

Advancing Aquaculture – and why it matters for the world, NZ, BoP and Opotiki

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The World

- The Aquaculture sector is the fastest growing seafood sector
- The Food & Agriculture Organisation (FAO) predicts that global consumer demand for seafood will almost double from 45 to 85 million tonnes by 2020
- It is estimated that aquaculture will increase from 42% to 58% of global seafood production by 2020
- The growth in global fish protein consumption to 2020 will be from developing countries – over half of which will come from the Asia Pacific region



New Zealand

- New Zealand's aquaculture produce is currently exported to 79 countries worldwide
- An industry drive supported by government, for new species development is assisting this sector to move towards new, high value species and value added products that promise to be the future of aquaculture in NZ



New Zealand Cont..

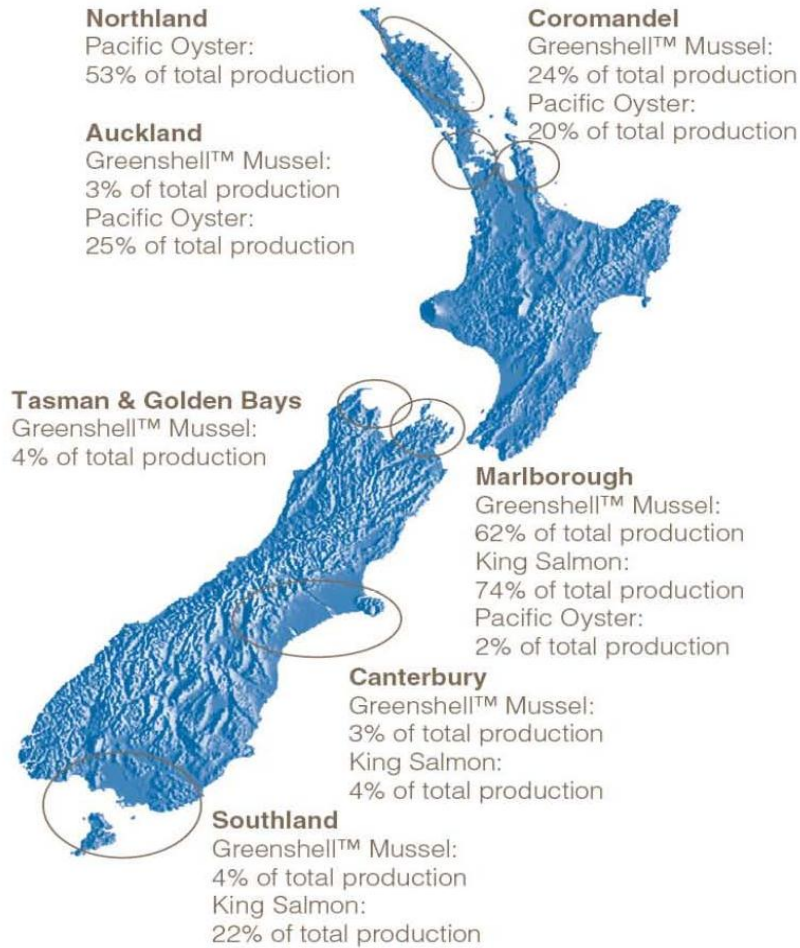
- NZ is recognised as operating one of the strictest quality assurance programmes for shellfish in the world. NZ is also unique in the fact that it does not use antibiotics, pesticides, growth promotants or vaccines in Salmon Farming practices
- Sustainable aquaculture has the potential to make a significant contribution to New Zealand's economy. Currently offering employment to over 3,000 people, this figure is expected to increase significantly within the coming years



New Zealand Cont..

- Aquaculture activities in NZ take place within approximately 17,630ha of allocated water space. Of this:
 - 41% are near-shore sites
 - 51% are open-ocean sites
 - 8% is undeveloped space in interim AMA's
- Most of the open-ocean space is still in the early stages of development. Open-ocean aquaculture occurs in exposed sites which require more space between farm structures and different types of structures to those typically used. This limits stocking capacity, which means open-ocean aquaculture can have a lower yield per hectare than near-shore sites

Major Aquaculture Areas in New Zealand



Source: Aquaculture New Zealand Levy Production 2010

Greenshell™ Product Forms

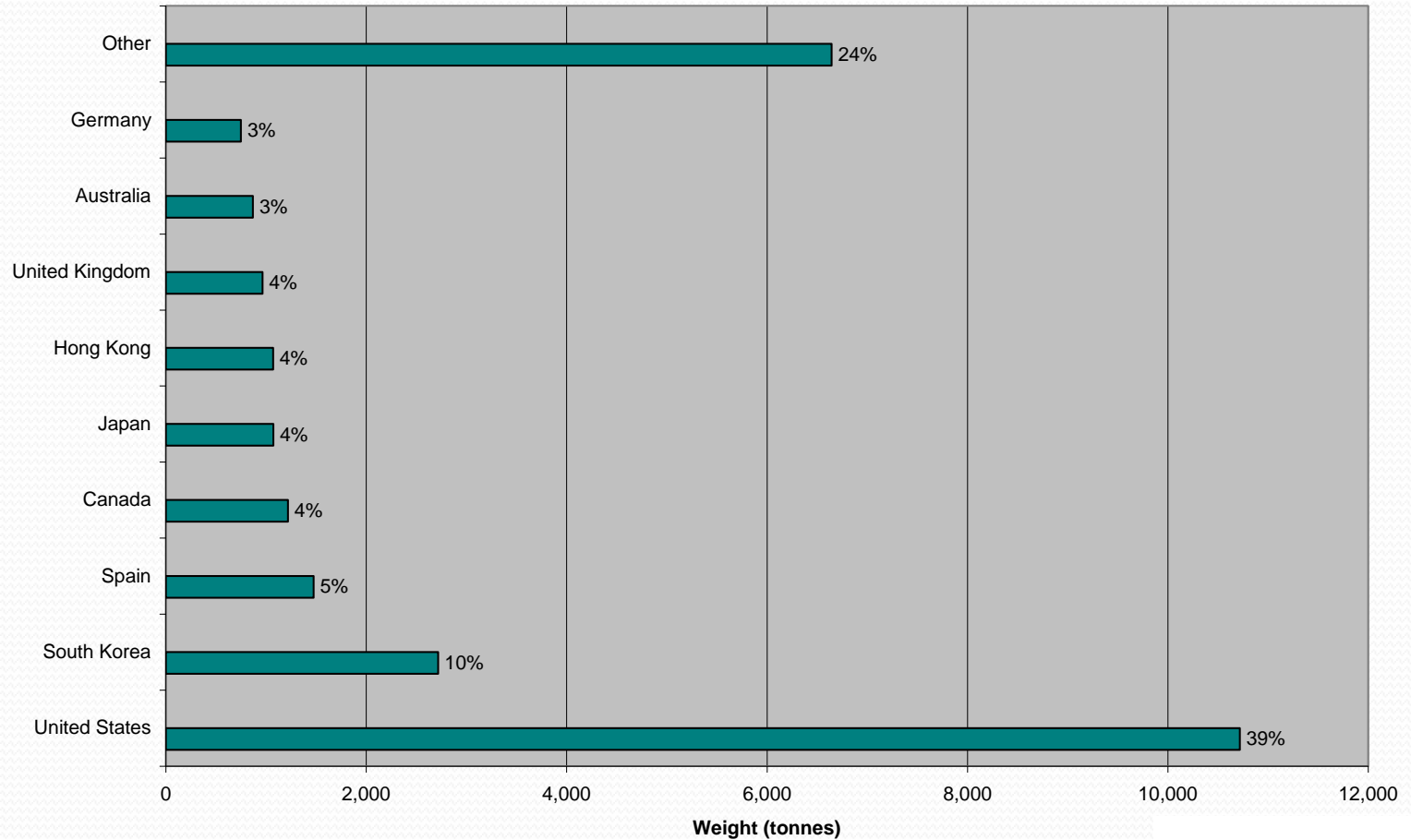
New Zealand Greenshell™ Mussel exports 2008

Product category	Export Weight (kg's)	% of exports	% change on 2007 exports
HS Frozen	27,990,138	84.06%	0.60%
Meat Frozen	2,906,762	8.73%	-1.20%
Whole Frozen	1,261,319	3.79%	0.56%
Pre'ed/Marinated	448,723	1.35%	0.06%
Live	430,337	1.29%	-0.10%
Freeze-dried powder	201,447	0.61%	0.09%
Other not L/Ch/Fz	20,311	0.06%	0.05%
Meat Chilled/Fresh	8,917	0.03%	-0.01%
Whole Chilled	7,323	0.02%	-0.04%
Smoked	6,528	0.02%	-0.02%
Proc in Can, Jar	6,484	0.02%	0.01%
HS Fresh/Chld	5,577	0.02%	0.00%
Powder in capsule	2,132	0.01%	0.00%



Source: New Zealand Seafood Industry Council Ltd

Where do Greenshell™ Go? – Frozen half shell Year 2009

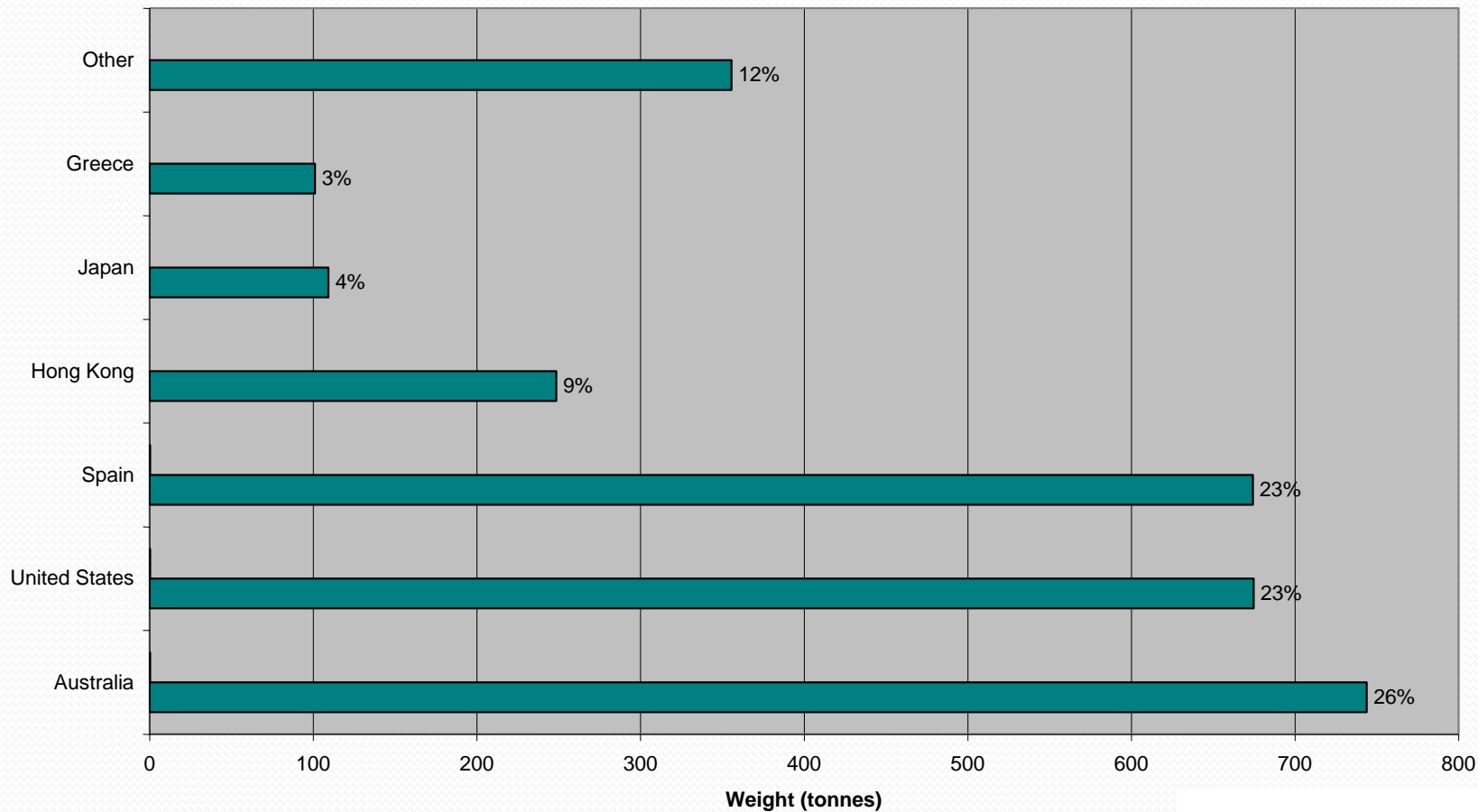


Source: Aquaculture New Zealand Ltd – New Zealand Aquaculture
Farm Facts June 2009



Where do Greenshell™ Go? – Frozen mussel meat

Year 2009

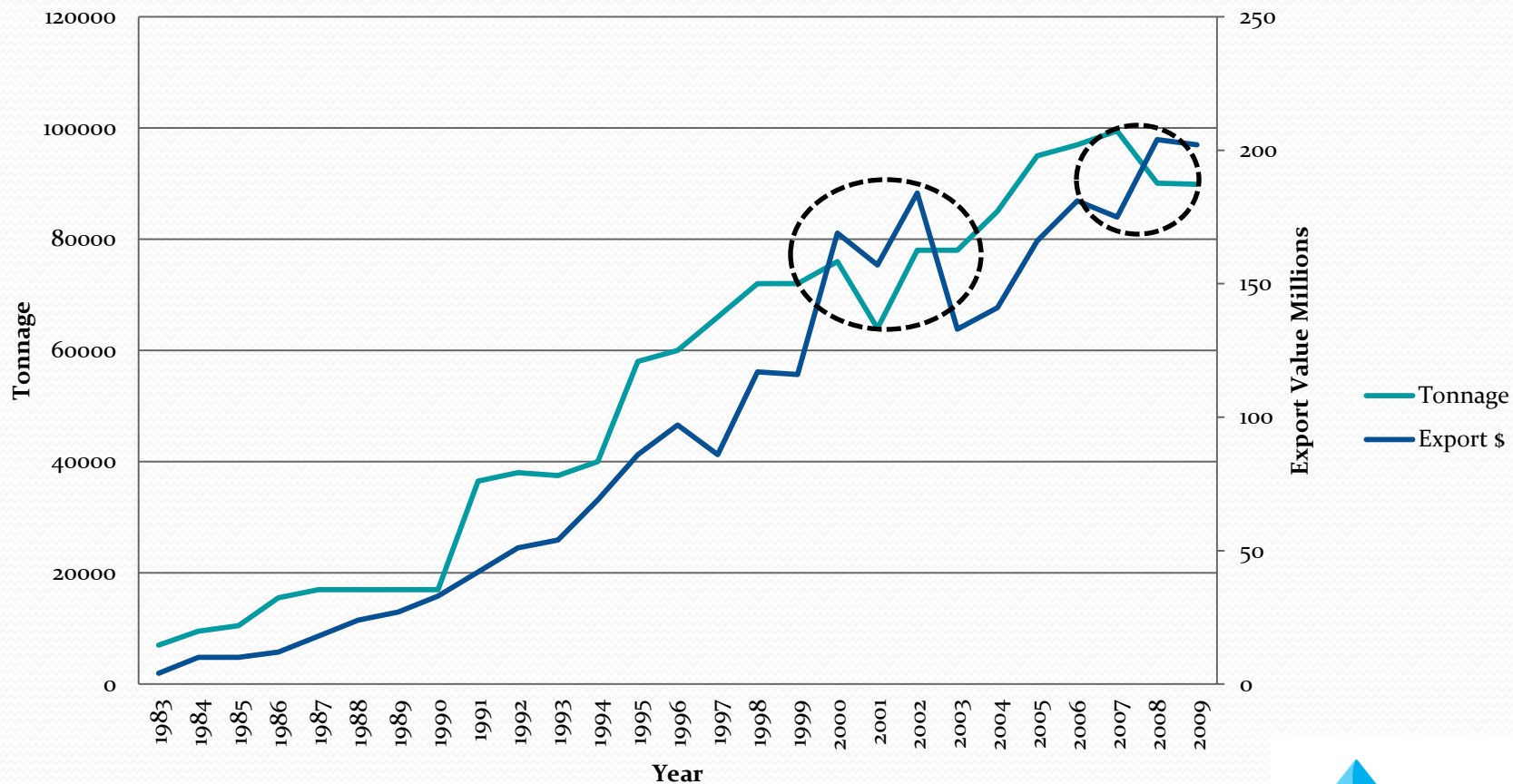


Source: Aquaculture New Zealand Ltd – New Zealand Aquaculture Farm Facts June 2009



Tonnage and value of Greenshell exports from 1983

Estimated farm tonnage and value of Greenshell exports from 1983 - 2009



Bay of Plenty

1. Regionally supportive
2. Water Quality
3. Uniqueness
4. Growing areas/ opportunities
5. Infrastructure



Opotiki

1. Offshore site available
2. Enthusiastic supportive Council
3. Branding
4. Opportunity (technology / species)
5. Jobs, on water, in processing plants
6. Adding value

