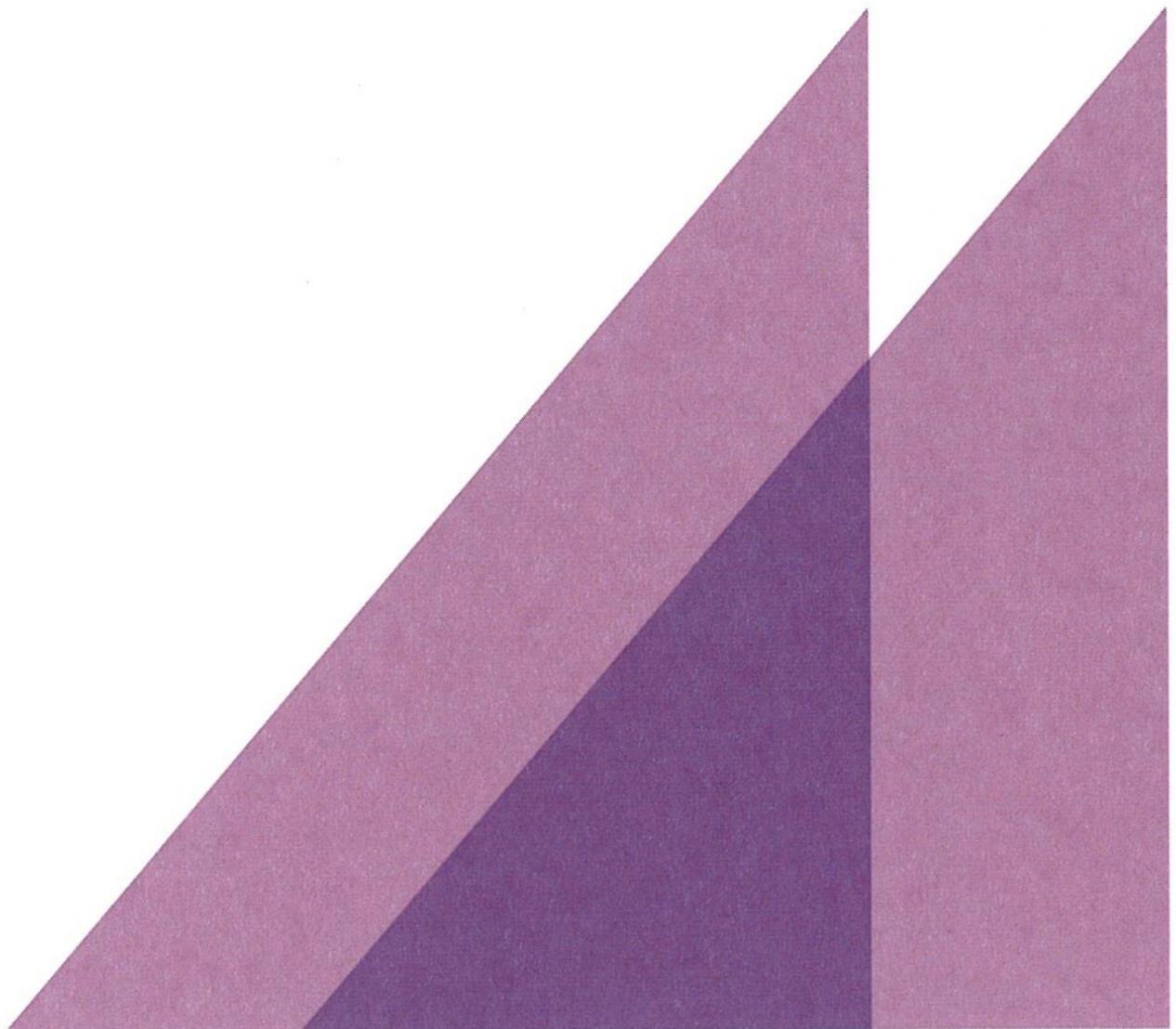


NSW OYSTER INDUSTRY STRATEGY



NSW Oyster Industry Strategic Plan Implementation Group

Progress Report - October 2017



NSW Oyster Industry Strategic Plan

Implementation Group - Progress report

October - 2017

Executive Summary

This report provides a summary of key initiatives and activities that have been progressed by the IG since it was established by Shellfish Committee. It also includes those initiatives and actions undertaken by industry and other key stakeholders in realising the strategic priorities identified in the NSW Oyster Industry Strategic Plan (Plan). The direct influence of the Plan and IG in realising these priorities varies, however it is without question that both the Plan and the actions of the IG have had a positive influence on industry, and enhanced the industry's capacity to drive change.

It is view of the IG that given time the actions arising from the strategic priorities of Plan will generate the necessary momentum within the broader NSW oyster industry for the key desired outcomes of the Plan to become key components of the culture of the NSW oyster industry.

Delivering the Strategic Priorities identified in the Plan

Significant momentum has been generated and progress made in the delivery of the Production System, Environment & Disease and Policy outcome areas identified in the Plan. It is clear that the desired outcomes in these areas identified in the Plan have been broadly embraced by industry and other key stakeholders. While significant progress has been made and action has been initiated, significant work still remains to be progressed in a number of key areas.

1. Introduction

In May 2015 the NSW Oyster Industry Strategy (Plan) was finalised in cooperation with the NSW Oyster Strategy Working Group. To assist the realisation of the priorities identified in the Plan an Implementation Group (IG) was formed in August 2015 by NSW Shellfish Committee (SC).

This report provides a summary of key activities and initiatives that have been progressed by the IG since it was established by SC. The direct influence of the Plan and IG in these initiatives varies, however it is without question that both the Plan and the actions of the IG have had a positive influence on industry and enhanced the industry's capacity to drive change.

2. Reporting Structure & Preparation

The IG has a broad geographic representation, and is well briefed in terms of access to information. IG members have also acted as a valuable conduit to extend information to other farmers.

The IG reports directly to Shellfish Committee regarding progress in achieving the strategic priorities of the Strategic Plan.

Implementation Group Membership

| Member | Estuary |
|------------------------------|-------------------------------|
| Tony Troup (Chair) | Camden Haven River |
| Anthony Sciacca | Wallis Lake |
| Richard Hamlyn-Harris | Port Stephens |
| Noel Baggaley | Tweed/Brunswick Rivers |
| Shane Buckley | Wapengo lagoon |
| Kel Henry | Wonboyn lake |
| Ian Crisp | Manning River |
| Brandon Armstrong | Camden Haven/ Nambucca Rivers |
| Kevin McAsh | Clyde River |
| Dominic Boyton | Merimbula Lake |
| Andy Myers | OceanWatch Australia |
| Andy Baker (previous member) | Pambula Lake |

Secretarial support provided by NSW DPI.

Report Preparation

This report was prepared by the IG, with input from a number of organisations, including:

- Select Oyster Company (SOCo)
- NSW DPI
- NSW Food Authority (NSWFA)
- NSW Farmers Association (NSWF)
- Aquaculture Research Advisory Committee (ARAC)
- OceanWatch Australia (OW)
- NSW Local Land Services NSW LLS
- Sapphire Coast Wilderness Oysters (SCWO)

3. Delivering Strategic Priorities

The Strategic Plan identified five areas where there was potential for considerable gains to be made by the NSW oyster industry. These areas (or themes) are described below. Under each theme a number of desired outcomes were identified and priority actions were assigned to assist in the realisation of these outcomes. The IG recognises that in a number of theme areas the industry is well advanced in meeting the outcomes identified in the Strategic Plan and in a number of instances the IG has taken action to reinforce the industry initiatives already underway. In other areas the IG has taken steps to initiate and progress key actions to facilitate the delivery of the theme outcomes identified in the Strategic Plan. The IG has worked closely with the OceanWatch (OW) to initiate and progress a number of key initiatives. Where appropriate the IG has also worked with other groups or organisations to achieve the objectives identified in the Strategic Plan. It is view of the IG that given time the on-going actions arising from the implementation of the Strategic Plan will generate the necessary momentum within the broader NSW oyster industry for the key desired outcomes of the Strategic Plan to become key components of the culture of the NSW oyster industry.

3.1. Theme Area: Production Systems

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|-------------------------|--|
| Outcomes Sought: | <ul style="list-style-type: none">• Resilient production systems• Consistent cost effective product• Consistent access to high quality oyster seed stock |
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| Priority Action: | <ol style="list-style-type: none">1. Increasing adoption by industry of technologies & practices2. On-going targeted R&D to provide a pipeline of innovation3. The breeding-hatchery-nursery system is commercially viable |
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Table 3.1a Activities undertaken to deliver desired Production System Outcomes

| Key Activities & Initiatives Undertaken: | Priority Action | Delivery | Status |
|---|------------------------|---|---------------|
| <ul style="list-style-type: none"> Information on innovations and new products is regularly featured by the Extension Officer, and product suppliers make frequent trips along the NSW coast. | 1 | OW IG Trade | On-going |
| <ul style="list-style-type: none"> Infrastructure suppliers actively working with farmers to improve production systems, leading to efficiency gains. | 2 | Suppliers | On-going |
| <ul style="list-style-type: none"> Greater industry connectedness stems from better access to news, internet, workshops and other networking forums, which allows information to be shared across estuaries, regions & states. | 1 2 | OW IG NSW DPI SOCo NSW LLS | On-going |
| <ul style="list-style-type: none"> Farming Together Grant obtained by SOCO with support of Implementation Group to open up potential to access spat from WA hatchery. | 3 | SOCo IG | In progress |
| <ul style="list-style-type: none"> NSW DPI working with South Australian hatcheries to finalise Import Risk Assessment to potentially access Pacific Oyster stock from SA hatcheries. | 3 | Industry NSW DPI SA Hatchery | In progress |
| <ul style="list-style-type: none"> Establishment of the Moruya Shellfish Hatchery. South Coast farmers are working with the local Council to establish a commercial Shellfish Hatchery at Moruya. | 3 | Industry Local Council | In progress |
| <ul style="list-style-type: none"> SOCo undertaking a workshop to review current funding model and investigate alternatives. Industry, hatcheries and NSW DPI will be participants. | 3 | SOCo | Completed |
| <ul style="list-style-type: none"> SOCo has initiated a program to improve farmers handling of juvenile stock, while increase distribution of SOCo stock to more farmers, and has also brought in experts to provide support for NSW hatcheries with funding from NSW LLS. | 1 | SOCo NSW LLS | In progress |
| <ul style="list-style-type: none"> A Farming Together Grant has been lodged to facilitate the assessment of Black Lip Oysters as an alternative oyster crop in QX affected estuaries in northern NSW. | 2 | Industry IG | Initiated |
| <ul style="list-style-type: none"> Hunter LLS working with farmers to develop farm profiles and providing grants to upgrade infrastructure. | 1 | NSW LLS | In progress |
| <ul style="list-style-type: none"> A number of digital farm management tools have been developed by trade and industry that will allow farmers to better manage stock and business activities. | 1 | Industry Trade NSW LLS | In progress |

Table 3.1b Progress in delivering the desired Production System Outcomes

| Desired Outcomes | Delivery Status |
|---|-----------------|
| Resilient production systems | Advanced |
| Consistent cost effective product | Advanced |
| Consistent access to high quality oyster seed stock | In progress |

3.2. Theme Area: Markets

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| Outcomes Sought: <ul style="list-style-type: none"> • Stronger industry led marketing • NSW oysters in demand & commercially valued for their quality & unique features |
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| Priority Action: <ul style="list-style-type: none"> 4. Encourage development of marketing skills & partnerships 5. Acceptance & use of grading standards widespread in industry |
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Table 3.2a Activities undertaken to deliver desired Markets Outcomes

| Key Activities & Initiatives Undertaken: | Priority Action | Delivery | Status |
|--|-----------------|----------------------------|-------------|
| <ul style="list-style-type: none"> • Marketing discussions were initiated at local sessions at the NSW LLS south coast travelling workshops. South coast workshops informed the content of the consultant brief for structure of the marketing workshop conducted at the NSW Oyster Conference. | 4 5 | IG NSW LLS | On-going |
| <ul style="list-style-type: none"> • Three prominent oyster marketing groups have emerged to service the industry in recent years. These groups are a result of industry and seafood wholesale sector initiative. | 4 5 | Industry Wholesale | In progress |
| <ul style="list-style-type: none"> • Grading standards were a focus area of the South Coast Estuary Workshops 2017. Increased acceptance of grading standards is also been driven through the trade marketing groups. | 5 | Trade NSW LLS IG | On-going |
| <ul style="list-style-type: none"> • Discussion opened with NSW Farmers Assoc regarding the incorporation of oysters within their country connections program, an oyster event was held in Sydney to launch the program. | 4 5 | NSW Farmers', IG | Completed |
| <ul style="list-style-type: none"> • Discussion opened regarding changing the "Sydney Rock Oyster" product name to "Rock Oysters", enabling the product name to be | 5 | NSW SC, NSW Farmers' | Initiated |

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| preceded by the regional name. eg Merimbula "Rock Oysters". It is recognised that support would be required from the Fish Names Committee. This matter to be progressed by the NSW SC and Farmers' Assn. | | | |
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Table 3.2b Progress in delivering the desired Markets Outcomes

| Desired Outcomes | Delivery Status |
|---|----------------------------------|
| Stronger industry led marketing | Initiated, NSW Farmers' to drive |
| NSW oysters in demand & commercially valued for their quality & unique features | In progress |

3.3. Theme Area: Environment & Disease

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| Outcomes Sought: | <ul style="list-style-type: none"> Oyster farmers can harvest more often and readily transfer oysters Effective & efficient biosecurity Environment stewardship |
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| Priority Action: | <ol style="list-style-type: none"> Shellfish Program & biosecurity arrangements optimises the times estuaries are open for harvest and oysters can be moved between them Targeted estuary rehabilitation Expand EMS to all estuaries |
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Table 3.3a Activities undertaken to deliver desired Environment & Diseases Outcomes

| Key Activities & Initiatives Undertaken: | Priority Action | Delivery | Status |
|--|-----------------|------------------------------|-------------|
| • Review of the NSW Shellfish Program undertaken as a result of Plan recommendation. | 6 | SC NSWFA | Completed |
| • NSW Food Authority implemented Harvest & Hold policy (& review). | 6 | SC NSWFA | Completed |
| • NSW Food Authority also working with The Yield to deploy additional sensors. | 6 | NSWFA Industry NSW DPI | In progress |
| • Tweed River / Terranora Lakes oyster farmers EMS developed & launched. | 8 | OW | Completed |
| • Sapphire Coast Wilderness Oysters & OceanWatch Australia providing EMS | 8 | SCWO OW | In progress |

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|---|--------|-------------------------------|-------------|
| implementation support to farmers on the south coast of NSW | | NSW LLS | |
| <ul style="list-style-type: none"> Hunter LLS, North Coast LLS, South East LLS, OceanWatch & Sapphire Coast Wilderness Oysters have facilitated grants to farmers to upgrade infrastructure & improve local water quality/amenity. | 7 8 | OW Industry NSW LLS | In progress |
| <ul style="list-style-type: none"> OceanWatch trialling the use of oyster shell waste for the restoration of natural oyster reefs & erosion control. | 7 | OW | In progress |
| <ul style="list-style-type: none"> NSW DPI & OzFish trialling QX resistant stock in the Richmond, for estuary rehabilitation & industry benefits. | 6 | NSW DPI NGO | In progress |
| <ul style="list-style-type: none"> Hunter LLS and NSW DPI undertaking research and initiating action at Wallis Lake to assist oyster production recovery. | 7 | NSW LLS NSW DPI | In progress |
| <ul style="list-style-type: none"> NSW oyster industry participating in development of the Aquatic Deed. | 6 | NSW DPI Industry | In progress |
| <ul style="list-style-type: none"> Enactment of new NSW Biosecurity Act. | 6 | NSW DPI | Completed |

Table 3.3b Progress in delivering the desired Environment & Diseases Outcomes

| Desired Outcome | Delivery Status |
|--|-----------------|
| Shellfish Program & biosecurity arrangements optimises the times estuaries are open for harvest and oysters can be moved between them. | Advanced |
| Effective & efficient biosecurity. | Advanced |
| Consistent access to high quality oyster seed stock. | In progress |

3.4. Theme Area: Industry Structure & Governance

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| Outcomes Sought: | <ul style="list-style-type: none"> Growers can access capital to develop their businesses New entrants attracted to industry Re-create effective advocacy voice Self-reliant & coordinated industry representation |
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| Priority Action: | <ul style="list-style-type: none"> 9. Improve ability to secure bank & other sources of finance 10. Reinvigorate linkages within & between industry & representative structures 11. Targeted capacity building of groups & individual growers |
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Table 3.4a Activities undertaken to deliver desired Industry Structure & Governance Outcomes

| Key Activities & Initiatives Undertaken: | Priority Action | Delivery | Status |
|---|------------------------|--------------------------------|---------------|
| <ul style="list-style-type: none"> Industry representation has improved markedly, and regional branches of NSW Farmers becoming more active. | 10 11 | Industry NSWF | On-going |
| <ul style="list-style-type: none"> Farming Together Grant application made by IG to progress bank & finance issues. | 9 | IG | Initiated |
| <ul style="list-style-type: none"> Various initiatives (Hunter LLS, Oyster Cloud & Smart Oysters) provide farm data which can be used to support finance applications. | 9 | Industry Trade | On-going |
| <ul style="list-style-type: none"> Communications plan developed & implemented to reduce negative interactions between rec. fishers & boaters with aquaculture leases (media releases, best-practice videos, lease stickers, Code of Conduct). | 11 | SC IG NSW DPI | In progress |
| <ul style="list-style-type: none"> Oyster extension officer looking to develop training pack for new industry entrants. | 11 | OW | In progress |
| <ul style="list-style-type: none"> Farmers encouraged to participate in leadership programs, led field-trips at the conference and also MC'd sessions. | 10 11 | Industry IG | Completed |
| <ul style="list-style-type: none"> Breeding program is increasing investor confidence by reducing production risks. | 11 | NSW DPI SOCo | In progress |

Table 3.4b Progress in delivering the desired Industry Structure & Governance Outcomes

| Desired Outcome | Delivery Status |
|--|------------------------|
| Growers can access capital to develop their businesses | Initiated |
| New entrants attracted to industry | On-going |
| Re-create effective advocacy voice | In progress |
| Self-reliant & coordinated industry representation | In progress |

3.5. Theme Area: Policy

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|-------------------------|--|
| Outcomes Sought: | <ul style="list-style-type: none"> • 100% leases available & used • Leases are secure & well managed • Effective, efficient and equitable food safety system & biosecurity system |
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| Priority Action: | 12. Review & improve Shellfish Program, biosecurity arrangements and the NSW Oyster Industry Sustainable Aquaculture Strategy |
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Table 3.5a Activities undertaken to deliver desired Policy Outcomes

| Key Activities & Initiatives Undertaken: | Priority Action | Delivery | Status |
|---|-----------------|--------------------------|-------------|
| <ul style="list-style-type: none"> • OISAS (3rd Revision) released in 2016. | 12 | NSWDPI SC Industry | Completed |
| <ul style="list-style-type: none"> • NSW DPI reviewing lease & permit procedures. The review is focusing on the following issues: <ul style="list-style-type: none"> ○ Permits Vs Licences and surrounding issues ○ Lease ownership / tenure ○ Public liability ○ Security bonds ○ Entry to industry requiring industry knowledge ○ Biosecurity | 12 | IG NSWDPI | In progress |
| <ul style="list-style-type: none"> • New Biosecurity Act | 12 | NSW DPI | Completed |

Table 3.5b Progress in delivering the desired Policy Outcomes

| Desired Outcome | Delivery Status |
|--|-----------------|
| 100% leases available & used | In progress |
| Leases are secure & well managed | Advanced |
| Effective, efficient and equitable food safety system & biosecurity system | Advanced |

4. Significant Outcome Areas Requiring Further Action

Significant momentum has been generated and progress made in the delivery of outcomes across outcome the theme areas identified in the Plan. It is also clear that the desired outcomes in these areas identified in the Plan have been broadly embraced by industry and other key stakeholders. While significant progress has been made and action has been initiated, significant work still remains to be progressed in a number of key areas. The areas that require focused action to realise the desired industry outcomes identified in the plan are summarised in Table 4 below.

Table 4. Key outcome areas and priority actions that require focused attention by industry stakeholders

| Theme Area | Desired Outcome | Priority Action |
|---------------------------------|--|--|
| Production Systems | Consistent access to high quality oyster seed stock | 3. The breeding-hatchery-nursery system is commercially viable |
| Markets | Stronger industry led marketing | 5. Acceptance & use of grading standards widespread in industry |
| Environment & Disease | Environmental stewardship | 8. Expand EMS to all estuaries |
| Industry Structure & Governance | Growers can access capital to develop their businesses | 9. Improve ability to secure bank & other sources of finance |
| Industry structure & governance | Self-reliant & coordinated industry representation | 10. Reinvigorate linkages within & between industry and representative structures |
| Policy | Leases are secure and well managed | 12. Review & improve Shellfish Program, biosecurity arrangements and the NSW Oyster Industry Sustainable Aquaculture Strategy* |

* NSW DPI Lease and Permit Review.