



Sustainability in Australian seafood supply chains: Identifying the gap between theory & practice

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Background & introduction



Structured literature review

10 scholarly databases were interrogated with a structured list of search terms and the literature revealed the following key issues on sustainable seafood supply chains:

1. Sustainability in fisheries and aquaculture
2. Seafood products' traceability and technologies
3. Waste management in the supply chain
4. Quality management
5. Supply chain strategies

Research objectives & research questions

- Research objectives:

- To determine the trend of supply chain members' policies relating to sustainability
- To identify the similarities and difference of issues between current knowledge and the real practice of supply chain members

- Research questions:

- What is the trend towards solutions to improve the performance of seafood product supply chain?
- What is the existing gap of this research area, and what should be done to improve the future study?

Materials & methods

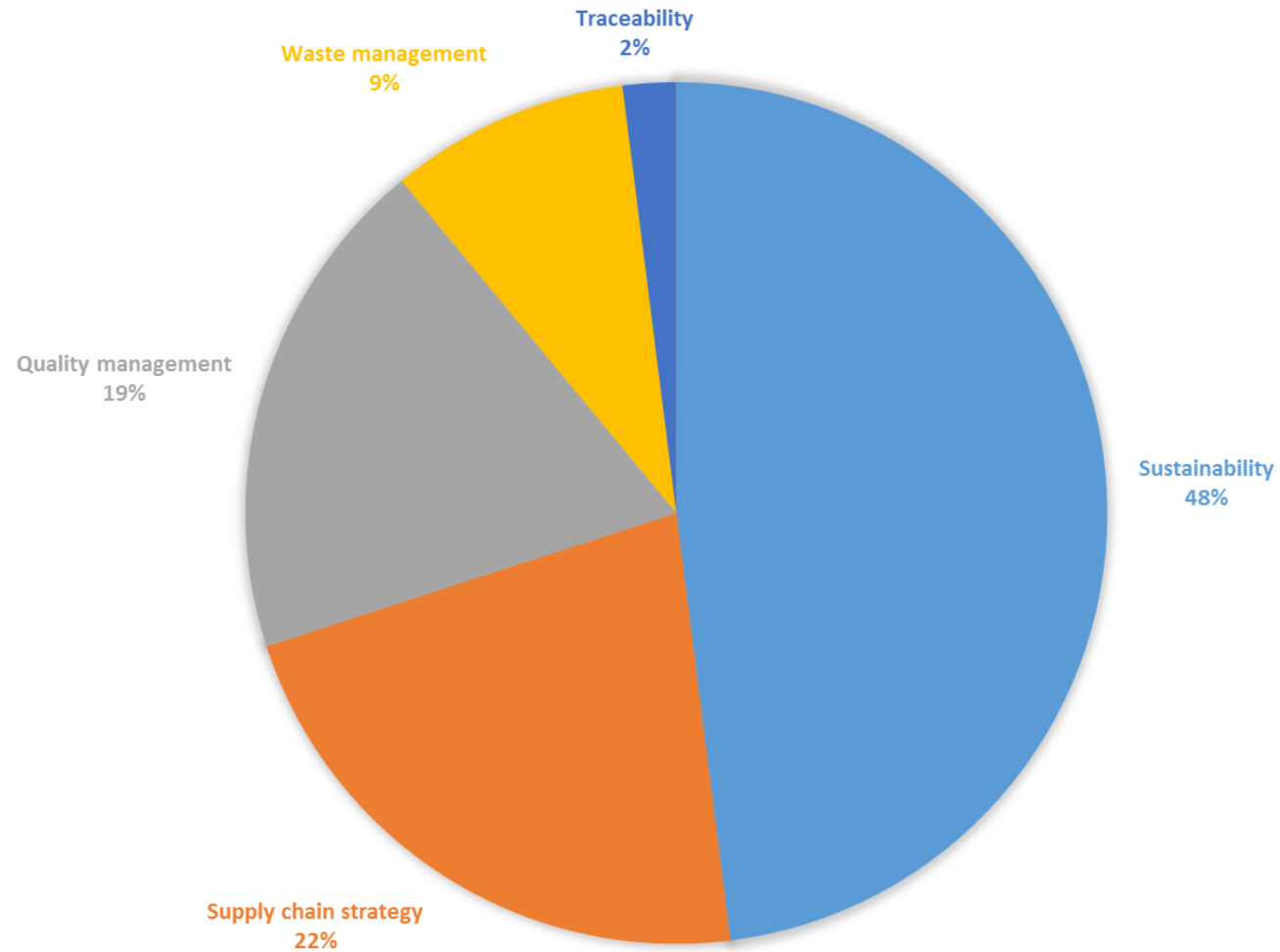
- Content analysis of annual reports (n=48) from companies in the Australian seafood supply chain
- Data were analysed using NVivo12 and a combination of provisional coding and sub-coding strategies

Industry/Company	Market Share*	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<u>Feed Production (pre-upstream)</u>		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
• Ridley Corporation Ltd	41.5%	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<u>Seafood Processing (upstream)</u>		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
• Tassal Group Ltd	24.5%	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
• Simplot Australia Pty Ltd	20.0%					✓		✓		✓	
• Huon Aquaculture Group Ltd	17.9%							✓	✓	✓	✓
• Petuna Pty Ltd	4.9%			✓							
<u>Retailing (downstream)</u>		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
• Wesfarmers Ltd	15.6%	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
• Woolworths Ltd	2.0%	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

*Market share data were sourced from IBISWorld reports

Results

CONTENT ANALYSIS OF THE ANNUAL REPORTS OF SEVEN MAJOR PLAYERS OF SEAFOOD PRODUCT SUPPLY CHAINS IN AUSTRALIA



Discussion of results

Sustainability issue	In the literature	In annual reports
“Sustainability” was discussed in terms of the environment, farming, workforce, community, processing and retailing while strategies being employed by the sample companies related to information technology, partnerships, logistics, manufacturing and sales.	✓	✓
“Quality management” with an emphasis on accreditation and awards, food safety, feed, products, processes, facilities and brand reputation and services.		✓
Traceability and associated technologies	✓	
“Waste management” of both feed waste and processing waste	✓	✓
Best practice in managing packaging waste		✓

Conclusions

- Sustainability and waste management are at the top of everyone's agenda.
- Quality management is a mature (declining?) area of knowledge in the manufacturing literature but still features prominently in industry
 - Action: Is it time for scholars in operations management to re-visit their knowledge and collaborate with industry?
- Traceability is featured prominently in the literature but has been largely overlooked in industry
 - Action: Do we need to further explore the adoption of traceability technologies in Australia's seafood supply chain?



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