



# Australian Wild BARRAMUNDI

Food Service  
Market  
Strategy

**2023-28**

[www.australianwildbarramundi.com.au](http://www.australianwildbarramundi.com.au)

Created by Honey & Fox Pty Ltd for the Fisheries Research and Development Corporation (FRDC) as part of project 2019-067 *Investigate the changes in acceptance of wild caught Barramundi in the food service and hospitality sectors.*

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#### **Acknowledgements**

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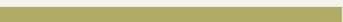
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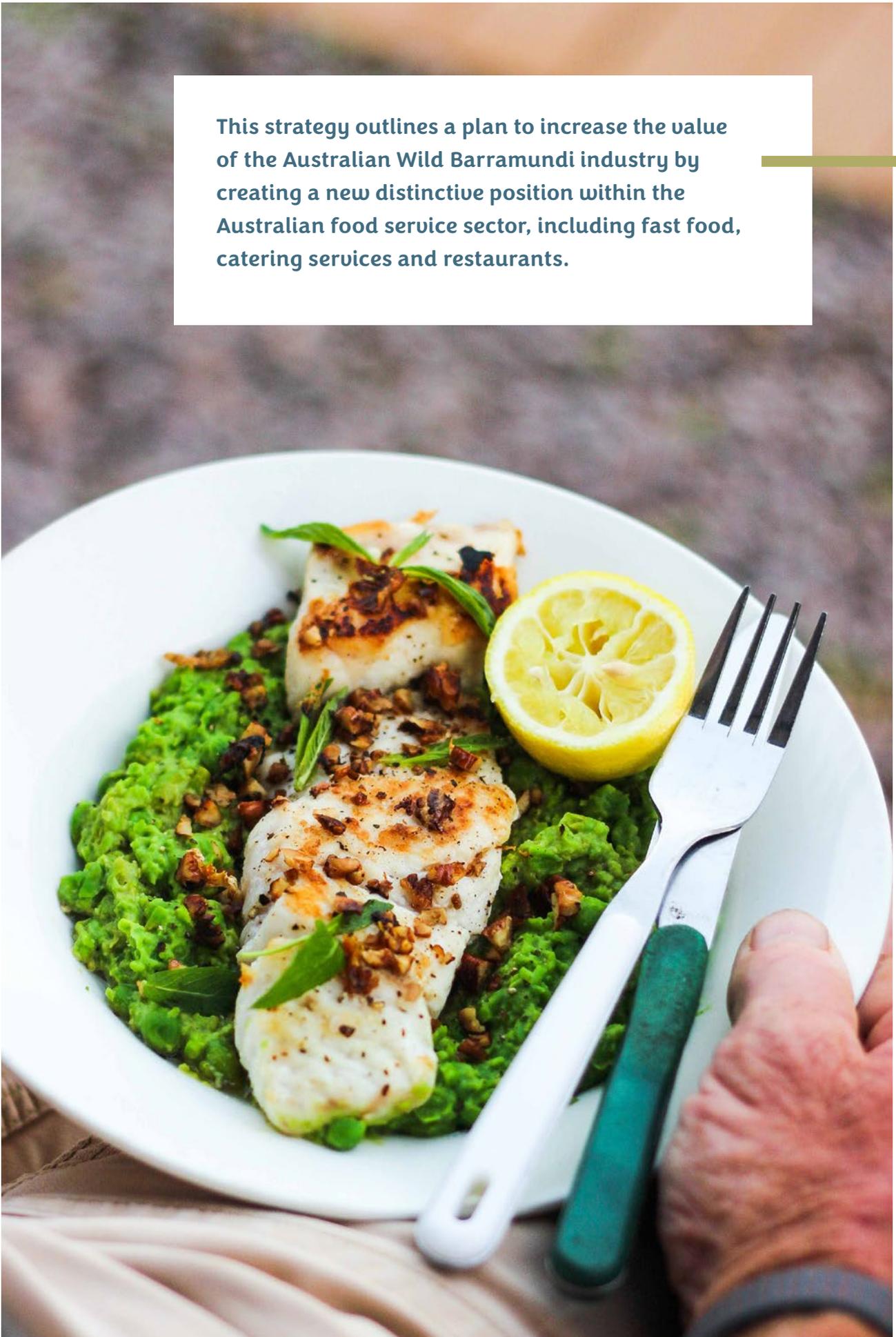
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This strategy outlines a plan to increase the value of the Australian Wild Barramundi industry by creating a new distinctive position within the Australian food service sector, including fast food, catering services and restaurants.



# SUMMARY

## — our vision —

To create a distinctive place for **Australian Wild Barramundi** in the hearts and minds and on the plates of Australians everywhere

## — our positioning —

“Simply the best Australian fish”

## — our approach —



Working collaboratively as an industry



Consistently meeting customer specifications



Carving our own space in the category



Controlling the narrative and telling our stories



Building connections with food service customers



### ENABLING YEARS 1-2

- 1 QUALITY STANDARDS
- 2 PROVENANCE STORIES
- 3 AUTHENTICITY TECHNOLOGIES



### COMPETING YEARS 2-3

- 4 PACKAGING INNOVATION
- 5 MARKETING & MESSAGING
- 6 SUPPLY CHAIN INNOVATION



### CREATING YEARS 4-5

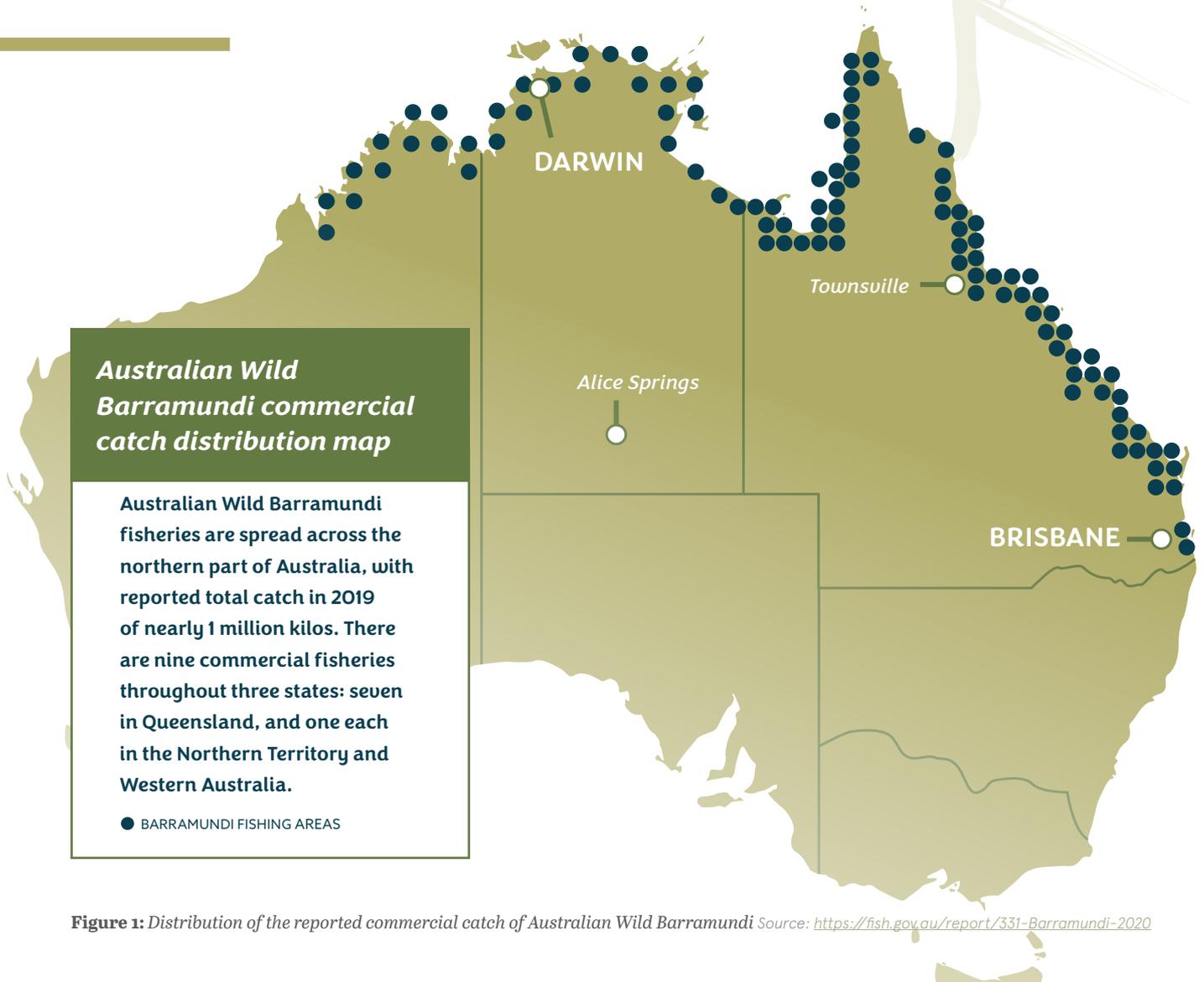
- 7 PRODUCT INNOVATION
- 8 MARKET INNOVATION
- 9 PROCESS INNOVATION



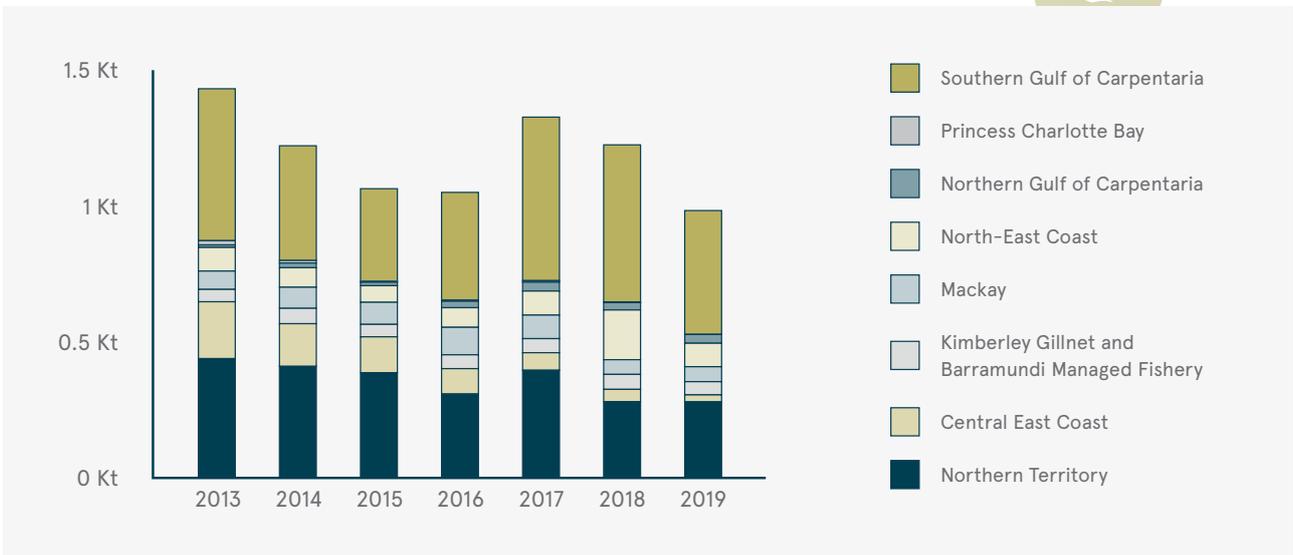
”  
*Australian Wild Barramundi  
is assessed as sustainable  
in the 2020 FRDC Status  
of Australian Fish Stocks*



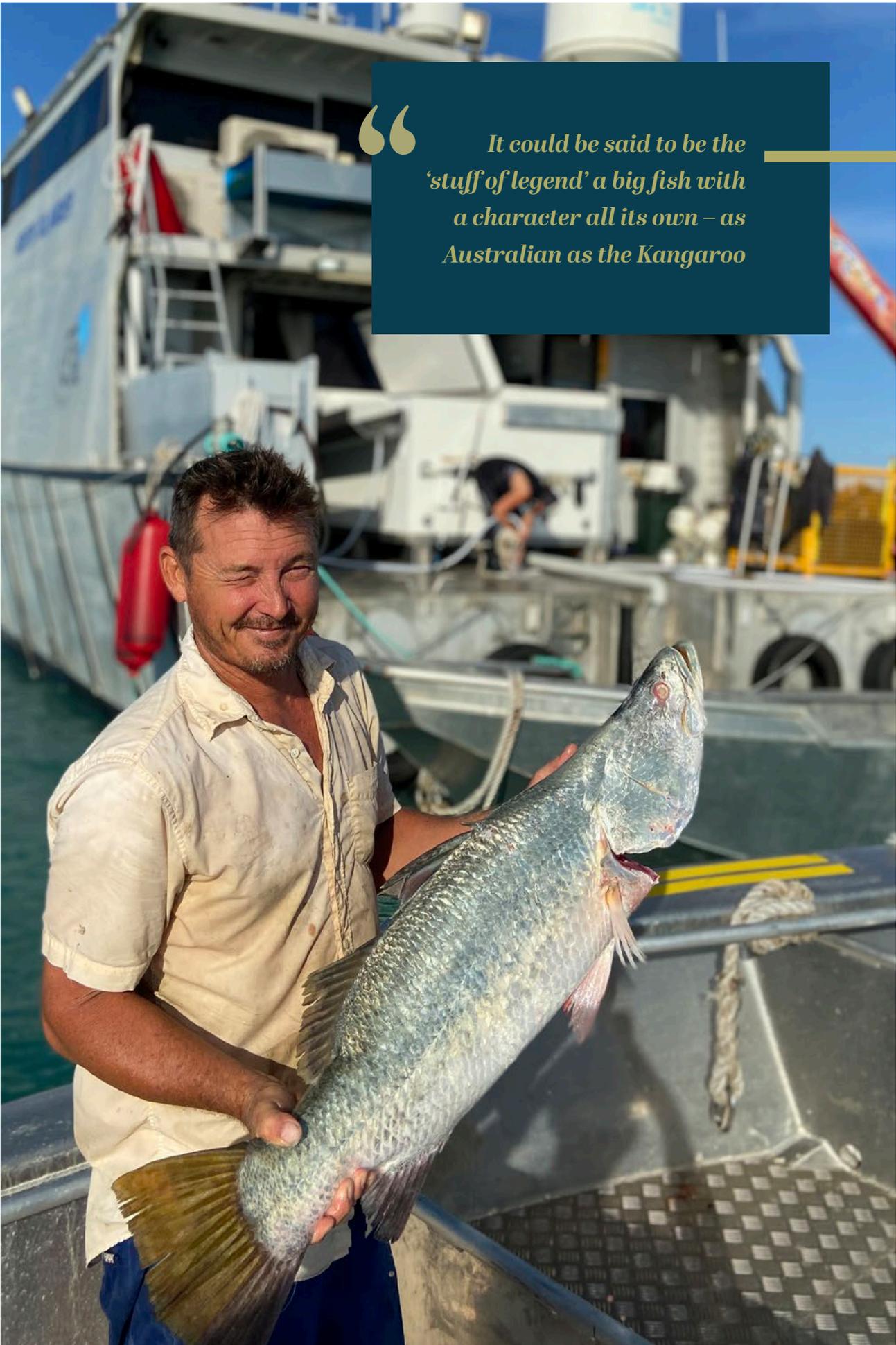
# OUR INDUSTRY



**Figure 1:** Distribution of the reported commercial catch of Australian Wild Barramundi Source: <https://fish.gov.au/report/331-Barramundi-2020>



**Figure 2:** Commercial catch (tonnes) of Barramundi Source: <https://fish.gov.au/report/331-Barramundi-2020>



“

*It could be said to be the 'stuff of legend' a big fish with a character all its own – as Australian as the Kangaroo*

# OUR PRODUCT

**Australian Wild Barramundi is available from February to November. With a sweet buttery flavour it has gained a reputation as one of Australia's finest eating fish.**

Barramundi is a versatile fish, and the relatively mild flavour gives chefs a wide range of options when it comes to spices and modes of preparation. It can be baked, broiled, fried, grilled, or poached with deliciously good results.

Consumer research conducted in 2015 by the University of the Sunshine Coast, found that Barramundi is a "dream fish", holding a compelling position in the Australian market.



*the dream fish*

- ▶ The high ground position
- ▶ Health and nutrition association
- ▶ Sounds fresh and natural
- ▶ Links to Dreamtime and Dreamtime Barramundi stories
- ▶ Summary stance—Australia's best fish 'My Favourite Fish'
- ▶ Highlight taste—our tastiest fish
- ▶ De-commoditise white fin fish
- ▶ Iconic Australian
- ▶ Compelling emotional platform—head and heart
- ▶ Prestige Premium 'The Fish'
- ▶ When only the best will do
- ▶ The restaurant fish.

**Figure 3:** Australian Wild Barramundi holds a compelling position Source: University of the Sunshine Coast

# OUR MARKET

**Barramundi is arguably one of the most well known Australian fish.**

Australian Wild Barramundi has unique product characteristics which are clearly different to farmed and imported barramundi. However, Australian Wild Barramundi is perceived to be inaccessible by both chefs and the broader seafood market.

The growth in farmed barramundi has made the species more widely available, more of a commodity, and less worthy of special consideration.

*The Wild Alaskan Salmon industry faced a similar challenge, now Wild Alaskan Salmon commands a price typically three-to-four times that of farmed salmon.*

To better understand the opportunities and needs of the food service market, we interviewed wholesalers and distributors servicing this sector, as well as chefs and food service buyers/managers.

We found that in a crowded category with little to distinguish Australian Wild Barramundi from other sources, there is an opportunity to move to an uncontested space.

## SIZE OF THE AUSTRALIAN FOOD SERVICE MARKET

### Fast food and takeaway food services



Market size

\$22b

Number of businesses

36.4K

### Restaurant industry



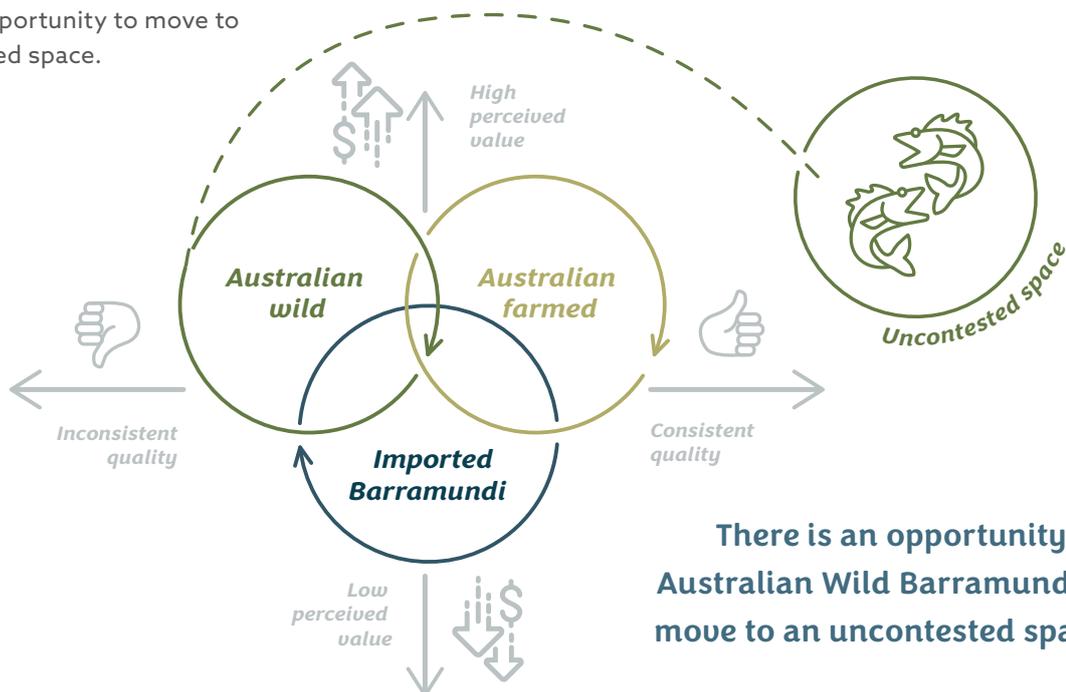
Market size

\$21b

Number of businesses

32.2K

Figure 4: The Australian food services sector. Source: <https://www.ibisworld.com>, 2021



**There is an opportunity for Australian Wild Barramundi to move to an uncontested space.**

## What did the target market tell us?

There is good awareness of Australian Wild Barramundi, but there are significant barriers to consideration and purchase by chefs and food service buyers.

Chefs (and their customers) value a strong local story, and 'wild caught by Australian fishers' is one they clearly want to know. This story, combined with consistent quality and availability can transform the Australian Wild Barramundi industry.

### SIGNIFICANT BARRIERS TO CONSIDERATION + PURCHASE



Don't know where to get wild product



Don't know how to tell if they have a genuine wild product



Wild product not available all year round



Don't know the difference between wild and farmed

### OPPORTUNITIES TO GROW IN FOOD SERVICE



Great awareness of Australian Wild Barramundi in general



Want to know the story "wild caught by Australian fishers"



Reliability of supply, convenient formats and packaging innovation will help stand out from the crowd



Consistent quality and stable price is key

## — our positioning —

**"Simply the best Australian fish"**

### BECAUSE AUSTRALIAN WILD BARRAMUNDI IS:

Sustainably wild-caught by Australian fishers who are committed to preserving the fisheries for future generations to enjoy

Fresh and frozen in a variety of product formats that can be tailored to customer needs

Underpinned by quality and provenance assurance so you know you are buying Australia's best

# OUR ACTION PLAN

**A lasting and intentional strategic shift is needed to improve the perceived value and to deliver on “the promise” of Australian Wild Barramundi.**

This is a significant challenge and one that a focused industry-wide effort can overcome.

There are nine market building tactics separated into three main groups: enabling platforms, market competing, and market creating innovations.



*Barramundi is arguably one of Australia’s most well known fish at home and around the world*

— *our approach* —



*Working collaboratively as an industry*



*Consistently meeting customer specifications*



*Carving our own space in the category*



*Controlling the narrative and telling our stories*



*Building connections with food service customers*

— *our market building tactics* —



**ENABLING**

*YEARS 1-2*

The first three market building tactics provide the foundations for the rest of the strategy.

These should be implemented in the first 18 months to 2 years.

- 1** QUALITY STANDARDS
- 2** PROVENANCE STORIES
- 3** AUTHENTICITY TECHNOLOGIES



**COMPETING**

*YEARS 2-3*

The second group are the market competing tactics. Implemented in years 2 and 3, these activities will help differentiate Australian Wild Barramundi from competitors.

- 4** PACKAGING INNOVATION
- 5** MARKETING & MESSAGING
- 6** SUPPLY CHAIN INNOVATION



**CREATING**

*YEARS 4-5*

The final group to be implemented in years 4 and 5 are market creating tactics. These will help move Australian Wild Barramundi into a distinctive position in the hearts and minds of consumers everywhere.

- 7** PRODUCT INNOVATION
- 8** MARKET INNOVATION
- 9** PROCESS INNOVATION



# ENABLING PLATFORMS

*The first three market building tactics provide the foundations for the rest of the strategy. These should be implemented in the first 18 months to 2 years.*

## QUALITY STANDARDS

1

Fishers, food service buyers, chefs, and supply chain partners all identified the need to improve the consistency of the product offering.

Consistent and reliable quality will underpin Australian Wild Barramundi's market positioning.

### Actions

Take a whole of industry approach to improving quality consistency for Australian Wild Barramundi by:

- ▶ Undertaking industry-wide consultation to finalise the draft COP and publish
- ▶ Investigating the potential for a trust mark to be developed that could support compliance with the COP
- ▶ Supporting individual businesses to adopt the COP and Product Specifications to their individual circumstances.

### Estimated investment

\$135,000 plus individual company investment in quality improvements

### Resources to help

A Code of Practice detailing operating procedures for product handling and processing, together with draft product specifications sheets for whole chilled fish and frozen fillets, have been developed and are ready for implementation by individual companies.

All of these resources can be downloaded from [www.australianwildbarramundi.com.au](http://www.australianwildbarramundi.com.au)

## PROVENANCE STORIES

2

Creating and sharing provenance stories is the fastest and easiest way to get customers lining up to buy from you. Don't let others tell your story!

There is an opportunity at a whole of industry level to tell stories.

### Actions

Develop an industry story bank that includes compelling and engaging stories, photos and videos that showcases:

- ▶ People who fish for Australian Wild Barramundi
- ▶ Places where Australian Wild Barramundi is fished
- ▶ What is special about the product
- ▶ The journey it takes to get to the customer in the best condition possible
- ▶ Make the story bank available to businesses to use as needed.

### Estimated investment

\$85,000 plus individual company investment in photography if needed/wanted.

### Resources to help

A draft Australian Wild Barramundi website has been created ready for the industry to build and use to communicate information and stories about the Australian Wild Barramundi industry.

There are also many resources to help, including a provenance storytelling kit comprising reports, case studies, a guide and templates. Available at: [www.honeyandfox.com.au/storytelling](http://www.honeyandfox.com.au/storytelling)



## AUTHENTICITY TECHNOLOGIES

3

Customers and consumers increasingly expect proof that their product is genuine – and is “as described”. Traceability and authenticity technologies can provide a powerful and engaging user interface, allowing customers to become more connected to your products and your provenance stories.

### Actions

- ▶ Create a Source Certain Provenance database to support provenance and authenticity technology applications in individual businesses
- ▶ Trial and evaluate traceability and authenticity technologies for the conditions experienced in the Australian Wild Barramundi supply chain
- ▶ NB these actions could be undertaken in collaboration with other seafood sectors.

### Estimated Investment

\$125,000 to develop, trial and evaluate the provenance authenticity system.

### Resources to help

Technologies are developing rapidly and it can be difficult to know where to start. There are resources to help:

- ▶ Traceability Chooser to help you work out which technologies might suit your business
- ▶ FRDC Traceability for Seafood Discussion Paper details key issues for businesses and sectors to consider
- ▶ Traceability resources library

You can download these free resources from the Traceability Chooser website:  
[www.traceabilitychooser.com.au](http://www.traceabilitychooser.com.au)

## PRIORITY ACTIVITIES

### WHOLE OF INDUSTRY

- ▶ Consultation with industry about the draft COP and the potential for a trust mark to be developed
- ▶ Create website and collateral to support Australian Wild Barramundi story and positioning messages
- ▶ Australian Wild Barramundi provenance proof database development
- ▶ Ongoing market research to measure performance

**TOTAL INVESTMENT**  
**\$345,000**

### INDIVIDUAL BUSINESSES

- ▶ Company quality standards and product specification sheets
- ▶ Individual company provenance stories
- ▶ Product authenticity technologies that suit individual business needs
- ▶ Ongoing discussions with customers to monitor response to market and product innovation options



# MARKET COMPETING

*The second group are the market competing tactics. Implemented in years 2 and 3, these activities will help differentiate Australian Wild Barramundi from competitors.*

## PACKAGING INNOVATION

4

After working on achieving consistent quality (Tactic 1 - Quality Standards), this tactic focuses on how packaging innovation can help you stand out in the crowd – new sizes, new materials and importantly, sustainability credentials which are all critical.

With increasing attention to and concern about the use of plastics in packaging, businesses need to identify more sustainable packaging options that do not compromise the safety and quality of the product.

### Actions

- ▶ Working as a whole of industry sector commission the Australian Institute of Packaging (AIP) to identify, trial and evaluate sustainable packaging options in Australian Wild Barramundi supply chains.

### Estimated investment

\$80,000 plus individual company investment in packaging if needed/wanted.

### Resources to help

An initial report on sustainable packaging options is available at:

[www.australianwildbarramundi.com.au](http://www.australianwildbarramundi.com.au)

## MARKETING & MESSAGING

5

Having created the provenance stories (Tactic 2 - Provenance Stories), the Marketing and Messaging tactic is all about using those stories to communicate with your target markets.

### Actions

- ▶ Use the Australian Wild Barramundi website to educate the market and provide a resource for individual businesses
- ▶ Conduct regular market research to tailor key messages about Australian Wild Barramundi, including how to tell a genuine “wild” product
- ▶ Work collaboratively to create market education materials about Australian Wild Barramundi
- ▶ Participate, in partnership with ABFA, in National Barramundi Day.

### Estimated investment

\$220,000 to create messaging and market education materials plus individual company investment in marketing if needed/wanted.

### Resources to help

Other seafood industry sectors have developed common marketing and messaging which individual businesses or groups of businesses have then used for their own marketing efforts.

For examples see:

- ▶ Great Australian Seafood:  
[www.greataustralianseafood.com.au](http://www.greataustralianseafood.com.au)
- ▶ Love Australian Prawns:  
[www.australianprawns.com.au](http://www.australianprawns.com.au)
- ▶ Taste the Wild:  
[www.australianwildprawns.com.au/taste-the-wild/](http://www.australianwildprawns.com.au/taste-the-wild/)



## SUPPLY CHAIN INNOVATION

6

Traceability and authenticity technologies (Tactic 3 - Authenticity Technologies) provide the capability of regular monitoring supply chain performance.

Collecting data such as temperature, management, handling steps and location of your product as it travels to market will highlight opportunities for improving efficiencies and reducing risks – to you and your customers.

### Actions

- ▶ Design and conduct a supply chain improvement program that includes multiple operators monitoring different supply chains to identify potential areas for improvement (e.g. process efficiencies, product quality, customer service)
- ▶ Work with technology providers to assess the fit-for-purpose of different technologies to improve supply chain performance.

### Estimated Investment

\$100,000 plus individual company investment in supply chain improvements if needed/wanted.

### Resources to help

Technologies such as RFID, smart devices and mobile sensors can track your product and provide data about location, temperature, humidity, and other critical performance parameters.

For example, see Escavox at [www.escavox.com](http://www.escavox.com)

## PRIORITY ACTIVITIES

### WHOLE OF INDUSTRY

- ▶ Work with the Australian Institute of Packaging to identify potential sustainable packaging to suit the Australian Wild Barramundi industry
- ▶ Develop and implement a coordinated market education program to demonstrate the distinctive attributes of Australian Wild Barramundi
- ▶ Create industry benchmarks for supply chain performance expectations
- ▶ Ongoing market research to measure performance

**TOTAL INVESTMENT**  
**\$400,000**

### INDIVIDUAL BUSINESSES

- ▶ Implement sustainable packaging innovations that suits company operations and meets customer needs
- ▶ Develop and implement company specific marketing and promotion to amplify sector messages
- ▶ Monitor supply chain improvement and implement actions needed to improve performance
- ▶ Update company COP and product specification sheets to reflect improvements



# MARKET CREATING

*The final group to be implemented in years 4 and 5 are market creating tactics. These will help move Australian Wild Barramundi into a distinctive position in the hearts and minds of consumers everywhere.*

## PRODUCT INNOVATION

7

Consistent quality (Tactic 1 - Quality Standards) and packaging innovations (Tactic 4 - Packaging Innovation) will open opportunities for creating new products, particularly those that improve the convenience, storage life and versatility for end users.

Product innovation can come from responding to new market demands (e.g. skin on fillets), utilising the whole of catch, and waste transformation (e.g. skin, wings, heads).

### Actions

- ▶ Conduct an audit across the industry to identify and characterise current waste
- ▶ Identify potential ways to reduce costs by minimising waste and/or ways to use the waste to create new revenue streams
- ▶ Undertake regulatory, market and economic viability assessments of the highest potential new products from current waste streams
- ▶ Work with the food service sector and use consumer insights to develop and bring to market new products and product formats.

### Estimated investment

\$80,000 for a whole-of-catch product utilisation study, including a market opportunity analysis plus individual company investment in taking advantage of any opportunities.

### Resources to help

- ▶ **Utilising the whole fish**  
*Gill-to-fin: The Whole Fish Cookbook*  
<http://fishbutchery.com.au>
- ▶ **New product format**  
Dragon Tasmania  
[www.dragontasmania.com.au](http://www.dragontasmania.com.au)

## MARKET INNOVATION

8

The development of provenance stories (Tactic 2 - Provenance Stories) and marketing messages (Tactic 5 - Marketing & Messaging) provide the foundations to create a diversified market portfolio. A broader market base will help reduce the impact of market disruptions. Collaboration may be needed to capture potential new market opportunities.

### Actions

- ▶ Working as an industry, conduct regular market research to identify potential gaps where demand could be built (increasing demand increases price when the supply is finite)
- ▶ Establish direct relationships with food service customers to co-create new market niches
- ▶ Investigate opportunities to export Australian Wild Barramundi to international markets (note this will require EPBC Act approvals).

### Estimated investment

\$100,000 to undertake market monitoring to identify potential market diversification opportunities and communicate these to industry members.

### Resources to help

Market innovation can come from targeting new segments e.g. taking a product that is traditionally an Asian delicacy and targeting western fine dining restaurant, or using a different channel, (e.g. selling online). For example:

- ▶ **Fair Fish**  
Delivering South Australian seafood differently  
[www.fairfishsa.com.au](http://www.fairfishsa.com.au)



## PROCESS INNOVATION

9

Traceability and authenticity technologies (Tactic 3 - Authenticity Technologies), together with a well-managed supply chain (Tactic 6 - Supply Chain Innovation) will support process innovation. Process innovation will also be driven by Product Innovation (Tactic 7) and Market Innovation (Tactic 8).

### Actions

- ▶ Investigate global processing innovations with the potential for adoption by the Australian Wild Barramundi industry
- ▶ Trial new processing onboard options to evaluate fit-for-purpose for Australian Wild Barramundi.

### Estimated Investment

\$120,000 for a whole-of-industry opportunity analysis to understand the opportunities and barriers to processing improvement.

### Resources to help

The Australian wild prawn industry is currently investigating how to implement food waste reduction throughout the prawn supply chain, on board, during transport, storage and at retail/food service through processing and packaging innovations. Learn more at: [www.fightfoodwastecrc.com.au/project/prawns/](http://www.fightfoodwastecrc.com.au/project/prawns/)

## PRIORITY ACTIVITIES

### WHOLE OF INDUSTRY

- ▶ Undertake a waste audit to understand what waste products are produced and available for product and/or market innovation
- ▶ Undertake market monitoring to identify potential market diversification opportunities and communicate these to industry members
- ▶ Conduct an opportunity analysis to understand the opportunities and barriers to processing improvement.
- ▶ Conduct ongoing market research to measure performance

**TOTAL INVESTMENT**  
**\$300,000**

### INDIVIDUAL BUSINESSES

- ▶ Monitor and document waste generated on board and/or in the supply chain
- ▶ Collaborate with other industry members to capture new market diversification opportunities
- ▶ Invest in onboard processing technologies that are proven to be worthwhile
- ▶ Ongoing discussions with customers to monitor response to market and product innovation and to identify new opportunities

# IMPLEMENTATION

## Industry coordination

An Australian Wild Barramundi food service market development working group should be created to coordinate the industry-wide actions. The group would monitor progress against agreed performance criteria and communicate with other stakeholders.

## Estimated investment

To implement this strategy the total collaborative industry investment, over the five years, is estimated to be approximately \$1 million. This equates to an investment of about \$0.20/kg per year (based on an average total catch of 1,000 tonnes per annum).

## Timetable

The food service market strategy should be implemented over five years. The enabling platforms (tactics 1-3) should be implemented in Horizon 1 (18 months to 2 years). The market competing tactics should be implemented in Horizon 2 (2 to 3 years), with the final group, market creating tactics implemented in Horizon 3 (4 to 5 years).



## Investment summary

**ENABLING**  
YEARS 1-2

- 1 QUALITY STANDARDS
- 2 PROVENANCE STORIES
- 3 AUTHENTICITY TECHNOLOGIES

**\$345,000**

**COMPETING**  
YEARS 2-3

- 4 PACKAGING INNOVATION
- 5 MARKETING & MESSAGING
- 6 SUPPLY CHAIN INNOVATION

**\$400,000**

**CREATING**  
YEARS 4-5

- 7 PRODUCT INNOVATION
- 8 MARKET INNOVATION
- 9 PROCESS INNOVATION

**\$300,000**

## Measuring progress

Measuring implementation progress and impact of the strategy is important. The benefits of implementing this strategy will come from reduced fluctuations in price and sustainable price premiums for product that consistently meets customer expectations.

When measuring impact, it is important to measure both the short-term and the long-term impacts.

Short-term impacts can be measured by short-term KPIs such as sales. A focus on sales will result in short-term sales uplifts/spikes. Just focusing on sales does not create overall long-term increased value. The increased sales do however create the revenue to use for longer-term investment in marketing to create a sustainable increase in value.

This strategy is focused on building the brand over a longer period which will result in a more sustainable uplift in sales (volume and value).

This can be measured by longterm KPIs such as consumer behaviours, beliefs, and attitudes. Measuring progress towards the long-term KPIs should be done every year. However, it will take five years (on average) to achieve a long-lasting change.



**Figure 5:** The two ways that marketing works to improve profitability Source: Binet & Field 2013

## Key performance indicators

Baselines for all performance metrics need to be set in year 1 and progress measured in real terms i.e. adjusted for inflation.

### KEY PERFORMANCE INDICATORS



#### PRICE PREMIUM INDEX - BARRAMUNDI

Measure your price changes against the farmed and imported Barramundi price



#### PRICE PREMIUM INDEX - OTHER SEAFOOD

Measure your price changes against a basket of seafood – higher and lower priced



#### GROWTH IN GROSS VALUE OF PRODUCTION

Measure changes in the total GVP of the industry, watching for any year on year changes



#### CUMULATIVE INCREASED REVENUE

Measure the total cumulative change in revenue over five years

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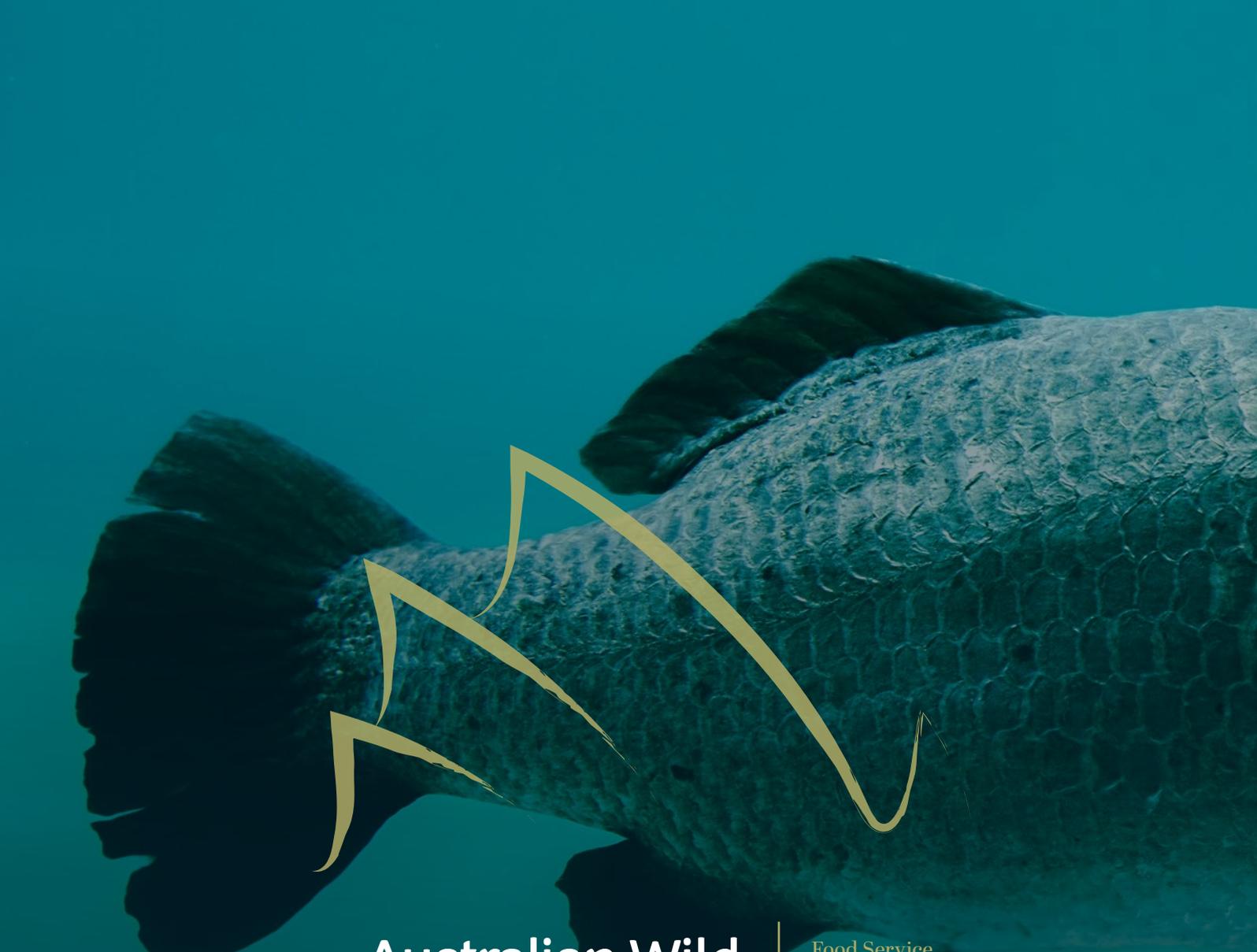
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*There are opportunities to build the  
value of the industry and for the  
businesses that operate within it*

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