Ministry for Primary Industries
Manatū Ahu Matua

MPI Presentation for tangata whenua led aquaculture in Te Tai Tokerau

23 November 2022

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Agenda

- Karakia timatanga
- Whakawhanaungatanga
- Ko wai mātou- who is the aquaculture directorate and what is our mahi?
- Snapshot of aquaculture in Te Tai Tokerau- including key constraints
- What is an ‘opportunities assessment’ - an overview of the opportunities project undertaken in Te Moana-a-Toi and some key learnings
- Discussion
    - What are the outcomes we want to achieve through an opportunities assessment in Te Tai Tokerau ?
    - What are the Individual and collective aquaculture aspirations of tangata whenua in Te Tai Tokerau?
    - What is needed to progress the opportunities assessment in Te Tai Tokerau & how do we all work together?
- Karakia whakamutunga

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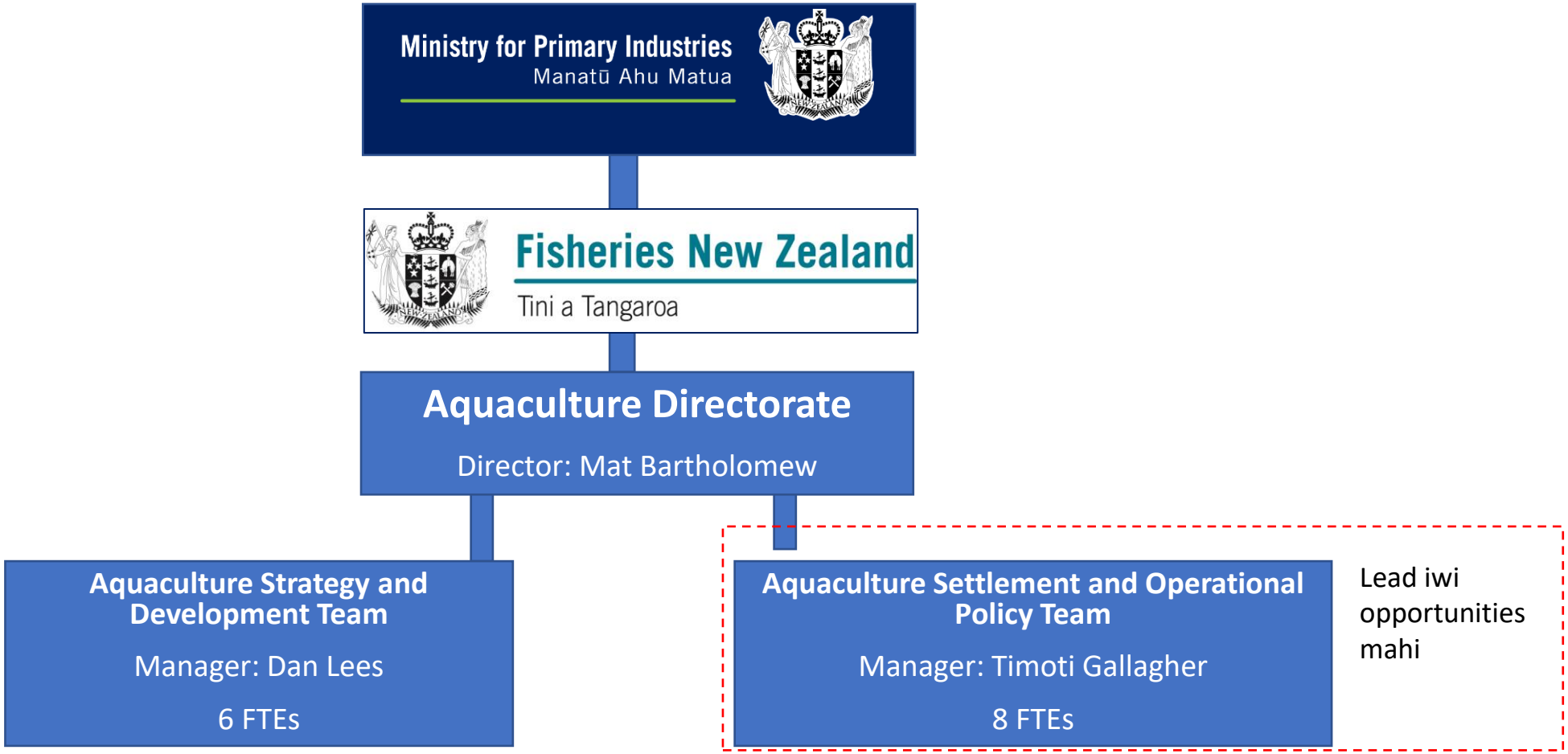
Ko wai mātou?



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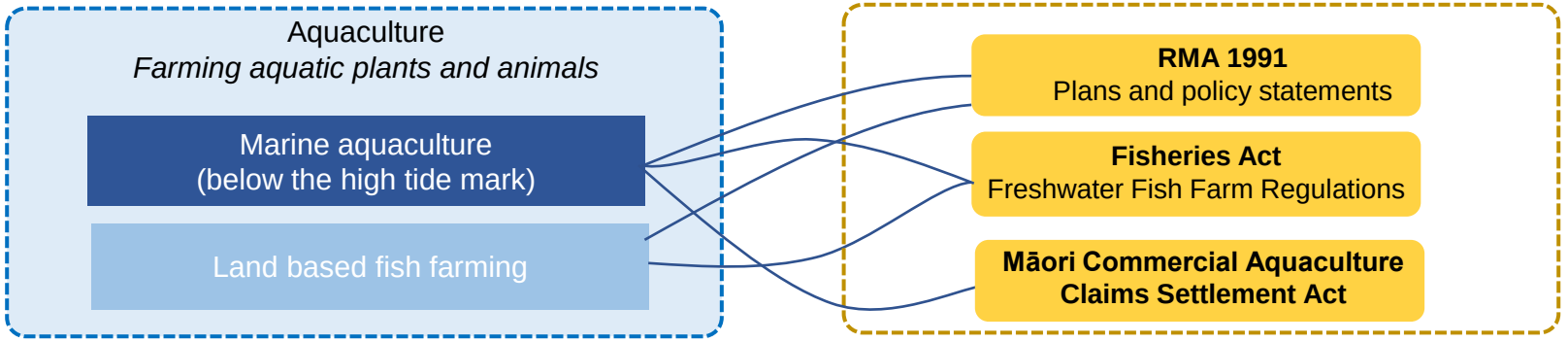
Fisheries New Zealand – our roles in aquaculture



Strategic

Regulatory

Aquaculture Strategy & Development	Set Government priorities & deliver Aquaculture Strategy	Champion sustainable aquaculture growth & promote sustainable practices	Guide Government investment in aquaculture research & infrastructure		Work with iwi, industry and councils to support regional aquaculture growth	Build relationships to reduce barriers to aquaculture growth Treaty centric approach & partnerships Support ministers in aquaculture matters
Aquaculture Settlement & Operational Policy	Participate in council planning processes for aquaculture e.g. submitting on RCPs & Consents, RM Reform	Plan for and deliver the Crown's aquaculture settlement obligations, working closely with Te Ohu Kaimoana	Lead & contribute to operational policy development for aquaculture, incl Biosecurity	Work with tangata whenua to understand and lead opportunities		
Aquaculture & Fisheries Permitting	Administer the Undue Adverse Effects Test on fishing for new marine farms	Maintain a register of farmers and regulate elements of land-based aquaculture	Consider exemptions for fish stock sourcing and special permits			

Key partners & stakeholders:

- **Minister for Oceans & Fisheries**
- **Iwi**
- **Aquaculture industry**
- **Agencies (MfE, DOC, MBIE)**
- **Regional councils**
- **Environmental groups**

Snapshot of Aquaculture in Te Tai Tokerau

- Northland has around 750 hectares of consented aquaculture space, but only around 270 hectares is in use (Regional Growth Study, 2015)
- Most of this is for Pacific oysters, with a relatively small area for greenshell mussels
- There is a single commercial land-based pāua farm at Bream Bay
- Te Hiku spat/Te Oneroa-a-Tōhē is also key to the aquaculture sector (GLM9/wild-caught spat provides around 70% supply)
- Key growing areas include – Mahurangi, Kaipara Harbour, Waikare Inlet, Whangaroa Harbour, Bay of Islands, Houhora, Kaipara and Parengarenga Harbour
- Despite favourable environments (e.g. productive waters, sheltered bays), aquaculture in the region is relatively small scale, and has untapped potential

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Tio/Oysters

- The majority of oyster farms are located in Mahurangi, Whangaroa Harbour, Bay of Islands, Houhora, Kaipara and Parengarenga Harbour
- Significant oyster growing region- around 600t/pa (2022), although down to around half from its peak in 2010 (pre-herpes virus)

Opportunities

- Expanding the Pacific oyster industry- (an additional 150 ha of oyster farming and related processing can contribute $14m GDP and support 220 jobs annually)- utilizing pre-consented space
- Improving and shifting technology e.g. flip farms, improving spat resilience
- Establishing an oyster hatchery in Te Tai Tokerau- could have high impact
- Re-establishing the native rock oyster industry
- Tentative opportunities for flat oysters (noting current biosecurity considerations)

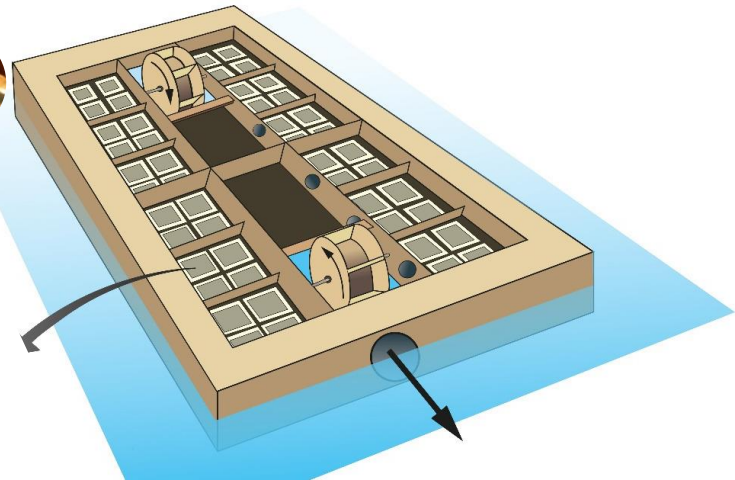
Kūtai/Greenshell mussels

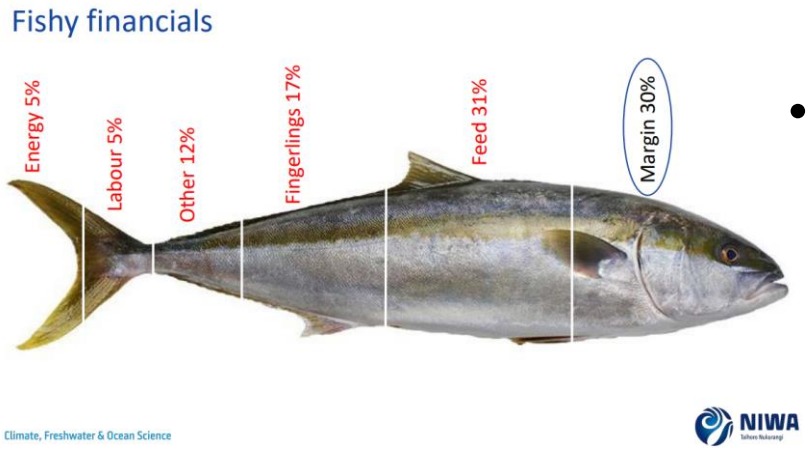
Grow out & Spat

- Grow out is currently very small (producing around 600t/pa). Currently mostly in Hokianga, Houhora and Whangaroa
- Te Hiku spat source- a taonga & backbone of GSM industry (70%). Even as industry moves to hatcheries, still a significant role for this sector

Opportunities

- Looking into options for expanding GSM grow out is worth exploring- inshore and open ocean- (mindful of temperature tolerance)
- Improving wild spat collection, handling and transport techniques + options for line caught spat
- Establishing nurseries (sea-based and on land), making use of rearing systems for improved mussel spat performance
- GSM sector needs at least 2 more hatcheries- potential case for a northland hatchery (needs to make sense within a broader GSM value chain and access to grow out space)





Warehenga/Yellowtail kingfish

- The NIWA Northland Marine Research Centre is an important aquaculture research facility in Ruakākā

Opportunities

- NIWA are currently establishing commercial scale land-based kingfish business
- Northland waters are also suitable for marine farming kingfish- (note current proposed farm in Coromandel)
- Let both of these be the ‘pilots’- then assess for future feasibility for investment

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Other species with potential

- Toheroa- Te Roroa/University of Waikato project underway
- Rimurimu/seaweeds
- Geoduck
- Inanga/whitebait

Training opportunities

- Muriwhenua Developments Charitable Trust
  - The programme is run out of Northtec's Oxford Street Campus and is free to students under the Government Targeted Training programme and a product of a unique partnership between the Muriwhenua Charitable Development Trust and Nelson Marlborough Institute of Technology's aquaculture group.

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Key constraints

- Regulatory environment – Northland Regional Coastal Plan places restrictions on where new aquaculture can occur
- Social attitude and opposition to aquaculture (NIMBY history in Northland)
- History- some failed enterprises and issues e.g. Parengarenga Kingfish landbased farm, GLM9 tensions, herpes/oysters
- Past strategies haven't produced tangible results- e.g. 2012 Northland aquaculture Strategy- NADG ($300million, 700 jobs by 2025)
- Lack of investment and infrastructure in the region
- Workforce, skills and training
- Aquaculture can be expensive and takes time to establish

BUT

- Aquaculture could still present a significant opportunity in Te Tai Tokerau- starting with an honest appraisal of opportunities, and early wrap-around government committment to supporting the sector

AND

- If we can present a bigger picture 'case' for aquaculture, with wider government support identified accross the value chain, we can also explore regulatory options to unlock the opportunities i.e. plan change, possible central government tools etc

What is an ‘opportunities assessement’?

- An exercise that identifies aquaculture opportunities embedded in tangata whenua aspirations and values.
- Begins with a scan of the existing regional, national and international aquaculture landscape for consumer, market and technology trends to assess relevant opportunities.
- Those opportunities are then grounded in the realities, challenges and growth possibilities in the region.



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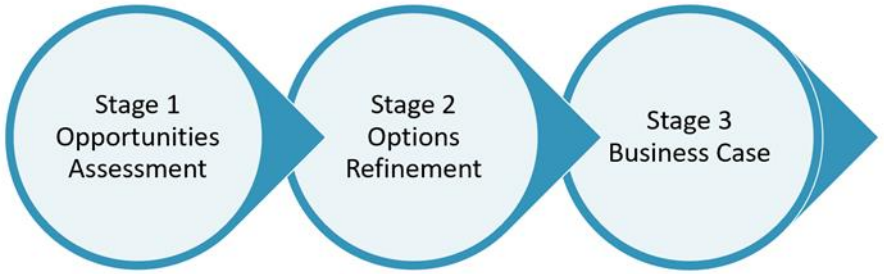
Te Moana-a-Toi iwi opportunities assessement

- Project began in 2019- a group of three motivated iwi (Te Arawa, Whakatōhea, Te Whānau-ā-Apanui) who championed the work on behalf of Te Moana-a-Toi iwi.
- Iwi wanted more business case information to support decisions before entering into aquaculture and making aquaculture settlement decisions.
- Key drivers of the project were:
  - Māori economic development.
  - Growing people through job creation, training, career pathways, research and leadership opportunities.
  - Empowering and exercising rangatiratanga & kaitiakitanga and maintaining and enhancing the mauri of Te Moana-a-Toi.
- MPI and Te Ohu Kaimoana worked with iwi to scope and fund the iwi-led project, based on a three staged approach:



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What was involved in ‘stage 1’?

- Key deliverable of this ‘opportunities assessement’ stage (which took arounf 5 months) was a report that set out:
  - state of play of aquaculture in region- harbour infrastructure, processing, workforce and training programmes
  - international and domestic trends, and what these insights mean for the region
  - premilinary screening of species options (assessed via demand readiness, expected margin, technology readiness, time horizon, see table below)
  - idenitifying key risks and challenges (i.e. climate change, investment, regulatory environment etc)
  - exploring technology and innovation opportunities- e.g. Open ocean Technologies, waste minimisation and circular economy
  - assessing opportunities at a range of scales- i.e. whānau-centric and collective iwi models – and ‘growth through collaboration’ to unlock further opportunities and funding
  - Identifying key potential aquaculture pathways, to take through to the next stage

Species	Demand Readiness	Expected Margin	Technology Readiness	Time Horizon
Marine				
Pacific Oyster / tio repe	High	Medium	High	Short
Yellowtail Kingfish / warehenga	High	Medium	High	Medium
Greenshell Mussel / kūtai	High	Low	High	Short
Snapper / tāmure	High	High	Medium	Medium
NZ Scallop / tupa	High	High	Medium	Medium
Geoduck / Hohehohe	High	High	Low	Medium
Wreckfish / hāpuku	High	High	Medium	Long
Brown Kelp / *Ecklonia radiata*	High	Medium	Low	Medium
Sea Lettuce / *Ulva spp.*	Low	Low	High	Short
Microalgae spp.	Low	Low	High	Short
Trevally / araara	Medium	Medium	Medium	Long
Freshwater				
Whitebait / Īnanga	High	High	High	Medium
Freshwater crayfish / koura	Low	Medium	High	Short
Freshwater Macroalgae	Low	Low	High	Short

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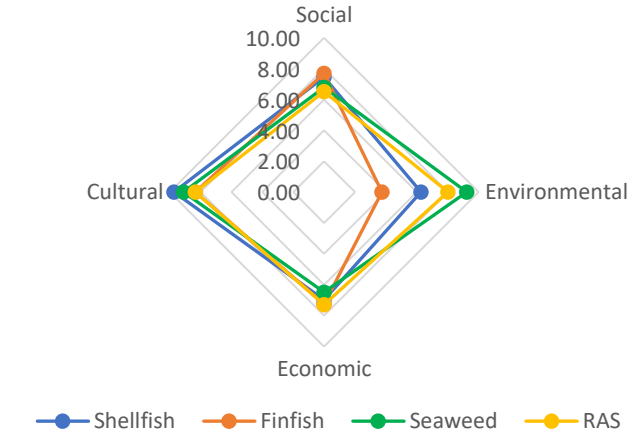
What was involved in ‘stage 2’

- This was a shorter ‘options refinement’ stage, that took around two months.
- It took the long list options from stage 1, and ‘refined’ them through a four pou analysis



- It also applied a commercial matrix, including:
  - Job creation (on water and processing), scalability, market premium, pricing (retail and farm gate), competition (NZ and overseas), potential market size & commercial viability timeframe
- This stage also saw development of an Intellectual Property strategy

See for more resources: https://smartmaoriaquaculture.co.nz/

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What was involved in ‘stage 3’

- This third ‘business case’ stage was funded by MPI’s SFFF- (Sustainable Food, Fibre, Futures Fund). This is a co-funding grant, and iwi leads were able to offer in-kind contributions & committments.
- This stage took the top four propositions, to work into business cases:

  Offshore Greenshell Mussels | Kutai

  Offshore Ecklonia Seaweed | Rimurimu

  Offshore Yellowtail Kingfish |Warehenga

  Land-based Yellowtail Kingfish | Warehenga
- Looked at variety of scales: 500ha, 2,000ha, 5,000ha (the IRR increases with scale).
- Also involved cultural impact assessment, workforce strategy, consenting pathway overview, legal structuring considerations etc
- Now looking at taking to Investment Memorandum stage

Marine surveys

- These BOP economic assessments were also supported by benthic and watercolumn surveys which helped identify 7,500ha of suitable marine space (triggered under the settlement act).
- FNZ undertook surverys in 2015 to locate possible sites for marine farming in Te Tai Tokerau (under settlement act obligations).
- Looked at Hokianga- oyster, mussel and finfish site, + Whangaroa and Ahipara.
- Space was not pursued further, but we do have some marine-based information.
- This opportunties assessment project might help identify some future potential sites, and further surveying needs.

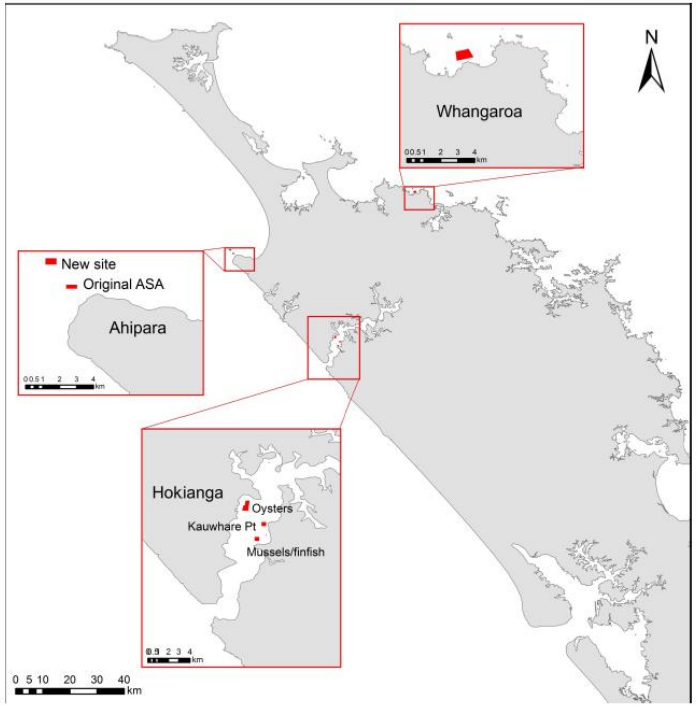

Figure 1. Locations of scoping survey sites in Northland.

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What made the Te Moana-a-Toi iwi project unique and successful?

- Iwi-led, government supported kaupapa.
- Outside of the box thinking- balance between being future-focussed, but also realistic.
- Exploring collaborations- the business cases showed that if each iwi worked on their own, the business cases reduced in value.
- Embedded in strong relationships- an ecosystem of research agencies, central and local government (e.g. MPI, Te Ohu Kaimoana, New Zealand Trade and Enterprise, DOC, MSD, Te Puni Kōkiri Regional Council)
- Grounded in Te Ao Māori perspective:
  - growing people (involved workforce and educational planning)
  - growing kai (building a resilient Maori economy, but also feeding own people)
  - mana motuhake (individually, and collectively)
  - protecting IP (IP strategy & Wai262 awareness)
  - enhancing environment and taonga species

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What are some key learnings?

- By-Māori, For-Māori: must be tangata whenua-led- with Crown in a supporting role.
- Strength in a ‘collective approach’- and providing cohesive picture of the regions future.
- Not a ‘one size fits all’ approach, but we have a good ‘template’.
  - i.e. Te Moana-a-Toi - has already had significant investment in aquaculture infrastructure (Harbour project, processing, hatchery). Te Tai Tokerau has been chronically under-invested and under-supported by Government.
- Need to get governance clear from outset- so that tangata whenua can shape and participate in project, as desired.
- Need to get wider Government (local and central) on board early- Aquaculture Strategy = NZ Governments responsibility.
- Need to line up the funding pathway for future business cases (stage 3) early.

What would you want to achieve from this kaupapa?

- What are the individual and collective aquaculture aspirations of tangata whenua in Te Tai Tokerau?
  - Stocktake of where each of you are at- existing, underway and future

- What outcomes do you want to achieve through an opportunities assessment in Te Tai Tokerau?

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Is there a mandate to proceed with this project?

- If so, how do we all work together?
  - divide the project into sub-regions? e.g. Kaipara, Te Oneroa-a-Tōhē, East Coast/West Coast?
  - should we have a governance and/or a working group?
  - should we have formality around this project in the form of a Terms of Reference?
  - who might undertake it? – suggested consultants?
  - funding and participation- initial stages $ Fisheries NZ- business cases = SFFF (in-kind contributions)
  - what are the next steps going forward? When do we get wider groups and agencies involved?

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Resources

- Te Tai Tokerau Regional Growth Study (2015)- MPI and MBIE.
- ENVECO. 2010. The Northland Regional Economic Impacts of Aquaculture
- Clark D, Taylor D, 2015. Northland site assessments. Prepared for Ministry for Primary Industries. Cawthron Report No. 2675. 20 p. plus appendices (copies shared upon request)

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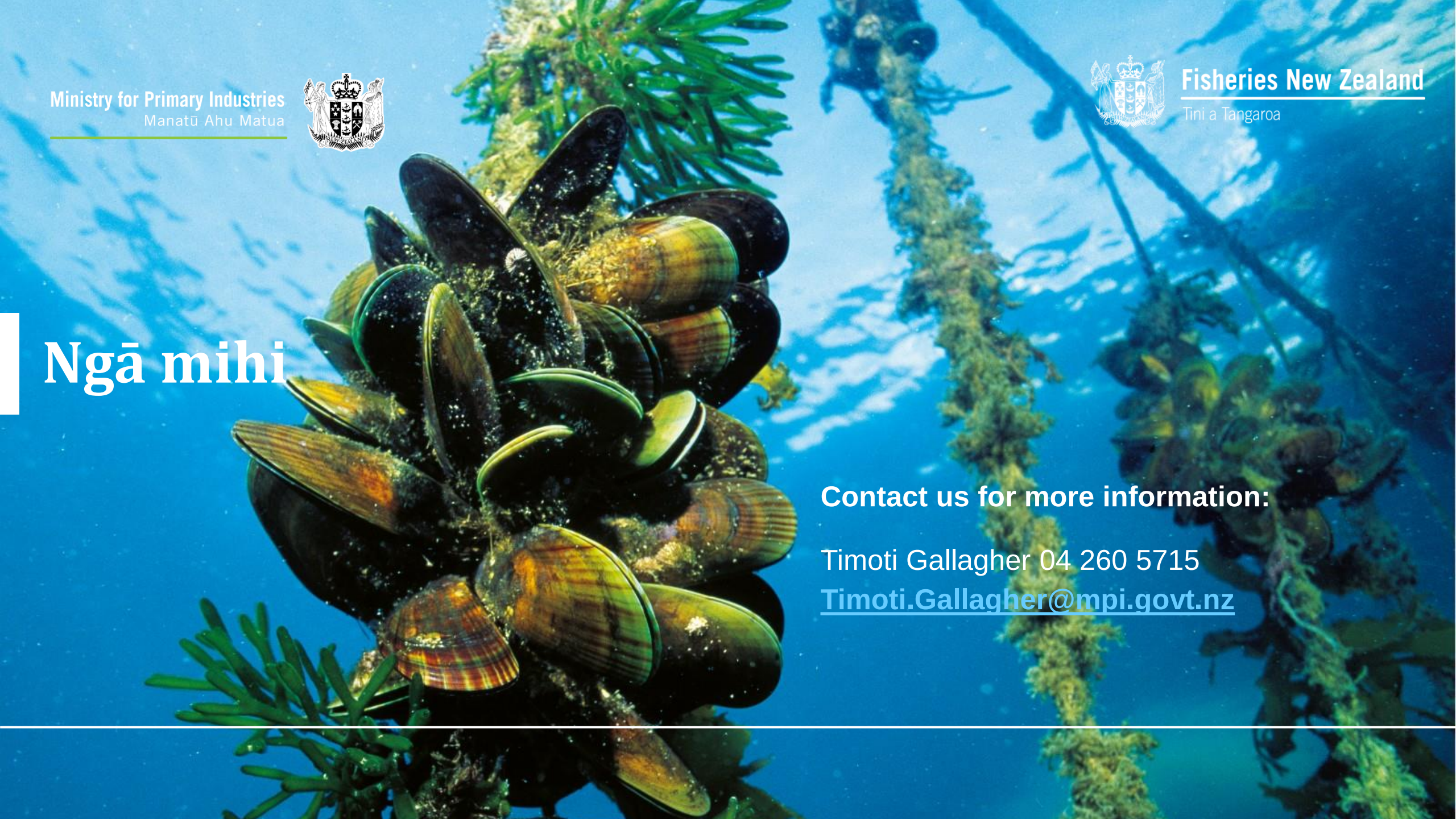

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Ngā mihi

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An overview of Aquaculture Planning and Consenting

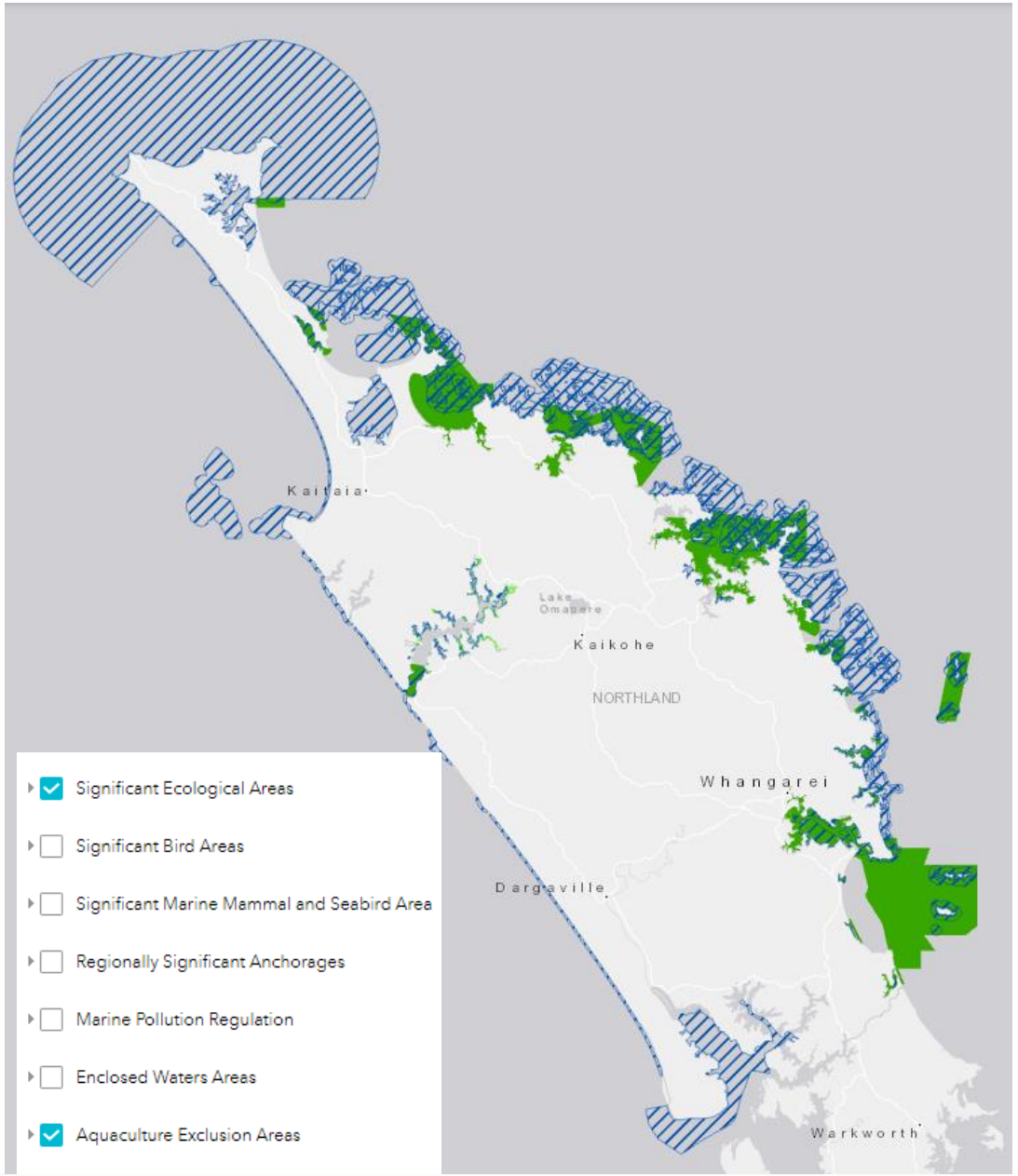
Background Information for Te Tai Tokerau iwi

Background information

- These slides provide some background information on:
  - Northland Regional Council's planning rules for aquaculture
  - Resource Management Reform
  - The current status-quo system for attaining marine aquaculture space
    - The process for attaining consents under the RMA, including undertaking and Assessment of Environmental Effects (AEE)
    - National Environmental Standard for Marine Aquaculture (NES-MA)
    - Customary Marine Title
    - Marae Based Aquaculture

Proposed Coastal Plan

- The Northland Regional Council has created the Proposed Regional Plan (PRP) - which is currently undergoing appeals.
- Aquaculture outside of 'significant areas and development zones' would be a discretionary activity i.e. resource consent needed but Council has retained full discretion as to whether it will grant the resource consent.
- Aquaculture inside 'significant areas and development zones' would be a prohibited activity (see blue and green areas on map)
- This map and the adjustable layers can be found here
- Note. the PRP will not be fully operative until all appeals are resolved. Rules in the PRP that have not been appealed are considered operative.



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Activities under Proposed Regional Plan (PRP)

Classification	Activity
Controlled Activity – Resource Consent required but always granted	• Re-consenting aquaculture (not finfish)
Restricted Discretionary Activity – Resource consent required but Council limits the range of matters it considers, setting only conditions which are relevant to the matters to which it has limited discretion	• Re-consenting aquaculture (not finfish) in a significant area • Realignment of existing aquaculture • Extensions to authorised aquaculture
Discretionary Activity – Resource consent needed but Council has retained full discretion as to whether it will grant the resource consent	• Re-consenting finfish aquaculture • Aquaculture outside significant areas and development zones • New aquaculture in an authorised area • Aquaculture in a Māori oyster reserve • Extensions to existing aquaculture in significant areas and development zones • Marae-based aquaculture in significant areas and development zones • Relocation of aquaculture within the Waikare Inlet and Parengarenga Harbour
Non-complying Activity	• Small scale and short duration aquaculture in significant areas and development zones • Aquaculture in a Significant Ecological Area in the Kaipara Harbour
Prohibited Activity	• Aquaculture in significant areas and development zones

Key Messages on RM Reform

- The Government is expected to introduce the Natural and Built Environment Bill and the Spatial Planning Bill to Parliament before the end of this year to replace the Resource Management Act 1991.
- Fisheries New Zealand has led the development of the parts of the Bills that relate to aquaculture. The polices on aquaculture were agreed to by Ministers and were strongly informed by feedback received from Treaty partners and key stakeholders during engagement in early 2022.
- We (FNZ) have actively involved ourselves in the policy development of aquaculture in a process led by MfE on the resource management reforms.
- We've pushed to deliver key outcomes in the system including better planning for aquaculture, more certain and efficient consenting process, and ensuring the Crown can best deliver on its obligations under the Māori Commercial Aquaculture Claims Settlement Act.
- As the work progresses we will look for more opportunities to get better outcomes for aquaculture, communities, and tangata whenua.

Key components of a reformed RM system

Strategic spatial planning

More upfront planning through regional spatial strategies

- Stronger links to the Aquaculture Settlement
- Anticipating aquaculture growth and the land-based infrastructure required to service that growth
- Spatial planning of aquaculture is considered alongside other uses

Detailed planning and zoning

Greater ability for Councils and Ministers to manage and provide for aquaculture

- Minister can amend NBA plans to provide for aquaculture in more cases
- Minister can make themselves the decision-maker on allocation for aquaculture
- Minister can stay applications to manage demand and address settlement
- Regional planning committees will, through NBA Plans, carry out more detailed planning and zoning for aquaculture

Consenting certainty

Greater upfront planning to make more efficient and certain consenting

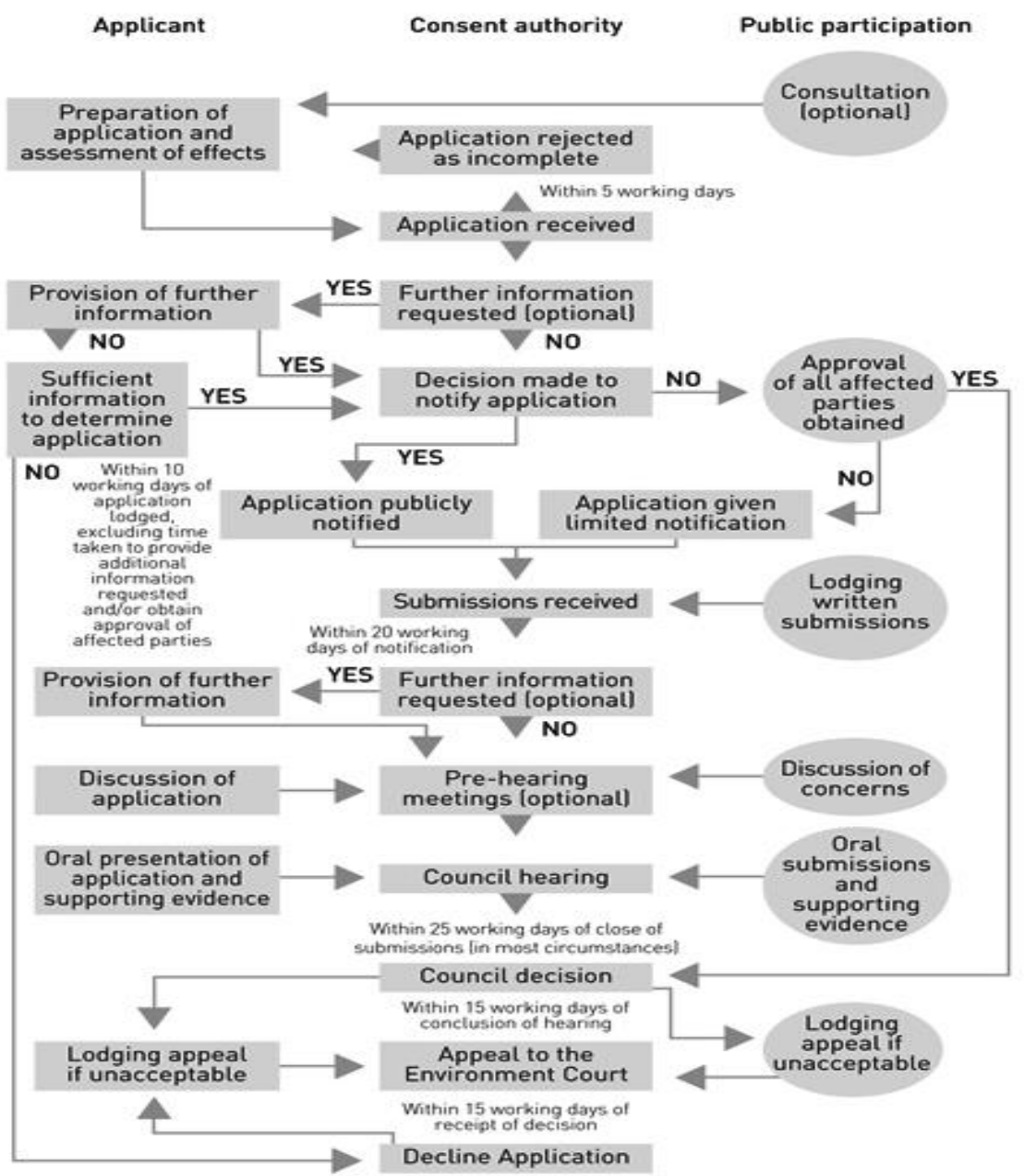
- Retaining consent duration certainty
- Replacement consents for existing marine farms will be managed in a similar way to the current approach, with priority for existing consent holders
- Faster and more certain consent process for certain aquaculture activities

RM Consent Process

1. **Preparation of applications** involve conducting the relevant assessments. These include assessments of environmental effects as well as cultural impacts your farm may have. Although the RMA does not require applicants to consult with anyone, the Marine and Coastal Area Act 2011 requires applicants to circulate a copy of the application to all who have applied for a customary marine title in that location and seek their view. Consulting with all affected parties is advised. In some cases if all affected parties approve of the activity, applications can progress non-notified.

2. **Lodging your application** will require payment on an initial fee. The Council will determine the scale and effects of the proposed activity, and any affected parties from whom written approval is desired. Aquaculture applications are typically publicly notified requiring a 20 working day period of submission. Evidence is provided before the hearing and a council report prepared. A hearing (if required) to present evidence is completed by 75 working days from close of submissions if fully notified (likely for aquaculture activities).

3. **The decision** will be reached, either approved or declined. Applicants and submitters are notified of the decision and a 15 working day appeals period begins. For an approved application, provided there is no appeal – conditions are checked and the council's involvement is complete.



Consenting under the RMA

- All marine farms require a consent (or coastal permit) to operate.
- A consent will cover the variety of activities associated with aquaculture, including occupation of the coastal marine area, disturbance of the seabed, take and discharge of seawater etc.
- The consent is processed according to the rules in the regional coastal plan (or NES) and application must include an assessment of environmental effects (AEE)
- Consents for new farms are typically publicly notified (submissions and hearings)
- Consents are usually processed by Regional Councils, although consents for significant projects can be referred directly to the Environment Court, or board of inquiry
- Consents can be lengthy (6-12months+), and costly ($100,000s-$1M, depending on how contested the consent is).
- Sometimes consents include conditions around biosecurity and animal interactions, including requirements for relevant management plans
- Consent terms range from 20 years (minimum) - 35 years (maximum)

Assessment of Environmental Effects

- Preparing a consent requires an Assessment of Environmental Effects (AEE).
- Exactly what needs to be included in an AEE will differ depending on the scale of the proposal and the policies and rules of the coastal plan.
- An AEE typically requires expert assessments of the effects of the proposed farm on various matters including:
    - Indigenous biodiversity (e.g. seabirds, marine mammals)
    - Benthic and water quality effects
    - Landscape, natural character, and amenity values
    - Cultural values, including effects on sites or areas of significance to tangata whenua
    - Biosecurity risks
    - Hydrodynamics
    - Noise, rubbish, debris
    - Lighting and navigation
    - Use of antibiotics and therapeutants (finfish farms)
    - Cumulative effects

Reconsenting sites in Northland

- Re-consenting aquaculture (not finfish) in a significant area in Northland – restricted discretionary activity (C.1.3.2)
- Matters of discretion include effects on outstanding or significant areas, positive effects, level of investment, need to upgrade structures etc.
- Resource consent applications under this rule are precluded from public and limited notification.

Marae-based Aquaculture (MBA)

- MBA presents an opportunity for iwi to utilise space in their rohe moana, and improve traditional customary kaimoana provision for their marae.
- MBA is allowed within the prohibited zones provided conditions laid out the coastal plan, some of which include:
    - The area of occupation is no more than one ha per marae, within the area traditionally harvested by the Marae
    - The purpose of the aquaculture activities is to improve traditional customary kaimoana provision for marae, and the farmed kaimoana is for non-commercial use
- Resource consent will still need to be gained

Customary Marine Interests

- **Customary marine title** (CMT) recognises the relationship iwi, hapū or whānau have with a part of the common marine and coastal area. A CMT cannot be sold, and free public access, fishing and other recreational activities can still occur within these areas.
- Any aquaculture developments require the written permission of CMT holders, who have the right to accept or decline any new aquaculture consents in the area.
- **Protected customary rights** or activities recognising customary activities, uses, and practices that iwi, hapū, and whānau have exercised since 1840. A resource consent is not required to carry out these activities.

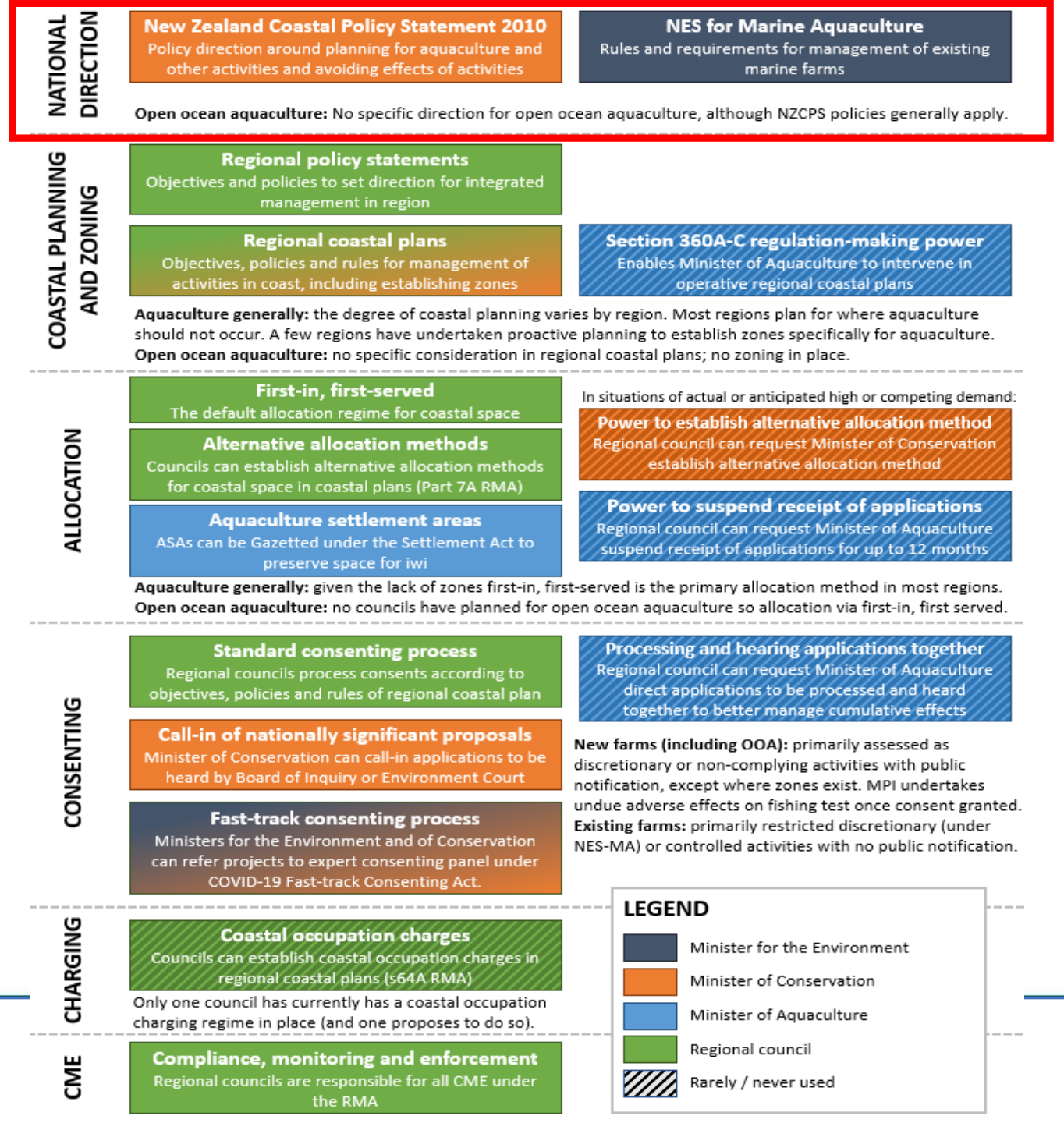
UAE Test

- A requirement under the Fisheries Act 1996 is that an application for an aquaculture consent needs to be assessed by MPI for undue adverse effects (UAE) on:
    - Recreational Fishing
    - Commercial Fishing
    - Customary Fishing

- The UAE test needs to be completed before the consent can be commenced
- Three possible outcomes or “aquaculture decisions” can be reached.
- Everyone carrying out the activity of fish farming must be registered on the Fish Farm Register. This is managed by FishServe, on behalf of MPI.

Presence on effects	Result
Farm would have no UAE on fishing	**You can set up the farm**
Farm would have UAE on commercial fishing for QMS species	**You can set up the farm if an agreement is reached with affected quota owners**
Farm would have undue adverse effects on: - Commercial fishing (for non-QMS species) - Customary & Recreational Fishing	**The farm can’t proceed**

Overview of System



National direction

What is it? National direction enables central government to provide direction on significant national issues. National policy statements (including NZCPS) set objectives and policies to guide and direct decision-makers for planning and consenting. National environmental standards set rules, standards and requirements for activities that have immediate legal effect.

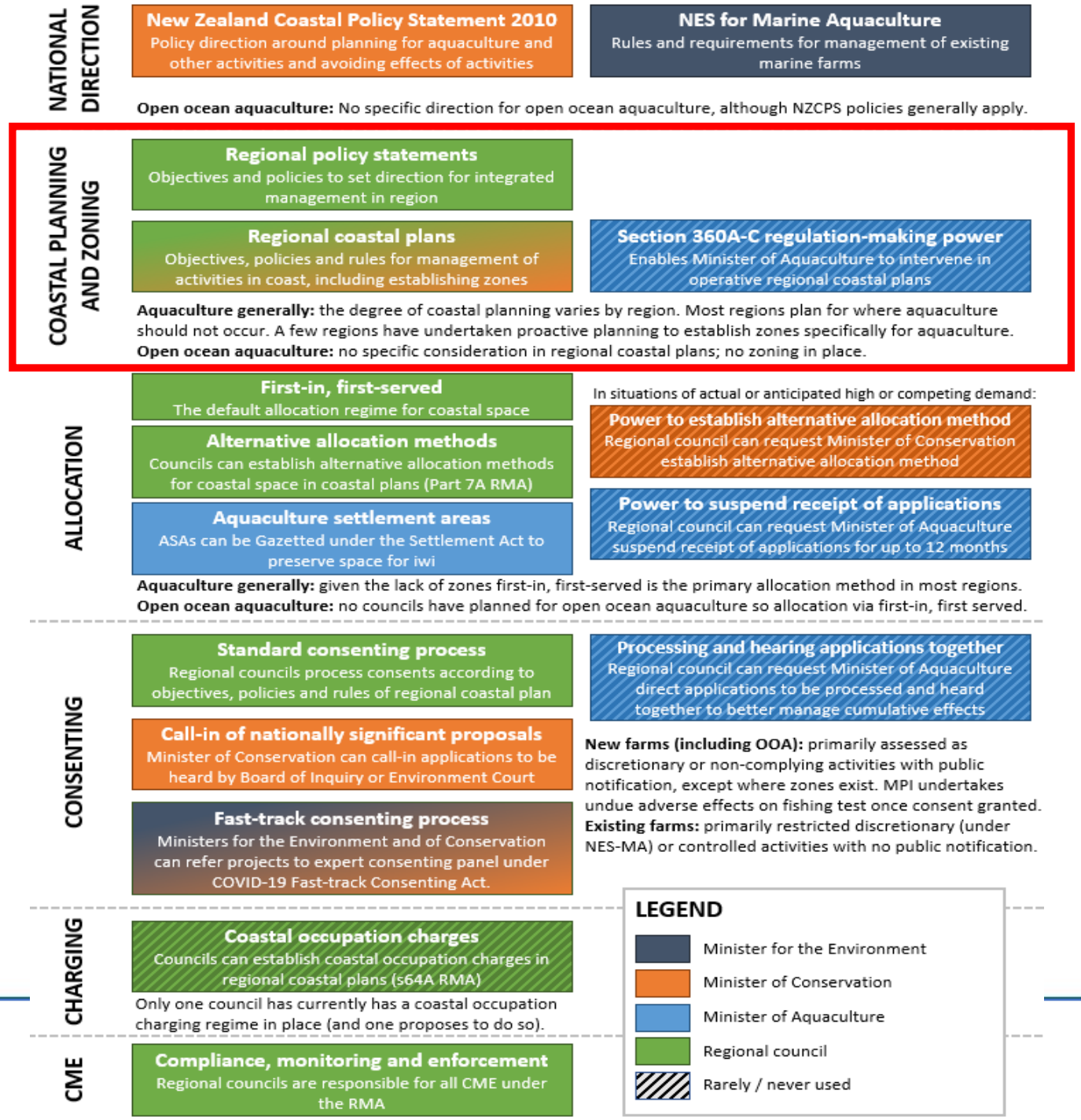
What's the process? Either Board of Inquiry (used for NZCPS) or alternative process established by Minister (most common). Usually takes 3+ years to develop and be put in place. Final decisions made by Minister for the Environment (or Minister of Conservation for NZCPS), and are subject to judicial review.

How are Māori and stakeholders involved? Formal consultation on the national direction proposals. Often targeted engagement during early stages of development.

What issues are addressed? Anything that could be considered nationally significant or that warrants national consistency. In the marine space this includes how to plan for use and development and avoid, remedy or mitigate effects on places/values of significance.

National Environmental Standards (NES)

- NESs provide the opportunity for central government to promote the adoption of consistent standards across Aotearoa. It may set the minimum standard to be followed, allowing councils to impose stricter regulations.
- NES for Marine Aquaculture (NES-MA) makes sure farms meet best environmental practice while providing a more certain and efficient process for replacement consents for existing marine farms, realignment, and change of species applications. See this link for more info.
- This is achieved by allowing regional councils to make it easier to get replacement consents for existing farms, provided they are not within an area identified as inappropriate for existing aquaculture
- The NES-MA does not apply to applications for replacement coastal permits for new marine farms (i.e. where no farm is currently at the site). In this situation the relevant regional coastal plan applies.
- A rule in the Coastal Plan prevails over a standard in the NES-MA if it is more stringent than the standard. A standard in the NES-MA will prevail over a rule in the Coastal Plan if it is more stringent than the rule.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Open ocean aquaculture: No specific direction for open ocean aquaculture, although NZCPS policies generally apply.
COASTAL PLANNING AND ZONING
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Regional coastal plans
Objectives, policies and rules for management of activities in coast, including establishing zones
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ALLOCATION
First-in, first-served
The default allocation regime for coastal space
Alternative allocation methods
Councils can establish alternative allocation methods for coastal space in coastal plans (Part 7A RMA)
Aquaculture settlement areas
ASAs can be Gazetted under the Settlement Act to preserve space for iwi
In situations of actual or anticipated high or competing demand:
Power to establish alternative allocation method
Regional council can request Minister of Conservation establish alternative allocation method
Power to suspend receipt of applications
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Only one council has currently has a coastal occupation charging regime in place (and one proposes to do so).
CME
Compliance, monitoring and enforcement
Regional councils are responsible for all CME under the RMA
LEGEND
Minister for the Environment
Minister of Conservation
Minister of Aquaculture
Regional council
Rarely / never used

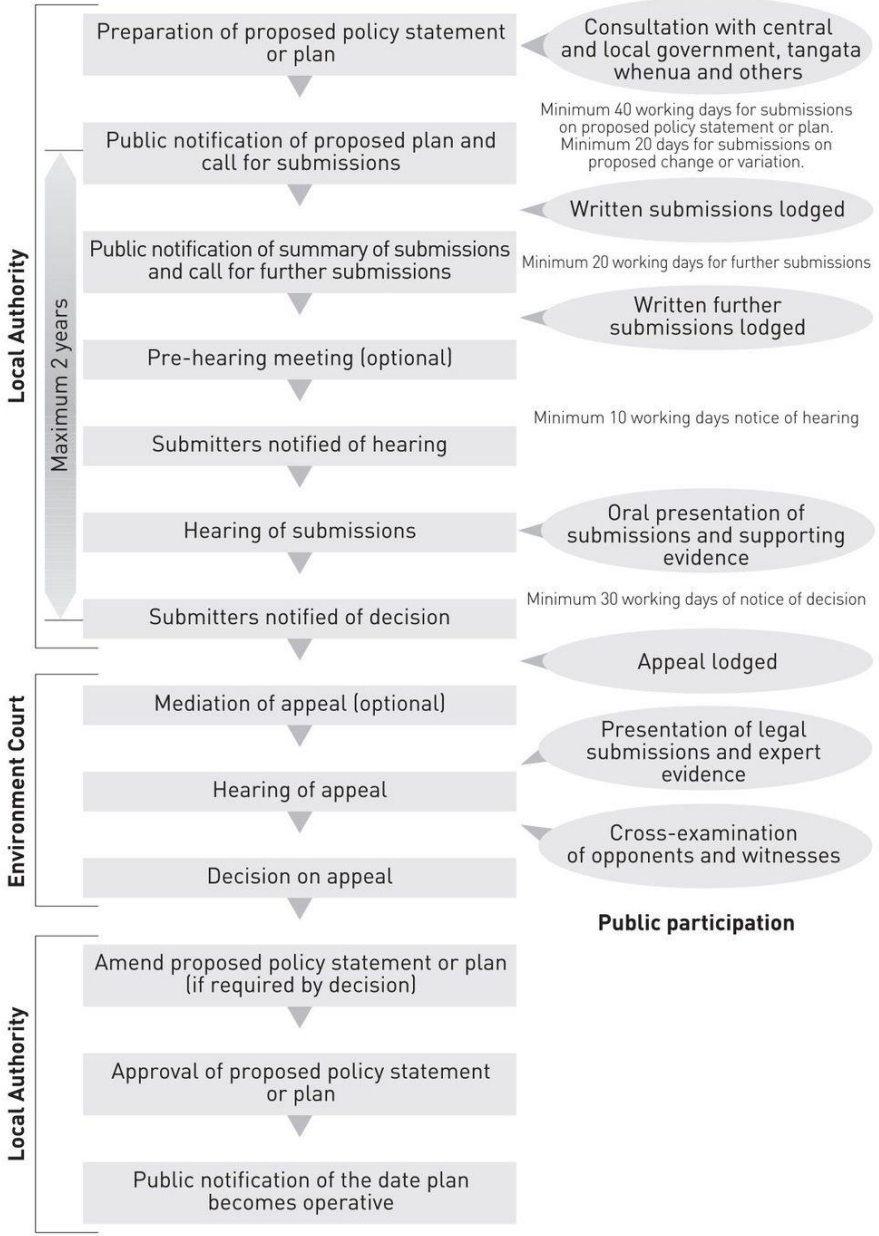
Planning and zoning

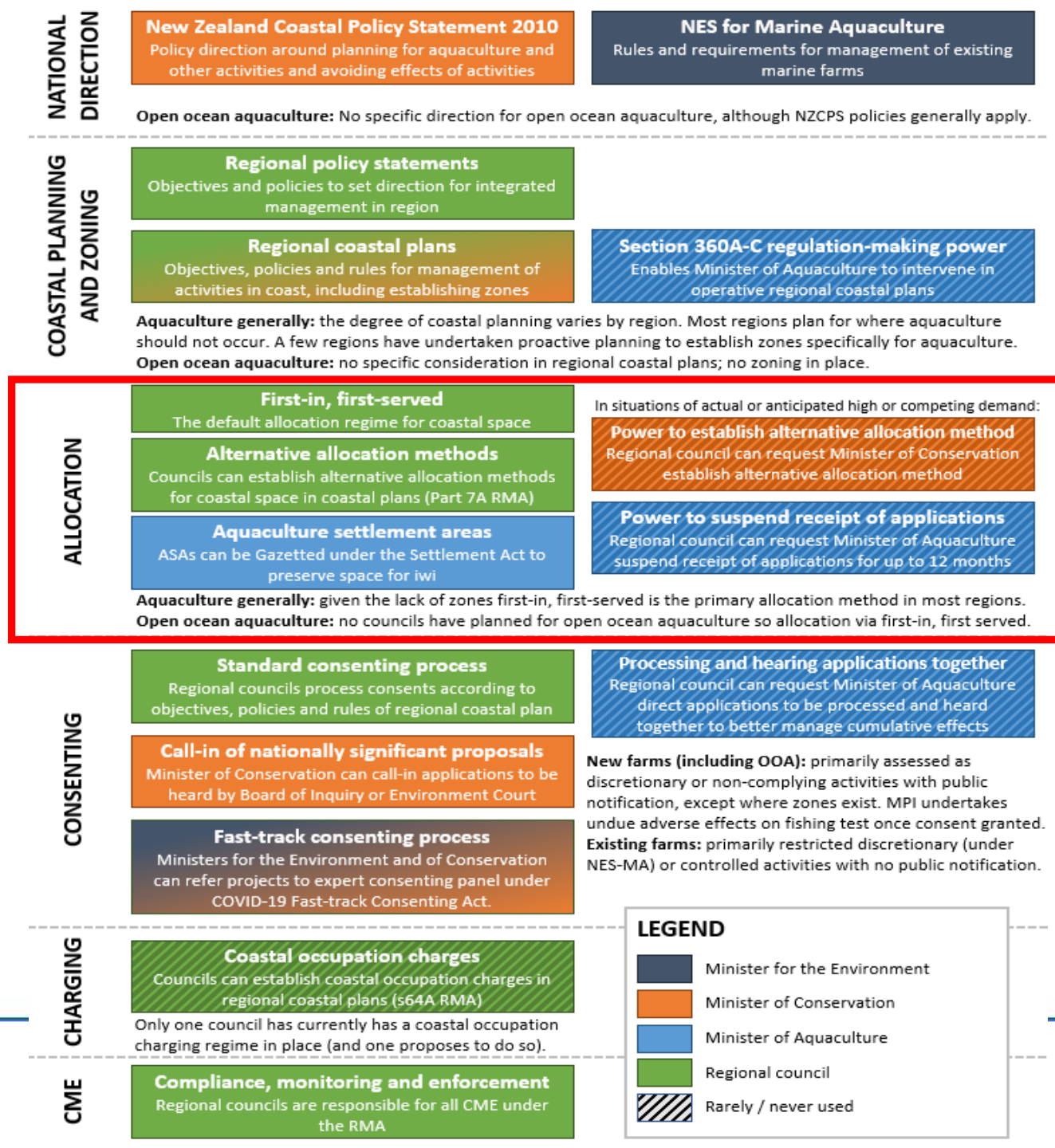
What is it? Regional policy statements and plans set the regulatory framework (objectives, policies, rules) in each region (out to 12 nm).

What's the process? Regional councils develop plans and are required to review them every ten years. In the intervening period plans can be amended either by plan changes (by regional council or private plan change) or using Minister of Aquaculture's regulation-making power. Decisions subject to Environment Court appeal (judicial review only for Minister's power). Minister of Conservation has final approval of regional coastal plans.

How are Māori and stakeholders involved? Early consultation during plan development and ability to lodge submissions and appeal decisions. Mana Whakahono ā Rohe between tangata whenua and councils.

What issues are addressed? Where aquaculture can and can't be located (including recognition of settlement areas); identification of areas/habitats of significant value; controls on fishing (since *Motiti* decision); provision for land-based infrastructure.

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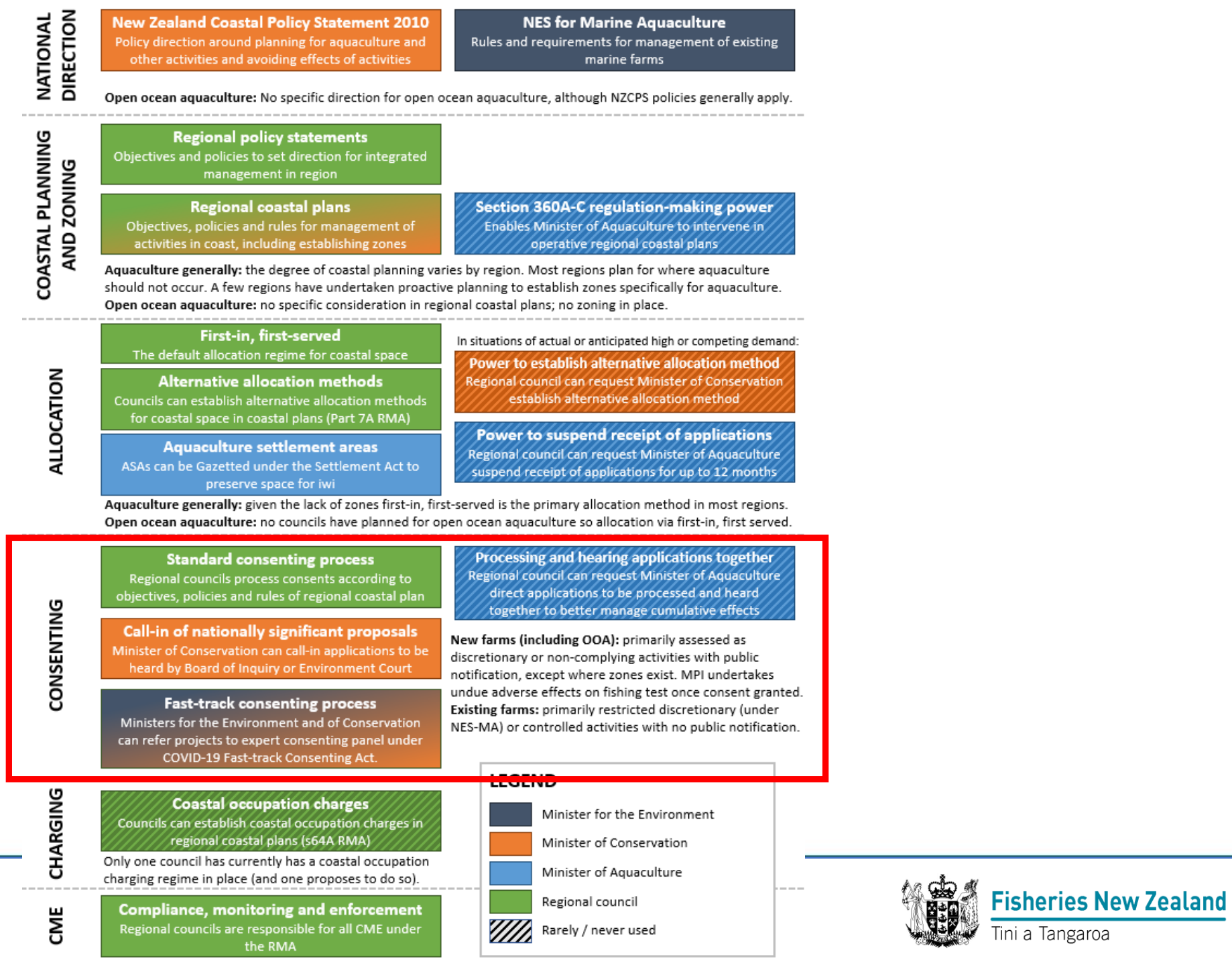
Allocation

What is it? The default mechanism for allocating coastal space is first-in, first-served. Councils can introduce alternative allocation methods (tendering, weighted attributes tendering, auction, balloting, etc) via plan changes (or request alternative methods via Minister of Conservation *Gazette* notice power). There has been limited uptake of alternative allocation (Coromandel Marine Farming Zone, proposed Marlborough Environment Plan). Note separate allocation process for aquaculture settlement areas.

What's the process? Where an alternative allocation mechanisms are in place, the regional council will allocate authorisations for space, based on the approach specified in the plan. The council must notify the Minister of Conservation four months prior to enable strategic central government direction, including with respect to Treaty settlements.

How are Māori and stakeholders involved? Anyone can make an offer for authorisations. There is no consultation process involved in an assessment of offers.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Ngā mihi

Contact us for more information:
Timoti Gallagher 04 260 5715

Timoti.Gallagher@mpi.govt.nz

Fisheries New Zealand
Tini a Tangaroa

Greenshell mussel industry

Aquaculture Directorate, Fisheries New Zealand

Frozen half shell mussels

$229.9 m

Mussel oil

$26.5 m

Frozen whole mussels

$19 m

Current state

Greenshell mussels are our biggest aquaculture export earner $275 m/annum)

Most sales are low value frozen half shell

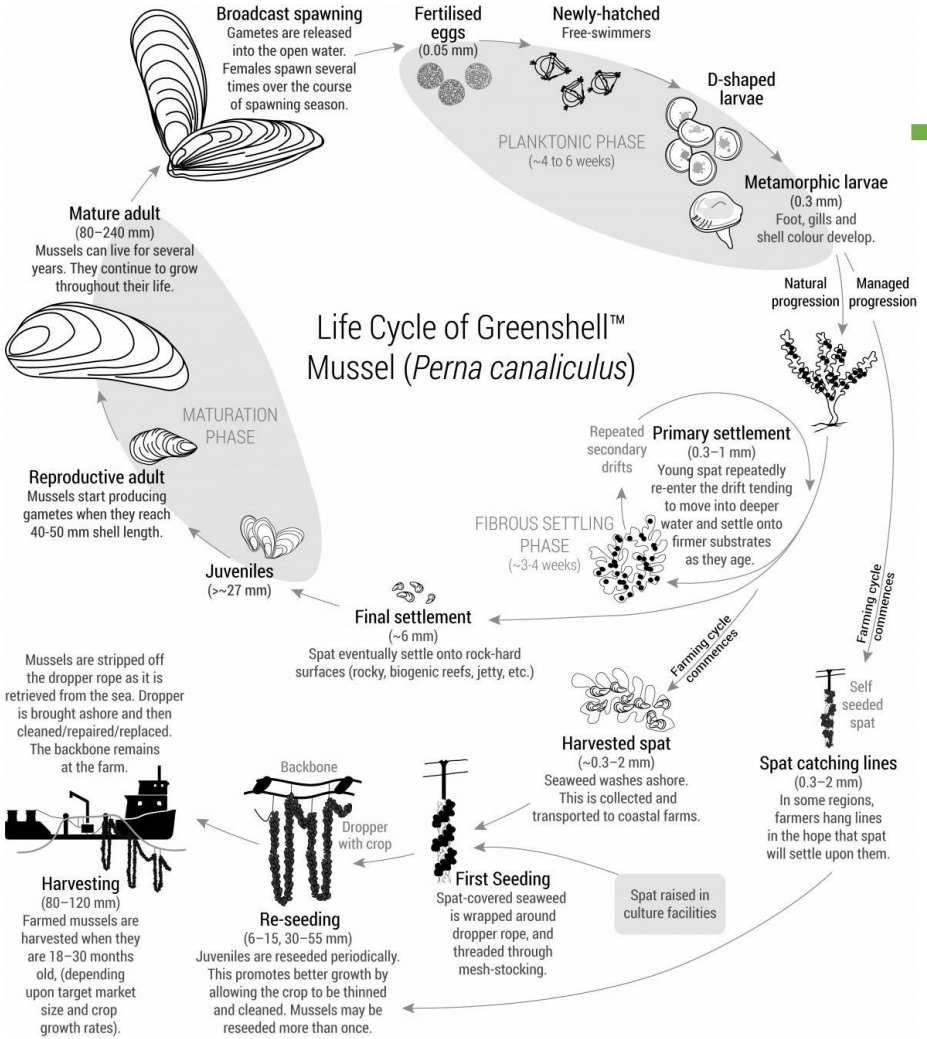
Key challenges

Supply of spat

Low survival rates of spat on farm (retention)

Low value of half shell format

Traditional production cycle



https://niwa.co.nz/aquaculture/aquaculture-species/greenshell-mussel

Hatchery production

The Government's Aquaculture Strategy

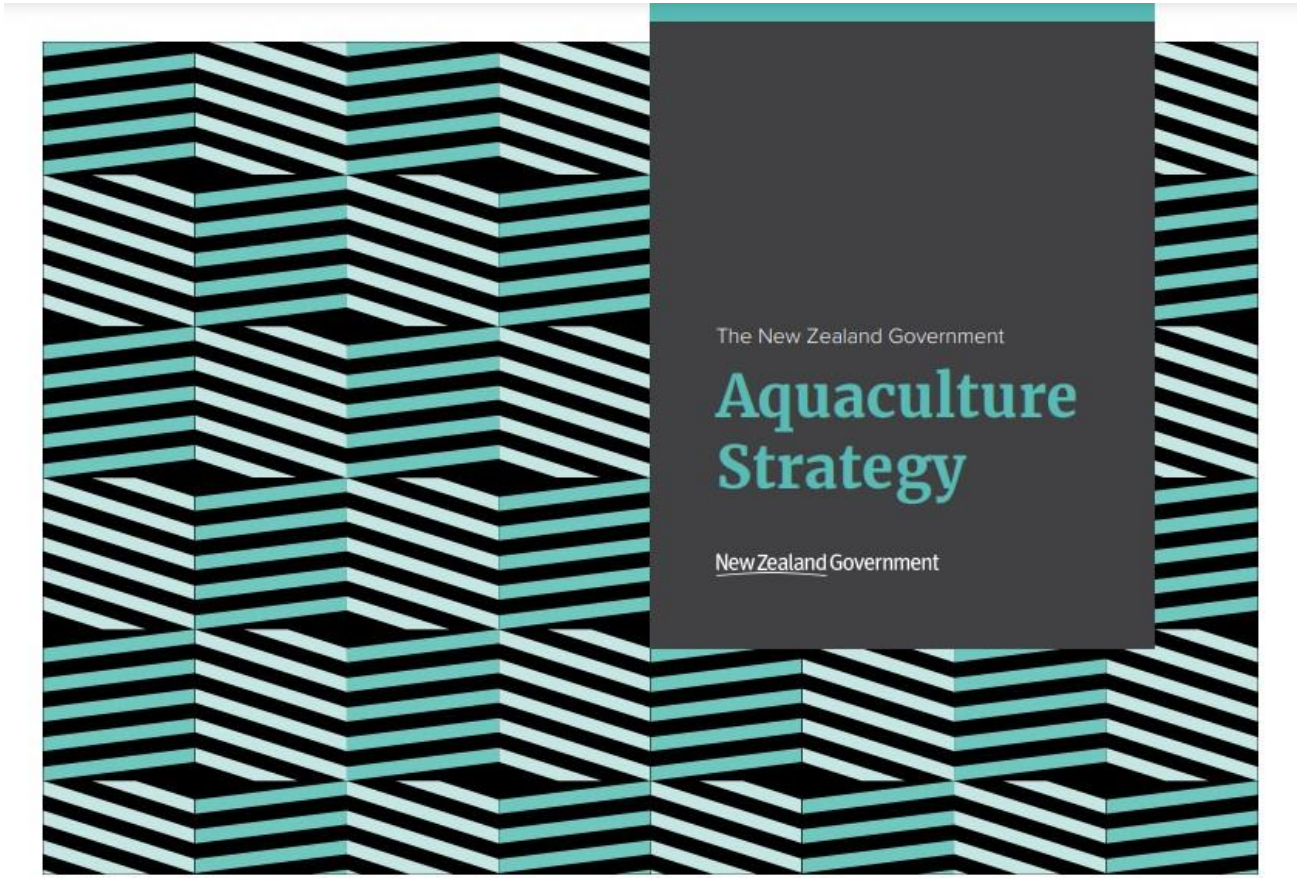
Goal for aquaculture industry to reach 3b in revenue by as soon as 2030

We expect mussels aquaculture to contribute 1b of this through

- Unlocking consented but undeveloped space
- Increasing productivity with selectively bred hatchery mussels
- Pursuing higher values higher value products
- Increasing survival of spat

Key actions from the strategy:

- Work with industry and partners to identify the infrastructure required to enable growth.
- Facilitate co-investment in priority infrastructure.
- Work with industry to support planned development of hatchery infrastructure to improve value and resilience.
- Support industry to transition to selective breeding to improve value and resilience.
- Support an industry-led spat strategy to safeguard from the impacts of climate change and provide for planned growth.

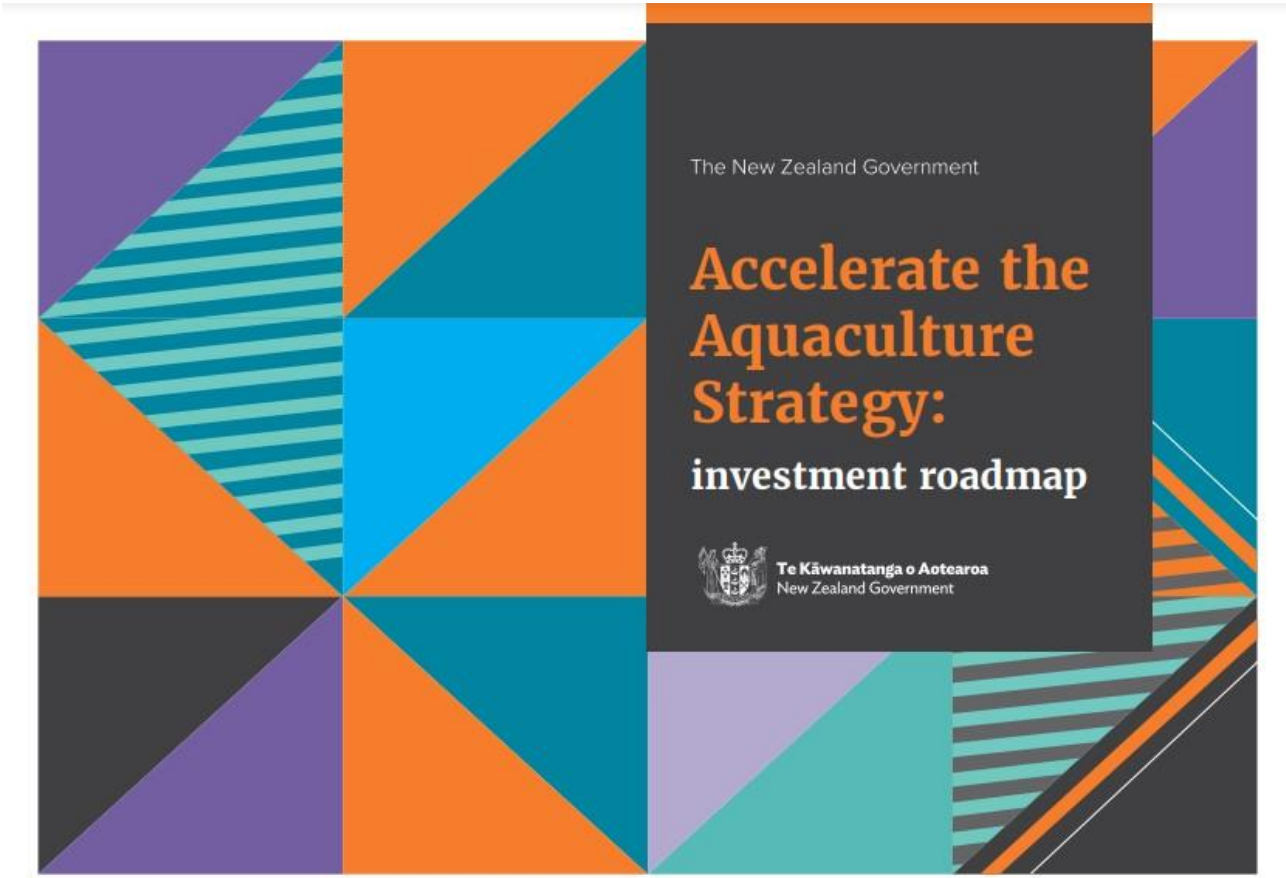


Accelerate the Aquaculture Strategy: investment roadmap

Identifies key investments required to achieve the goals of the Aquaculture Strategy

Opportunity 1: maximise the value of the existing industry

- Key investment required:
- 3 or more mussel hatcheries
- Develop farm space
- Develop land or sea-based spat nurseries
- Research into breeding for climate change
- Research into improving spat retention (survival)
- High value product development



Main challenges

Spat supply

- Wild sources are variable in terms of quality and quantity
- Only one company have access to hatchery spat
- Further hatcheries are needed - these are expensive and industry is currently squeezed
- Need access to IP to avoid paying for replication of research

Retention

- hatchery spat> line caught spat>beach cast spat
- Coromandel production will be down 50% in coming years due to poor survival of Te Hiku spat this season which seems to be due to both spat quality and environmental conditions such as climate change

Te Oneroa-a-Tōhē beach-cast spat (Kaitaia or Te Hiku spat)

- Collected from Te Oneroa-a-Tōhē (90 mile beach) on seaweed and sent down to mussel farms
- Managed under the quota management system (QMS)
- Currently contributes 65-80% of industry's spat needs
- Quality and quantity is variable – size of spat has decreased over time
- Retention (survival) on farm is often less than 1%
- Iwi have concerns about effects on harvest process on the beach

Wild caught spat (local spat)

- Caught on ropes
- 20-30% of industries spat supply
- Grows well as caught locally and adapted to conditions
- Variable supply – catch is declining in several areas (Golden Bay and Marlborough)
- Aotea Harbour catches still viable and there is interest in other areas such as Kawhia Harbour
- Low retention (20-50% retained)

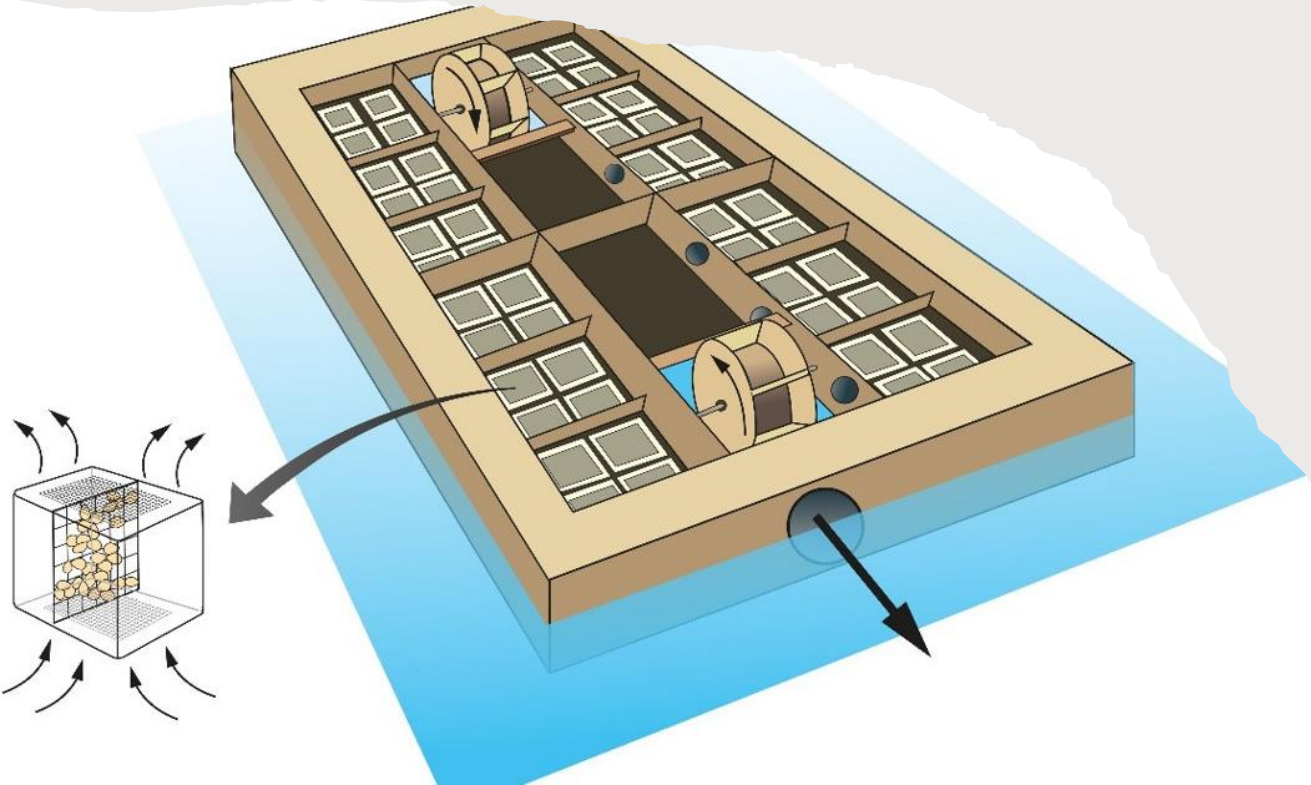
Hatchery Spat

- One hatchery currently supplies 10-20% of industry spat needs
- Technically challenging and production fluctuates
- Expensive
- Grows up to 50% faster than wild spat sources
- Enables selective breeding (higher productivity, resilience to climate change, and marketable traits)
- Higher retention than other sources (30-70% retained)

Land-based nursery culture

- Spat size, seeding density and nutritional history are possible causes of losses
- Land-based nurseries are a possible solution - spat collected from wild and fed before being sent to farms
- Land based nurseries are used as the final setup of hatchery culture
- Unproven for wild spat but likely to improve retention (survival)
- Higher cost – some research into cheaper alternative feeds underway

Sea-based nursery culture



- Environmental factors at sea influence spat retention
- Spat collected from wild or taken from hatchery and grown at sea (sea-based nursery) until large enough for main grow-out areas
- More research is needed to understand what factors should drive nursery siting
- Suitable sites need to be secured/consented
- Coromandel FLUSPSY (contained sea-based nursery) research currently underway

Investment needs and research gaps

Goals

Goal 1: Increase hatchery supply

Goal 2: Improve retention

Goal 3: Ensure fair access to all (including enabling iwi aspirations)

Workstreams

1. Hatcheries – all of industry
2. Land-based nurseries – are they viable
3. Sea-based nurseries – identify and secure