
Southland Aquaculture Infrastructure & Supply Chain Pathway Report

Investment readiness and implementation pathway

Final report | June 2026

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1. Executive Summary

Murihiku Southland has always been shaped by the sea: by a rugged southern coastline, cold clear waters, and generations of people who have navigated, harvested and worked the marine environment.

That legacy underpins a seafood economy estimated at approximately \$272 million per year across wild catch fisheries and aquaculture. It is supported by established operators, practical marine capability, port activity, processing capacity and coastal communities with a deep connection to the moana.

That relationship with the sea is now becoming an investment proposition. Southland is not starting from a blank page. It has existing seafood production, marine infrastructure, port activity, processors, vessel operators, freight links and practical commercial capability. Its advantage is the combination of natural conditions and industrial competence: waters suited to premium aquaculture, a region that understands primary production, and businesses used to operating at distance, managing complexity and turning practical constraints into workable systems.

The question is whether that foundation is ready for the next stage of growth.

The prize is significant. The Murihiku Southland Aquaculture Pathway 2025 identifies aquaculture as a potential \$1 billion opportunity for the region. If managed well, that growth could diversify the economy, support skilled employment, strengthen coastal communities and allow more value to be retained locally. It could also help position Southland as a national leader in premium, sustainable seafood.

This report has been prepared to help move that opportunity from aspiration toward implementation. It sits under the Murihiku Southland Aquaculture Pathway 2025 and responds directly to the need for infrastructure and services that can enable future growth. Its purpose is to test whether the region is ready for the scale of aquaculture investment now being contemplated.

The report does not assume a single future. It tests four planning scenarios: the current baseline; a first step-change associated with early Hananui production; a fuller regional growth position based on existing activity plus full-scale Hananui; and a longer-term growth envelope in which further marine or land-based aquaculture follows once the sector has matured.

The scenarios show that Southland's challenge is not one isolated constraint. The risk is cumulative pressure across the system. Growth may increase demand for marine access, operational land, vessel servicing, processing, freight reliability, utilities and skilled labour. Some requirements will arise before production reaches full scale because land, infrastructure, workforce and consenting decisions take time.

The report also identifies evidence gaps that need to be closed before major investment decisions are made. Production timing is not yet settled. Future processing and freight requirements need more testing. The capacity of some enabling infrastructure is not yet clear. Marine servicing and haul-out requirements need a stronger business case. Scarce port-side land will need to be protected for activities that genuinely require water access. Workforce and housing pressures also need to be understood against a wider Southland economy that is already growing strongly.

Two enabling projects are particularly important in this context: the Syncrolift / haul-out and wash-down pathway at Bluff, and the resilience and capacity of the SH1 Invercargill to Bluff corridor. Both are early-stage but strategically important because they support the marine servicing, compliance, freight and logistics conditions required for future aquaculture growth.

The key finding is that Southland should prepare now, but invest carefully. Waiting until every production decision is certain would leave the region exposed to late, reactive and more expensive responses. It may also allow more of the value chain to be captured elsewhere. At

the same time, major capital commitments should not be made before demand, utilisation, ownership and funding are clear.

The recommended response is a staged investment-readiness pathway. Southland should confirm the evidence base, protect strategic options, align key partners and test trigger points for future investment. Where the case is mature enough, projects should move into feasibility, business case or funding work.

The next phase should also include a market-facing demand aggregation and supplier readiness function. This would translate aquaculture growth scenarios into clear demand signals for Southland businesses, including likely timing, scale, service requirements and capability gaps across processing, cold chain, freight, logistics, marine servicing, engineering, training and other supporting services. The ability for Southland to capture and retain value locally will depend not only on infrastructure being ready, but on whether the local businesses community can see the opportunity early enough to prepare, invest and participate.

This report should be used as a readiness and sequencing tool. It provides a basis for discussion with industry, iwi, councils, infrastructure providers, asset owners, funders and central government. It should help the region decide what needs to happen now, what should be prepared, and what should wait until the demand case is stronger.

2. About this Report

Purpose and scope

This report assesses Southland's current readiness to support the level of aquaculture growth now being contemplated. It focuses on the infrastructure, supply chain, workforce, social licence and investment coordination conditions that will determine whether growth can be converted into regional value.

The report does not confirm a final capital programme. Its scope is to convert the current evidence into a practical pathway by setting out the current position, testing possible growth scenarios, identifying pressure points and defining the further evidence needed before planning, funding or investment decisions are made.

Why the report has been prepared

This report has been prepared as part of the implementation of the Murihiku Southland Aquaculture Pathway 2025. The Pathway identifies aquaculture as a significant regional opportunity and includes a core goal to develop the infrastructure and services required to enable success.

The report responds to two priority actions: developing an integrated infrastructure and transport plan, and assessing current supply chain capability and capacity alongside learnings from other marine hubs. It is part of a wider pathway for sustainable aquaculture growth in Murihiku Southland, not a standalone infrastructure study.

Source inputs and synthesis role

This report is a synthesis document. It draws together the infrastructure assessment, benchmarking work, workforce considerations and social licence inputs into a single pathway for regional investment readiness.

The Southland Aquaculture Infrastructure and Supply Chain Pathway Report provides the core evidence base for the current system. The Murihiku Aquaculture Infrastructure and Supply Chain Insights Report provides a comparative lens by showing how other aquaculture regions have approached marine access, operational land, processing, supplier capability and the sequencing of public and private investment.

Workforce and social licence are treated as part of the enabling system. Future growth will depend not only on production approvals and infrastructure, but also on whether Southland can build the technical, operational and supplier capability required to support a larger sector, while maintaining iwi and community confidence in the places most affected by growth.

How this report should be used

This report should be used as an investment-readiness assessment. The scenarios are planning assumptions, not forecasts. They are intended to test the readiness of the regional system rather than predict exactly what will happen.

The next phase should move from readiness assessment to evidence testing. It should confirm the assumptions behind the scenarios, test those assumptions against existing and planned infrastructure capacity, and distinguish between actions needed now, actions that should be prepared, and investments that should wait until demand is clearer.

The report should not be read as a final investment case or capital programme. It provides a structured view of current readiness and a pathway for further evidence, coordination and decision-making.

3. Strategic Context

Southland aquaculture opportunity

Murihiku Southland's aquaculture opportunity begins with place. The region sits at the edge of Te Ara a Kiwa, where cold, clear waters, a vast coastline and generations of seafood knowledge have shaped communities, livelihoods and identity. Bluff oysters, crayfish, blue cod, paua, salmon and mussels are more than products. They are part of the Southland story: a story of working waters, practical skill, resilience and pride.

The opportunity now is to build from that foundation. Southland already has a strong seafood and aquaculture base, but future growth could change its scale and significance. Open-ocean salmon, land-based aquaculture, seaweed, shellfish and value-added marine products all point to a broader future in which the region is known not only for producing premium seafood, but for doing so with care, credibility and local purpose.

That future cannot be separated from the people and places that will carry it. Aquaculture in Murihiku must uphold the mana of the moana, respect iwi leadership, protect the marine environment and create visible benefit for local communities. It needs to happen with the region, not to the region.

If Southland gets this right, aquaculture can become part of the next chapter of regional resilience. It can diversify the economy, support skilled work, strengthen coastal communities and connect the region's primary production story from land to sea. The opportunity is not simply to grow more product. It is to build an industry that feels unmistakably Southland: grounded, capable, sustainable and proud of its place in the world.

The risk is that opportunity runs ahead of readiness. Some enabling decisions will need to lead the market, particularly where land, infrastructure, workforce and community confidence take time to build. Other decisions should respond to clearer demand, so capital is not committed before the case is strong enough. Good planning will not remove uncertainty, but it can give Southland the discipline to move early where it should, wait where it must, and hold the long-term opportunity together.

4. Current Situation

Southland's economy has long been shaped by its climate and geography. Distance from major markets, a sometimes-challenging climate, abundant natural resources and a strong primary production base have produced a region accustomed to solving problems for itself.

That culture of practicality remains one of Southland's strengths. Much of the existing seafood and marine economy reflects it. Infrastructure, logistics and supply chains have evolved over time in response to commercial opportunity, changing markets, operational necessity and the ingenuity of the people working within the system.

Bluff sits at the centre of that story. As Southland's primary marine gateway, it is where many of the region's seafood, port and marine activities converge. It is also where the opportunities and pressures associated with future aquaculture growth are likely to be felt first. Bluff is not simply an industrial location. It is a working coastal community whose identity, history and economy are closely connected to the marine environment.

The existing model has served Southland well, but it may not be sufficient for the step-change now being contemplated.

From incremental adaptation to coordinated growth

Southland's existing model has worked well, but future aquaculture growth may require a more coordinated response.

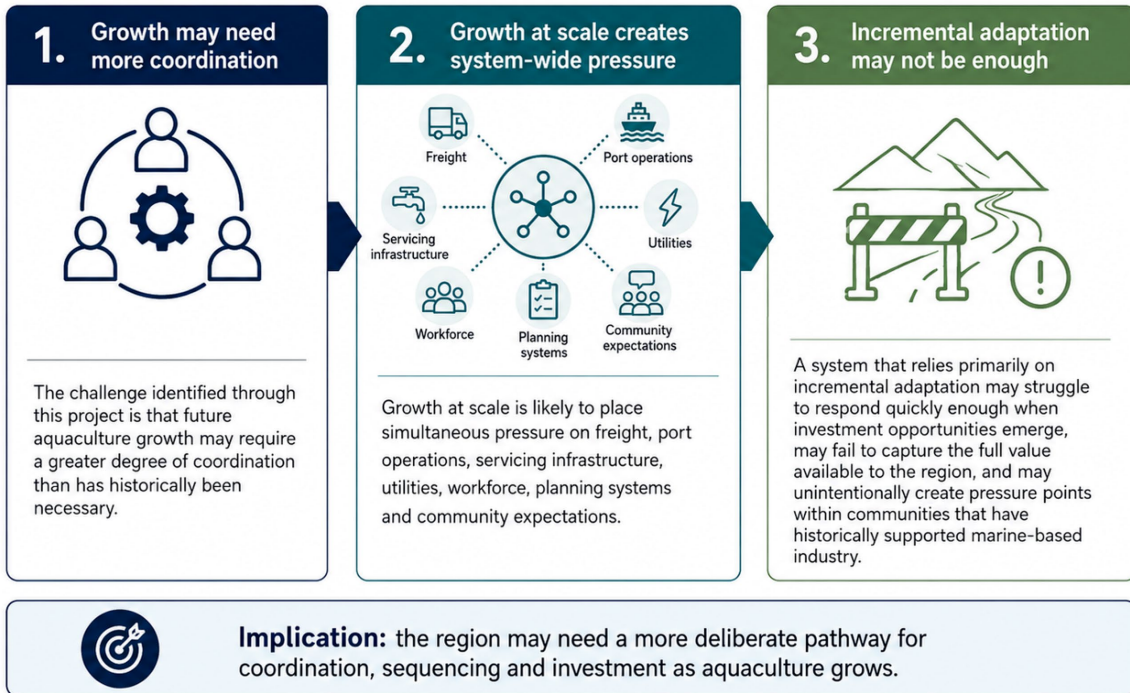


Figure 1: From incremental adaptation to coordinated growth.

Wider Southland economic context

This current position needs to be understood in the context of Southland's wider economic performance. Murihiku Southland is not a slow-growth region looking for a single new industry to carry it. Southland's regional economic growth of 9.8% is the strongest in New Zealand (year end March 2025) with GDP per capital the highest in the country at \$95,061.00. Economic activity for 2026-2027 is forecast to be circa \$9.94 billion.

That strength matters for aquaculture. Future growth will occur in a region that already has confidence, capability and export momentum. It also means aquaculture will compete for the same scarce inputs as other parts of the economy. Port space, industrial land, skilled labour, housing, infrastructure capacity and public-sector attention are already under pressure from existing industries and other growth opportunities.

Aquaculture is therefore best understood as part of Southland's diversification story. Its value is not that it replaces dairy, tourism, energy, manufacturing or other regional strengths. Its value is that it adds another resilient, export-facing sector to the regional economy.

It is important to note that approximately 75% of all Southland production is exported out of region.

Three risks if growth is not planned

Southland has a functioning marine and seafood system, but it is not yet configured as a planned aquaculture growth platform.

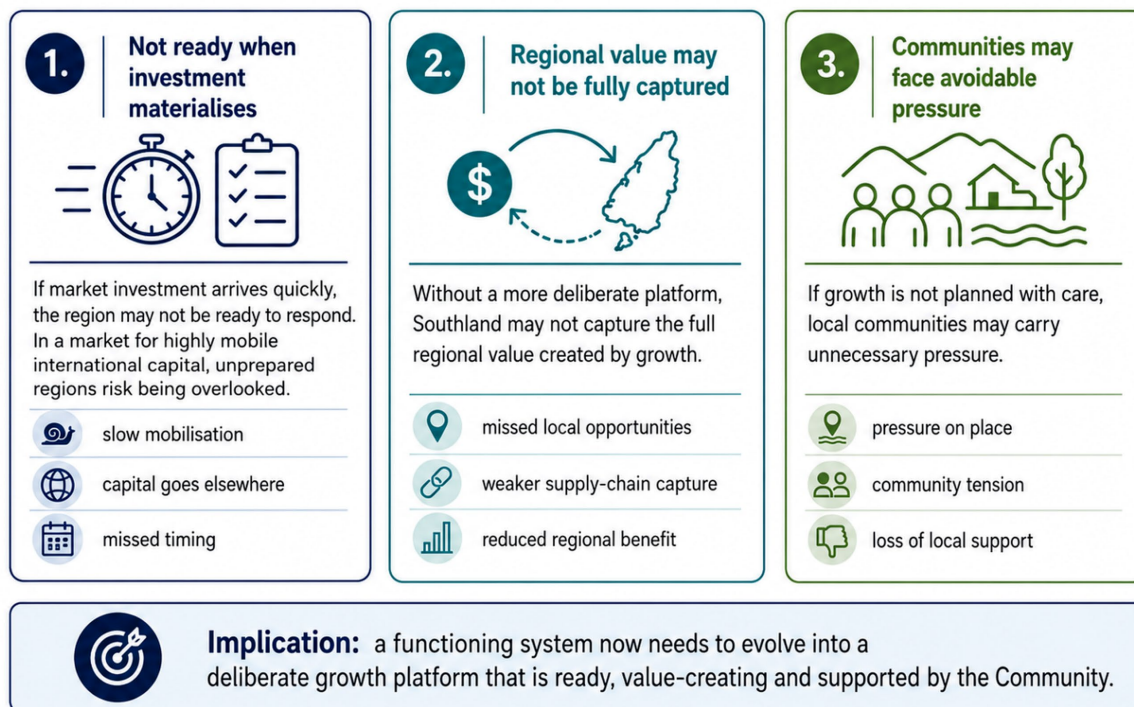


Figure 2: Three risks if aquaculture growth is not planned.

Existing seafood activity, infrastructure and supply chain

Southland's current aquaculture activity is modest when compared with the scale of the future opportunity. The region already has a meaningful seafood economy equating to approximately \$272 million each year, including wild catch fisheries and aquaculture. Future projections indicate this could grow to at least a \$1 billion industry. However, Southland is not yet a mature aquaculture region with the integrated infrastructure, supply chain and investment settings required to support production at the scale contemplated by the projects now in planning.

The production baseline should be treated as a planning baseline rather than a definitive production account. Fisheries New Zealand catch data is reported by fishstock and fishing year, not necessarily by port of landing or final processing location. Farmed shellfish, land-based production and non-salmon aquaculture volumes should be confirmed with operators and available regional datasets as part of the next phase. However, it is reported that Southland is currently producing approximately one third of national salmon production.

Current seafood and aquaculture production baseline

The table below summarises current annual volumes by category and the basis for the figures.

Category	Current annual volume / catch	Basis / comment
 Farmed salmon	c.5,000–5,400 tonnes per annum	Current Southland salmon production baseline, primarily associated with Big Glory Bay.
 Farmed shellfish / other farmed seafood	To be confirmed	In 2024 Southland produced 3% of New Zealand's farmed mussels, a total greenweight tonnage of around 2,400 tonnes
 Foveaux Strait oysters	c.3.0 million oysters	2025 reported commercial catch for OYU5 was 3,016,147 oysters. Note this is recorded in oyster units, not tonnes.
 Rock lobster / crayfish	c.1,380 tonnes	2025 reported commercial catch for CRA8 was 1,379,517 kg.
 Wild catch finfish	c.16,500 tonnes across selected Southland stocks	Indicative aggregation of major Southland fishstocks in the 2025 Fisheries NZ catch table, including barracouta, ling, stargazer, school shark, blue cod and related Southland finfish stocks.
 Kina and other wild shellfish	c.470 tonnes for kina, plus other shellfish to be confirmed	2025 reported commercial catch for SUR5 kina was 469,999 kg. Other shellfish should be verified before final report issue.
 Total quantified baseline, excluding oysters by unit	c.23,000–24,000 tonnes plus c.3.0 million oysters (by unit)	Indicative only. Combines farmed salmon, CRA8 lobster, selected wild finfish and SUR5 kina. It excludes oysters from tonnage because they are reported in units.

Note: All volumes are indicative and based on the latest available data (2025). Assumptions will be tested and refined through scenario development.

Figure 3: Current seafood and aquaculture production baseline.

Southland is therefore not planning aquaculture growth in isolation from the rest of its seafood economy. Salmon is the main growth focus, but the infrastructure system already supports mussels, oysters, crayfish, blue cod, kina, ling, barracouta and other wild-catch activity. Freight, cold chain, vessel servicing, wash-down, processing, testing, assurance, workforce and market access are shared system questions, not aquaculture-only questions.

The existing system has largely grown around the needs of individual businesses. That has been appropriate while growth has been incremental, however, the next phase may be less forgiving. Warming waters in other production regions, Southland's cold and clear marine environment, changes to national consenting pathways and increasing global demand for seafood and marine products could create demand that is no longer simply organic.

The immediate growth conversation is largely focused on salmon because of its scale, value and infrastructure implications yet other forms of aquaculture remain relevant. Shellfish, seaweed, wild catch, marine servicing and associated processing may not all create the same infrastructure demand, but they draw on many of the same systems. If demand can be understood across the wider marine and premium food economy, some enabling investments may become more viable and more defensible.

This demand needs to be visible beyond aquaculture producers and asset owners. As production grows, it will place new pressure on the businesses that sit around and support the sector including the firms that move product, hold it cold, service vessels, process inputs and outputs, provide technical support, manage compliance and help get product to market.

Much of that capability already exists in Southland, but local firms will need a clearer view of likely timing, scale and technical requirements before they can make sensible investment decisions. Where capability does not yet exist, the region may need to support new partnerships, targeted capability development or external providers with a pathway into the local market.

Without an aggregated view of future demand, Southland risks seeing more of the supply-chain response organised from outside the region, reducing the value captured locally.

Current workforce position

The Murihiku Southland Aquaculture Pathway 2025 identifies workforce as one of the core conditions for future aquaculture growth. It frames the ambition clearly: Southland's aquaculture industry should be powered by a locally grown, skilled and diverse workforce that develops over time in partnership with industry.

The current workforce base is modest. Existing mussel and salmon aquaculture operations are recorded as supporting about 185 jobs in Southland. Those roles provide an important starting point because they sit within a region that already understands marine work, seafood handling, vessel operations, processing and export markets.

The scale of the future workforce is likely to be much larger and possibly more diverse. The Pathway estimates that proposed aquaculture projects could support up to 1,978 jobs if they reach full scale. That figure does not include indirect supply-chain employment, construction workforce demand or the wider jobs created when additional workers and families need services in the region.

Workforce planning should also account for future mechanisation, automation and technology development.

As aquaculture scales, some labour demand may be reduced or reshaped by automated feeding systems, remote monitoring, sensor networks, data platforms, robotics, vessel technology and more sophisticated processing systems. However, these technologies will not remove the workforce requirement. They are likely to change the nature of that requirement, creating demand for people who can plan, install, operate, service, maintain and troubleshoot increasingly technical production, processing and marine-support systems.

This means the workforce pathway should not focus only on the number of people required. It should also consider the changing skill mix needed to support a more technology-enabled aquaculture sector, including technical trades, marine engineering, electrical and mechanical servicing, data capability, equipment maintenance, automation support and specialist contractor capacity.

Southland therefore has an aquaculture workforce, but not yet the scale, visibility or specialist capability required under a major growth pathway. The next phase should test the workforce assumptions behind each scenario and identify what can realistically be developed locally, what needs to be attracted from elsewhere, and by when.

Current social licence position

Social licence for aquaculture in Southland starts from a strong but sensitive place.

Regional support for aquaculture is already present, however must be viewed on a project-by-project basis and not a blanket approach to the industry and its forecast growth. The Murihiku Southland Aquaculture Pathway 2025 frames aquaculture as an economic diversification opportunity that can build from Southland's seafood identity, primary production strengths and coastal communities. It also sets a clear expectation about how growth should occur: aquaculture needs to be developed with the region and for the region, not to the region.

The people of Southland are open to aquaculture growth, but support depends on the way growth is pursued. Communities need to see local benefit. Iwi interests need to be respected from the outset. Environmental effects need to be understood and communicated honestly because Bluff, Rakiura and other coastal communities will judge growth through what they experience locally, rather than through regional export or revenue figures alone.

Murihiku Papatipu Runaka support sustainable aquaculture, but that support is conditional and each project will be considered on its merits. The Pathway calls for early engagement, transparent information-sharing and tangible benefits for whanau and the region.

The current social licence position is therefore not passive support. It is a mandate with conditions. Southland has a foundation of community pride, iwi leadership and practical

connection to the marine environment. That foundation can support growth if it is protected. It can also weaken if growth feels distant, imposed, poorly explained or disconnected from local benefit.

Southland should consider tools such as marine spatial planning, soon, to ensure local and existing use and views are considered alongside new or expanded activity. This will ensure the health of the moana is first and foremost but also that there is clarity around the suitability of various areas of water for different species and activity.

Known constraints and information gaps

The current-state work identifies several information gaps that should be resolved before the region moves from opportunity framing to investment decisions. Some gaps sit with industry, including production timing, product form and market pathways. Others sit with councils, infrastructure providers and asset owners, particularly around spare capacity, growth assumptions and upgrade timing.

These gaps do not prevent the pathway from progressing. They do, however, point to the need for scenario-based planning rather than a fixed infrastructure answer. The immediate task is to understand where existing systems have capacity, where they need to be strengthened, and which decisions need to be brought forward before market demand hardens.

Current position and information gaps / constraints

A summary of key areas where information, modelling or testing is required to support future aquaculture growth planning.

Area	Current position	Information gap / constraint
 Production demand	Prospective growth pipeline exists, but timing remains uncertain.	Volumes, ramp-up, product form and investment triggers are not yet known.
 Freight	Existing pathways rely heavily on road and onward uplift through larger freight gateways.	Aggregated demand for premium, fresh, live and time-sensitive freight has not yet been modelled.
 Port / marine	Bluff is the primary marine operating node.	Future berthage, feed, hardstand, servicing, haul-out and wash-down requirements need further testing. Island Harbour and Port side land need spatial modelling.
 Processing	Existing seafood processing capability provides a base.	Future live-holding, cold-chain, contract processing and waste-handling demand is not yet quantified.
 Water / wastewater / electricity	Existing regional assets may support growth.	Capacity, upgrade cost, timing, consenting and ownership are not yet confirmed. Growth scenarios unknown and untested.
 Land	Industrial land exists, but location and function are more important.	Need to distinguish port-adjacent, water-dependent, industrial, logistics and airport-linked uses and timing to activate.
 Workforce	Existing skills and supplier capability may be transferable.	Future labour, skills and training demand has not yet been mapped to scenarios.
 Social licence	Existing pathway recognises the need for local benefit and community confidence.	Cumulative effects, benefit-sharing, iwi partnership and community engagement approach need further definition.
 Existing infrastructure capacity	Current infrastructure supports existing activity, but available headroom is not clear.	Spare capacity, renewal pressures, committed upgrades and operating limits need to be tested against growth scenarios.
 Council and infrastructure-provider growth forecasts	Public and network planning already contain growth assumptions.	It is unclear whether those assumptions account for aquaculture-led growth, Bluff intensification, premium freight, utilities demand or private investment timing.

Figure 4: Current position and information gaps / constraints.

5. Possible Future Scenarios

Southland's aquaculture growth opportunity should therefore be assessed through planning scenarios rather than a single forecast. Southland already has aquaculture and wider seafood activity, but the scale, timing and configuration of future growth remain uncertain.

Much of the quantified step-change opportunity currently being discussed relates to salmon, particularly through prospective open-ocean, coastal and land-based projects. Ngai Tahu Seafood's Hananui Aquaculture Project is in the fast-track process. For this report, the core full-scale Hananui planning assumption is c.14,400 tonnes per annum, with the overall Scenario 3 volume expressed as existing Sanford production plus full-scale Hananui.

There are also further potential projects that could materially change the regional production profile, including Sanford's Project South, Impact Marine / Fiordland Group's proposed land-

based salmon farm and processing facility at Ocean Beach, and Ocean Farms' proposed offshore salmon farming area. These projects differ in maturity, consenting pathway, timing, production model, infrastructure requirements and investment certainty. They should not be aggregated into a single forecast.

These projects are not treated as committed production in the core scenarios because their timing, consenting pathway, investment status and infrastructure requirements remain uncertain. However, they are important to the long-term regional envelope. If one or more of these projects progresses, or if other marine, coastal or land-based aquaculture opportunities emerge, they could materially increase total regional production, change the timing of infrastructure demand, and create different pressure points across land, utilities, marine access, processing, workforce, freight and supplier capability.

Scenario 4 is therefore used as a strategic planning envelope rather than a forecast. It allows Southland to test what should be protected or planned for now, so the region is not closed off from future growth options if additional projects become credible over time.

The scenario frame is not salmon-only. Other forms of aquaculture, including seaweed, shellfish and land-based production, create different but still material demands on the regional system. Seaweed, for example, may require berthage, vessel movements, landing space, freshwater, stabilisation, drying, hatchery, processing, storage, road freight, export logistics, labour and by-product management.

For that reason, this report uses salmon production thresholds as the clearest available proxy for scale, while keeping the assessment broad enough to capture other marine and land-based aquaculture activity. The thresholds are not intended to predict which projects will proceed or at what scale. They provide a way of testing what different levels and types of growth could mean for the infrastructure ecosystem needed to support investment.

Scenario assumptions: yield, output and production volume

Production volume is used as a proxy for system demand; the scenarios are planning assumptions, not forecasts.

How volumes are derived (high level): Baseline (existing Sanford operation continues); Scenario 2 (Sanford continues alongside first stage of Hananui); Scenario 3 (Sanford plus full Hananui, assuming no other salmon farms); Scenario 4 (Sanford, full Hananui and additional new farm production 20,000 tonnes)

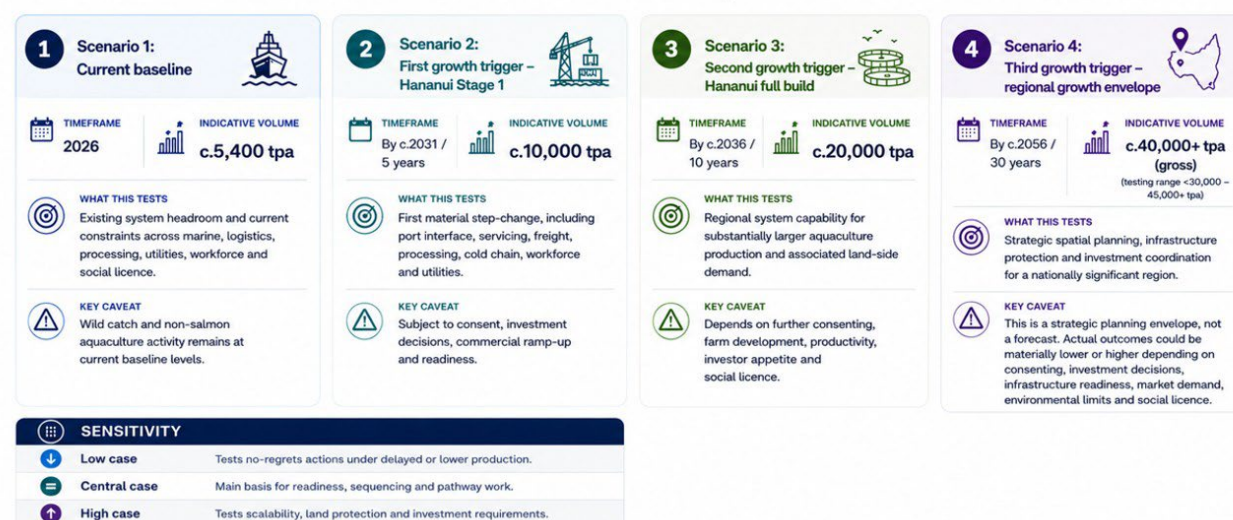


Figure 5: Scenario assumptions, yield, output and production volume.

Evidence discipline and confidence levels

The scenarios are deliberately provisional. The next phase should maintain a live assumptions register so partners can distinguish between confirmed information, working assumptions and matters requiring validation.

Planning assumptions used to frame scenario testing and the next evidence steps.

Assumption	Planning basis	Role in report	Confidence	How to test next
 Existing Sanford / Big Glory Bay production	c.5,400 tpa	Current baseline for scenario testing.	 Medium	Confirm current production, processing and servicing assumptions with operator input.
 Hananui first-stage production	Scenario 2 total c.10,000 tpa gross	Represents first material step-change.	 Medium / low	Confirm staged development timing, commercial ramp-up and biosecurity assumptions.
 Hananui full-scale production	c.14,400 tpa added to existing baseline	Core Scenario 3 planning assumption.	 Medium	Confirm consent conditions, development staging, productivity assumptions and timing.
 Long-term regional envelope	c.40,000+ tpa gross; testing range below / above this level	Strategic planning envelope rather than forecast.	 Low	Use to test land protection, scalability and investment coordination, not as a committed production forecast.

Note: These are planning assumptions for readiness testing, not committed production forecasts.

Note: Confidence ratings reflect the current level of certainty around production timing, scale, consenting pathway, commercial ramp-up and infrastructure implications. They do not assess the quality of the opportunity or the likelihood of long-term sector growth. Hananui first-stage production is rated medium / low because staging, consent conditions, investment decisions, biosecurity requirements and ramp-up timing still need to be confirmed. Hananui full-scale production is rated medium because it provides a useful Scenario 3 planning assumption, but remains dependent on development staging, productivity assumptions, investor appetite and social licence. The long-term regional envelope is rated low because it is deliberately a strategic planning envelope, not a forecast, and may depend on one or more additional farms or production models that are not yet on the planning landscape.

The scenarios allow the report to separate common actions from demand-dependent decisions. Some actions may be useful under almost any growth pathway, such as improving the evidence base, protecting strategic land, understanding infrastructure headroom and aligning council and infrastructure-provider assumptions. Other decisions, particularly larger capital commitments, should be linked to clearer demand triggers, ownership models, utilisation assumptions and funding pathways.

The central question is therefore: What does Southland need to prepare now so that, if growth materialises, the region is not forced into late, reactive or poorly sequenced infrastructure decisions.

6. Counterfactual: Implications of an Unprepared Investment Ecosystem

The scenarios in section 5 test what may be required if aquaculture growth accelerates. This section considers the counterfactual: what happens if investment appetite continues, but Southland is not organised to receive it.

The counterfactual is not that aquaculture investment disappears. Interest in aquaculture is likely to continue in New Zealand and globally, particularly as demand for high-quality seafood grows and production conditions shift in other regions. The more relevant risk is that Southland attracts individual projects without the regional infrastructure, planning and commercial settings needed to convert that activity into a mature, integrated aquaculture sector.

Under that scenario, growth may still occur. It may, however, occur more slowly, at smaller scale, with higher delivery risk. Production could proceed while broodstock, processing, cold chain, specialist servicing, engineering, freight coordination, innovation, workforce development and supplier capability and associated benefits are captured elsewhere, out of region.

From an investment perspective the market will be waiting to see if the region can present itself as organised and is therefore investable. This will require clear growth assumptions, protected strategic land, credible infrastructure pathways, responsive local government, aligned partners, reliable utilities, workforce planning and durable social licence.

Southland's competition is not simply other regions; it is competing against global markets with proven delivery systems, investment-ready infrastructure, clear approvals pathways and the capacity to move projects from concept to execution. Highly mobile global capital is attracted to ease of execution: places where risk is understood, decisions are timely, and delivery barriers can be managed with confidence.

If those conditions are not visible, Southland may still be seen as promising, but difficult. Investors may price in additional risk, defer decisions, reduce scope, internalise more functions, bypass local suppliers or place higher-value activities in regions that are easier to invest in.

The opposite risk also needs to be managed. Investment readiness does not mean committing early to major capital projects before demand, utilisation, ownership and funding are understood. The risk of under-investment is real, but so is the risk of stranded capital.

The Syncrolift / haul-out pathway illustrates the point. Marine servicing may become a critical enabling requirement, but the appropriate scale, timing, ownership, utilisation and funding model need to be tested. A facility sized too far ahead of confirmed demand could create stranded capital. Insufficient servicing capacity could constrain growth, compliance or investor confidence.

The strategic choice is between organic growth and organised growth. Organic growth may still deliver individual projects. Organised growth is more likely to attract patient capital, protect public investment and maximise regional value capture.

7. Assessment of Infrastructure Systems and Investment Ecosystem

The assessment below translates the scenario and counterfactual analysis into a practical readiness view. It is not intended to determine final infrastructure requirements or recommend immediate capital commitments. It identifies where the current system appears most exposed to growth pressure, where further testing is required, and what work should be progressed next.

The readiness ratings are indicative. They are intended to support discussion and prioritisation, not to replace detailed feasibility, engineering, planning or investment analysis.

Emerging gap analysis

Initial view of system readiness and areas requiring further assessment with relevant infrastructure providers.

System / enabler	Rating	What is needed next	System / enabler	Rating	What is needed next
 Marine and port infrastructure	Red / Amber	Bluff / Island Harbour marine industrial master plan.	 Roading and regional freight corridors	Amber	Include aquaculture in regional freight and transport planning.
 Haul-out facility / vessel servicing	Red	Confirm staged haul-out pathway and integrate with the regional infrastructure plan.	 Workforce and skills	Red / Amber	Develop workforce demand assessment linked to scenarios.
 Port-side land and industrial adjacencies	Red	Identify and protect strategic marine industrial land.	 Housing and community capacity	Red / Amber	Link growth assumptions to housing and population planning.
 Processing and cold chain	Red / Amber	Assess processing, live-holding, cold-chain and servicing options.	 Social licence	Red / Amber	Develop iwi, community and benefit-sharing approach.
 Freight and logistics	Amber	Engage freight, courier, cold-chain and logistics providers.	 Planning and consenting	Red / Amber	Insert assumptions into spatial, infrastructure and LTP processes.
 Airport interface	Amber	Confirm airport land, logistics and Customs / MPI requirements.	 Governance and investment coordination	Red	Establish joint decision-making, funding and governance.
 Three waters / wastewater	Red / Amber	Confirm capacity, planned upgrades and growth demand modelling.	 Investment proposition	Red / Amber	Develop regional investment proposition / regional deal pathway.
 Power and energy	Amber	Engage energy providers on capacity and upgrade triggers.			

 Readiness ratings are deliberately provisional. The next step is to confirm whether each gap is immediate, trigger-dependent, or only relevant under longer-term growth.

Great South / COIN South — Aquaculture Infrastructure & Supply Chain Pathway

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Figure 6: Emerging gap analysis - initial readiness assessment.

What the assessment indicates

The assessment indicates that Southland's aquaculture opportunity is unlikely to be constrained by a single infrastructure issue. The real risk is cumulative system pressure as growth creates concurrent demands across multiple parts of the investment ecosystem.

Each system operates on different planning, funding and delivery timeframes. Market-led aquaculture investment may move faster than the ability of local and central agencies to plan and deliver infrastructure, regulatory or planning improvements. If those timeframes are not better aligned, Southland may have credible investor appetite before the enabling conditions required to support investment decisions are ready.

The investment pathway therefore needs to manage two risks at the same time: under-investment, where infrastructure or planning settings lag market demand and reduce investor confidence; and over-investment, where capital is committed before utilisation, ownership, funding and demand are sufficiently understood.

Marine infrastructure and port-side capacity

Marine and port infrastructure is likely to be where growth becomes visible first. Stakeholder interviews indicated that parts of the Bluff marine system are already working close to practical limits. The issue is not simply whether there is more activity at the port, but whether the port-side system can absorb a different operating rhythm: more frequent vessel movements, greater servicing demand, stronger biosecurity expectations and less tolerance for delay.

Benchmarking from other aquaculture regions shows that these requirements can emerge before harvest volumes reach scale. In Marlborough, the Blue Endeavour pilot demonstrated the need for access to suitable wharf-side land for pen assembly before farms can be installed. It required substantial wharf-side land before full production began because the pens needed to be assembled and maintained on land. This shows open-ocean aquaculture can create infrastructure demand well before product is moving through the supply chain.

Future production in Southland may create a similar timing issue. Marine-facing activities need access to port-side water, operational land and servicing infrastructure before production reaches scale. A staged marine infrastructure pathway would allow Southland to test vessel

requirements, servicing demand, land needs, trigger points and delivery options before major capital commitments are made.

Case study: Syncrolift and Haul-Out Pathway

Bluff's existing Syncrolift is a critical part of Southland's marine servicing system. The current Syncrolift is understood to have a nominal capacity of approximately 1,000 tonnes, which is sufficient for many existing fishing and service vessels. The heaviest regular vessel demand is understood to be around 650 tonnes, while a significant proportion of the current fleet sits below approximately 350 tonnes however the author notes these figures should be confirmed through the next stage of business case and operator engagement.

The issue is not simply lifting capacity. The more immediate constraint is the compliance, condition, utilisation and investment pathway for the wider haul-out and wash-down system. Current wash-down and wastewater arrangements require improvement, and the existing discharge arrangements are time-limited. Without a staged response, Southland may face increasing constraints on vessel servicing, environmental compliance and investor confidence.

The current, but emerging approach is to progress this as a staged pathway rather than a single large capital commitment. The immediate priority is to support a Stage 1 wash-down and wastewater compliance response, led through the relevant asset owner and regulatory pathway. In parallel, the region should progress a Stage 2 haul-out business case, including the case for a travel lift, hardstand, servicing area and supporting marine infrastructure. A larger-scale future facility should remain a long-term option only if demand, ownership, funding and utilisation become clearer.

For the aquaculture pathway, the Syncrolift is important because marine servicing demand may arise before full production volumes are reached. Open-ocean aquaculture, vessel support, biosecurity, maintenance and compliance requirements all depend on reliable access to haul-out, wash-down and servicing infrastructure.

The Syncrolift pathway should therefore remain a priority enabling project within the regional aquaculture infrastructure programme.

Bluff, Island Harbour and functional land use

Scarce port-side land needs to be allocated by function, timing and operational requirement. Southland may have land options across the wider region, but not all land performs the same role. Some activities need water access. Others need reliable freight access, utilities, cold-chain connectivity or room to expand.

Bluff and Island Harbour sit at the centre of this issue because they are where marine access, industrial activity and community life meet most directly. Future marine-facing activities should not have to compete unnecessarily with activities that could operate from lower-cost or more expandable sites elsewhere in the region.

There may be an opportunity to locate some logistics, cold-chain, broodstock supply, processing support and supply-chain functions away from scarce port-side land where direct marine adjacency is not required. This does not mean those functions should shift away from Bluff by default. It means future land-use planning should protect port-side land for activities that

genuinely need it while testing other regional locations that allow Southland to retain value without adding unnecessary pressure to Bluff or Island Harbour.

Processing, cold chain, freight and value capture

Broodstock production, processing, cold chain and freight are already value-capture issues for Southland. Stakeholder feedback indicated that premium live and fresh product often relies on road freight to Christchurch or Auckland before international uplift. For high-value seafood, that adds time, handling and risk before the product reaches its customer.

Aquaculture growth could amplify this issue. If production increases but processing, storage, freight coordination, testing or specialist servicing are located elsewhere, Southland may carry more of the impact while capturing less of the value. Local production does not automatically translate into local value capture.

The Opotiki harbour and mussel development is a useful comparison, although not as a simple model for Southland to replicate. Its progress has been complex, and the timing of production, infrastructure investment and commercial uptake has not always aligned neatly.

That experience is still relevant. Aquaculture development often plays out over long timeframes, with infrastructure, workforce, processing capacity and community confidence maturing at different speeds. Even where delivery is difficult, the regional benefits can be material. The creation of around 200 jobs, together with the local support and capability that sits around those roles, is significant for a place-based regional economy.

For Southland, the lesson is to plan production, processing, servicing and marine access as connected parts of the same system. If those elements are treated separately, the region may still host aquaculture activity, but capture less of its long-term value.

The commercial case for new processing and cold-chain investment will depend on production certainty, product form, labour, utilities, land, freight reliability and producer strategy. A regional freight aggregation model may be an important early step.

This aggregation function would help convert producer and project-level assumptions into a clearer regional opportunity statement: what services may be required, when they may be required, what scale of demand is plausible, and what capability standards suppliers may need to meet. This would allow Southland businesses to assess whether, when and how to position themselves for the opportunity.

Case study: SH1 Invercargill to Bluff strategic corridor

The SH1 Invercargill to Bluff corridor is a critical enabling corridor for Southland's seafood and aquaculture economy. It connects Bluff, South Port, seafood processing, freight movements, marine servicing, workforce access and the wider Southland logistics network.

The corridor is also carrying a broader mix of users than a conventional freight route. Bluff is the southern endpoint for Te Araroa, the 3,000-kilometre walking trail from Cape Reinga to Motupōhue / Bluff, which now has approximately 2,000 continuous trail completions each year. Te Araroa Trust has also reported growth from an estimated 350 hikers in the 2015/16 season to more than 2,000 registered walkers in the current season. Bluff is also the finish point for Tour Aotearoa, the 3,000-kilometre bikepacking route from Cape Reinga, with the brevet attracting a full field of 1,000 riders in 2020 and becoming an annual event from 2021, alongside independent riders completing the route through the year.

This growing mix of heavy vehicles, freight, commuters, visitors, walkers and cyclists adds to the safety exposure of a corridor that already has a serious crash history. Public reporting on Invercargill City Council's advocacy for the route records nine serious crashes over a recent five-year period on the Bluff Highway section from Elles Road, three of which were fatal, and notes that heavy vehicles account for around 20 percent of traffic on the road. Ministry of Transport data also shows that, in 2024, Invercargill City recorded four death and serious injury crashes on open-road state highways.

As aquaculture production grows, this corridor is likely to carry increased pressure from product movement, service vehicles, workforce travel, construction activity and marine-related logistics. Its reliability, safety and resilience should therefore be treated as part of the aquaculture investment-readiness pathway, not simply as a general transport issue.

Recognition of SH1 Invercargill to Bluff in regional and national transport planning would support future aquaculture growth by protecting access between the port, processing, logistics and wider supply-chain functions. Continued advocacy for the corridor's strategic status, including its potential recognition as a Road of National Significance, would align with the region's wider objective of strengthening South Port, Bluff, aquaculture growth and regional freight resilience.

Utilities, workforce and housing

Utilities are not always visible in aquaculture discussions, but they may become decisive under growth. Land-based aquaculture, processing, refrigeration and industrial expansion can all place new pressure on water, wastewater, discharge and electricity systems. Aquaculture demand needs to be visible early in infrastructure strategies, asset management plans, LTP assumptions, renewals planning, connection planning and regional growth models.

Workforce has the same timing problem. Open-ocean aquaculture can require a different capability profile from established inshore activity. Without early demand signals, local suppliers may not have enough time to adapt into new materials, systems and operating requirements.

Housing and community capacity sit behind the workforce question. If workers cannot be attracted, housed and retained, ramp-up timing, local employment capture and investor confidence may all be affected. A workforce and housing demand profile linked to the aquaculture scenarios and wider regional growth assumptions is therefore needed particularly when there is certainty on the numbers, type and timing of the future workforce.

Social licence, planning and consenting

Social licence, planning and consenting are part of investment readiness. They influence timing, operating certainty and whether market appetite can be converted into delivered projects.

Southland's aquaculture pathway already recognises that growth needs to deliver local benefit, maintain community confidence and be supported by ongoing communication and education. Future growth will not be assessed only as a production opportunity. It will be assessed through local impacts, iwi interests, community identity, environmental stewardship and confidence that benefits will be shared.

Fast-track processes may help some proposals, but they do not remove the need to align infrastructure planning, spatial planning, utilities, marine access, land use, biosecurity, environmental management and community outcomes. A social licence and planning pathway should sit alongside infrastructure planning, not behind it.

Governance and investment coordination

Governance and investment coordination become more important as the pathway moves from opportunity framing into implementation. Stakeholder feedback identified a timing mismatch between market investment and public-sector planning. Aquaculture and premium food exporters may need to respond to commercial opportunities quickly, while public infrastructure, funding, consenting and delivery processes often move over longer timeframes.

Southland needs a clear continuation mandate. Great South / COIN are well placed to hold the evidence base, convene partners, maintain scenario assumptions, track actions and move the pathway from this assessment into business cases, planning processes, regional deal discussions or investment propositions.

The next-stage mandate should make clear who owns the pathway, who maintains the scenario assumptions, who convenes South Port, ICC, iwi, industry and infrastructure providers, and who decides when an action moves from testing to business case development.

Market-facing demand coordination

A related but distinct function is also required. Governance and investment coordination should align asset owners, regulators and Iwi but in parallel a market-facing demand coordination function is required that can translate aquaculture growth scenarios into practical opportunity signals for the wider business community.

This function could be held by an independent regional convenor, such as Great South / COIN South, rather than by an individual producer or asset owner. Its role would be to aggregate industry triggers and scenario assumptions, identify the likely timing and scale of demand for supporting services, and communicate those opportunities to Southland businesses in a form that supports commercial decision-making.

The purpose of this "aggregator" is not to direct private investment, but to give the market enough visibility to prepare.

Without that next stage, individual proponents may continue to progress projects, but the region may not have the infrastructure, planning settings, workforce pathways, social licence, freight systems or investment coordination required to capture the full value of growth.

8. Scenario-linked Investment Triggers

The following scenario trigger matrices describe when action should move from evidence-building to readiness planning, and then to investment.

The pathway needs to manage timing. Some actions are needed now because they respond to current system issues or protect future options. Some actions become important once Hananui, or an equivalent first step-change, becomes credible. Larger capital decisions should wait until demand, utilisation, ownership and funding are clearer.

The trigger tables are planning tools. They are not a confirmed capital programme. They do not confirm asset capacity, asset condition, approved capital works, funding, ownership or delivery timing. Those matters need to be tested with asset owners, councils, infrastructure providers and operators before any investment decision is made.

Scenarios 1 to 3 focus on current readiness, the first production step-change and medium-term regional growth. Scenario 4 is treated as a long-term planning envelope. It is included to protect options and test strategic implications, rather than to signal an immediate investment programme.

Scenario Infrastructure Trigger Matrix

Scenario 1: Existing Sanford / Big Glory Bay baseline

Identify current deficits, no-regrets investment stages and evidence gaps that need to be progressed under the current operating baseline.



Great South / COIN South — Aquaculture Infrastructure & Supply Chain Pathway

Figure 7: Scenario 1 infrastructure trigger matrix - current baseline.

Scenario Infrastructure Trigger Matrix

Scenario 2: Sanford + first-stage Hananui

Define the enabling conditions that must be confirmed, funded, coordinated or materially advanced before first-stage Hananui can be absorbed without creating system failure.



Great South / COIN South — Aquaculture Infrastructure & Supply Chain Pathway

Figure 8: Scenario 2 infrastructure trigger matrix - first-stage Hananui.

Scenario Infrastructure Trigger Matrix

Scenario 3: Sanford + full Hananui / further growth starting

Define the scaling conditions that must be confirmed, funded, coordinated or materially advanced before full Hananui-scale production can be absorbed.



Great South / COIN South — Aquaculture Infrastructure & Supply Chain Pathway

Figure 9: Scenario 3 infrastructure trigger matrix - Hananui full build.

Scenario Infrastructure Trigger Matrix

Scenario 4: Regional growth envelope / additional farm production

Protect the long-term conditions and options that may be required if regional-scale aquaculture growth becomes credible.



Great South / COIN South — Aquaculture Infrastructure & Supply Chain Pathway

Figure 10: Scenario 4 infrastructure trigger matrix - regional growth envelope.

9. Solutions and Recommendations

The assessment identifies a set of readiness issues across Southland's aquaculture infrastructure systems and investment ecosystem. The recommended response is a staged work programme that strengthens the regional evidence base, improves coordination, tests infrastructure and supply-chain requirements, and supports future investment decisions.

The recommendations are practical next steps rather than final capital commitments. They are sequenced to move the pathway from mandate and validation, through evidence testing and planning, into investable propositions where the case is mature enough.

The recommendations should not be read as a strict priority ranking in which the final item is least important. Some immediate actions, such as testing the scenarios with a sector and infrastructure reference group, are critical validation steps. The sequencing reflects the order in which decisions should mature.

Infrastructure pathway recommendations – sequenced for impact

Recommended order of actions to progress the aquaculture infrastructure and investment pathway.

No.	Recommendation	Rationale	Lead	Supporting Partners	Timing
1	 Confirm a continuation mandate and funding for the aquaculture infrastructure pathway.	The current work has identified a material opportunity, but further work is required to convert this into a coordinated investment pathway. Without a clear owner and mandate, the opportunity risks being lost among other regional priorities.	Great South	COIN, lead industry partners, iwi, councils and infrastructure owners.	● Immediate
2	 Reconvene the sector and infrastructure reference group to test scenarios, gaps, recommendations and sequencing.	The report should be tested with those who understand the sector, infrastructure constraints and investment context before finalisation.	Great South / COIN	Lead industry partners, iwi, councils, infrastructure owners, central and local government partners.	● Immediate
3	 Complete an infrastructure readiness assessment.	Current infrastructure assumptions need to be tested against aquaculture growth scenarios, including three waters, wastewater, power, roading, freight, land, marine infrastructure and airport logistics.	ICC	Asset owners, electricity network providers, freight providers and Great South.	● Short term
4	 Update population, workforce and demand assumptions to include aquaculture and other major regional growth sectors.	Council and infrastructure planning may rely on conservative baseline assumptions that do not fully account for aquaculture, wind, data centres, tourism and other potential regional investments.	ICC	Great South and asset owners.	● Short term
5	 Prepare a Bluff / Island Harbour marine industrial master plan.	Bluff and Island Harbour are central to the aquaculture opportunity. A master plan is required to identify port-side adjacencies, marine servicing needs, land requirements, logistics interfaces and future industrial uses.	South Port	ICC, iwi, Bluff Community Representative, Aquaculture industry and infrastructure asset owners.	● Short term
6	 Protect strategic marine industrial land and logistics corridors.	Growth may require land for servicing, processing, storage, engineering, logistics, utilities and future marine-related activity. Strategic land should be protected before it is lost to incompatible uses and/or impacts the Bluff Community.	ICC	South Port and Great South.	● Short term
7	 Support the Synchrolift / haul-out investment business case pathway.	Haul-out and marine servicing are already known constraints and risks and should be integrated into the broader aquaculture and marine infrastructure pathway.	Environment Southland	South Port, ICC, industry and central govt funders.	● Immediate / short term
8	 Establish a market-facing supply-chain demand aggregation and supplier readiness function.	Growth may create opportunities for local engineering, fabrication, logistics, cold chain, processing, technology, training and professional services. An independent regional function is needed to aggregate producer and project-level demand signals, identify timing and scale, and communicate those opportunities to Southland businesses so they can prepare, invest or partner.	Great South / COIN	Industry, training providers, freight operators and local businesses.	● Short / medium term
9	 Develop a social licence and community narrative workstream.	The aquaculture opportunity will need to be understood and accepted by iwi, Bluff, local communities and wider Southland. Social licence should be addressed early, not after investment decisions are made.	ICC	Great South, iwi, industry, community representatives.	● Short / medium term
10	 Develop a regional investment proposition / regional deal pathway.	Aquaculture may provide a practical vehicle for a broader regional infrastructure and economic development proposition involving local government, central government and private investment.	Great South with ICC	Great South, councils, industry, iwi and central government partners.	● Short / medium term
11	 Advocate for SH1 Invercargill to Bluff to be designated a road of national significance.	SH1 is the critical freight and resilience corridor for Southland and the Southern Scenic Route. Designation would recognise its national economic significance, unlock targeted investment and improve safety, resilience and reliability for people, freight and the aquaculture sector.	Great South with ICC	NZTA Waka Kotahi, central government, councils, industry, freight operators and community representatives.	● Short / medium term



Timing is indicative and will be refined as the pathway is progressed. Many actions can run in parallel once mandate and leadership are confirmed.

● Immediate ● Short term ● Short / medium term

Figure 11: Infrastructure pathway recommendations - sequenced for impact.

The recommendations identify what needs to be done. The implementation pathway sequences those actions over time. The scenario trigger matrices then show how future investment decisions should be linked to demand, readiness and evidence.

10. Implementation Pathway

The implementation pathway sequences actions from immediate alignment through to investable projects. It is designed to avoid premature capital commitments while the region protects options, tests assumptions and builds a credible investment pathway.

The pathway allows Southland to move quickly without over-committing capital. It also gives industry, councils, iwi, infrastructure providers and central government a shared set of assumptions for decision-making.

Timing	Priority action	Description	Lead / partners	Output
0-3 months	Confirm pathway mandate	Agree who owns the next stage of the aquaculture infrastructure pathway and how it will be funded.	Great South / COIN, with councils, industry and iwi.	Continuation mandate and short-form work programme.
	Test scenarios with sector and infrastructure reference group	Present draft production scenarios, pressure points and assumptions for challenge and refinement.	Great South / COIN, with sector and infrastructure reference group.	Validated scenario assumptions and agreed caveats.
	Engage ICC on current baseline and future assumptions	Confirm what ICC has modelled for infrastructure, population, land use, three waters, roading and spatial planning, and whether aquaculture is included.	Great South / ICC.	ICC baseline information request and response.
	Confirm South Port / Bluff infrastructure assumptions	Test current and future assumptions around port-side land, Island Harbour, servicing, berthage, unloading, laydown, haul-out and marine infrastructure.	Great South, South Port, ICC and industry.	Port-side infrastructure assumptions note.
	Complete targeted freight and logistics engagement	Engage freight, courier, cold-chain and logistics providers to confirm current capacity and future constraints.	Great South / COIN / freight providers.	Freight and logistics snapshot.
3-6 months	Scope Bluff / Island Harbour marine industrial master plan	Develop scope, governance, funding and technical advisory structure for a Bluff / Island Harbour master plan.	ICC, South Port, Great South, iwi and industry.	Master plan project brief.
	Scope infrastructure readiness assessment	Define assessment across wastewater, water, power, roading, freight, airport logistics, land and marine infrastructure.	ICC, asset owners, Great South and infrastructure providers.	Infrastructure readiness assessment brief.
	Insert aquaculture assumptions into spatial and infrastructure planning	Ensure aquaculture growth assumptions are visible in regional spatial planning, LTP, infrastructure strategy and relevant planning processes.	ICC, regional partners, Great South and relevant agencies.	Planning integration note.
6-12 months	Establish supply-chain demand aggregation and supplier readiness workstream	Aggregate industry and scenario-based demand triggers into a market-facing view of likely service requirements, timing, scale and capability gaps. Include processing, cold chain, freight, logistics, marine servicing, engineering, fabrication, compliance, training and professional services.	Great South / COIN, industry, training providers, freight and logistics providers, processors, marine service providers and local businesses.	Supplier opportunity map, demand trigger register and local business readiness plan.
	Develop social licence workstream	Develop structured engagement and narrative programme focused on iwi, Bluff, community, environmental issues and benefit-sharing.	Great South, iwi, industry and councils.	Social licence strategy and engagement plan.
	Develop regional investment proposition	Convert the pathway into an investment proposition for central government, councils, infrastructure providers and private investors.	Great South, councils, industry, iwi and central government partners.	Draft regional deal / investment proposition.
12-24 months	Progress priority business cases	Advance business cases for priority infrastructure where triggers, benefits, costs and ownership are sufficiently clear.	Relevant asset owners and funders.	Fundable infrastructure business cases.
	Confirm delivery and governance arrangements	Establish the governance and delivery model for priority projects emerging from the pathway.	Great South, councils, industry, iwi and asset owners.	Delivery structure and investment programme.



Timing is indicative and will be refined as the pathway is progressed. Many actions can run in parallel once mandate and leadership are confirmed.

Figure 12: Implementation pathway.

11. Conclusion

Murihiku Southland has the natural conditions, seafood identity and emerging investment interest to support a larger aquaculture sector. The opportunity is credible, but it is not yet fully organised. The region has a functioning seafood and marine system, but that system has not been planned as an integrated platform for aquaculture growth at the scale now being contemplated.

The scenarios tested in this report show that the region is unlikely to face one single constraint. The more likely challenge is cumulative pressure across marine access, port-side land, servicing, processing, freight, utilities, workforce, housing, planning and community confidence. Some of these pressures will emerge before production reaches full scale. That makes timing critical.

The report also shows that Southland should not wait for perfect certainty before acting. Infrastructure planning, land protection, workforce development, social licence and investment coordination all have long lead times. If the region waits until production decisions are fully confirmed, it may be forced into late and reactive responses. It may also lose the chance to capture more value locally.

At the same time, the report does not support premature capital commitments. The evidence base is still developing. Production timing, utilisation, ownership, funding and asset capacity need further testing before major investment decisions are made. A disciplined pathway is therefore required: prepare early, protect options, test assumptions, and advance projects only when the case is strong enough.

The immediate priority is to move from assessment to coordination. That means confirming a continuation mandate, testing the scenarios with industry and infrastructure providers, clarifying current infrastructure headroom, and ensuring aquaculture assumptions are visible in regional planning and investment processes.

Coordination should also extend outward to the supplier market. The pathway will be stronger if Southland businesses can see the demand profile early, understand the service standards likely to be required, and make informed decisions about investment.

This is central to ensuring that aquaculture growth results in local value capture, not simply local production.

Aquaculture should be treated as part of Southland's broader resilience and diversification story. It will not replace the region's existing economic strengths, but it can add another high-value, export-facing sector that is grounded in place and connected to local benefit.

The next phase should turn this pathway into an investable programme of work. If Southland can align its partners, sharpen its evidence base and sequence decisions well, it will be better placed to receive aquaculture investment on its own terms: with the region, for the region, and not to the region.