



Fisheries New Zealand

Tini a Tangaroa

To: Hon Shane Jones, Minister for Oceans and Fisheries
Jenny Marcroft MP, Parliamentary Under-Secretary to the Minister for Oceans and Fisheries
From: Dan Bolger, Deputy Director-General Fisheries New Zealand

Seafood Industry Forum

| Date | 15 February 2024 | Reference | AM24-0118 |
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Purpose

- This aide-memoire provides background information for the Seafood Industry Forum on Monday 19 February.

Meeting arrangements

- You are attending a forum with seafood industry leaders on Monday 19 February between 3:00pm-5:00pm at Charles Fergusson Building. A draft agenda is attached in **Appendix One**. We are working through final details with the forum co-chairs and will send you a final agenda separately.
- The meeting will be attended by industry leaders, with supporting officials and staff from your office. A full list of attendees can be found in **Appendix Two**.
- Media have been invited by your office to be present during your opening remarks.
- The forum is followed at 5:30pm by dinner for industry representatives.

The focus of the meeting is to identify opportunities for export value growth in the seafood sector

- Information about the current state of the seafood sector can be found in **Appendix Two** (wild capture fisheries) and **Appendix Three** (aquaculture).
- The seafood sector is forecast to generate \$2.3 billion in exports in the year to 30 June 2024, an 8 percent increase on the previous year. There are opportunities to further increase the export value of our aquaculture and fisheries products.
- The volume of wild-caught fish is not expected to increase significantly in the future so the key opportunities for increasing value are from:
 - maximising the price received for New Zealand's premium seafood;

- b) using every part of the fish harvested to create new higher value products; and
 - c) reducing/removing barriers to efficient and sustainable fishing business operations.
8. Aquaculture has significant potential to grow both through volume and increasing value. MPI, working with industry, has identified three pathways for growth:
- a) extending aquaculture into the open ocean;
 - b) maximising the value derived from existing aquaculture space. This requires improving access to shellfish spat, enabling development of consented but undeveloped space, and research and innovation to grow product value; and
 - c) developing new opportunities like kingfish and seaweed, and growing the land-based aquaculture sector, to diversify the industry.
9. Background information about other issues that may be raised during the meeting can be found in **Appendix Four**.

Minister / Minister's Office

Seen / Referred

/ / 2024

Released Under the Official Information Act 1982



Agenda: Seafood Industry Forum – Growing the export value of sustainable seafood

Date: Monday 19 February 2024

Time: 3–5pm

Venue: Charles Fergusson Building 38–42 Bowen Street Wellington

Co-chairs: Ray Smith and Greg Gent

01

Welcome and introductory comments from the Minister for Oceans and Fisheries, Hon Shane Jones

Invited media will leave after this part of the meeting

15
minutes

02

Round table discussion on opportunities to grow seafood export value.

Seafood industry representatives to share their thoughts on topics including:

- Fisheries Regulation
- Innovation and science
- Environmental performance
- Market access and trade
- Labour market
- International fisheries
- Data sharing
- Resource Management Regulation

60
minutes

03

Discussion on issues raised – key themes and priorities emerging

30
minutes

04

Next steps and future meetings

10
minutes

05

Closing remarks

5
minutes

Attendees:

| | |
|--|--|
| Ministers | <ul style="list-style-type: none">Hon Shane Jones – Minister for Oceans and FisheriesJenny Marcroft - Parliamentary Under-Secretary for Oceans and Fisheries |
| Industry | <ul style="list-style-type: none">Steve Tarrant – CE MoanaAndrew Talley – Director, Talley’sTony Hazlett – CE Talley’sDoug Paulin – CE SealordCraig Ellison – Interim CE, SanfordVaughan Wilkinson – GM Strategy and Innovation, SanfordCarl Carrington – CE NZ King SalmonGraeme Hastilow – Interim CE, Te Ohu KaimoanaGreg Gent – Independent Chair, Seafood NZJeremy Helson –CE, Seafood NZLaws Lawson – Seafood NZ and Aquaculture NZ board memberTom McClurg – Board Chair, FishserveGary Hooper – CE, Aquaculture NZMark Edwards – CE Rock lobster Industry Council |
| Officials | <ul style="list-style-type: none">Ray Smith – Director-General, MPIDan Bolger – Deputy Director General Fisheries New ZealandJulie Collins – Deputy Director General Policy and Trade, MPIRobert Pigou – Deputy Chief Executive and Head of Kānoa - Regional Economic Development & Investment Unit, MBIEPeter McCarthy – Chief Legal Adviser, Ministry for Primary IndustriesEmma Taylor – Director, Fisheries ManagementBridget Giesen – Director, AquacultureAlastair Cameron – Director, Primary Sector Policy |
| Offices of the Minister for Oceans and Fisheries and Parliamentary Under-Secretary | <ul style="list-style-type: none">s9(2)(a) – Senior Private Secretary to the Minister for Oceans and Fisheriess9(2)(a) – Private Secretary to the Minister for Oceans and Fisheriess9(2)(a) – Private Secretary to the Parliamentary Under-Secretary for Oceans and Fisheriess9(2)(a) – Press Secretarys9(2)(a) – Political Adviser |
| FNZ Secretariat | <ul style="list-style-type: none">Thea Wallace – Director, Strategy and GovernanceRuth Cook – Manager, Strategic EngagementMark Wansbrough – Principal Adviser |

Appendix Two: Attendees

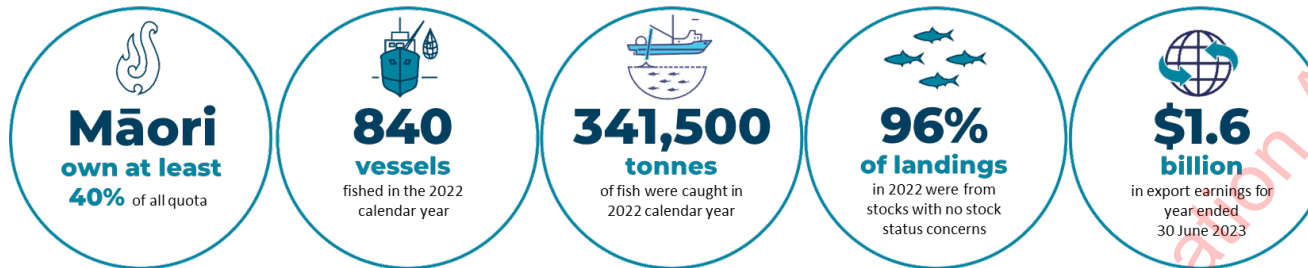
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|--|--|--------------------|
| Hon Shane Jones | Minister for Oceans and Fisheries | Confirmed |
| Jenny Marcroft MP | Parliamentary Under-Secretary to the Minister for Oceans and Fisheries | Arriving at 3:30pm |
| Steve Tarrant | CE Moana | Confirmed |
| Andrew Talley | Director, Talley's | Confirmed |
| Tony Hazlett | CE Talley's | Confirmed |
| Doug Paulin | CE Sealord | Confirmed |
| Carl Carrington | CE New Zealand King Salmon | Confirmed |
| Laws Lawson | Seafood New Zealand and Aquaculture New Zealand board member | Confirmed |
| Greg Gent | Independent Chair, Seafood New Zealand | Confirmed |
| Jeremy Helson | CE, Seafood New Zealand | Arriving at 4pm |
| Gary Hooper | CE, Aquaculture New Zealand | Confirmed |
| Craig Ellison | Interim CE, Sanford | Confirmed |
| Tom McClurg | Board Chair, Fishserve | Confirmed |
| Vaughan Wilkinson | GM Strategy and Innovation, Sanford | Confirmed |
| | | |
| Graeme Hastilow | Interim CE, Te Ohu Kaimoana | Confirmed |
| Mark Edwards | CE Rock Lobster Industry Council | Awaiting response |
| Ray Smith | Director-General, MPI | Confirmed |
| Dan Bolger | Deputy Director-General Fisheries, New Zealand, MPI | Confirmed |
| Peter McCarthy | Director Legal Services, MPI | Confirmed |
| Julie Collins | Deputy Director-General Policy and Trade, MPI | Confirmed |
| Emma Taylor | Director Fisheries Management, MPI | Confirmed |
| Bridget Giesen | Director Aquaculture, MPI | Confirmed |
| Alastair Cameron | Director Primary Sector Policy, MPI | Confirmed |
| Robert Pigou | Head of Kānoa, Regional Economic Development and Investment Unit, MBIE | Confirmed |
| Thea Wallace, Ruth Cook, Mark Wansbrough | MPI Secretariat | Confirmed |

Appendix Three: Wild Capture Commercial Fishing Overview



Fisheries New Zealand

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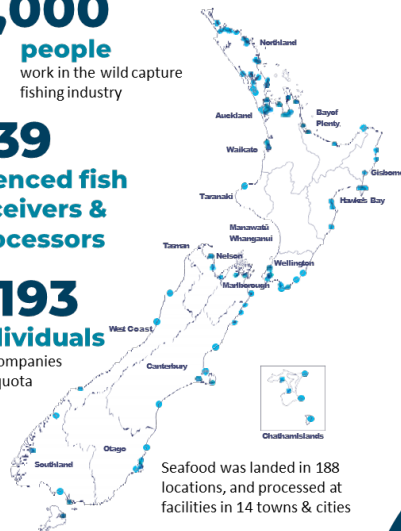


Industry Participants

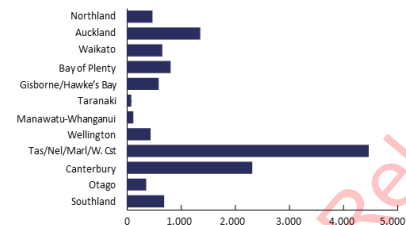
About **9,000 people** work in the wild capture fishing industry

239 licenced fish receivers & processors

1,193 individuals and companies own quota



Workforce regional breakdown

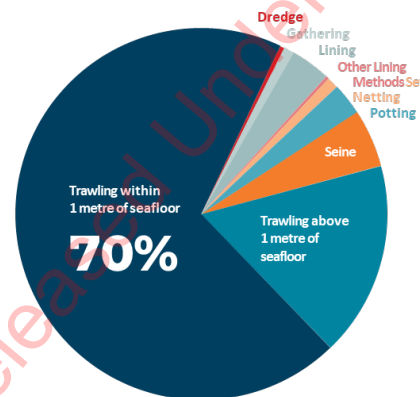


Fishing methods

11% of the area within New Zealand's EEZ has been contacted by trawl gear since 1990

Around **30%** of New Zealand's EEZ is closed to bottom trawl and dredging

Fishing method by volume of catch by percentage



Deepwater

- Typically operate beyond territorial sea (12 nautical miles)
- Trawl, lining and potting are the most frequently used harvest methods
- Species harvested are mainly processed onboard and frozen. Accounts for most of the industry catch
- Key species: hake, hoki, jack mackerel, ling, orange roughy, oreo, southern blue whiting, scampi and squid
- Trips up to 6 weeks duration
- Majority of New Zealand's deepwater fish products are exported
- Some products are high volume/low value/big market share (e.g. hoki block) and others are medium/high value (e.g. scampi)

Inshore

- Typically operate within 12 nautical miles from the coast
- Potting, set netting, lining and trawl are the most popular inshore fishing methods
- Species harvested, chilled and brought to shore for processing
- Key species: blue nose, blue cod, flatfish or flounder, gurnard, hāpuku, ling, school shark, snapper, tarakihi, trevally, and rig
- Trips last between 1–7 days long
- Fish is sold both domestically or fresh to key markets globally (mainly Australia)
- Med volume and value

Shellfish

Pāua

- Nearshore
- Hand gathering, one-breath dive or Underwater Breathing Apparatus on Chatham Islands only
- Harvested, live, binned and covered, kept damp or in swim tanks
- Trips 1 day long
- Predominantly export
- Low volume, high value

Rock Lobster

- Typically nearshore
- Potting
- Harvested, live, binned and covered, kept damp or in swim tanks
- Trips 1–3 days long
- Predominantly export
- Low volume, high value

Species and markets

Top export seafood species by sector

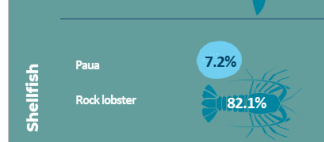
Deepwater: Arrow squid (14.5%), Hoki (32.7%)



Inshore: Dogfish (7.9%), Snapper (33.9%)



Shellfish: Paua (7.2%), Rock lobster (82.1%)



Highly migratory species: Albacore tuna (23.2%), Southern bluefin tuna (45.0%)



Source: Situation and Outlook for Primary Industries export data June 2023

Highly Migratory

- Key species: tuna (southern bluefin, Pacific bluefin, bigeye, yellowfin, albacore, skipjack) and swordfish
- Purse seine, longline, and troll remain the most popular methods of fishing for Highly Migratory Species (HMS)
- New Zealand's HMS fisheries mainly operate within New Zealand's fisheries waters but are subject to both domestic and regional management requirements
- Trips last on average 6–8 days
- Key markets for HMS products include Japan for southern bluefin tuna, and canneries in Spain, Thailand, Vietnam and Mauritius for albacore tuna and skipjack tuna

Appendix Four: Aquaculture Overview



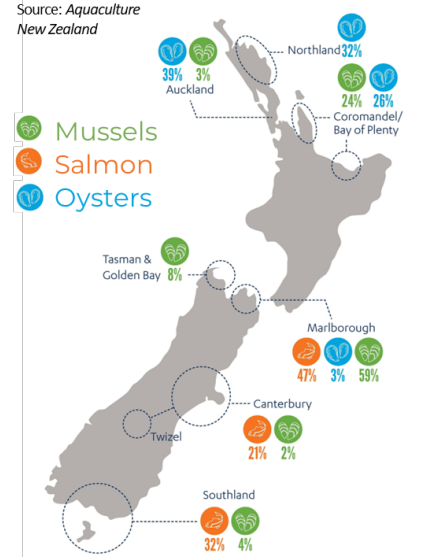
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Species production by region

Source: Aquaculture New Zealand



Around **3200** people work in the aquaculture industry

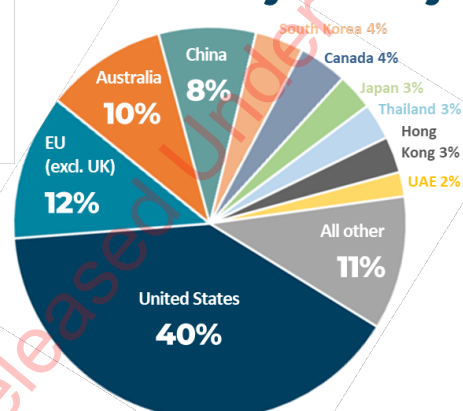
The workforce will need to double by 2035 to meet the goals of the Aquaculture Strategy

Industry growth

Aquaculture exports have grown by an average of **7.3%** annually since 2012

Since 2011, there has been **3221 hectares** of new marine farming space consented

Aquaculture export revenue by country



Mussels

- Mussels are usually grown using long-line systems in sheltered bays.
- The industry is mostly dependent on wild-harvested spat. Spat supply, retention, and survival are key bottlenecks for the growth of the industry.
- The expansion of existing hatchery spat supply and development of new mussel hatcheries are crucial for sector growth.

Salmon

- New Zealand is the largest producer of Chinook salmon globally.
- The production cycle begins in freshwater hatcheries. Juvenile salmon are then transported into marine farms (net pens) or freshwater farms.
- There is interest in developing open ocean salmon farming in NZ. Applications to date have been in the territorial sea.

Oysters

- New Zealand mostly farms the Pacific oyster.
- The industry uses both wild-caught spat and hatchery reared spat and a mix of different farming methods.
- The use of hatchery spat, and modern farming techniques could produce more resilient and higher-value oysters.

Industry Levy

- Mussel, salmon, and oyster farmers pay a levy to Aquaculture New Zealand, who spends it on the industry's behalf.

Other species

- Pāua farming is a small sector but has a long history. Current pāua farms are land-based.
- Yellowtail kingfish farming is being piloted on land-based farms.
- There are some seaweed farming projects in pilot stages throughout New Zealand.

Exports by species

| | Top export products | Export value in millions |
|---------|----------------------|--------------------------|
| Mussels | 1. Frozen Half Shell | \$288.6 |
| | 2. Mussel Oil | \$44.3 |
| | 3. Frozen Whole | \$19 |
| Salmon | 1. Chilled Whole | \$118.5 |
| | 2. Frozen Fillets | \$26 |
| | 3. Smoked | \$13.6 |
| Oysters | 1. Frozen | \$8.8 |
| | 2. Chilled | \$3.3 |
| | 3. Live | \$2 |

Source: Stats NZ, compiled by AQNZ for the 2023 calendar year

Māori Commercial Aquaculture Settlement

The Crown is obliged to provide iwi with assets representative of 20% of new aquaculture growth. Iwi can choose to receive their settlements as exclusive authorisations for space to farm, or as cash.

16.5% of settlement assets have been delivered as authorisations for space

The total value of assets delivered to date (space and cash) is **\$77 million**

Appendix Five: Issues that may be raised during the meeting

Priority topics

| Topic | Comment |
|---|---|
| Improving fisheries decision making | <ul style="list-style-type: none"> Fisheries management measures such as catch limits are increasingly challenging to set. More frequent legal challenges are contributing to this. This results in lost opportunities for utilisation and sustainability risks. We consider that there are opportunities for targeted changes to improve efficiency, responsiveness, and timeliness of statutory decisions under the Fisheries Act. This includes options such as pre-set decision rules, and consideration of whether decision making criteria could be clarified. We are currently preparing initial advice for you on this issue, and would want to work with industry on proposals. We are also developing new operational processes to better enable changes to catch settings for low information stocks, using the better data available because of cameras and electronic catch reporting. |
| Supporting innovation in the fishing sector | <ul style="list-style-type: none"> Gear innovation has the potential to reduce the environmental effects of fishing, avoid unwanted catch, and enable better targeting of high value species. Regulatory settings and operational practices can be a barrier to innovation. We are currently preparing advice for you on options for identify and mitigate regulatory barriers to innovation, to enable more risk-based decision making. We will also seek decisions on specific regulatory changes to enable innovation, such removing the ban on the use of data transmission cables on trawl vessels (which can enable a live camera feed in the net). MPI and Seafood New Zealand are also planning jointly facilitated workshops with the sector to identify key opportunities for innovation and how they could be supported. |
| Interface with the Resource Management Act | <ul style="list-style-type: none"> Following a 2019 Court of Appeal decision, the Resource Management Act (RMA) can be used to control fishing activities for the purpose of protecting biodiversity. Measures have been implemented in Northland, Bay of Plenty and Marlborough. Consideration of additional controls is underway in Marlborough, and other regions. Industry has concerns about the ability to control fishing under the RMA, including the costs of participating in processes, impact of spatial closures, and uncertainty associated with overlapping legislation. We recognise the need for effective biodiversity protection, s9(2)(g)(i) MPI is currently preparing advice on this issue for the Minister. Any changes would require agreement with other relevant Ministers. |

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| <p>Enabling aquaculture development through the Fast Track Consenting Bill</p> | <ul style="list-style-type: none"> • Obtaining a resource consent is the biggest barrier to growth in the aquaculture sector, particularly for open ocean aquaculture. Industry has significant concerns about the uncertainty, timeframes, and cost of existing processes. • We are working to ensure the Fast Track Consenting Bill (the Bill) supports aquaculture development, s9(2)(f)(iv) • We are also providing advice on options for extending marine farm consent durations under the Bill of subsequent legislation. • The Bill is intended to be introduced by 7 March, go through a select committee process, and be enacted by the end of 2024. • Industry may raise the importance of the Bill for future development, and their interest in getting specific projects listed in the Bill. We have provided you with advice on potential projects for inclusion. |
| <p>On-board Cameras</p> | <ul style="list-style-type: none"> • Some industry representatives do not support cameras, while some major companies and Seafood NZ have gone on record supporting camera use, provided concerns around cost, privacy and access to footage are addressed and reasonable. • s9(2)(g)(i) • We are working through options for addressing these issues to inform the future approach to the programme. s9(2)(f)(iv), s9(2)(g)(i) • We are also working to drive greater value from cameras through improving management of low information stocks, and to use the verification from cameras to enable the effects of fishing on protected species to be managed with less significant regulatory interventions. |
| <p>Bottom trawling in the exclusive economic zone (EEZ)</p> | <ul style="list-style-type: none"> • Bottom trawling is widely used, with 70% of fish by volume in New Zealand caught by trawling within 1 metre of the seabed. • A multi-stakeholder forum met throughout 2022 to discuss and make recommendations on further measures to manage the effects of bottom trawling in the EEZ. The forum concluded in December 2022 when members submitted separate recommendations. • Officials are preparing advice to the Minister on the work of the Forum and confirming next steps. • s9(2)(g)(i) |

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| | <ul style="list-style-type: none"> • Industry may raise the need for further investment in research on benthic effects of fishing to understand the issue, as well as support for gear innovation to mitigate effects of bottom trawling. |
| Hauraki Gulf | <ul style="list-style-type: none"> • Industry has concerns about the impact of proposed trawl corridors under the Fisheries Act and marine protection measures under the Hauraki Gulf / Tikapa Moana Marine Protection Bill that is currently before the House. • Proposals have been developed over many years, and there is significant public pressure for greater protection. • We will provide advice to the Minister by April on how to proceed on additional restrictions on fishing methods that can impact the seafloor such as bottom trawling, while mitigating impacts on industry to enable their continued operation. • Consideration of any changes to the Hauraki Gulf / Tikapa Moana Marine Protection Bill will require discussions with the Minister of Conservation, who is responsible for the Bill. |
| Protected species | <ul style="list-style-type: none"> • Fishing can have effects on a range of protected species, such as seabirds and marine mammals. A range of plans and measures are in place to mitigate these effects, including for marine mammals, seabirds, and sharks. • Industry has concerns about the impacts some of these measures have and want access to greater data to support industry to take non-regulatory measures to manage risks to protected species. • We consider that the additional verification provided by on board cameras provides greater scope to enable this, and are considering options for greater efficiencies in the delivery of protected species work. |
| Workforce | <ul style="list-style-type: none"> • While workforce pressures have eased following the disruptions of COVID-19, the sector continues to face shortages. • During COVID-19, industry agreed to develop a Seafood Sector Workforce Plan, in response to a Ministerial Inquiry into New Zealand's seafood workforce. This plan is in the early stages of implementation. • A seafood sector agreement came into effect in October 2022 and covers both deep sea fishing boat crew and seafood processing workers – both capped. The latter to employ migrant workers below median wage, the former to encourage a shift from industry reliance on migrant labour. The sector agreements are due to be reviewed in October this year alongside Pacific Labour Mobility interests. • Industry may raise removing the immigration cap for the seafood sector, and the need for investment to support workforce development in the sector. • We would need to engage with MBIE and the Minister for Immigration if work was to be progressed in this area. • MPI recently supported a report by NZIER into the future workforce needs of the aquaculture sector, and will work with Aquaculture New Zealand as they implement their action plan to grow the sector. |

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|-----------------------|---|
| Landings and discards | <ul style="list-style-type: none"> • The Fisheries Amendment Act 2022 strengthened and modernised New Zealand's fisheries management system. • Key changes include: <ul style="list-style-type: none"> ○ Tightening commercial fishing rules for when Quota Management System (QMS) stocks or species must be landed, and when they may or must be discarded at sea, ○ graduated penalties that are more proportionate and appropriate to the size of a landing or discard offence, and ○ technical changes to support on-board cameras. • A four-year implementation period began in October 2022 for reviewing around 26 existing exceptions to the requirement to land QMS species against the new exception provisions. • Industry agrees that unwanted catch ought to be balanced against annual catch entitlement, but has concerns about the requirement to land unwanted fish rather than to discard it at sea. They also have concerns about the uncertainty associated with changing fishing practices to adapt to new rules over the transition period. • We will provide further advice on these timeframes and implementation approach. Officials will work closely with fishers to support them to understand and adjust to any new rules. |
| Cost recovery | <ul style="list-style-type: none"> • The total amount to be recovered from industry for the 2023/24 fishing year is \$41.2 million, which is up \$4 million on 2022/23. The key reasons for this increase are on-board cameras and increased costs for registry services. • Industry has concerns about cost recovery, including the transparency of the process; the impact of levies on fishers; and the balance of expenditure between science-based activity and compliance-based activity. Industry consider that compliance is in the public interest and should not be recovered, similar to some other sectors (such as animal welfare). • Industry has previously proposed a first principles review of cost recovery. • We note that some aspects have been reviewed previously and that any changes in cost recovery would need to be considered in the context of government funding constraints and cost pressures. • We would like to work with industry on specific aspects of its concerns, including opportunities to improve the transparency of the process. |

Other topics that may be raised by industry participants

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| <p>Approved /authorised fisheries management by industry</p> | <ul style="list-style-type: none"> • Currently most fisheries management measures are determined by the Minister or MPI. These decisions are informed by advice provided by FNZ, science commissioned by FNZ, and views raised during consultation. • Some industry participants would like to have a greater role in determining management of fisheries, including the ability for industry to set collectively developed rules for particular fisheries and to have a greater role in deciding what fisheries services (such as science) is procured to inform management. • Industry members also want to ensure that voluntary measures, such as industry 'shelving' annual catch entitlement to reduce catch, can be considered when setting total allowable catches. This is seen as an alternative to decreasing catch limits in some circumstances, which industry considers would enable more timely management. • MPI notes that industry already undertakes substantial management s9(2)(g)(i) |
| <p>First Mate</p> | <ul style="list-style-type: none"> • FirstMate is a charity that supports the health and wellbeing of people across the commercial seafood sector. It has funding to June 2024. • s9(2)(b)(ii) • s9(2)(g)(i) s9(2)(g)(i) |
| <p>Potential for squid jigging in New Zealand waters</p> | <ul style="list-style-type: none"> • Squid has been commercially fished in New Zealand since the late 1960s. Landings peaked in the early 1980s when over 200 squid jigging vessels came to fish seasonally in New Zealand's exclusive economic zone. These jiggers stopped fishing in New Zealand in the late 1980s following the discovery of large squid stocks in the southwest Atlantic. • Since 2016 the Fisheries Act has required all vessels fishing in New Zealand waters to be flagged to New Zealand, following a Ministerial inquiry into safety, labour, and fishing practices. The chartering of foreign-owned and flagged jig vessels was the predominant model responsible for squid catch from jiggers, and this requirement effectively prohibited this model as it is uneconomic for vessels to re-flag. • s9(2)(b)(ii) s9(2)(g)(i) |

| | |
|---|---|
| | <ul style="list-style-type: none"> • s9(2)(g)(i) |
| Aquaculture biosecurity programme | <ul style="list-style-type: none"> • MPI's Aquaculture Biosecurity Programme was established in 2021 to develop a comprehensive aquaculture biosecurity system that provides: improved biosecurity at the facility-level (on-farm) for both marine-based and land-based aquaculture; management of broader aquatic pest and disease pathways; record-keeping and reporting; and surveillance. • We consulted on several proposals in these areas in 2023. • Industry agrees that good biosecurity is critical, but is not convinced the costs and benefits of the Programme stack up. Industry thinks biosecurity should be left to industry initiatives and regional council programmes. Instead, industry suggested that government should focus on strengthening the border and developing a national marine biosecurity strategy. • We seek direction from you and the Minister for Biosecurity on the future of the programme, taking into account the submissions received and limited available resourcing due to current biosecurity responses. |
| Accelerated depreciation | <ul style="list-style-type: none"> • The introduction of an accelerated depreciation scheme to incentivise investment was raised strongly by industry in the development of several industry transformation plans, including fisheries. MBIE has raised this issue with incoming Ministers. |
| Impact of Emissions Trading Scheme | <ul style="list-style-type: none"> • Industry may raise the impact of the Emissions Trading Scheme (ETS). Fishing vessels contribute about 4% of New Zealand's total transport emissions. While there are some opportunities to optimise fuel use, industry consider there are limited options to significantly reduce emissions from fuels currently, as alternative fuels are not available. • Any consideration of these issue would require engagement with the Minister for Climate Change and Ministry for the Environment who are responsible for the ETS. s9(2)(g)(i) |
| Global biodiversity targets for marine protection – 30x30 | <ul style="list-style-type: none"> • The Kunming-Montreal Global Biodiversity Framework (GBF), adopted in December 2022 via the Convention on Biological Diversity, includes a target that 30 percent of land and marine ecosystems globally be protected by 2030 ("30x30"). • In implementing the GBF domestically, the Government has choices around the setting of national targets and actions. s9(2)(g)(i), s9(2)(f)(iv) • Industry considers that s9(2)(g)(i) and that over 30% of New Zealand's marine environment is already protected by effective measures. |

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| Vessel renewal | <ul style="list-style-type: none"> • As part of the fisheries industry transformation plan, industry identified the importance of renewing the commercial fishing fleet. • Related to this, a proposal for boat building in Northland to support the renewal of the inshore fishing fleet was under consideration by Kānoa, with significant Government investment sought ^{s9(2)(b)(ii)} [REDACTED] A business case was developed by NZIER as part of this. The proposal also included a government buy back scheme of existing vessels. • ^{s9(2)(g)(i)} [REDACTED] • There may be opportunities for a project to be considered under the Regional Infrastructure Fund, the scope of which is currently under design. |
| South Pacific Regional Fisheries Management Organisation (SPRFMO) – fishing access | <ul style="list-style-type: none"> • Industry may raise the importance of maintaining viable commercial access in the SPRFMO Convention area. • Since the COVID-19 pandemic, catches for New Zealand vessels in the Convention Area have been low, with almost no fishing in the last two years. This was caused by pandemic related labour shortages and supply chain issues, along with rising fuel prices and compliance action that saw two vessels unable to fish in the Convention Area. • New Zealand's activities in the Convention Area involve bottom trawling for orange roughy and bottom longlining for other species, as well as an exploratory toothfish fishery. • At recent meetings New Zealand officials delayed further spatial protection and reduced boundaries for bottom fishing at the recent Commission meeting, in order to allow more time for you to consider options. |

**Fisheries New Zealand**

Tini a Tangaroa

To: Hon Shane Jones, Minister for Oceans and Fisheries
Jenny Marcroft MP, Parliamentary Under-Secretary to the Minister for Oceans and Fisheries

From: Dan Bolger, Deputy Director-General Fisheries New Zealand

Seafood Industry Forum

| Date | 31 May 2024 | Reference | AM24-0534 |
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Purpose

- This aide-memoire provides background information for the Seafood Industry Forum (the Forum) meeting on 4 June.

Meeting arrangements

- You are attending a forum with seafood industry leaders on Tuesday 4 June between 1:00pm to 2:15pm at the Seafood New Zealand Boardroom, Level 12, 7 Waterloo Quay.
- The agenda (including the list of attendees) and papers for the meeting are attached as **Appendix One**. We understand the Parliamentary Under-Secretary is unable to attend but this aide-memoire is copied to her for her information.
- s9(2)(g)(i)

The primary focus of the meeting is to hear industry leaders' views on possible commercial fisheries reform work areas

- Forum discussions to date have generated a range of possible commercial fisheries work areas for your consideration. A subgroup of the Forum has been working through a range of issues.
- You were recently briefed on these work areas (B24-0216 *Update on the development of a commercial fisheries reform work programme* refers) and the Forum will discuss them at the meeting on 4 June 2024.
- The Forum subgroup, including officials, is broadly in agreement around the work areas signalled in columns 1 and 2 of the table in **Appendix One** (refer to Agenda Item 4) and the benefits of the following recommended package:
 - reducing regulatory costs to the fishing sector by:

- i. immediate levy reductions of \$1.1 million for 2024/25;
 - ii. undertaking a targeted review of cost recovery settings with a goal of further significant reductions for the 2025/26 fishing year;
 - b) enhancing camera footage protections, and containing cost to the industry;
 - c) amending the landing and discard rules to:
 - i. extend the statutory deadline when the transitional provisions for the current discard rules will expire;
 - ii. add flexibility into the landings and discards framework through enabling monitored (camera or observer) returns to sea;
 - d) increasing agility in commercial fisheries management; and
 - e) amending fisheries regulations to reduce cost, duplication, and complexity.
7. Industry representatives on the Forum subgroup have indicated that they seek fuller system reform s9(2)(f)(iv) as well as the more immediate and targeted work programme set out in columns 1 and 2. s9(2)(f)(iv)
8. The Forum is an opportunity for you to hear from industry their views and discuss the issues and the way forward.

Minister / Minister's Office

Seen / Referred

/ / 2024

Under-Secretary / Under-Secretary's Office

Seen / Referred


/ / 2024

Appendix One: Agenda and meeting papers

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Agenda: Seafood Industry Forum

| | | | |
|---------------|--|-------------------|---|
| Date: | 4 June 2024 | Time: | 1:00pm –3:00pm |
| Where: | Seafood NZ, Boardroom, Level 12, 7 Waterloo Quay Microsoft Teams Out of scope  | Co-Chairs: | Ray Smith – Director General, MPI Greg Gent – Chair, Seafood New Zealand |

| | Agenda Item | Who | Time |
|---|---|-------------------------------|---------------------------|
| 1 | Coffee and tea | All | 1:00–1:05pm 5 minutes |
| 2 | Welcome | Ray Smith / Greg Gent | 1:05–1:10pm 5 minutes |
| 3 | Update from Minister for Oceans and Fisheries | Hon Shane Jones | 1:10–1:25pm 15 minutes |
| 4 | Seafood Industry Forum Subgroup report back and discussion on draft commercial fisheries work areas | Dan Bolger / Jeremy Helson | 1:25–2:40pm 75 minutes |
| 5 | Aquaculture update <ul style="list-style-type: none">– Fast-track Approvals Bill– Extending marine farm consents | Julie Collins | 2:40–2:55pm 15 minutes |
| 6 | Wrap up and next Forum meetings: <ul style="list-style-type: none">– Tuesday 27 August 3–5pm– Thursday 21 November 3–5pm | Ray Smith / Greg Gent | 2:55–3:00pm 5 minutes |



| | |
|---|--|
| Industry | <ul style="list-style-type: none">• Jeremy Helson – CE, Seafood NZ• Steve Tarrant – CE, Moana• Andrew Talley – Director, Talley's (TBC)• Doug Paulin – CE, Sealord• Vaughan Wilkinson – GM Strategy and Innovation, Sanford• Laws Lawson – Seafood NZ and Aquaculture NZ board member & Te Ohu Kaimoana• Tom McClurg – Board Chair, Fishserve• Gary Hooper – CE, Aquaculture NZ• Mark Edwards – CE, NZ Rock lobster Industry Council |
| Officials | <ul style="list-style-type: none">• Dan Bolger – Deputy Director General Fisheries New Zealand• Julie Collins – Deputy Director General Policy and Trade• Peter McCarthy – Chief Legal Adviser, Ministry for Primary Industries• Lisa Collins – Acting Director, Primary Sector Policy• Emma Taylor – Director, Fisheries Management• Bridget Giesen – Director, Aquaculture (TBC) |
| Offices of the Minister for Oceans and Fisheries and Parliamentary Under-Secretary | <ul style="list-style-type: none">• s9(2)(a) – Private Secretary to the Minister for Oceans and Fisheries• s9(2)(a) – Private Secretary to the Parliamentary Under-Secretary to the Minister for Oceans and Fisheries |
| Secretariat | <ul style="list-style-type: none">• Thea Wallace – Director, Strategy and Governance, FNZ• Maryanne Aynsley – Manager, Sector Support & Innovation, FNZ• Ruth Cook – Manager, Strategic Engagement, FNZ• Tamar Wells – Seafood NZ (Forum Subgroup Secretariat) |
| Apologies | <ul style="list-style-type: none">• s9(2)(a), Parliamentary Under-Secretary to the Minister for Oceans and Fisheries• s9(2)(a) – Political Advisor to the Parliamentary Under-Secretary to the Minister for Oceans and Fisheries• s9(2)(a) – Senior Private Secretary to the Parliamentary Under-Secretary to the Minister for Oceans and Fisheries• Tony Hazlett – CE, Talley's• David Mair – CE, Sanford• Graeme Hastilow – Interim CE, Te Ohu Kaimoana• Carl Carrington – CE, NZ King Salmon• Alastair Cameron, Director, Primary Sector Policy, MPI |



| Ref | Actions | Status |
|---------|---|--------|
| SIF-001 | MPI to provide information on the comparative level of fees and charges paid by the seafood sector relative to other MPI sectors. | Closed |

Response to SIF-001

- The proportion of costs recovered from industry varies across different MPI regulatory systems. This is to be expected given the differing mix of services that are delivered, and the extent to which those service costs are recoverable, in line with the cost recovery principles and relevant legislation.
- Table 1 below shows the split between Crown funded and industry funded services for three regulatory systems.

Table 1: Proportion of Crown vs Industry expenditure for MPI regulatory systems 2023/24

| | Fisheries management | | Biosecurity system | | Food system ^[1] | |
|----------------------|----------------------|---------|--------------------|----------|----------------------------|---------|
| | % | Total | % | Total | % | Total |
| Crown | 67% ^[2] | \$82.2m | 62% | \$233m | 36% | \$44.6m |
| Cost recovery | 33% | \$41.2m | 38% | \$141.4m | 64% | \$79.8m |

- The fisheries management system requires unique services (for example, fish stock research) to manage sustainable utilisation of fisheries and a portion of these costs are recovered from industry. While some of the recovered services are unique to fisheries, recovery of monitoring and offence detection activity is not unusual across primary sector systems.
- We note the seafood sector pays food system levies for services in addition to fisheries management levies. For example, to cover costs relating to developing export and domestic standards including monitoring and market access programmes.

^[1] Note that exporters (including the seafood sector) also pay additional non levy costs, for example for export certificates.

^[2] This includes costs relating to recreational and customary fishing.



Fisheries New Zealand

Seafood Industry Forum

**Forum Subgroup report back
4 June 2024**



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Agenda Item 4: Seafood Industry Forum Subgroup report back (wildcapture focused)

- Productive engagement on fisheries management changes
- The table of commercial fisheries work areas captures the issues and options discussed at the Forum and Forum Subgroup
- Progressing multiple work areas will involve significant work, need to consider what can be progressed in what timeframes
- Subgroup supported progressing Column 1 – Operational and regulatory changes, work has begun on these
- Subgroup largely supported progressing work areas in Column 2 – Targeted legislative changes
- s9(2)(f)(iv) [REDACTED]
- Decisions on scope of reform package will have implications for resourcing, time, complexity and support for legislative change

Agenda Item 4: Discussion on commercial fisheries work areas

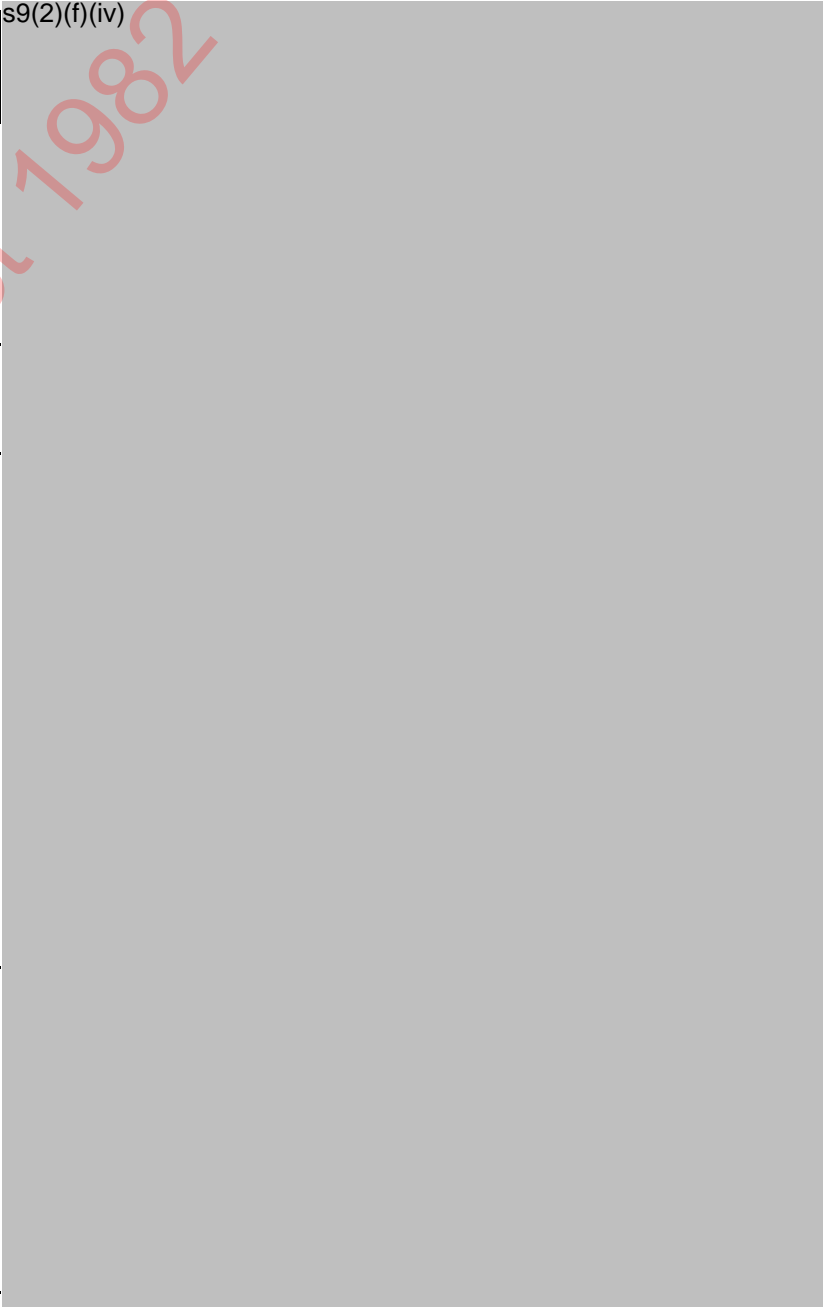
- Fisheries change domains:
 1. Commercial fisheries
 2. On-board cameras
 3. Cost recovery
 4. Landings and discards
 5. Access to fishing grounds
 6. Fisheries regulations
 7. Data availability and sharing
- Discussions to date have focused primarily on fisheries change domains 1-4
- Refer to table of commercial fisheries work areas for details

Agenda Item 4: Draft commercial fisheries work areas discussed at Forum and Forum Subgroup meetings

| Domain | Column 1 - Operational and regulatory change (approx. 6–12-month delivery or initial implementation) | Column 2 - Targeted legislative change (approx. 12–24-month delivery) |
|---|--|--|
| Commercial fisheries – management stock, catch and protected species interactions | <ul style="list-style-type: none">Separate management approaches for shared and non-shared (i.e. commercial only) stocks.Streamline and take a risk-based approach to low/medium knowledge stock management approach.Trial new approaches in sustainability round Oct 2024.Further implement risk-based approach to managing environmental effects of fishing (including protected species interactions). | <ul style="list-style-type: none">Provision for two-tier regime, with certain stocks specified by schedule (e.g., non-shared). More agile management tools for those stocks, potentially including:<ul style="list-style-type: none">Multi-year total allowable catch setting.Shelving policy framework.Pre-set decision rules.Certain technical decisions move from Minister to MPI.ACE carryover for Rock Lobster. |
| On-Board Cameras | <ul style="list-style-type: none">s9(2)(g)(i)Continue progressing opportunities for camera verified data to generate more value to industry and fisheries management (relates to other actions in table).Develop systems for fishers to view their footage. | <ul style="list-style-type: none">Enhance camera footage protections (resolving privacy and commercial sensitivities including consideration of applicability of OIA). |
| Cost recovery levies | <ul style="list-style-type: none">Hold 24/25 cost recovery levies at or below 23/24 levels and progress work in short term to identify further savings.Annual report to levy payers to ensure transparency.Industry / Government discussion on service levels for 2024/25 levies.Explore opportunities with the Department of Conservation to clarify protocols for determining which projects should be funded under conservation services and fisheries services. | <ul style="list-style-type: none">Legislate changes if required to Act and /or regulations. |
| Landings and discards | <ul style="list-style-type: none">Extend transitional expiry date of existing landing exceptions by 2-years from commencement (timeframe and delivery subject to legislative vehicle).Greater consideration of the flexibility available within the current regime. | <ul style="list-style-type: none">Add flexibility to the landings and discards framework for monitored returns (camera or observer) to sea. |

THIS IS A RECORD OF ITEMS RAISED – IT DOES NOT CONVEY A PREFERRED APPROACH OR OPTION BY EITHER PARTY

| Domain | Column 1 - Operational and regulatory change (approx. 6–12-month delivery or initial implementation) | Column 2 - Targeted legislative change (approx. 12–24-month delivery) |
|-------------------------------|---|---|
| | <ul style="list-style-type: none">Progress, where possible under existing legislation, exceptions for predated, unavoidably damaged fish and other fish causing operational difficulties.Clarify definition of when a fish is considered caught. | |
| Access to fishing grounds | <ul style="list-style-type: none">Consideration of approaches to provide more certainty about bottom trawling. | <ul style="list-style-type: none">Address Fisheries Act and Resource Management Act interface. |
| Fisheries regulations | <ul style="list-style-type: none">Progress enabling data transmission cables.Progress enabling use of underwater breathing apparatus (UBA) (including for shellfish).Deliver electronic reporting for amateur charter vessels (ACVs). | <ul style="list-style-type: none">Remove redundant regulations and/or regulations which are overly complex, duplicative, or impose unnecessary compliance cost (informed by list industry will provide to MPI). |
| Data availability and sharing | <ul style="list-style-type: none">Enable appropriate data (where fishers give their agreement) to be made available to support timely industry action, including:<ul style="list-style-type: none">'Right time right place' pilot project to support more selective fishing using data insights.Build on data sharing pilot with surface long line fleet on seabird captures | |



Seafood Industry Forum – Meeting Record

| | | | |
|---------------|---------------------------------|-------------------|---|
| Date: | 19 April 2024 | Time: | 1:00pm – 2:15 pm |
| Where: | Online – Microsoft Teams | Co-Chairs: | Ray Smith – Director-General, MPI Greg Gent – Chair, Seafood New Zealand |

Minutes

| Agenda Item | High level discussion points |
|-------------|--|
| 1 | <p>Welcome</p> <p>The co-chairs welcomed members and referenced the broad discussions that had been taking place in the Forum Subgroup. The following principles were proposed to guide decisions on the focus of the Forum’s resources and effort: The Seafood Industry Forum will prioritise matters that:</p> <ul style="list-style-type: none"> • will lift seafood industry productivity and increase investment in the sector; and • are supported by a robust and sound business case; and • do not weaken social licence. <p>Industry Members were supportive of the principles and did not want to overly restrict thinking at this stage. Industry members also re-iterated the cost and financial pressures facing the industry and the importance of protecting Treaty settlement rights, that had been raised in the first Forum meeting. This includes the importance of reducing costs and increasing certainty.</p> <p>MPI noted that significant cost has been taken out of the Ministry and we could explore more work in this area as part of the cost recovery levies.</p> |
| 2 | <p>Report back on Forum Subgroup (wild-capture) discussions</p> <p>The co-chairs of the Forum Subgroup updated the Forum on issues the Subgroup were discussing and the continuum of options from more operational changes through to more significant system reform, noting in particular:</p> <ul style="list-style-type: none"> • Productive discussions on fisheries management, options available with fisher verified data, early discussions indicating some shared views on opportunities to improve flexibility of system. |



- MPI had put on table the potential of holding cost recovery levies at 2023/24 levels while Government's improving regulation programme gets underway.
- Landing and discards, consideration of pausing implementation to allow a period of assessment based on information from camera verification.
- On-board cameras, rollout underway, have been working on details of costs and have put on the table the potential that once we are through the transition period s9(2)(g)(i)

Looking to manage access to camera footage to address concerns related to fisher privacy.

- With bottom trawling haven't had detailed discussions and are keen to know if industry wants to progress work on this.
- Work is underway on the RMA / Fisheries Act interface.
- Industry had raised issue of quota owners having the ability to manage fisheries above the regulated bottom line.

Discussion included:

- The cumulative impact of spatial access measures on fishing.
- Current financial stress including for inshore fisheries.
- Cost Recovery:
 - Industry members were keen to see costs taken out of the system and suggested at least a 6.5-7.5% reduction in line with the reductions across the public sector. They also queried the comparative level of fees and charges paid by the seafood sector relative to other MPI sectors.
 - Some industry members put forward views on the history of the cost recovery regime and considered that there should be a first principles look at cost recovery, investigation to include whether enforcement and compliance costs should be recovered from the industry, whether such services should be delivered elsewhere e.g. enforcement services by Police, consideration of who delivers and funds the services to manage a fishery, and the balance between public and private goods.
 - MPI indicated some aspects seemed unrealistic and queried whether members wanted to prioritise a first principles review and looking at organisational design or focus attention on a pragmatic approach and review with the aim of taking costs out.
 - MPI agreed to provide information on the comparative level of fees and charges paid by the seafood sector relative to other MPI sectors (**Action SIF 001**).
- Fisheries Management
 - Range of views expressed from more operational changes to significant system reform.



| | |
|---|---|
| | <ul style="list-style-type: none"> On-board cameras <ul style="list-style-type: none"> There was discussion on the link between camera information, landings and discards, compliance activity and the infringements and penalties regime. It was noted that issues about cost represent a big part of industry's concerns. Bottom trawling <ul style="list-style-type: none"> Industry acknowledged that it remains vitally important and that they were doing some work that they could share when it matures. Industry suggested that this was a secondary issue for the Forum at this time. |
| 3 | <p>Aquaculture update</p> <p>Vaughan Wilkinson left the meeting before the Aquaculture Update, identifying his involvement in the Fast Track consent expert panel.</p> <p>MPI updated members on:</p> <ul style="list-style-type: none"> Fast-track Approvals Bill <ul style="list-style-type: none"> The Fast-track Approvals Bill has been introduced to the House, and public submissions close today. Applications to list projects in Schedule 2 of the Bill are open on the Ministry for Environment website until the 3rd of May. Extending marine farm consents <ul style="list-style-type: none"> The Government is proposing to extend the duration of existing marine farm consents by a set period to give certainty and confidence to invest in the industry. Work is underway on this. <p>Industry members sought clarification of the timelines, particularly for consents expiring soon. MPI noted that this issue is on the Government's quarterly plan.</p> |
| 4 | <p>Wrap up and next steps:</p> <ul style="list-style-type: none"> CE check in to be organised for mid-May. (Note that with limited availability of key people, subsequent decision not to hold CE check in prior to next Forum meeting). Next Forum to be held on Tuesday 4 June 1-3pm. |

Forum Meeting Record



Fisheries New Zealand

Tini a Tangaroa

| Ref | Actions | Status |
|---------|---|--------|
| SIF-001 | MPI to provide information on the comparative level of fees and charges paid by the seafood sector relative to other MPI sectors. | Open |

Attendees

- Jeremy Helson – CE, Seafood NZ
- Steve Tarrant – CE Moana
- Doug Paulin – CE Sealord
- Craig Ellison – Interim CE, Sanford
- Vaughan Wilkinson – GM Strategy and Innovation, Sanford
- Carl Carrington – CE NZ King Salmon
- Graeme Hastilow – Interim CE, Te Ohu Kaimoana
- Laws Lawson – Seafood NZ and Aquaculture NZ board member & Te Ohu Kaimoana
- Tom McClurg – Board Chair, Fishserve
- Gary Hooper – CE, Aquaculture NZ
- Mark Edwards – CE NZ Rock lobster Industry Council
- Dan Bolger – Deputy Director General Fisheries New Zealand
- Julie Collins – Deputy Director General Policy and Trade, MPI
- Emma Taylor – Director, Fisheries Management
- Eugene Rees – Acting Director, Primary Sector Policy
- Bridget Giesen – Director, Aquaculture
- s9(2)(a) – Private Secretary to the Minister for Oceans and Fisheries
- Thea Wallace – Director, Strategy and Governance, FNZ
- Maryanne Aynsley – Manager, Sector Support & Innovation, FNZ
- Ruth Cook – Manager, Strategic Engagement, FNZ
- Tamar Wells – Seafood NZ

Apologies

- Andrew Talley – Director, Talley's
- Tony Hazlett – CE Talley's
- Alastair Cameron – Director, Primary Sector Policy
- Peter McCarthy – Chief Legal Adviser, Ministry for Primary Industries

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**Fisheries New Zealand**

Tini a Tangaroa

To: Hon Shane Jones, Minister for Oceans and Fisheries
CC: Jenny Marcroft MP, Parliamentary Under-Secretary to the Minister for Oceans and Fisheries
From: Dan Bolger, Deputy Director-General Fisheries New Zealand

Seafood Industry Forum

| | | | |
|-------------|----------------|------------------|-----------|
| Date | 27 August 2024 | Reference | AM24-0826 |
|-------------|----------------|------------------|-----------|

Purpose

- This aide-memoire provides background information for the Seafood Industry Forum (the Forum) meeting on 27 August.

Meeting arrangements

- You are attending a forum with seafood industry leaders on Tuesday 27 August. The meeting is between 3:00 pm and 5:00 pm and you are joining the meeting from approximately 3:10 pm to 3:40 pm at the Ministry for Primary Industries' (MPI) office, Charles Ferguson Building, Level 15 Boardroom, Ballantrae Place.
- s9(2)(g)(i)
- You have an opportunity to address the Forum when you arrive, this will be towards the beginning of the meeting. Brief introductory talking points are provided at **Appendix Two**.

The primary focus of the meeting is for the Forum subgroup to report back to the Forum on its discussions on potential targeted legislative change and operational improvements

- Since the 4 June Forum meeting (you attended the first half of the meeting), a subgroup chaired by Lisa Futschek and Dan Bolger has been focused on progressing operational improvements and options for targeted legislative reform (column one and column two, refer **Appendix Three**) under the following headings:
 - Commercial fisheries - management of stock, catch and protected species interactions;
 - On-Board Cameras – enhance camera footage protections;
 - Cost Recovery levies;

- d) Landings and discards – increased flexibility;
 - e) Access to fishing grounds (including Fisheries Act and Resource Management Act interface);
 - f) Fisheries regulations; and
 - g) Data availability and sharing.
5. Ministerial consultation is currently underway on a draft Cabinet paper, based around the headings in paragraph 4 above, that seeks agreement to you developing a package of options for changes to the Fisheries Act 1996 and regulations (refer Sub24-0021 *Fisheries reform work programme*). Many of these matters are canvassed in the Forum subgroup report back, which is consistent with the direction in your draft paper.
6. The next steps for the package of options in this Cabinet paper, following confirmation by Cabinet, are:

| | |
|---------------------|--|
| Fourth quarter 2024 | Cabinet approval to release public discussion document on regulatory and legislative proposals |
| Feb / Mar 2025 | Public consultation |

s9(2)(g)(i), s9(2)(f)(iv)

7. The Forum papers provide an indicative timeline based on these dates, to illustrate the timing of steps for passage of a potential Fisheries Reform Bill by August 2026.

Additional items on Forum agenda

8. In addition to the Forum subgroup report back there are two other items on the agenda.

a) **Industry update on** s9(2)(f)(iv) **work** Craig Ellison (s9(2)(f)(iv))

s9(2)(f)(iv)

s9(2)(f)(iv)

- b) **Cumulative spatial access loss** Mark Edwards (Rock Lobster Industry Council (RLIC)) will present his paper on mechanisms to address the cumulative impact of spatial access restrictions on commercial fishing activity. The paper was provided on Wednesday 21 August for circulation with the Forum papers. This will be the first Forum discussion of the issue. RLIC has identified the cumulative impact of spatial access restrictions as a key issue for its members and has raised the issue in previous Forum meetings. s9(2)(g)(i)

Cost Recovery levies

9. Cost recovery is not specifically on the agenda but is a topic of interest to industry leaders. Cabinet considered on Monday 26 August the cost recovery levies for 2024/25, so you may wish to announce them at the Forum. These figures are expected to be gazetted on Wednesday 28 August.
10. The levies for 2024/25 will be \$39.5 million, a reduction of \$1.8 million from the \$41.2 million levies in 2023/24¹. MPI will also return to industry an over-recovery of costs from the 2022/23 financial year of \$3.2 million. This will reduce the amount industry is required to pay to \$36.3 million.
11. MPI is also investigating opportunities for additional levy reductions for the 2025/26 year and will provide you with advice on this in the coming weeks.
12. In addition, MPI is meeting with the board of Seafood New Zealand on Friday 30 August to kick off the process for 2025/26 levies, including how we will engage with industry on service levels and costs.

Minister / Minister's Office

Seen / Referred

/ / 2024

¹ Due to rounding these numbers do not perfectly align.

Appendix One: Agenda and meeting papers

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s9(2)(g)(i)

Released Under the Official Information Act 1982

Appendix Three: Fisheries Reform Work Areas

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**Agenda: Seafood Industry Forum**

| | | | |
|---------------|--|-------------------|---|
| Date: | 27 August 2024 | Time: | 3:00pm -5:00pm |
| Where: | Charles Fergusson Building, Level 15 - Room 15.01, 34-38 Bowen St, Wellington Out of scope [REDACTED] | Co-Chairs: | Ray Smith – Director General, MPI Greg Gent – Chair, Seafood New Zealand |

| | Agenda Item | Who | Time |
|---|---|-------------------------------|---------------------------|
| 1 | Welcome | Ray Smith / Greg Gent | 3:00-3:05pm 5 minutes |
| 2 | Update from Minister | Minister Jones | 3.05-3.15pm 10 minutes |
| 3 | Seafood Industry Forum Subgroup report back: <ul style="list-style-type: none">Legislative reform timeline (relates to Action SIF-001 from 4 June meeting)Commercial fisheriesLandings and discards – adding flexibilityOn-Board Cameras – enhance camera footage protectionsAccess to fishing grounds – Fisheries Act and Resource Management Act interfaceCost Recovery leviesFisheries regulationsData availability and sharing | Dan Bolger / Lisa Futschek | 3:15-4.30pm 75 minutes |
| 4 | Industry update s9(2)(f)(iv) [REDACTED] | Craig Ellison | 4:30-4:40pm 10 minutes |
| 5 | s9(2)(ba)(i) [REDACTED] | Mark Edwards | 4:40-4:50pm 10 minutes |
| 6 | Wrap up and next Forum meeting: <ul style="list-style-type: none">CE Check-in – Tuesday 1 October (4-5pm)Seafood Industry Forum - Thursday 21 November (3-5pm) | Greg Gent / Dan Bolger | 4:50-5:00pm 10 minutes |



| | |
|--|--|
| Co-Chairs | <ul style="list-style-type: none">• Ray Smith, Director General, Ministry for Primary Industries (until 4pm)• Greg Gent, Chair Seafood New Zealand |
| Minister for Oceans and Fisheries | <ul style="list-style-type: none">• Minister Shane Jones, joining after Question time in House• s9(2)(a) – Private Secretary to the Minister for Oceans and Fisheries |
| Industry | <ul style="list-style-type: none">• Lisa Futschek – CE, Seafood NZ• Tony Hazlett – CE, Talley's• Steve Tarrant – CE, Moana (online)• Doug Paulin – CE, Sealord (online)• Vaughan Wilkinson – GM Strategy and Innovation, Sanford• Craig Ellison – s9(2)(f)(iv)• Graeme Hastilow – CE, Te Ohu Kaimoana• Laws Lawson – Seafood NZ and Aquaculture NZ board member & Te Ohu Kaimoana• Tom McClurg – Board Chair, Fishserve• Gary Hooper – CE, Aquaculture NZ (online until approx. 4pm)• Mark Edwards – CE, NZ Rock lobster Industry Council• Tiff Bock, General Manager Inshore, Seafood NZ |
| Officials | <ul style="list-style-type: none">• Dan Bolger – Deputy Director General Fisheries New Zealand• Julie Collins – Deputy Director General Policy and Trade• Alastair Cameron – Director, Primary Sector Policy• Emma Taylor – Director, Fisheries Management• Simon Lawrence – Director, Digital Monitoring |
| Secretariat | <ul style="list-style-type: none">• Maryanne Aynsley – Manager, Sector Support & Innovation, FNZ• Tamar Wells – Seafood NZ (Forum Subgroup Secretariat) |
| Apologies | <ul style="list-style-type: none">• Andrew Talley – Director, Talley's• Carl Carrington – CE, NZ King Salmon• David Mair – CE, Sanford• Thea Wallace – Director, Strategy and Governance, FNZ |



| Ref | Actions | Status |
|---------|---|---------------------------------|
| SIF-001 | MPI to provide a high-level timeline of what would be required to develop and pass legislation to progress column 2 matters by August 2026. | Closed – refer to Agenda item 3 |
| SIF-002 | Industry to develop the matters in s9(2)(f)(iv) prioritising the matters they wish to bring back for discussion at the Forum. | Closed – refer to Agenda item 4 |
| SIF-003 | CE check in to be organised for late July. Update 27 August: CE Check-in was held on 31 July | Closed |

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Seafood Industry Forum – Meeting Record

| | | | |
|---------------|-----------------------|-------------------|---|
| Date: | 4 June 2024 | Time: | 1:00pm – 3.00 pm |
| Where: | Seafood NZ Board room | Co-Chairs: | Ray Smith - Director-General, MPI Greg Gent – Chair, Seafood New Zealand |

Minutes

| Agenda Item | High level discussion points |
|-------------|---|
| 1 | Welcome The co-chairs welcomed the Minister for Oceans and Fisheries and members of the Forum. |
| 2 | Update from the Minister for Oceans and Fisheries The Minister for Oceans and Fisheries provided a general update on a range of relevant matters that included: <ul style="list-style-type: none">s9(2)(f)(iv) |
| 3 | Report back on Forum Subgroup (wild-capture) discussions Members had a high-level discussion on how to progress the work areas, with officials highlighting the work involved and time required to progress matters in columns one and two. Industry indicated their support for the matters in column one and two s9(2)(g)(i), s9(2)(f)(iv) MPI agreed to provide a high-level timeline of what would be required to develop and pass legislation to progress column 2 matters by August 2026 [Action SIF-001]. MPI also highlighted the respective roles of industry and officials in developing policy and legislation and that officials as part of their role would advise Ministers. Industry were supportive of working with FNZ/MPI in making material progress on the issues in columns 1 & 2 including passing legislation before August 2026. |

Forum Meeting Record



Fisheries New Zealand

Tini a Tangaroa

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|---|--|
| | <p>Industry also agreed to develop the matters in s9(2)(f)(iv) prioritising the matters they wish to progress and bring back for discussion at the Forum [Action SIF-002].</p> <p>Members discussed cost recovery levies, s9(2)(f)(iv), s9(2)(g)(i)</p> <p>Some industry members raised the limited work areas in relation to access to fishing grounds and highlighted the impact on their industry of threats to and cumulative impact of loss of spatial access.</p> |
| 4 | <p>Aquaculture update</p> <p>MPI noted the legislation that was before the House as mentioned by the Minister and industry noted its support. MPI advised work was underway considering the Resource Management Act and Fisheries Act interface. The impact of the NZ Coastal Policy Statement and Aquaculture National Environmental Standards on aquaculture development and operations were acknowledged.</p> |
| 5 | <p>Wrap up and next steps:</p> <ul style="list-style-type: none">• CE check in to be organised for late July [Action SIF-003].• Next Forum to be held on Tuesday 27 August, 3-5pm |



| Ref | Actions | Status |
|---------|---|--------|
| SIF-001 | MPI to provide a high-level timeline of what would be required to develop and pass legislation to progress column 2 matters by August 2026. | Open |
| SIF-002 | Industry to develop the matters in s9(2)(f)(iv) prioritising the matters they wish to bring back for discussion at the Forum. | Open |
| SIF-003 | CE check in to be organised for late July. | Open |

Attendees

- Hon Shane Jones, Minister for Oceans and Fisheries (until 2.15pm)
- Ray Smith - Director-General, MPI
- Greg Gent – Chair, Seafood New Zealand
- Jeremy Helson – CE, Seafood NZ
- Steve Tarrant – CE Moana
- Doug Paulin – CE Sealord
- Vaughan Wilkinson – GM Strategy and Innovation, Sanford
- Laws Lawson – Seafood NZ and Aquaculture NZ board member & Te Ohu Kaimoana
- Doug Loder – Talley's
- Gary Hooper – CE, Aquaculture NZ
- Mark Edwards – CE NZ Rock lobster Industry Council
- Dan Bolger – Deputy Director General Fisheries New Zealand, MPI
- Julie Collins – Deputy Director General Policy and Trade, MPI
- Emma Taylor – Director, Fisheries Management, MPI
- Lisa Collins – Acting Director, Primary Sector Policy, MPI
- s9(2)(a) – Private Secretary to the Minister for Oceans and Fisheries
- s9(2)(a) – Private Secretary to the Parliamentary Under-Secretary to the Minister for Oceans and Fisheries
- Maryanne Aynsley – Manager, Sector Support & Innovation, MPI
- Tamar Wells – Seafood NZ
- Tiff Bock – Seafood NZ

Apologies

- Andrew Talley – Director, Talley's
- Tony Hazlett – CE Talley's
- Carl Carrington – CE NZ King Salmon
- Graeme Hastilow – CE, Te Ohu Kaimoana
- Tom McClurg – Board Chair, Fishserve
- Alastair Cameron – Director, Primary Sector Policy, MPI
- Peter McCarthy – Chief Legal Adviser, Ministry for Primary Industries
- Bridget Giesen – Director, Aquaculture, MPI



Fisheries New Zealand

Te Kaitiaki Take Kōwhiri

Seafood Industry Forum

**Forum Subgroup report back
27 August 2024**



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Agenda Item 2: Seafood Industry Forum Subgroup report back

Purpose

- Provide update to Forum on progress made on Fisheries Reform Work Areas (columns one and two) :
 - 1) Legislative timeline for potential Fisheries Reform Bill to be passed by August 2026 (slide 3)
 - 2) Commercial fisheries (management of stock, catch and protected species interactions) (slide 4):
 - a. Targeted legislative change
 - b. Operational and regulatory changes
 - 3) Landings and discards – adding flexibility (slide 9)
 - 4) On-Board Cameras – enhance camera footage protections (slide 10)
 - 5) Access to fishing grounds – Fisheries Act and Resource Management Act interface (slide 11)
 - 6) Cost Recovery levies (slide 12)
 - 7) Fisheries regulations (slide 14)
 - 8) Data availability and sharing (slide 15)

Refer to last slide on Fisheries Reform Work Areas

Key points

- Final draft consultation document and Cabinet approval to consult late November 2024
- Consultation February/March 2025

2) Commercial fisheries (management of stock, catch and protected species interactions)

(a) Targeted legislative change overview – details follow

Proposed options

- New Agile Management Tools:
 - Improved TAC setting:
 - TAC changes over a defined period
 - Decision rules
 - Recognition of ACE shelving
 - Delegated decision-making to the Chief Executive of MPI (for some technical decisions).

Issues we are working through

- Scope of application (broad but considering whether subject to additional policy)
- Use in low knowledge fisheries – change in the Act may be required to achieve the appropriate balance between sustainability and utilisation

(b) Operational improvements – details follow

Proposed options

- Low knowledge fisheries management
- Protected species interactions
- General process efficiency and effectiveness

2 (a) Targeted legislative change

To achieve improved TAC setting – TAC changes over defined period

Proposed options

Amend s(13) and any other appropriate provisions to:

- Allow socio-economic impacts to be given weight in decision making alongside biological factors when deciding on a TAC for a stock that requires rebuilding
- Provide for one decision that allows for a series of changes to the TAC over a defined period (either up, down or both) to support mitigation of socio-economic impact or allow for a development opportunity
- Allow more flexibility in timing of commercial harvest through deferring catch to subsequent year(s) through carry forward.

Issues we are working through:

- In respect of more flexibility in timing of commercial harvest, when and how could apply
- Implications for FishServe registry services on some design options

2(a) Targeted legislative change

To achieve improved TAC setting – Decision rules

Proposed options

- To provide for multi-year management procedures/harvest control rules in the Fisheries Act
- Rules would specify when and how to adjust a catch setting (up or down) without the need for an annual stock review.
- Rules would consist of:
 - A stock target
 - A performance measure
 - A definition of what we expect the stock to do with proposed controls
 - What will happen if actual performance is better or worse than expected performance
- Implementation of changes to TACs once rules are in place could be delegated to the CE MPI.

Issues we are working through

- In shared fisheries, maximum benefit would be obtained if the rules incorporate allocation
- What consultation looks like once a rule is established – reducing the process cost of making TAC changes is a key benefit.
- Use in low knowledge fisheries – change in the Act may be required to achieve the appropriate balance between sustainability and utilisation

Next steps

- Progress proposals to amend relevant sections of the Fisheries Act (parts 3, 4) to provide for the use of multi-year decision rules.

2(a) Targeted legislative change

Recognition of ACE shelving

Proposed options

- Allowing the Minister to explicitly take into account an ACE shelving arrangement when setting or varying a sustainability measure (including a TAC change and the amount of that change).

Issues we are working through

- In considering the weight to give any arrangement, what factors should be considered:
 - nature and robustness of any arrangement
 - appropriateness of shelving in a particular case (i.e., stocks with very low stock status and long rebuild timeframes)
- Allocation impacts in shared fisheries where ACE shelving is applied to rebuild a stock (i.e., where the consequences of allocation decisions could be different) – section 308 considerations (protection from claims for compensation for reallocation).

Next steps

- Progress proposals to amend section 11 and potentially section 13 of the Fisheries Act to recognise shelving.

2) (b) Operational improvements

Progress update

- **Management of low/medium knowledge stocks**
 - More active, risk-based management of stocks where we don't have stock assessment information
 - Using newly developed data dashboards / insights tools that identify and prioritise stocks for review, and operational procedures to inform options for changes to catch limits that provide for utilisation opportunities while managing sustainability risks
 - Trial approach in October Sustainability Round: LEA 3 and KIN 3 (increase catch limits)
- **Protected species working group discussions underway**
 - Develop and implement risk-based approach to managing protected species interactions. Approach includes:
 - understanding risk to protected species from fishing, and tailoring management approach to that risk;
 - collaborating with industry on an escalating toolbox of measures (from non-regulatory to statutory measures);
 - leveraging increased verification from onboard cameras;
 - clearly defined roles and responsibilities for both industry and government.

Next steps

- Protected species – sub-forum discussion on 5 September
- Implement October Sustainability Round decisions, and apply approach to April Round

3) Landings and discards – adding flexibility

Work underway

- Extend transitional expiry of the date of existing landing exceptions by two years from commencement (timeframe and delivery subject to legislative vehicle).
- Progress, where possible under existing legislation, exceptions for example for predated and unavoidably damaged fish.

Proposed option for legislative change

- **Retain existing exception provisions and add a new exception provision** to enable return of QMS fish to the sea if monitored, balanced and reported (see table for description).

| Monitored returns | Description | Approach |
|---------------------------------|--|---|
| Scope | Intentional returns of QMS species | Baseline approach across all QMS species |
| Requirements | Fishing activity is monitored (observers watching, or cameras recording – not necessarily reviewed) | |
| Life status of fish returned | Dead and alive | |
| Balancing requirements | All monitored returns, irrespective of life status, balanced with ACE or deemed values | |
| Interplay with other exceptions | In general, does not overlap (e.g., the same species would not have both a monitored return as well another unbalanced exception), except in certain circumstances | Assessed on a case-by-case basis |
| Verification protocols | Returns are detectable – there is an ability to verify returns (species ID and counts/volume) to retain the incentive to report accurately and collect the necessary information to inform fisheries management. | Assessed on a case-by-case basis Factors to consider: Volume of returns; ACE and Port Price; Species lookalikes; Fishing method (e.g., bulk vs serial); Stock sustainability risk; Fishery type (e.g., shared vs commercial) |

4) On-Board Cameras – enhance camera footage protections

OIA requests received

- To date we have responded to 10 requests for onboard camera footage: 4 from vessel owners, 4 from eNGOs, 1 from iwi, and 1 from a journalist.
- We have implemented existing guidelines to respond to these requests.
- **No footage has been released** other than to the 4 vessel owners wanting to view footage from their own vessel to improve fishing practices.

Progress update:

- Advice being prepared for the Minister on options to enhance camera protection. Options range from providing summary data instead of camera footage through to a fuller carve out from the OIA.

Operator access to data

- A manual process enables fishers to view footage from their vessel. We have received a small number of requests from fishers and provided access and associated controls to protect privacy.
- We are exploring options to provide fishers with faster and more convenient access to footage, ranging from improving the current manual process to building an automated system that enables on demand access to footage.
- Demand for footage is unclear at this stage. We plan on engaging with fishers to better understand needs, which will help decide the most cost-effective option.

Next steps

- Provide advice to the Minister on options to include for consultation.
- Engage with industry on enhancing approach to make OBC footage available to fishers.

5) Access to fishing grounds

(a) Fisheries Act and Resource Management Act interface

Progress update:

As Minister has publicly stated, officials are working to address the Fisheries Act / Resource Management Act interface.

Advice is with Ministers.

(b) Industry update on consideration of approaches to provide more certainty about bottom trawling (1.14)

Industry working group approved a broad programme of work that includes:

- gear innovation
- research and aggregation of existing data
- communications, education, and PR

6) Cost Recovery Levies

- Cost recovery levies for 2024/25 have been held below 23/24 levels:
 - Cabinet decision on final levies imminent and to be advised.
 - MPI is working through options for further cost efficiencies particularly around compliance.
- Drafting an annual report on how cost recovery levies have been spent in 23/24 is underway. A draft will be available for feedback in September.
- Kick off meeting with senior industry representatives to discuss service priorities for 2025/26 tentatively scheduled for late August / early September. This is the first step in an enhanced calendar of industry engagement on service planning as set out on next slide.
- Undertaking discussions on industry delivery of aspects of commercial research programme.
- Work ongoing to better align research timelines and clarify lead agencies for science areas between FNZ and DoC.
- s9(2)(g)(i), s9(2)(f)(iv)
[Redacted]
[Redacted] This could initially be implemented through amendments to the Cost Recovery Rules to extend the existing transitional arrangements for the 2025/26 fishing year, followed by further amendments as part of the fisheries reform package.

6) Cost Recovery engagement and communication over the upcoming year

| Cost recovery engagement and communication over the upcoming year |
|---|
| |
| Overarching |
| •Senior level government / industry service planning kick off meeting |
| Observers |
| •Initial engagement with industry and ENGOs on priorities and planning (and discussion on process) |
| •FNZ and DoC create list of priorities |
| •Indicative observer plan (capacity) program and levy rates |
| •Consult with industry and ENGOs to share plan and priorities |
| •Confirm plan and priorities and proceed with Standard Approval Process for Fisheries Levy Package |
| Science |
| •Generate research long-list after idea generation and priority setting; discuss fisheries plans and medium term research plans where available |
| • Discuss research ideas long-list at Iwi Fisheries Forums and Working Groups |
| •Research portfolio prioritisation |
| •Feedback sought from industry on research portfolio prioritisation |
| •Detailed review of high-value projects |
| •Refinement of initial shortlist (cost-recovered and Crown-funded) |
| Compliance * |
| •Seafood NZ meetings (Inshore/Inshore Council & Committees/Aquaculture NZ) |
| •Rock Lobster Industry meetings |
| •Paua Industry meetings |
| •Deepwater Group Compliance and Management Vessel Operators annual meeting |
| •Meetings with other organisations (eg Fisheries Compliance Services) |
| Annual Reporting |
| •Annual Report - Cost Recovery (23/24) |
| |
| Consult on levies package |

s9(2)(g)(i), s9(2)(f)(iv)

*Compliance:
- The engagement outlined above represents the key engagements, however stakeholder engagement is not limited to these meetings.
- Compliance's engagement with the SREs is general in nature and provides opportunities to hear industry views on Compliance priorities.

7) Fisheries regulations

Progress update:

Input has been sought on potential changes to regulations to clarify obligations on fishers and reduce cost.

So far:

- Issues identified through direct engagement with the Seafood Industry Forum subgroup. Initial response from industry identified about 70 regulations across 13 sets of regulations and circulars.

Next steps

- Formal consultation on regulation changes planned for 2025.

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8) Data availability and sharing

Progress update:

- Drafted **Data Management Protocol** between MPI and Fishserve. Will provide a framework for greater use of fisher data to enable value-adding products whilst maintaining appropriate controls.
- Continue working with Seafood NZ (and others) to make aggregated data available under existing **data sharing arrangements**.
- Plenty of scope to **increase provision of disaggregated data** where fishers have given receiving party permission (for example, daily feed of surface longline interactions with protected species).
- Next **quarterly release of protected species captures** planned for late August. This will add information on landed catch to give more context for these captures (*recent fur seal captures reflect the busy hoki and southern bluefin tuna season*). Have agreed to provide Seafood NZ embargoed data with commentary before release.

Next steps

- Finalise Data Management Protocol with FishServe and begin development of priority products.

Fisheries Reform Work Areas

s9(2)(f)(iv)

| Ref | Column 1 – Operational and regulatory | Ref | Column 2 – Targeted Legislative change |
|--|--|-------|---|
| Commercial fisheries – management stock, catch and protected species interactions | | | |
| 1.1 | Separate management approaches for shared and non-shared (i.e. commercial only) stocks | 2.1 | Provision for two-tier regime, with certain stocks specified by schedule (e.g., non-shared). More agile management tools for those stocks, potentially including: |
| 1.1.1 | Streamline and take a risk-based approach to low/medium knowledge stock management approach. | 2.1.1 | Multi-year total allowable catch setting |
| 1.1.2 | Trial new approaches in sustainability round Oct 2024. | 2.1.2 | Shelving policy framework |
| 1.2 | Further implement risk-based approach to managing environmental effects of fishing (including protected species interactions). | 2.1.3 | Pre-set decision rules |
| | | 2.1.4 | Certain technical decisions move from Minister to MPI |
| | | 2.2 | ACE carryover for Rock Lobster |
| On-Board Cameras | | | |
| 1.4 | Continue progressing opportunities for camera verified data to generate more value to industry and fisheries management (relates to other actions in table). | 2.3 | Enhance camera footage protections (resolving privacy and commercial sensitivities including consideration of applicability of OIA). |
| 1.5 | Develop systems for fishers to view their footage. | | |
| Cost recovery levies | | | |
| 1.6 | Hold 24/25 cost recovery levies at or below 23/24 levels and progress work in short term to identify further savings. | 2.4 | Legislate changes if required to Act and /or regulations. |
| 1.7 | Annual report to levy payers to ensure transparency. | | |
| 1.8 | Industry / Government discussion on service levels for 2024/25 levies. | | |
| 1.9 | Explore opportunities with the Department of Conservation (DOC) to clarify protocols for determining which projects should be funded under conservation services and fisheries services. | | |
| Landings and discards | | | |
| 1.10 | Extend transitional expiry date of existing landing exceptions by two-years from commencement (timeframe and delivery subject to legislative vehicle). | 2.5 | Add flexibility to the landings and discards framework for monitored returns (camera or observer) to sea. |
| 1.11 | Greater consideration of the flexibility available within the current regime. | | |
| 1.12 | Progress, where possible under existing legislation, exceptions for predated, unavoidably damaged fish and other fish causing operational difficulties. | | |
| 1.13 | Clarify definition of when a fish is considered caught. | | |
| Access to fishing grounds | | | |
| 1.14 | Consideration of approaches to provide more certainty about bottom trawling. | 2.6 | Address Fisheries Act and Resource Management Act interface. |
| Fisheries regulations | | | |
| 1.15 | Progress enabling data transmission cables. | 2.7 | Remove redundant regulations and/or regulations which are overly complex, duplicative, or impose unnecessary compliance cost (informed by list industry will provide to MPI). |
| 1.16 | Progress enabling use of underwater breathing apparatus (UBA) (including for shellfish). | | |
| 1.17 | Deliver electronic reporting for amateur charter vessels (ACVs). | | |
| Data availability and sharing Enable appropriate data (where fishers give their agreement) to be made available to support timely industry action | | | |
| 1.18 | 'Right time right place' pilot project to support more selective fishing using data insights. | | |
| 1.19 | Build on data sharing pilot with surface long line fleet on seabird captures. | | |



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Fisheries Reform Work Areas

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| 1.2 | Further implement risk-based approach to managing environmental effects of fishing (including protected species interactions). | 2.1.3 | Pre-set decision rules |
| | | 2.1.4 | Certain technical decisions move from Minister to MPI |
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| 1.19 | Build on data sharing pilot with surface long line fleet on seabird captures. | | |

**Fisheries New Zealand**

Tini a Tangaroa

To: Hon Shane Jones, Minister for Oceans and Fisheries**CC:** Jenny Marcroft MP, Parliamentary Under-Secretary to the Minister for Oceans and Fisheries**From:** Dan Bolger, Deputy Director-General Fisheries New Zealand

Seafood Industry Forum

| | | | |
|-------------|-----------------|------------------|-----------|
| Date | 6 December 2024 | Reference | AM24-1137 |
|-------------|-----------------|------------------|-----------|

Purpose

- This aide-memoire provides background information for the Seafood Industry Forum (the Forum) meeting on 9 December.

Meeting arrangements

- You are attending a forum with seafood industry leaders on Monday 9 December. The meeting is between 1:00 pm and 2:30 pm and you are joining the meeting from approximately 1:00 pm to 1:30 pm at the Ministry for Primary Industries' (MPI) office, Charles Fergusson Building, Level 1 meeting room, Wellington
- The agenda (including the list of attendees) and papers for the meeting are attached as **Appendix One**. The meeting will recap what has been achieved this year and look ahead to 2025. We understand the Parliamentary Under-Secretary is unable to attend and this aide-memoire is copied to her for her information.
- s9(2)(g)(i)

Fisheries Reform Work Areas

- On Monday (just prior to the Forum meeting), Cabinet is considering release of a consultation document and public consultation in early 2025 on proposed changes to the Fisheries Act 1996.
- You have signalled publicly, following Cabinet decisions in September, that practical changes to reduce red tape, provide a boost to commercial fishers, and ensure a thriving and sustainable seafood industry, were being developed and feedback would be sought early next year.

6. The Forum subgroup, chaired by Lisa Futschek and Dan Bolger, have been testing the targeted legislative reform proposals and provided an update to the Forum at their August meeting on the work being done. The subgroup has also been focused on progressing operational improvements (refer **Appendix Three**, column one and column two). There will be a brief update on the progress made at the Forum meeting.

7. s9(2)(f)(iv)

Craig Ellison will provide an update to the Forum on this work.

Aquaculture

8. MPI will provide an overview of the regulatory change work of interest to aquaculture, and Gary Hooper, Chief Executive Aquaculture New Zealand, will provide an industry update.

Cost recovery levies

9. Cost recovery is not specifically on the agenda but is a topic of interest to industry leaders. The cost recovery levies for 2024/25 are \$39.5 million, a reduction of \$1.8 million from the \$41.2 million levies in 2023/24¹. MPI also returned to industry an over-recovery of costs from the 2022/23 financial year of \$3.2 million. This reduced the amount industry is required to pay to \$36.3 million.
10. At an earlier Forum meeting, MPI undertook to progress work to identify further savings. s9(2)(g)(i), s9(2)(f)(iv)
- Further savings have been identified for albacore and skipjack for 2024/25 levies (B24-0699 *Change to Fisheries Services Levies 2024/25* refers) and a new process is planned to smooth non-Quote Management Species species unders and overs.
11. MPI held a discussion with industry on 2025/26 service levels and costs on 30 August as part of engaging industry early in the cost recovery levy setting process. MPI is also providing an annual report for levy payers on the services provided with the 2023/24 levies.

Minister / Minister's Office

Seen / Referred

/ / 2024

¹ Due to rounding these numbers do not perfectly align.

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Agenda: Seafood Industry Forum

| | | | |
|---------------|---|-------------------|---|
| Date: | 9 December 2024 | Time: | 1:00pm–2:30pm |
| Where: | Charles Fergusson Building, Level 1 – Room 1.04 & 1.05, 34–38 Bowen St, Wellington Out of scope [Redacted] [Redacted] [Redacted] | Co-Chairs: | Ray Smith – Director General, MPI Greg Gent – Chair, Seafood New Zealand |

| | Agenda Item | Who | Time |
|---|---|-------------------------------------|-------------------------|
| 1 | Welcome | Ray Smith / Greg Gent | 1:00–1:05pm (5mins) |
| 2 | Minister for Oceans and Fisheries update | Minister Jones | 1:05–1:20pm (15mins) |
| 3 | Industry update s9(2)(f)(iv) [Redacted] | Craig Ellison | 1:20–1:35pm (15mins) |
| 4 | Seafood Industry Forum Subgroup report back <ul style="list-style-type: none">Progress report on Columns 1 and 2 | Dan Bolger / Tiff Bock | 1:35–1:45pm (10mins) |
| 5 | Aquaculture update <ul style="list-style-type: none">Overview of regulatory changesIndustry update | Alastair Cameron/ Gary Hooper | 1:45–2:05pm (20mins) |
| 6 | Update on FloMo – Release-At-Depth (RaD) Technology | Greg Johansson | 2:05–2:15pm (10mins) |
| 7 | Wrap up, next steps and looking ahead to 2025 <ul style="list-style-type: none">Quarterly meetings of Forum – propose next meeting mid to late MarchDiscuss possible topics for discussion in 2025. | Greg Gent / Ray Smith | 2:15–2:30pm (15mins) |

| | |
|--|---|
| Co-Chairs | <ul style="list-style-type: none"> • Ray Smith, Director General, Ministry for Primary Industries • Greg Gent, Chair Seafood New Zealand |
| Minister for Oceans and Fisheries | <ul style="list-style-type: none"> • Minister Jones, Minister for Oceans and Fisheries (for part of meeting) • s9(2)(a) – Private Secretary to the Minister for Oceans and Fisheries (for part of meeting) |
| Industry | <ul style="list-style-type: none"> • Lisa Futschek – CE, Seafood NZ • Steve Tarrant – CE, Moana • Tony Hazlett – CE, Talley's • David Mair – CE, Sanford (online) • Vaughan Wilkinson – GM Strategy and Innovation, Sanford • Craig Ellison – Lead, s9(2)(f)(iv) (online) • Graeme Hastilow – CE, Te Ohu Kaimoana • Laws Lawson – Seafood NZ and Aquaculture NZ board member & Te Ohu Kaimoana • Tom McClurg – Board Chair, Fishserve • Gary Hooper – CE, Aquaculture NZ • Mark Edwards – CE, NZ Rock lobster Industry Council • Tiff Bock, General Manager Inshore, Seafood NZ • Annabel Scaife – PR and Comms Manager, Sealord (on behalf of Doug Paulin) (online) |
| Officials | <ul style="list-style-type: none"> • Dan Bolger – Deputy Director General, Fisheries New Zealand • Julie Collins – Deputy Director General, Policy and Trade • Alastair Cameron – Director, Primary Sector Policy • Emma Taylor – Director, Fisheries Management • Simon Lawrence – Director, Digital Monitoring |
| Secretariat | <ul style="list-style-type: none"> • Maryanne Aynsley – Manager, Sector Support & Innovation, FNZ • Tamar Wells – Seafood NZ (Forum Subgroup Secretariat) • Thea Wallace – Director, Strategy and Governance, FNZ |
| Apologies | <ul style="list-style-type: none"> • Andrew Talley – Director, Talley's • Doug Paulin – CE, Sealord • Carl Carrington – CE, NZ King Salmon • Bridget Gieson – Director, Aquaculture |

Responses to Actions from Seafood Industry Forum Meeting 27 August – for information

| Ref | Actions | Status |
|---------|--|---|
| SIF-001 | Forum Subgroup to consider options for in season adjustments as part of targeted legislative change to improve catch limit setting. | Closed – This is being considered as part of proposals developed for consultation. |
| SIF-002 | Forum Subgroup to consider implications of landings and discards 'monitored returns' approach for deep water fisheries (with and without observer on-board). | Closed – Under the consultation proposals, vessels with observers for monitored returns and on-board cameras, including those in deep water fisheries, would be able to discard QMS species. Other fish would need to be landed unless another landing exception applies, and the conditions for that exception are met. |
| SIF-003 | Forum Subgroup to consider how landing and discard provisions best work to enable technologies such as data link. | Closed – a new exception is proposed for consultation. |
| SIF-004 | <p>MPI to facilitate senior level engagement between industry and Department of Conservation officials with respect to cost recovery from fishing industry.</p> <p>Update 7/12: MPI is working with senior Department of Conservation (DoC) officials on changes to conservation services programme cost recovery ahead of engagement with industry on these matters.</p> | Open |
| SIF-005 | <p>MPI to meet with Mark Edwards and SNZ to understand and discuss in more detail the s9(2)(ba)(i)</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> | <p>Closed – the meeting has been held. This is a complex area and requires detailed consideration to determine how best to address it. In the first instance, we are focusing on work to address the interface of the Fisheries Act and the Resource Management Act. We are also considering operational changes to how we implement the current rules.</p> |



Fisheries New Zealand

Te Kaitiaki

Seafood Industry Forum

Material for agenda items 4, 5 and 7

9 December 2024



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Agenda Item 4: Seafood Industry Forum Subgroup report back

Purpose

- Provide update to Forum on progress made on Fisheries Reform Work Areas (Columns 1 and 2) :
 - 1) Legislative timeline for potential Fisheries Reform Bill to be passed by August 2026
 - 2) High-level overview of potential proposals
 - 3) Proposed Fisheries Reform 2025 consultation approach
 - 4) RMA-Fisheries Act interface
 - 5) Progress update on remaining items in Column 1 and Column 2 (Detail on [separate A3](#)).

s9(2)(g)(i), s9(2)(f)(iv)

Key points:

- On track
- Consultation February/March 2025

s9(2)(g)(i), s9(2)(f)(iv)

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Proposed Fisheries Reform 2025 consultation approach

- The consultation will be primarily online.
- MPI plans to attend Iwi Fisheries Forums in person where possible and this could present some opportunities for in person meetings with industry.
- MPI is open to arranging industry specific online sessions if this is of interest.
- Where there are regular industry meetings which MPI/Fisheries New Zealand attends, and industry would like to discuss the proposals, we will work to accommodate this.

| High-level draft timeline | |
|---------------------------|---|
| February | <ul style="list-style-type: none">• The consultation period will open with release of the public discussion document.• On release of the consultation document, the consultation period will begin and the time for submissions will open and run for approximately 6 weeks. |
| Late February | <ul style="list-style-type: none">• One week will be allowed before any public online drop-in sessions take place to give people time to read and absorb the document. |
| March | <ul style="list-style-type: none">• After this first week, a series of public online drop-in sessions will begin to enable people to hear about the proposals, ask questions, and share views. Participants will need to register for sessions.• There will be 3 to 4 public online drop-in sessions spread throughout the consultation period and held at a range of times and days to make them as accessible as possible. |

RMA–Fisheries Act interface

- Cabinet has agreed to amend the RMA–Fisheries Act interface to reduce regulatory overlap and provide certainty over how the RMA can control access to fisheries resources.
- We have provided advice to Ministers on the following options:
 - **Option 1:** Status quo
 - **Option 2:** Remove the ability of councils to control fishing for biodiversity (and related values) protection purposes under the RMA
 - **Option 3:** Clarify the extent to which councils can control fishing for biodiversity (and related values) protection purposes under the RMA
- Changes to the RMA–Fisheries Act interface will be progressed via the second Resource Management Amendment Bill.
- We anticipate that the Bill will be introduced to Parliament in mid-December 2024. The select committee phase will likely begin from early 2025. This will be an opportunity to make submissions on the Bill.

Progress update on remaining items in Columns 1 and 2

| Ref | Column 1 – Operational and regulatory | Status | Ref | Column 2 – Targeted Legislative change | Status |
|---|--|---|-------|---|--|
| Commercial fisheries – management stock, catch and protected species interactions | | | | | |
| 1.1 | Separate management approaches for shared and non-shared (i.e. commercial only) stocks | On track - Stock prioritisation for review continues. Work also identified possible legislative changes to enable better low/ medium knowledge stock (LMK) management which will be consulted on early 2025. | 2.1 | Provision for two-tier regime, with certain stocks specified by schedule (e.g., non-shared). More agile management tools for those stocks, potentially including: | On track - Proposals to be consulted on early 2025. |
| 1.1.1 | Streamline and take a risk-based approach to Low-Medium Knowledge (LMK) stock management approach. | | 2.1.1 | Multi-year total allowable catch setting | |
| 1.1.2 | Trial new approaches in sustainability round Oct 2024. | COMPLETED. Trialled LEA3. | 2.1.2 | Shelving policy framework | |
| 1.2 | Further implement risk-based approach to managing environmental effects of fishing (including protected species interactions). | On track - Industry / government working group have agreed major framework components, settings and implementation being developed. Industry / government working group input Q3 FY 24/25. | 2.1.3 | Pre-set decision rules | |
| | | | 2.1.4 | Certain technical decisions move from Minister to MPI | |
| | | | 2.2 | ACE carryover for Rock Lobster | |
| On-board cameras | | | | | |
| s9(2)(g)(i) | | On track - Planning underway to implement the approach by mid-2025. | 2.3 | Enhance camera footage protections (resolving privacy and commercial sensitivities including consideration of applicability of OIA). | On track - Proposals to be consulted on early 2025. |
| 1.4 | Continue progressing opportunities for camera verified data to generate more value to industry and fisheries management (relates to other actions in table). | CLOSED – progressed by other workstreams in 2024 (1.18-1.19, 1.1.1, 1.2 and 2.5) | | | |
| 1.5 | Develop systems for fishers to view their footage. | On track – fishers are able to request access to footage via email under the OIA/Privacy Act. Possible technology solutions are being explored. | | | |
| Cost recovery levies | | | | | |
| 1.6 | Hold 24/25 cost recovery levies at or below 23/24 levels and progress work in short term to identify further savings. | COMPLETED – 24/25 cost recovery levies are set below 23/24 level. Further savings identified for albacore and skipjack for 24/25 levies. New process embedded to smooth non-QMS species unders and overs. | 2.4 | Legislate changes if required to Act and /or regulations. | On track - No changes in 2024, no Act changes planned. Changes to be progressed prior to 25/26 levy setting to Cost Recovery rules (regulations) for cameras and to recognise the international benefit of albacore research. |
| 1.7 | Annual report to levy payers to ensure transparency. | On track - for release in December. | | | |
| 1.8 | Industry / Government discussion on service levels for 2024/25 levies. | COMPLETED – Discussion on 2025/26 service levels held 30 August 2024 | | | |
| 1.9 | Explore opportunities with the Department of Conservation (DoC) to clarify protocols for determining which projects should be funded under conservation services and fisheries services. | On track – FNZ and DOC have discussed desired state and updated approach is being developed, to be reflected in service work planning and implemented in 25/26 financial year. | | | |

Progress update on remaining items in Columns 1 and 2 cont.

| Landings and discards | | | | | |
|-------------------------------|---|---|-----|---|---|
| 1.10 | Extend transitional expiry date of existing landing exceptions by two-years from commencement (timeframe and delivery subject to legislative vehicle). | On track - PIRSA has been reported back to the House. Next step is 2 nd reading in the House. | 2.5 | Add flexibility to the landings and discards framework for monitored returns (camera or observer) to sea. | On track - Proposals for introducing monitored return exceptions developed and consultation planned for early 2025. |
| 1.11 | Greater consideration of the flexibility available within the current regime. | On track - work is underway so fishers have more options for dealing with catch. | | | |
| 1.12 | Progress, where possible under existing legislation, exceptions for predated, unavoidably damaged fish and other fish causing operational difficulties. | | | | |
| 1.13 | Clarify definition of when a fish is considered caught. | On track - Guidance on accidental loss is being prepared and tested with industry working group. Expected to be released in Q3 FY 24/25. | | | |
| Access to fishing grounds | | | | | |
| 1.14 | Consideration of approaches to provide more certainty about bottom trawling. | On-track - Industry has work underway. | 2.6 | Address Fisheries Act and Resource Management Act interface. | On track - with Ministers |
| Fisheries regulations | | | | | |
| 1.15 | Progress enabling data transmission cables (net sonde cables). | On track - Advice on regulatory amendment being drafted for Q3 FY 24/25. Depending on Cabinet and Ministerial decisions, potential implementation in Q2 FY 25/26. | 2.7 | Remove redundant regulations and/or regulations which are overly complex, duplicative, or impose unnecessary compliance cost (informed by list industry will provide to MPI). | On track - The suggestions relating to rock lobster reporting and section 111 of the Fisheries Act 1996 being scoped as separate processes. Increase the threshold for suspension of fishing permit for non-payment of deemed values (consultation in early 2025) Consultation on regulatory amendments in Q4 FY 24/25. |
| 1.16 | Progress enabling use of underwater breathing apparatus (UBA) (including for shellfish). | On track - Engagement with Iwi Forums complete. Next step Ministerial briefing. | | | |
| 1.17 | Deliver electronic reporting for amateur charter vessels (ACVs). | COMPLETED – Roll out of ACV app commenced from 1 Nov, and from 13 Dec, ACV operators must report via the app. | | | |
| Data availability and sharing | | | | | |
| 1.18 | 'Right time right place' pilot project to support more selective fishing using data insights. | COMPLETED – FNZ funded proof of concept (project). Has been presented to Government and industry. Proof of concept validated the approach and potential and benefits of use. Further funding would be required to operationalise. | | | |
| 1.19 | Build on data sharing pilot with surface long line fleet on seabird captures. | COMPLETED – Planned next step is a pilot project to build a digital platform to share protected species information with the surface longline fleet. | | | |

Agenda Item 5: Aquaculture update

s9(2)(g)(i), s9(2)(f)(iv)

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Agenda Item 7: Seafood Industry Forum – looking ahead to 2025

- The Industry / Government working groups and the Forum Subgroup have been focused on developing proposals for a potential Fisheries Bill. This stage is nearing completion with public consultation on proposals planned for early 2025.
- Opportunity to consider focus areas for Seafood Industry Forum and the role of the Forum Subgroup (Industry / Government Group chaired by CE Seafood NZ and DDG Fisheries New Zealand) for 2025.
- Meeting cadence:
 - Seafood Industry Forum (Forum) meeting quarterly, propose first meeting mid / late March 2025
 - Industry / Government Group chaired by Lisa Futschek and Dan Bolger to meet about a month prior to Forum meeting
 - Additional Industry / Government meetings can be scheduled on a case-by-case basis
 - CE Check-ins to be scheduled when requested / required.
- What would members like to discuss in 2025?

Fisheries Reform Work Areas – Progress Update – Seafood Industry Forum 9 December

Please note – the Columns 1-3 refer to the A3 that was shared with industry at the Forum meeting on 4 June. Forum Subgroup is progressing Columns 1&2 and industry is progressing and prioritising s9(2)(f)(iv)

| Ref | Column 1 – Operational and regulatory | Status | Ref | Column 2 – Targeted Legislative change | Status |
|---|--|--|-------|---|---|
| Commercial fisheries – management stock, catch and protected species interactions | | | | | |
| 1.1 | Separate management approaches for shared and non-shared (i.e. commercial only) stocks | On track - Stock prioritisation for review continues. Work also identified possible legislative changes to enable better low/ medium knowledge stock (LMK) management which will be consulted on early 2025. | 2.1 | Provision for two-tier regime, with certain stocks specified by schedule (e.g., non-shared). More agile management tools for those stocks, potentially including: | On track - Proposals to be consulted on early 2025. |
| 1.1.1 | Streamline and take a risk-based approach to Low-Medium Knowledge (LMK) stock management approach. | | 2.1.1 | Multi-year total allowable catch setting | |
| 1.1.2 | Trial new approaches in sustainability round Oct 2024. | COMPLETED. Trialled LEA3. | 2.1.2 | Shelving policy framework | |
| 1.2 | Further implement risk-based approach to managing environmental effects of fishing (including protected species interactions). | On track - Industry / government working group have agreed major framework components, settings and implementation being developed. Industry / government working group input Q3 FY 24/25. | 2.1.3 | Pre-set decision rules | |
| | | | 2.1.4 | Certain technical decisions move from Minister to MPI | |
| | | | 2.2 | ACE carryover for Rock Lobster | |
| On-board cameras | | | | | |
| 1.3 | s9(2)(g)(i) | On track - Planning underway to implement the approach by mid-2025. | 2.3 | Enhance camera footage protections (resolving privacy and commercial sensitivities including consideration of applicability of OIA). | On track - Proposals to be consulted on early 2025. |
| 1.4 | Continue progressing opportunities for camera verified data to generate more value to industry and fisheries management (relates to other actions in table). | CLOSED – progressed by other workstreams in 2024 (1.18-1.19, 1.1.1, 1.2 and 2.5) | | | |
| 1.5 | Develop systems for fishers to view their footage. | On track – fishers are able to request access to footage via email under the OIA/Privacy Act. Possible technology solutions are being explored. | | | |
| Cost recovery levies | | | | | |
| 1.6 | Hold 24/25 cost recovery levies at or below 23/24 levels and progress work in short term to identify further savings. | COMPLETED – 24/25 cost recovery levies are set below 23/24 level. Further savings identified for albacore and skipjack for 24/25 levies. New process embedded to smooth non-QMS species unders and overs. | 2.4 | Legislate changes if required to Act and /or regulations. | On track - No changes in 2024, no Act changes planned. Changes to be progressed prior to 25/26 levy setting to Cost Recovery rules (regulations) for cameras and to recognise the international benefit of albacore research. |
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| Landings and discards | | | | | |
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s9(2)(f)(iv)

FloMo Release-At-Depth (RaD) Technology

Opportunity

FloMo technology has optional functionality to open the codend at depth to release not only protected species but also unwanted catch, allowing fishers to maximise financial returns on fishing quota, grow export earnings and promoting ecosystem health.

FloMo explained

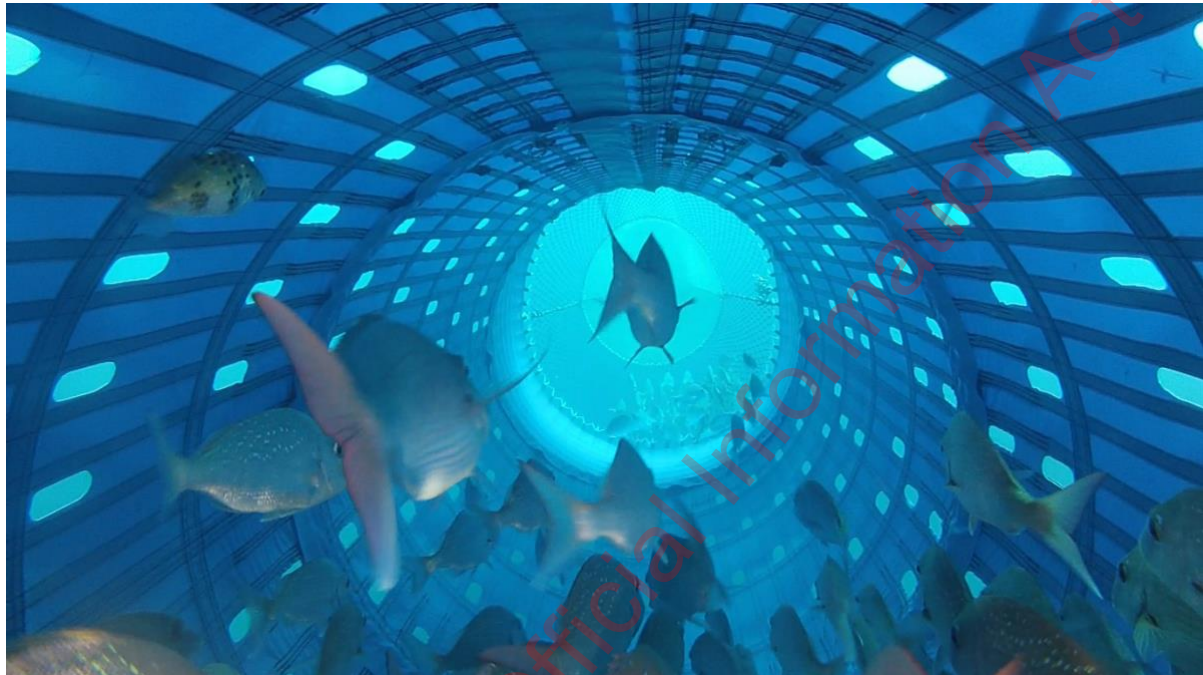
- FloMo codends harvest fish in an aquarium-like environment, keeping the catch alive within the trawl environment.
- FloMo can be fitted with functionality to release the codend at depth, enabling the fisher to release endangered, threatened, or protected species if they accidentally enter the trawl environment.
- FloMo has generic regulatory approval for >95% of New Zealand's commercial fish species and fishing areas. The Fisheries Amendment Act 2022 enables fishers to use FloMo's Release-at-Depth (RaD) functionality to release protected species.
- The RaD mechanism is triggered manually from the vessel's wheelhouse, and it relies on real-time catch-sensing technology to inform the fisher of what's in the codend. Various catch sensors are commercially available, and data transmission cables are the most reliable communication method between in-trawl sensors and the wheelhouse.
- As catch-sensing technology matures, skippers will be able to assess their catch composition (both species and size) at any time during the trawl. Smart software will be able to provide a dashboard overview of key metrics in real-time, such as catch composition, current market value of the catch, return per kilo against ACE, etc. This will enable skippers to make informed fishing decisions, such as releasing all catch at-depth to preserve valuable quota if a low-value catch composition or a choke species (i.e. a deemed value problem) has been detected.
- FloMo's RaD is a tool that facilitates more precise fish harvesting for fishers, allowing unwanted catch to live for another day and thus promoting overall ecosystem health, biomass growth and overall healthier fish stocks. In the longer term this will lead to higher TACC's and increased export earnings for the country.

Next steps

- FloMo will be made commercially available to NZ fishers in 2025. Additional regulatory approval is required if fishers want to use the RaD functionality routinely and not just for protected species. We seek clarity from the regulator regarding the requirements for obtaining such approval.
- The prohibition on the use of Net Sonde Cables must be repealed.

Appendix

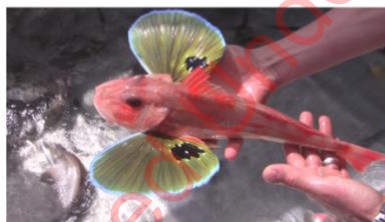
Appendix 1—Image of FloMo's aquarium-like in-trawl environment.



Appendix 2—Examples of FloMo benefits

FloMo improves catch quality & reduces bycatch

Protect



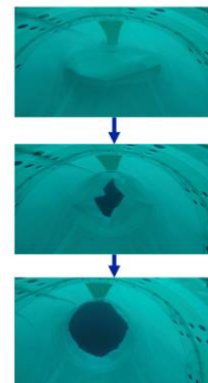
- ✓ Longline-quality catch
- ✓ Better shelf life
- ✓ Price premiums
- ✓ Better discard survivability

Select



- ✓ Select for size & species

Release



- ✓ Safeguard endangered, threatened, or protected species.

Released Under the Official Information Act 1982

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Fisheries Reform Work Areas – Progress Update – Seafood Industry Forum 9 December

Please note – the Columns 1-3 refer to the A3 that was shared with industry at the Forum meeting on 4 June. Forum Subgroup is progressing Columns 1&2 and industry is progressing and prioritising s9(2)(f)(iv)

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s9(2)(f)(iv)



BRIEF: Meeting with Seafood New Zealand: Seafood Industry Forum Update

| | | | |
|----------|---|----------------|---------------|
| To: | Hon Shane Jones, Minister for Oceans and Fisheries | | |
| From | Dan Bolger, Deputy Director-General Fisheries New Zealand | | |
| Date | 2 August 2024 | MPI Reference | MO24-0395 |
| Priority | High | Security Level | In Confidence |

Meeting with Seafood New Zealand

- You are meeting with Seafood New Zealand on Monday 5 August. We expect them to seek your views on the pathways for work discussed at the Seafood Industry Forum (the Forum).

Seafood Industry Forum 4 June meeting

- You attended part of the 4 June Forum meeting and indicated your support for a potential Bill to enable more responsive and agile fisheries management through targeted legislative change (column 1 and column 2 refer AM24-0534 *Seafood Industry Forum*). You have a draft Cabinet submission seeking agreement to the Fisheries Reform work programme to support the wild-caught seafood sector.
- Industry indicated at the 4 June meeting that they would work with officials on the short term and targeted legislative changes (column 1 and column 2) and would also progress separate work on fuller system change s9(2)(f)(iv) in a longer timeframe.

Development of targeted legislative change proposals

- Since the 4 June Forum meeting, the Forum subgroup has been meeting approximately every two weeks to discuss options for targeted legislative change.
- The material brought to the Forum Subgroup for discussion is being developed by government and Seafood New Zealand working groups who are collaboratively developing and testing ideas. To date the focus of the working groups has been on exploring more agile and enabling fisheries management tools for commercially harvested stocks and developing a more workable option for the landing and discarding of fish. Good progress is being made.
- Officials are maintaining a focus on the targeted legislative change, as tasked, as delivering a potential bill by August 2026 will require substantive work by government and industry to be completed by the end of this year.

Cost Recovery

- Cost recovery has been a topic of conversation at the Seafood Industry Forum with industry members seeking a reduction in costs. You have recently approved final levies of \$39.5 million for 2024/25 (a 4.4 percent reduction on 2023/24) for submission for Cabinet decision in late August. We are continuing to look for opportunities for further cost efficiencies.
- We undertook at a recent meeting with Seafood company Chief Executives (Wednesday 31 July) to provide advice to you on s9(2)(g)(i), s9(2)(f)(iv). We will be reporting to you shortly on this.

From: [Lisa Futschek](#)
To: s9(2)(a)
Subject: RE: SJC1164 | Seafood Industry Forum Process and Proposals
Date: Thursday, 31 October 2024 3:29:29 pm
Attachments: [image001.gif](#)
[image002.png](#)

Great. Thanks s9(2)(a)

From: s9(2)(a) <s9(2)(a)@parliament.govt.nz>
Sent: Thursday, October 31, 2024 3:25 PM
To: Lisa Futschek <lisa.futschek@seafood.org.nz>
Cc: Shane Jones <Shane.Jones@parliament.govt.nz>
Subject: RE: SJC1164 | Seafood Industry Forum Process and Proposals

Thanks Lisa,

Those numbers sound fine.

The Minister will have Officials from Fisheries New Zealand in attendance.

Kind regards,
s9(2)(a)



s9(2)(a)

**Private Secretary (Fisheries and Aquaculture) | Office of Hon
Shane Jones**

Minister for Oceans and Fisheries | Minister for Regional Development |
Minister for Resources | Associate Minister of Finance | Associate Minister
for Energy

Phone: s9(2)(a)

Mobile: s9(2)(a)

Email: s9(2)(a) <s9(2)(a)@parliament.govt.nz>

From: Lisa Futschek <lisa.futschek@seafood.org.nz>
Sent: Thursday, 31 October 2024 3:17 PM
To: s9(2)(a) <s9(2)(a)@parliament.govt.nz>
Cc: Shane Jones <Shane.Jones@parliament.govt.nz>
Subject: RE: SJC1164 | Seafood Industry Forum Process and Proposals

Kia ora s9(2)(a)

Thanks so much for the rapid follow-up and advice of a meeting slot.

Yes please, 8.30 – 9.15am works very well for us. As I envisage the discussion will need get into quite technical territory, I propose to bring Seafood NZ colleagues who have engaged fully in the various expert working groups: s9(2)(a) , s9(2)(a) and s9(2)(a) . But if that's too many let me know and I can trim.

Are you able to advise whether officials or others will also be in attendance?

Thanks again s9(2)(a) much appreciated.

Ngā mihi,

Lisa

Lisa Futschek

Chief Executive

A Level 12, 7 Waterloo Quay, Pipitea, Wellington 6011

T +64 (0)21 609 409

W seafood.co.nz

signature_203064922



From: s9(2)(a) <[s9\(2\)\(a\)@parliament.govt.nz](mailto:s9(2)(a)@parliament.govt.nz)>

Sent: Thursday, October 31, 2024 11:45 AM

To: Lisa Futschek <lisa.futschek@seafood.org.nz>

Cc: Shane Jones <Shane.Jones@parliament.govt.nz>

Subject: RE: SJC1164 | Seafood Industry Forum Process and Proposals

Good morning Lisa,

Thank you for the letter outlining the industries perspective on the proposed legislative changes.

The Minister would like to accept your invitation to meet. We have set aside time in the Ministers diary next Tuesday at 8:30-9:15am, please let me know if you have any issues with timing of the meeting.

Will it just be yourself attending?

As per usual, if you can please arrive at Parliament approximately 15 minutes before to get through security and signed in.

Kind regards,

s9(2)(a)



s9(2)(a)

Private Secretary (Fisheries and Aquaculture) | Office of Hon Shane Jones

Minister for Oceans and Fisheries | Minister for Regional Development |
Minister for Resources | Associate Minister of Finance | Associate Minister
for Energy

Phone: s9(2)(a)

Mobile: s9(2)(a)

Email: s9(2)(a) [@parliament.govt.nz](mailto:s9(2)(a)@parliament.govt.nz)

From: Lisa Futschek <lisa.futschek@seafood.org.nz>

Sent: Wednesday, 30 October 2024 6:28 PM

To: Shane Jones <Shane.Jones@parliament.govt.nz>

Subject: SJC1164 | Seafood Industry Forum Process and Proposals

Tēnā koe Minister.

Attached is a letter containing industry perspectives on the proposals identified by the Forum for potential legislative change ('Column two'), which have been worked on collaboratively between officials and industry.

We also highlight priority matters for the industry which are not yet being progressed.

As suggested in the letter, we would welcome the opportunity to discuss the range of matters with you.

Ngā mihi nui,

Lisa Futschek

Chief Executive

A Level 12, 7 Waterloo Quay, Pipitea, Wellington 6011

T +64 (0)21 609 409

W seafood.co.nz

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Level 12
7 Waterloo Quay, Pipitea
Wellington 6011
PO Box 297
Wellington 6140
NEW ZEALAND

Hon Shane Jones
Minister for Oceans and Fisheries

Tēnā koe e te Minita

Re: Seafood Industry Forum Process and Proposals

We write to express our appreciation for the opportunity to work with your officials on the development of proposals with the objective of enhancing the ongoing profitability and productivity of the seafood sector. Our aspiration in this process is to develop enduring policy that will enhance the sustainable utilisation of our fisheries. Overall, this experience has been positive and showcases the progress that can be made when we work together.

Throughout the year we have worked collaboratively to address priority areas of concern for the industry. Unsurprisingly, there are differing views on many of these issues. Initial proposals were subject to considerable analysis and debate. In some cases, this resulted in agreement to the initial proposals; in others, there has been measured compromise from one or both parties; and in several, the proposals have not been progressed at all. We consider that the ability to workshop various perspectives through the Forum process has resulted in a robust set of options that collectively deliver on the objective.

The key priority areas initially identified by the Forum for potential legislative change ('Column two') were:

1. Provision for two-tier regime, with certain stocks specified by schedule (e.g., non-shared). More agile management tools for those stocks, potentially including:
 - Multi-year total allowable catch setting
 - Shelving policy framework
 - Pre-set decision rules
 - Certain technical decisions move from Minister to MPI
 - ACE carryover for Rock Lobster
2. Enhance camera footage protections (resolving privacy and commercial sensitivities including consideration of applicability of OIA).
3. Add flexibility to the landings and discards framework for monitored returns (camera or observer) to sea.
4. Address Fisheries Act and Resource Management Act interface.
5. Remove redundant regulations and/or regulations which are overly complex, duplicative, or impose unnecessary compliance cost (informed by list industry will provide to MPI).

As stated above, the collaborative working process has meant that several of these initial proposals have undergone some transformation.

As a culmination of the many months of joint effort, we understand that you have been advised on the following proposals:

1. Catch limit setting:

- a) Multi-year TAC adjustments – both phased and fixed period

Industry comment: We endorse these proposals in their entirety, provided they are enabled for all stocks and any limitations on use are at the discretion of the decision-maker.

- b) Decision rules – set by the Minister with TAC adjustments delegated to the CE

Industry comment: We endorse this proposal, again, provided that they are enabled for use in all stocks and any limitations are at the discretion of the decision-maker.

- c) Defining low knowledge stocks and creating a new TAC provision to manage these

Industry comment: We strongly endorse the intent here and recognise the difficulties in implementation to ensure the integrity of the QMS is maintained. We would appreciate continued involvement in developing the details of this proposal.

- d) Better recognition for social, cultural and economic factors when setting a TAC for a rebuilding stock

Industry comment: We strongly endorse the intent here and have appreciated the robust discussion on the challenges associated with implementing this.

- e) Recognition of industry non-regulatory sustainability measures when setting a sustainability measure under the Act. Proposals:

- i. Minister may consider all non-regulatory sustainability measures
- ii. Minister must consider a non-regulatory sustainability measure of a type specified in a notice (initially ACE shelving and catch spreading)
- iii. Scope for both i. and ii.

Industry comment: We note that there is a difference in views between industry and officials on the approach to taking non-regulatory industry measures into account in decision-making. Industry prefers an approach that would require the Minister to consider any non-regulatory sustainability measure (noting the subsequent decision about the weight afforded to the measure would be at the discretion of the Minister).

Officials have not been supportive of this broad scope, noting concerns with potential workload of analysing measures for advice papers and the uncertainty associated with implementation of and the effects of measures other than ACE shelving and catch spreading.

Option iii of the above proposals provides a compromise position where the Minister must consider non-regulatory ACE shelving and catch spreading and/or may consider others. We consider that option i alone would be insufficient to address our concerns and recognise the value of non-regulatory measures.

- f) More flexible ACE carry forward regime. Proposals:
 - i. 15% default limit on ACE carry forward for eligible stocks
 - ii. The Chief Executive can approve additional carry forward for a stock for one year with 75% of quota holder agreement

Industry comment: We initially pushed for only option ii and also inclusion of a permanent change to certain stocks based on a request from 75% of quota holders. This more permanent change would address issues with unused ACE in the GLM9 spat fishery, where the availability of spat is based on weather patterns. We would have preferred to see that included as an option for consultation, acknowledging the concerns about the resource required to implement and limited examples of potential benefits.

We endorse proposal ii as we consider this addresses the policy issue that generic settings do not provide fishers with an option to maximise the value of their asset in the case of unusual and exceptional circumstances (not sustainability related) that leave them unable to harvest their ACE in a year. We note that the options are not mutually exclusive and both could be implemented. We have not formed a position yet on option i, but initial feedback from the sector indicates little support for it.

- 2. Monitored Returns of QMS species. Proposals:
 - a) Allow return of all QMS species if monitored by observer or camera provided catch is balanced with ACE
 - b) Amend some existing landing exceptions
 - c) TACC adjustments to account for the difference in balancing requirements
 - d) Allow for return of QMS species at depth under certain conditions
 - e) Simplify observer authorised returns

Industry comment: Industry is generally interested in seeing more flexibility, enabling fishers the discretion to make decisions at-sea that best support the viability of their operations. While we have advocated for the general loosening of these provisions, in the first instance, we consider the verification capabilities provided by cameras (or observers) should enable this flexibility and are supportive of the monitored returns concept.

We note that the working group on this topic has traversed a wide range of proposals and approaches, and we have appreciated the robust debates and genuine engagement on this topic.

We have not had sufficient time to fully canvass fishers on this proposal, but based on the feedback received to date, our initial position is to endorse the proposal. Our main area of concern relates to ensuring TACCs are adjusted to account for the requirement to balance catch that hasn't previously been required. We would appreciate continued engagement with officials on this proposal to ensure the operational detail remains pragmatic and operationally feasible.

3. On-board cameras. Proposals relating to privacy concerns:
- a) Enhance status quo with operational and process improvements
 - b) Fisheries Act provision for meeting official information obligations through specified means

Industry comment: We have long advocated for there to be a clear exclusion of on-board camera footage from the provisions of the Official Information Act for the protection of fishers' privacy.

This workstream was not undertaken in collaboration with us (we received headline updates) so we cannot comment in detail. However, we understand that option b would result in there being no release of camera footage under the OIA. That being the case, we are supportive of this option as this would provide additional certainty for operators around the privacy and security of their footage.

We also understand that the specifics of these proposals have continued to be refined and may be slightly different. Our objective relating to these proposals remains focused on ensuring the privacy and security of footage from on board cameras.

Cost of cameras to industry: in addition to the proposals above, industry understands that the government intends that ^{s9(2)(f)(iv)}
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4. Rock lobster ACE Carry Forward. Proposals:
- a) Remove rock lobster stocks (both species) from Schedule 5A
 - b) Provide for up to 10% carry forward (single year, single QMA) with 75% quota owner support

Industry comment: We endorse proposal b as this reflects the proposals put forward by industry after considerable consultation with quota owners of rock lobster stocks. There is little industry support for the proposal to remove rock lobster stocks from Schedule 5A entirely.

We understand that your officials have provided you with comprehensive advice on the above proposals.

Other issues (not included in the above joint work):

Cost recovery system review

Cost recovery was identified as industry's highest priority area for change. We aspired to see a review of the cost recovery system, principles and rules. Officials made it clear that there was no appetite to progress this work. We are very disappointed with this and wish to see work relating to the cost recovery system progressed in the near future.

Cumulative spatial access loss


Early in the forum process cumulative spatial access loss was raised as a priority reform issue. This issue has serious impacts on industry through high uncertainty, erosion of confidence and reduced incentives to invest. Failure to take into account fisheries displacement causes sustainability issues including:

- localised depletion, loss of areas of productive capacity, and loss of catch
- economic impact through increased cost of travel time and lower catch rates
- increased competition and acrimony between commercial, recreational and non-commercial customary fishers
- interference with both the commercial and non-commercial components of the Fisheries Settlement.

Industry proposed an amendment to help address this issue. The proposed amendment does not restrict the use of any other provision but provides for matters to be taken into account by the decision maker.

Our understanding is that the amendment relating to cumulative spatial access loss is not being progressed because officials have indicated it would require significant resourcing when providing advice on a range of sustainability measures under the Act. We acknowledge that there may need to be some refinement or change in approach, but this is a significant issue that we wish to see being actively progressed.

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Meeting request

We would welcome the opportunity for Seafood New Zealand to meet with you to discuss the wide range of matters set out in this letter. Our comments set out above are based on what we understand your officials are reporting back to you based on our collaborative work. However, if that detail is at odds with our understanding, we request the ability to adjust our positions accordingly.

Nāku noa nā

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Lisa Futschek
Chief Executive
Seafood New Zealand

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Laws Lawson
Forum Sub-Group member &
Seafood New Zealand Director