

Observations & Opportunities

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Observations 12 months on?

- **Comparison of the food based primary sectors**

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- **Comparison of the food based primary sectors**

	Dairy	Kiwifruit	Wine	Meat	Seafood
% World sales					
Cooperation					
Investment					
Returns to producer					

The Dairy industry

- **1996 – 2010**

- Farm numbers < 35%
- Herd size > 300%
- Production/cow > 32%
- Factories < 85%
- Productivity > 500%
- Payout > 22%



The Dairy Industry

- **Cooperation**

- Industry Structure

- single seller Dairy Board & Cooperative Companies
 - Fonterra more integrated (92% of industry)

- Investment

- production, manufacturing
 - product development
 - marketing & markets

- Opportunities

- sharemilking structure



Seafood Sector Opportunities

- **Growth in Demand**

- World demand for seafood increasing
 - FAO estimate consumption > 35% over next 10 yrs
- Growth in aquaculture
 - NZ target \$1B 2025
 - Estimate Aquaculture will be 60% of global seafood production 2020
- Wild fish
 - Opportunities for growth
 - How do we increase TACC
 - How do we increase numbers of wild fish & then the TACC?



Seafood Sector Opportunities

- **Promote the Healthy Product**



Seafood Sector Opportunities

- **Promote the Healthy Product**

Healthiness					

- **Increase domestic consumption**
 - NZ is a 'meat & two vege culture'
 - Change the culture to increase seafood consumption



Seafood Sector Opportunities

- **Cooperation**

- Harvesting Processing Marketing

- wild fish harvesting Roughy & Toothfish

- marketing & processing in mussels

- Consider returns

- » high fuel prices

- » increased world aquaculture closer to market

- Research & Innovation

- review the role of Seafood Innovation Ltd

- Training

- significant threat to SITO



Seafood Sector Opportunities

- **Cooperation**
 - Fisheries Management
 - Managing our own Ship
 - Telling the same story
 - best promoter of the industry is the industry itself
 - measure and promote best practice
 - get permission to fish from the NZ public
 - Clean Streams Accord
 - overseas markets



How Do We Bank The Opportunities

- **Realise and understand the opportunities of cooperation**
 - forgo immediate personal benefit for long-term industry gain
- **SeaFIC**
 - role to coordinate those gains through cooperating with the Sector Groups/CSO's
 - engage with and advocate for the defined needs of the industry



