

Murihiku Southland Aquaculture Infrastructure and Supply Chain Pathway

PROJECT OUTLINE AND Q + A

Date: 20 March 2026

Project Summary:

The overall aim is **to develop an integrated infrastructure and transport approach to support the growth of a future expanded Murihiku Southland aquaculture industry**. This approach will involve assessment of current capabilities and capacity based on feedback from stakeholders and individuals, and will utilise valuable learnings gained from elsewhere. Using this information, we will develop future scenarios for growth and identify key infrastructure and transport projects which support and enable delivery of these scenarios.

Technical Advisory Group:

A Technical Advisory Group (TAG) has been established to provide independent, expert, and evidence-based technical advice to COIN South and Great South. The TAG exists to strengthen decision-making by applying industry expertise, rigorous analysis, and practical insight and is not a representative or advocacy body. While some members work for aquaculture related businesses, they have been appointed for their skills and experience and have agreed to act in the best interests of the regional aquaculture ecosystem. COIN South and Great South will manage any conflicts of interest.

Project Delivery:

The project's key deliverable is a report which will be delivered by mid-2026. The approach will have 4 stages delivered via 5 workstreams as detailed below. These workstreams split aquaculture to various areas of focus including the port, land planning, supply chain etc.

STAGE 1:	Gaining insights from elsewhere: This stage involves engagement with people and organisations from other established aquaculture destinations, notably Tasmania, Norway and Nelson/Blenheim. We want to identify key learnings and experiences and use them to develop Murihiku Southland's approach.
STAGE 2:	Current situation assessment: This stage ensures we understand our existing local industry. We will undertake a stocktake of existing infrastructure providers, transport logistics, and supply chain businesses servicing aquaculture and seafood industries and then validate these findings through engagement with these businesses.
STAGE 3:	Future demand identification and assessment: This stage requires us to engage with current and prospective aquaculture businesses to understand their future infrastructure and logistics requirements. This feedback will be used to develop scenarios for possible future demand. We will then assess how the region will meet these scenarios based on the stocktake undertaken and engagement with existing infrastructure providers, transport logistics, and supply chain businesses.
STAGE 4:	Plan development and implementation: The final stage focuses on identifying key projects or actions including repurposing existing assets, which collectively meet future demand scenarios. Individual projects will consider timing, funding, ownership, and risk and may be displayed spatially via maps.

WORKSTREAM	DESCRIPTION & GOALS	APPROACH
Maritime & Port Infrastructure	Understand and identify current infrastructure capabilities, constraints, and opportunities to support scaled aquaculture operations at the port.	Partnership approach with Southport and key stakeholders. Align with current haul out and vessel cleaning project being driven by Environment Southland. Engage with key stakeholders via workshops or one on one interviews.
Land-Based Infrastructure & Planning	Understand capacity and constraints from an industry perspective to inform land-based development opportunities (including core infrastructure requirements). This data will be used to inform Council LTPs and future spatial planning approaches. Identify opportunities for shared infrastructure across supply chain and opportunities to address regulatory constraints.	Partner with Invercargill City Council to align with their current mahi and approach. This could include a spatial planning workshop based around Bluff (or part of another process to allow multiple stakeholders, community and Bluff Community Board to be involved). Also, one on one interviews or workshops with key stakeholders to gain individual perspectives.
Transport & Logistics	Develop a clearer understanding of Southland's current and future logistics capability across air, sea, land and rail transport systems (inbound & outbound). This will be based on engagement with existing seafood exporters and aquaculture operators.	Based on stakeholder engagement, map the region's existing freight infrastructure and system and identify potential constraints that could emerge if aquaculture production increases. Ensure input from airlines, freight forwarders, and logistics providers on current cargo capacity and opportunities for expansion. This could be gained via one on one interviews.
Engineering & Marine Services	Understand capability and key gaps and priorities for development of engineering and marine services. This includes identification of transferrable skills and capability.	Confirm key current suppliers for aquaculture and seafood (start with Sanford, Ocean Beach and Ngai Tahu Seafood). Interview key suppliers to determine level of capability and capacity aligned to growth possibilities. Detail interest wider engineering business to pivot and support needed to build capability (capture info re workforce too). Identify regional capability development priorities and areas for early opportunity.
Insights & Benchmarking Leading Aqua Regions	Identify key learnings and experiences and use them to inform Murihiku Southland's approach. Assess how other regions have developed local supply chains as aquaculture scaled via development of case studies.	One on one interview with key people and organisations from established aquaculture destinations, notably Tasmania, Norway and Nelson/Blenheim. Develop case study examples of supply business, particularly manufacturing & engineering businesses who have pivoted from agriculture to aquaculture.

Q + A

Who is responsible for delivery of this project and how is it funded?

Great South (Southland Regional Development Agency) and COIN South are partnering to deliver this project and have allocated resources available to them accordingly. There are a number of other key partners including Invest New Zealand, Southland Business Chamber, local councils and MPI.

Where has this project come from?

This project was identified as a key priority in the recently released [Murihiku Southland Aquaculture Pathway 2025](#) which has five goals:

1. Ensure sustainable principles underpin growth.
2. Develop infrastructure and services to enable success.
3. Extend into the Open Ocean.
4. Grow the value of existing activity on land and water.
5. Diversify for value and resilience.

There are two projects associated with Goal 2 – *“Develop an integrated Infrastructure and Transport Plan”* (Project 2) and *“Undertake an assessment of current supply chain capability and capacity alongside a review of other ‘marine hubs’* (Project 4).”

How will the project be delivered?

Great South and COIN South staff will primarily deliver the project but will engage external expertise and contractors where required.

Who is going to be talked to?

Current and prospective aquaculture businesses will be engaged with as well as existing infrastructure providers, transport logistics, and supply chain businesses in the region. Individuals and organisations from other established aquaculture areas will also be consulted.

What type of aquaculture is included in this project?

The focus is on predominantly on salmon. However, it is acknowledged that infrastructure, transport and logistics is important for all aquaculture and seafood.




How will the results of this project be used?

1. The results of this project will help existing infrastructure providers, transport logistics, and supply chain businesses understand what might be required when, to meet identified demand. This may support them to identify when they may play a role, invest and/or scale up.
2. This project is also seen to be important for current and prospective aquaculture businesses, ensuring the environment they operate in will enable them to achieve their aspirations.
3. Results will support local and central government as they look to provide future fit for purpose infrastructure, amenities and facilities as well as inform their spatial planning which is required as part of the reform of the Resource Management Act currently underway.

Will my results be shared with everyone?

No. Insights will be treated confidentially and will be incorporated into an overarching analysis alongside feedback from other organisations. Individual organisations or participants will not be identified, particularly where information is sensitive.

More Information

 <p>https://greatsouth.nz/</p>	<p>Great South was established as the Southland Regional Development Agency in March 2019. Committed to driving economic, social and cultural growth, Great South has a clear mandate to leverage opportunities for Southland in the areas of economic and business development, tourism and events.</p> <p>Great South manages the two regional tourism organisations within Murihiku Southland, as well as central government’s Regional Business Partner network and deliver a range of events, regional initiatives, and government-funded contracts. Great South also owns Space Operations New Zealand Limited.</p> <p>In essence, the organisation funded by all of the region’s councils and key stakeholders, provides a unified voice for the region, striving towards a vision of even better lives through sustainable regional development.</p>
 <p>https://www.coinsouth.nz/</p>	<p>COIN South is a collaborative innovation network for Southland startups and businesses to grow and thrive. They have an incredible network of mentors, industry experts, alumni and coaches, and a can-do attitude. COIN South is focused on coaching individuals, businesses and emerging industry using startup methodology and innovation tools to ensure they support successful, profitable, and sustainable businesses, and connect startups and businesses with the right people, skills, and tools at the right time.</p>
 <p>https://murihikuaquaculture.nz/</p>	<p>Murihiku Southland aims to become a leading aquaculture region, grounded in sustainable aquaculture practices. Great South developed the Murihiku Southland Aquaculture Pathway 2025 in partnership with iwi, and on behalf of Murihiku Southland communities, businesses, councils and key stakeholders.</p> <p>The Pathway provides a collective view of opportunities based on multiple stakeholders’ insights. It articulates how Murihiku Southland prepares for an expanded industry, acknowledging it will take many years. This includes how the region supports and enables existing and new business, the role of regulation, importance for local people to benefit and for ongoing communication and education of the benefits of aquaculture to maintain social license. It articulates a pathway forward with 9 focus areas, 5 goals and 17 key actions.</p>

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