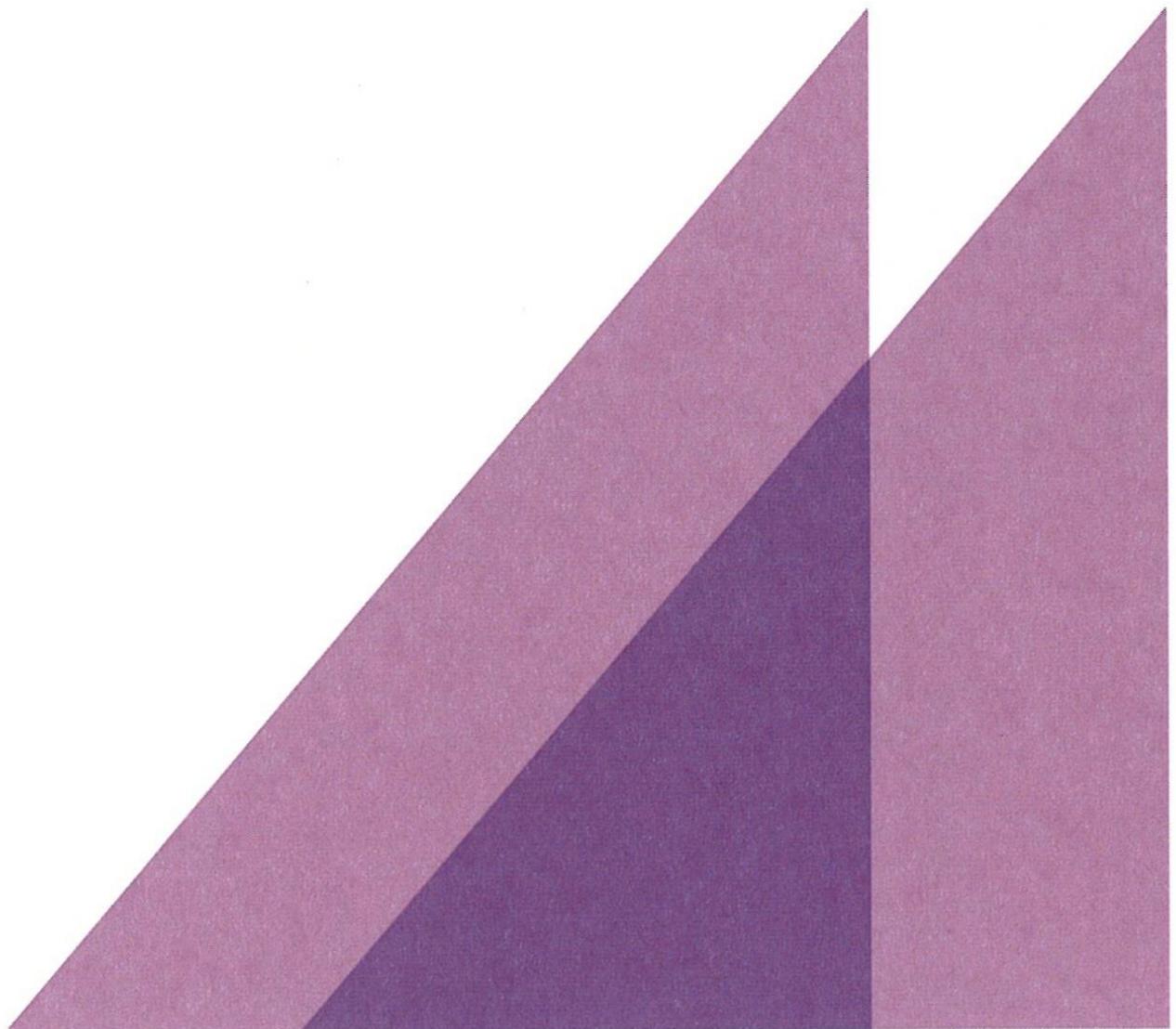


NSW OYSTER INDUSTRY STRATEGY



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

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

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

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

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"> 6. Shellfish Program & biosecurity arrangements optimises the times estuaries are open for harvest and oysters can be moved between them 7. Targeted estuary rehabilitation 8. 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

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

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: <ol style="list-style-type: none"> Improve ability to secure bank & other sources of finance Reinvigorate linkages within & between industry & representative structures Targeted capacity building of groups & individual growers

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 NSWFW	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

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.