

FREQUENTLY ASKED
QUESTIONS

TURNING THE TIDE

Investing in consumer education
and promotion for Australian
wild-caught abalone



Abalone Council
Australia Ltd

Dear Australian Abalone stakeholder,

Since 2010, a small team have been conducting “in market” research in China and Hong Kong and more recently in Singapore, Japan and Australia regarding Australian wild abalone. This important and timely research project was initiated by Abalone Council Australia (ACA) and has been supported with R&D funding provided by the Fisheries Research & Development Corporation (FRDC), the Australian Seafood Cooperative Research Centre (SCRC) and the Tasmanian Abalone Council Ltd.

The research has culminated in the development of a Market Research and Development Platform called Australian Wild Abalone® (AWA). For information about the AWA® Program please go to www.abalonepal.com and www.australianwildabalone.com.au.

One of the key successes to date has been the fact that eighty percent of Australia’s abalone exporters (measured by value and volume of sales) have joined the AWA® program since it was launched in China nine years ago. The most recent application from an exporter for membership of the AWA® program was received in September 2019 and approved by the ACA Board in October 2019.

Since the Shanghai launch in August 2010, the AWA® Program has been enthusiastically endorsed by over 50 Abalone Importers in China, Hong Kong, Singapore and Japan. They are now patiently waiting for us to commence AWA® “in- market” activation activities and to generate an AWA® promotional presence.

A very considerable amount of time, effort and resources have been devoted to this important industry-wide initiative and the support from all sectors of the supply chain from Exporter to Importer, Hotels & Restaurants to Food Retailers has been fantastic. Whenever and wherever we talk about the AWA® program with Importers, Wholesalers, F&B Managers and Executive Chefs, the most frequently asked question is “why wasn’t this done years ago?”

As the AWA® Program transitions from being an R&D project to full commercialisation, the funding support needs to transition from the R&D providers to the abalone industry.

If the Australian abalone industry wants the AWA® Program to go forward and promote Australian wild caught abalone products on a global stage into the future, we now need to establish a dedicated Abalone Consumer Education and Promotion Levy.

From 2016 to 2018 the AWA® project team held AWA® briefing sessions with stakeholders (abalone divers, license and quota owners and processors/exporters) in each of the Abalone producing states. The objective of these briefings was to update everyone on the findings and achievements of the AWA® Program to date, as well as seek industry support for an Abalone Levy equivalent to one and a half percent (1.5%) of annual gross industry value.

At each AWA® briefing, a formal presentation was provided followed by an opportunity for stakeholders to ask questions and provide feedback to the AWA® Team.

I have provided a list of Frequently Asked Questions (FAQ's – see below) in response to the feedback received from stakeholders to date.

It must be remembered that the AWA® project is focused on generic promotion of Australian Wild Abalone based around the attributes and values of the product and why consumers in our domestic and international markets should purchase it in preference to Abalone from other supply sources.

The AWA® Program is not about purchasing or selling Abalone. This has and always will remain the commercial activity of individual Australian exporters and their overseas importers and supply chain partners.



Dean Lisson; Chief Executive
Abalone Council Australia Ltd

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WHY INVEST

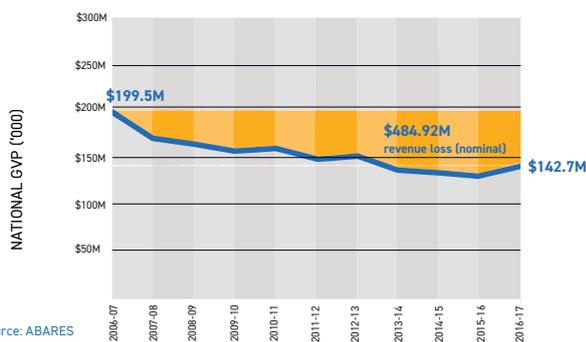
WHY DO WE NEED TO INVEST IN CONSUMER EDUCATION AND PROMOTION?

Between 1989 and 2001, Australia was the dominant supplier of abalone globally. In 2001, we reached a peak GVP of \$273 million, producing nearly 43% of the total global supply. In 2016 we reached the lowest value to date with a total wild-caught abalone GVP of \$132 million.

We are still the largest global supplier of wild-caught abalone (over 50%), however, we now only supply around 2% of the global market for abalone (FAO, 2017). This is due to the burgeoning growth of the farmed abalone sector, particularly in China.

Since 2016 there have been welcome signs of a modest recovery with the GVP increasing to \$143 million in 2017 (from a catch volume similar to that of 2016). The key question is whether this is the start of a new long-term upward trend in industry value. An alternative scenario is that it is a short-term increase that will be followed by a return to the previous downward trend (particularly if there are significant geopolitical or economic challenges in our markets and/or further declines in resource productivity).

ACCUMULATED VALUE LOSSES (NOMINAL OF THE AUSTRALIAN WILD-CAUGHT ABALONE INDUSTRY 2007-2017)



The fact that our industry has weathered these disruptions is a testament to our resilience and good business management. It has been tough.

We have faced additional challenges such as the US dollar going to above parity and quota cuts due to factors outside our control (such as disease, urchins and warm water). Changing Agri-political and geopolitical environments in our traditional markets, such as the US/ China Trade War and the current protests in Hong Kong, may impact on the future demand for our product. We need to protect ourselves against such risks.

As an industry we are investing in research and development to rebuild and sustain a healthy and resilient abalone resource. This is exceptionally important but by itself doesn't put the dollars in our pockets. Just as we are collectively investing in securing the sustainability and health of our abalone resource, we need to collectively invest in our other great asset: the consumer.

We cannot compete with farmed abalone on price, but we can reposition and sustain our Australian wild-caught abalone as a rare, luxury product that our consumers consider worthy of a price premium. A strategic approach to better understand what is happening in our key markets is needed to minimise market-based risks and sustain the recent industry GVP growth.

The proposed Consumer Education and Promotion (CEP) Program has been developed based on market research which identified how to improve communication with consumers to motivate their preference for Australian wild-caught abalone and pay a premium for it. This enormous task is beyond the capacity of any individual company or association. The most efficient and equitable approach is for the industry to agree to implement a nationwide compulsory levy. This ensures that everyone who benefits contributes to the cost.

Research shows that this is not only possible but that it would be welcomed by our supply chain partners, including our importers.

Australian wild-caught abalone is perceived as a premium seafood however, one of the key learnings of our research in China, Australia, Hong Kong, Singapore and Japan is that Asian consumers, including many chefs, actually know very little about abalone. Sure, they know what it is, and they have an appreciation of its cultural significance but generally speaking, “abalone is abalone” – currently most of them would not know if they were eating wild caught or farmed abalone.

The market is price sensitive and, with low to non-existent margins, our importers have and will continue to turn to cheaper abalone species or alternate products. Unless the Australian wild-caught abalone industry does something to educate consumers and promote our beautiful and increasingly rare product – we may struggle to maintain our position and relevance in an ever changing global market place.

We need to create an awareness of and a preference for Australian wild caught abalone products. It is our product; it is our story – so we need to tell it. It is our responsibility to educate our consumers and promote our product over our competitors.

So in summary:

- **Declining Revenue:** The combined effect of declining prices, declining volume, the USD/AUD exchange rate fluctuations, increased farmed abalone production, and other factors have resulted in significant revenue losses across the industry, including for quota owners. With a declining resource, we must maximise the value of every abalone harvested.
- **Massive growth in global aquaculture:** We cannot compete with farmed abalone on price, but we can reposition and sustain our Australian wild-caught abalone as a rare, luxury product that our consumers consider worthy of a price premium.

- **Supporting individual Australian wild-caught abalone businesses :** The CEP Program will enhance the marketing activities of individual processors, exporters and importers, by extending their reach and impact
- **Increasing competition** - South Africa, New Zealand, Mexico, Chile and South Korea – are investing considerable amounts of money in marketing and promoting their abalone products to consumers in key markets. We have to tell consumers our story. They need to know how we are different and why we are better. The result will be a premium price for our premium product.
- **The competition is not just coming from alternative sources of abalone;** there are now more options and opportunities for consumers to buy premium seafood than there have ever been.
- **New opportunities:** The domestic market is largely untapped for Australian wild-caught abalone businesses who have traditionally sent their product to export markets. There is lots of room for growth in the domestic market for Australian wild-caught abalone.
- **Become a market leader:** Communicating directly with consumers to give them a reason to ask for Australian wild-caught abalone is key to becoming a market leader with a premium product.

WHO RECEIVES THE BENEFITS FROM INVESTING IN CONSUMER EDUCATION AND PROMOTION?

The benefits of the [Consumer Education and Promotion \(CEP\) Program](#) will flow down to all abalone stakeholders. Increased “pull” demand generated by a successful CEP Program within our target markets will maintain and increase financial returns to **all abalone stakeholders** along the supply chain.

WHAT IS IN IT FOR QUOTA OWNERS?

Eventually – improved financial returns and the comfort in knowing that somewhere someone is working hard “24/7” to educate consumers in our target markets as to the benefits of eating Australian wild-caught Abalone – keeping our markets open and the demand for our product strong.

Here is an excerpt from the relevant Levies section of the DAWR website:

“The Department of Agriculture is responsible for the collection, administration and disbursement of levies and charges on behalf of Australian agricultural industries.

Agricultural levies and charges are imposed on primary producers by government at the request of industry to collectively fund research and development (R&D), marketing, biosecurity and residue testing programs.

The levy system enables agricultural sectors to respond to industry needs and help maintain and strengthen their position in highly competitive world markets through resource sharing and cooperation.”

For more information about Agribusiness levies, please go to:

<http://www.agriculture.gov.au/ag-farm-food/levies>

Because our importers trade a broad range of seafood and abalone products from all over the globe and/or don't have the time or the resources to actively promote Australian Wild abalone products directly to consumers.

They will promote their own brand but not the specific benefits of Australian Wild Abalone. Additionally, most of them import abalone from other countries and do not want to risk losing some of their suppliers by being seen to promote one country's abalone over another. Finally, the reality is that promotion/marketing to consumers in countries as large as China and Japan is too onerous and expensive a task for individual Importers to take on.

WHY DON'T THE IMPORTERS DO CONSUMER EDUCATION AND PROMOTION FOR US?

Because our importers trade a broad range of seafood and abalone products from all over the globe and/or don't have the time or the resources to actively promote Australian Wild abalone products directly to consumers. They will promote their own brand but not the specific benefits of Australian Wild Abalone. Additionally, most of them import abalone from other countries and do not want to risk losing some of their suppliers by being seen to promote one country's abalone over another. Finally, the reality is that promotion/marketing to consumers in countries as large as China and Japan is too onerous and expensive a task for individual Importers to take on.

HOW MUCH DO WE NEED TO INVEST TO DO CONSUMER EDUCATION AND PROMOTION WELL?

Initially, between \$1.5 million to \$2 million per year or about 1.5% of annual industry GVP (Gross Value of Production) – this quantum of funds will provide sufficient resources to fund an effective and strategic consumer education and promotion campaign in China, Hong Kong, Singapore, Australia and Japan as well as looking at opportunities in other markets. This figure is based on the market research conducted since the AWA® Project commenced in 2010 and is expected to provide a total of \$12 million over 5 years Levy funds will be leveraged where possible eg co-investment with government, other in seafood sectors and other food and wine industries.

HOW MANY YEARS WILL WE NEED TO INVEST IN CONSUMER EDUCATION AND PROMOTION BEFORE WE SEE THE BENEFITS?

This depends on many factors, including how competitive and organised our competitors are and how the markets respond to our Consumer Education and Promotion (CEP) Program. Typically, strategic whole of industry consumer education and promotion programs will see benefits over 5 years. We are currently “building” a solid foundation to commence activities in the key markets but of course it will take time to gain visibility and “traction” within these markets and for the Australian Wild Abalone AWA® trademark to be known and respected along the supply chain.

THE USE OF LEVY FUNDS

WHAT SORT OF ACTIVITIES ARE PROPOSED?

The proposed Consumer Education and Promotion Program details the activities that will be undertaken in each of our five key markets – Hong Kong, Japan, China, Singapore and Australia.

There are five major activity areas:

1. The Australian Wild Abalone® certification trademark – the cornerstone of the CEP Program
2. Global Market Access – ensuring that we have full access to the global markets
3. Consumer Awareness and Engagement – giving them a reason to choose Australian wild-caught abalone over our competitors and pay a premium for it
4. Supply Chain Enterprise Support – helping our exporters and importers/distributors and their customers promote Australian wild-caught abalone to consumers
5. Consumer Insights and Market Research – to stay on top of trends and take advantage of them

The [Australian Wild Abalone® \(AWA\) Program](#) is a great example of the activities that a strategic consumer education and promotion program will undertake. (insert link to the AWA program page)

The Australian Wild Abalone® (AWA) Program started as a research project funded by the Australian Seafood Cooperative Research Centre (SCRC), ACA Ltd and the Australian Fisheries Research and Development Corporation (FRDC).

The research project undertook market research and collected consumer insights to identify how we could differentiate Australian wild-caught abalone from our competitors. We found that consumers were fascinated by and put value on the fact that Australian Wild Abalone® is harvested sustainably by experienced divers from the cool clean waters of southern Australia and processed and packaged according to stringent Quality Assurance guidelines. This is our unique selling point. The Australian Wild Abalone® Certification mark was developed to test consumer and supply chain acceptability as a co-brand for Australian exporters to use. As fraud and substitution was a critical concern, NanoTag®, a product provenance (brand) protection technology was also tested. Used in combination the research found that we were able to differentiate Australian Wild Abalone® premium products as safe, sustainable and prestigious.

The research showed that we can differentiate our product on the basis of the following key attributes:



TRACEABLE
Providing assurance that the product is genuine



VERSATILE
Formats suitable for different uses and cuisine styles



HEALTHY
Safe, healthy, tasty and nutritious



CAUGHT WITH CARE
Hand-caught by divers ensuring no damage to the marine ecosystem



PROVENANCE ASSURED
Trademark guaranteeing product provenance



RARE
Limited quantities to ensure future supply



100% NATURAL AND WILD
From the pure, cold southern ocean of Australia



SAFE
Certified safe by the Australian government

One key outcome of this research was the development of the Australian Wild Abalone (AWA) ® certification trademark. This has been registered with the Australian Patents Office and the rules for use have been approved by the Australian Consumer and Competition Commission (ACCC). The certification trademark will be the cornerstone of the proposed Consumer Education and Promotion (CEP) Program.

With funding support from the Tasmanian Abalone Council Ltd, the AWA® Program launched a China optimised AWA® website www.awachina.com.cn and an Asian social media campaign on WeChat and Weibo platforms. These have recently ceased operating, due to lack of funds, but can be reinstated very quickly should the levy proposal be successful.

We also hosted, in 2015, the AWA® Innovative Cuisine Design Competition in Beijing. The competition had the following objectives:

- Inspire the Chinese cuisine and catering industries to use Australian Wild Abalone® in unique and innovative ways
- Enhance young Chinese chefs' culinary skills and knowledge of the qualities of Australian Wild Abalone®
- Showcase the versatility and taste of the Australian Wild Abalone® products, and
- Engage talented chefs as Australian Wild Abalone® Ambassadors

115 abalone dishes created by 80 young Executive chefs from across China were submitted for judging and 10 finalists were selected to participate in a live competition "cook-off" in Beijing. From these 10 finalists, three chefs were selected as AWA ® Young Chef Ambassadors".

A delegation of 20 influential chefs and F&B managers from China, led by the Vice President of the China Cuisine Association (CCA) Mr Bian Jiang, together with the three winning chefs embarked on a Gourmet Adventure Study Tour (GAST) to Australia in March 2016.

The delegates on the tour had the unique opportunity to meet the exporters, divers and other industry stakeholders during a week of culinary experiences with Australian Wild Abalone and other premium Australian food and beverage products. For more information please click on the below weblinks:

[Chinese chefs get innovative with AWA](#)
[AWA - Gourmet Adventure](#)
[AWA Partnership with China Cuisine Association](#)

All abalone companies involved in these Australian Wild Abalone AWA ® Program activities reported positive outcomes for their businesses – increased sales, new customers, potential new partnerships.

WHAT CONSULTATION HAS THERE BEEN WITH SUPPLY CHAIN PARTNERS?

Over 50 major abalone importers/distributors were interviewed as part of the research. All of these companies are supportive of the concept of using the AWA® Program as a basis to roll out a consumer education and promotion program across the key markets of China, Hong Kong, Singapore, Japan and Australia. In supporting the concept for the program, they stated that it would need to be appropriately customised to reflect the relevant market situation/dynamics within their countries.

All supply chain partners interviewed agreed that education seminars with influential Chefs and Food & Beverage Managers should be a starting point for any consumer-focused education and promotion activities.

To test this, a Supply Chain Education Program (SCE) was developed and trialed in HK and China between 2013 and 2016. The SCE program educated supply chain partners about AWA® product, where it grows in the wild and the way in which it is harvested. We partnered with other food sectors as appropriate e.g. at the Commonwealth Government Trade Mission in April 2014 (AWIC - Australia Week in China) and at F&B Trade Shows in Hong Kong and China during 2013, 2014 and 2015. We also worked with key F&B Retail customers, chefs from 4/5 Star Hotels and top restaurants in Hong Kong and China - hosting “technical” food preparation and cooking seminars to gather information and to inspire new and exciting Australian Wild Abalone® dishes.

Importers, chefs and food and beverage managers alike emphasised that, with increased funding to support the program, consumer education and creating “bottom-up” demand must be the underlying long-term objective.

WILL CONSUMER EDUCATION AND PROMOTION BE THE ONLY ACTIVITY THAT THE LEVY WILL BE USED FOR?

Levy funds will only be used for the purpose that it is legislated for. In this case it is for activities as outlined in the proposed Consumer Education and Promotion (CEP) Program. There are five major activity areas:

- The AWA® certification trademark – the cornerstone of the CEP Program
- Global Market Access – ensuring that we have full access to the global markets
- Consumer Awareness and Engagement – giving them a reason to choose Australian wild-caught abalone over our competitors and pay a premium for it
- Supply Chain Enterprise Support – helping our exporters and importers/distributors and their customers promote Australian wild-caught abalone to consumers
- Consumer Insights and Market Research - keep up with trends, take advantage of them

To see examples of the kinds of activities that will happen as the CEP Program is implemented have a look at [these short videos](#).

All the activities will be undertaken in each of the five key markets (Hong Kong, Japan, China, Singapore and Australia) and tailored to the individual needs of each those markets.

The costs of collecting, administering and reporting will also come from the levy funds. These costs have been minimized and are currently budgeted at \$690,000 over five years from a total budget of \$12,000,000.

An [Abalone Marketing Advisory Committee](#) will be established by the Fisheries Research and Development Corporation to guide the investment in consumer education and promotion.

All in-market consumer education and promotion activities will be undertaken by specialist experts in each market. These experts will be selected by tender and contracted and managed by the Fisheries Research and Development Corporation (FRDC).

WILL THE LEVY BE USED TO BUY OR SELL PRODUCT?

No. The levy funds cannot be used to buy or sell any Australian wild caught abalone products.

The levy funds can only be used to undertake the sorts of activities detailed in the proposed Consumer Education and Promotion (CEP) Program.

THE LEVY

WHY COLLECT THE FUNDS BY A COMPULSORY LEVY?

The biggest advantage of a national Abalone Consumer Education and Promotion Levy is that the cost of marketing is spread as widely as possible across the industry keeping the cost to each abalone business at an absolute minimum.

The fairest way to spread the cost of a national consumer education and promotion program is to collect a levy from across the whole of industry. It allows abalone businesses around Australia to collectively “pool” their resources to find a solution to priority issues that require a “whole of industry” approach – in this case the establishment and ongoing cost of a consumer education and promotion program.

The problem with voluntary levies is that only a few people end up paying while everybody benefits. A compulsory levy approach will stop anyone having a free ride!

The levy funds will not be used to buy or sell product. That would be illegal. The funds can only be used for the purpose for which it is collected. The purpose is outlined in the proposed Consumer Education and Promotion (CEP) Program available on the website www.abalonepal.com.

IF WE AGREE TO A LEVY, WILL IT BE FOREVER?

No. The levy must be reviewed every 5 years. Levy payers will always retain the power to alter the payment amount (collection time or payment terms) of the levy via a national vote. This includes the power to turn the levy off completely (i.e. setting the amount payable to zero).

Quota owners, as a collective, will always retain the ability to seek a new levy poll to alter the investment amount. This can be done by requesting that another national vote be conducted. This includes the ability to stop the investment completely at any stage during the next five years. Changes must be in line with ‘Levy Principle 12: Amendments to existing levies’ which states:

“The proposed change must be supported by industry bodies or by levy payers or by the Government in the public interest. The initiator of the change must establish the case for change.”

In any event, after five years, ACA will conduct a ballot to decide whether to continue the ballot or not.

WHO WOULD HAVE TO PAY THE LEVY?

The levy payer is the quota owning entity. If the vote is yes and the Minister agrees to implement the levy all Australian wild-caught abalone quota owners around Australia will pay the levy.

WHEN WOULD THE LEVY NEED TO BE PAID?

The proposal is for the levy to be paid when the product is first sold to a processor.

The levy will be calculated based on the sale amount and withheld from your payment by the processor. All levy funds will be remitted from the processor to the Department of Agriculture (DA) every 3 months.

There is no upfront payment by anyone.

The entire process will be subject to audit by the Department of Agriculture. A report will be provided annually to all levy payers providing information about the collection of the levy. This report is also provided to the Federal Parliament.

For more information about the levy collection process please download the [Proposed Levy Governance document here](#).

WHY IS IT PROPOSED THAT THE LEVY BE COLLECTED BY THE PROCESSOR?

Two key principles must be met in relation to how a levy is collected and administered – it must be equitable i.e. those who pay will get the benefit AND it must be efficient i.e. it must be collected at minimal cost to maximise the amount available for consumer education and promotion.

We have reviewed how the levy works in other industries. This information is available online at www.abalonepal.com. We have also consulted with the Department of Agriculture Levies Unit to understand the financial transactions in the Australian wild-caught abalone supply chain.

The most cost-efficient collection point for the proposed levy is at the processor.

The Department of Agriculture (DA) Levies Unit estimates that the levy collection cost (as a percentage of the total levy funds) would be 1.4%, if it is collected by processors at the first point of sale.

If the levy were to be collected directly from quota owners, the levy collection costs would be 23.75%. This is because there are approximately 20 times more quota owning entities than processing entities.

WHAT IF PEOPLE DON'T PAY THE LEVY THAT THEY SHOULD PAY?

Once the levy is approved by the Minister and is gazetted in Commonwealth legislation, non-payers will be followed up by the agency and required to pay or face legal action.

WHY HAS THE LEVY BEEN SET AT 1.5% AND NOT A SPECIFIC AMOUNT (FOR EXAMPLE 70C/KG)?

A percentage-based levy is the most equitable way to account for price variations across different products, markets and seasons.

Regardless of the form that the product is sold in, the levy will be calculated on an equivalent 'live in shell' weight.

We are aiming to raise a minimum of \$12 million over five years and have estimated that 1.5% levy on the first sale price will achieve that target. After five years the levy amount will be reviewed.

A five year budget and detail about the activities that are proposed to be undertaken are detailed in the Consumer Education and Promotion (CEP) Program that is available for download on the website www.abalonepal.com.

WHAT OTHER AUSTRALIAN PRIMARY INDUSTRIES HAVE LEVIES?

Australian Primary Industry Development Levies are collected via Dept of Agriculture (Commonwealth) for each of the following industry bodies:

- Australian Egg Corporation Limited
- Australian Grape and Wine Authority
- Australian Meat Processors Corporation
- Australian Pork Limited
- Australian Wool Innovation
- Cotton Research & Development Corporation
- Dairy Australia Limited
- Forest and Wood Products Australia Ltd
- Grains Research & Development Corporation,
- Horticulture Australia Ltd
- Live Corp
- Meat & Livestock Australia
- Plant Health Australia
- Australia, Sugar Research Australia and
- Wheat Exports Australia

For more information go to www.abalonepal.com.

THE BALLOT

WHO IS BEING ASKED TO VOTE?

Quota owning entities who owned Australian wild-abalone quota as of 30 August 2019 are entitled to vote on the levy.

WHY IS CORPVOTE CONDUCTING THE BALLOT?

Initially we had planned on having the Australian Electoral Commission (AEC) conduct the ballot. However the AEC has ceased doing fee for service private ballots. We were provided with the names of three companies that are approved by the Department of Agriculture to conduct these kinds of ballots. We sought a quote from all of them and selected CorpVote.

For more information about [CorpVote please go to their website here.](#)

IS THE BALLOT SECRET?

Yes. We will not know how individuals have voted.

HOW WILL THE VOTES BE COUNTED?

The votes will be counted in two ways. Firstly, how many quota holding entities voted 'yes' compared to the number that voted 'no'. Secondly, how much quota (in kgs) is owned by those entities which voted 'yes' compared to 'no'.

WHERE DO WE FIND MORE INFORMATION?

All relevant documents are available at

www.abalonepal.com
[Register to receive updates](#)

Happy Fishing!