



LIMESTONE COAST AQUACULTURE

Opportunities to join a growth industry in South Australia's
Limestone Coast Region

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For further information and news, visit
www.lcrdb.com/aquaculture

The Accent on Aquaculture project is an initiative of the
South East Local Government Association.

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DEVELOPING OUR AQUACULTURE POTENTIAL

Welcome to the Accent on Aquaculture project, which provides a blueprint for development of the aquaculture industry in the Limestone Coast Region of South Australia.

The project, sponsored by Federal, State and Local Government, has undertaken extensive research to establish an accurate picture of the region's potential to develop an economically viable and environmentally sustainable aquaculture industry.

The outcomes of this research were presented in early 2002 in the Accent on Aquaculture Report, produced by EconSearch Pty Ltd and the Limestone Coast Regional Development Board (LCRDB) for the South East Local Government Association (SELGA) on behalf of the seven councils in the region.

Based on the research, this publication, *Limestone Coast Aquaculture*, provides practical and reliable information to potential investors who want to share in the industry's expansion.



A THRIVING REGION

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Aquaculture is considered a growth industry in the thriving Limestone Coast Region in the South East of South Australia - midway between the capital cities of Adelaide and Melbourne.

The highly productive area supports a population of more than 62,000 people, focused on the main city of Mount Gambier and major towns of Naracoorte, Millicent, Robe, Kingston, Bordertown, Lucindale and Penola that service surrounding rural communities.

Forestry is a cornerstone of the region's economy, with 85% of South Australia's forest plantations producing pine and hardwood products for the domestic and export markets. Employing more than 4,000 people, the timber industry has an annual value of \$1.3 billion.



Wine is also a growth industry under the impetus of the Australia's expanding export markets. The region has 13,000 hectares of vineyards, accounting for 10% of the national grape crush and 20% of Australia's premium wine production.

Agriculture generates about \$450 million annually, with 30% of the State's agricultural products produced in the region. Sheep, meat and wool account for \$80 million, prime beef production and processing \$160 million and grain, vegetable seeds and oil seeds contribute \$86 million.



Beef and grape production are key drivers of the region's economy.

The region is also home to a buoyant fishing industry, with the clear, unpolluted waters along the Limestone Coast providing a highly productive environment for the southern rock lobster, abalone and other species. The lobster industry, centred mainly on exports to Asia, is worth \$60 million annually and provides 400 jobs.

The area's prosperity is built on an abundant supply of quality underground water complemented by high rainfall, fertile soil, a temperate climate and ample areas of land suitable for agriculture and industry.

These natural advantages are underpinned by a commitment to sustainable practices to protect the region's clean environment, combined with a focus on innovation and best practice, particularly in relation to the demands of international markets.

The LCRDB has a key role in the ongoing development of the region's economic growth, working closely with SELGA and its seven member councils: City of Mount Gambier, District Council of Grant, Kingston District Council, Naracoorte Lucindale Council, District Council of Robe, District Council of Tatiara and Wattle Range Council.



The Limestone Coast region in the South East of South Australia.



The region's lobster industry employs 400 people through a strong export focus.

AQUACULTURE'S RICH POTENTIAL

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Aquaculture is one of the South Australia's boom industries, as production has increased from \$99 million in 1997/98 to \$286 million in 2000-2001. The availability of locations in a range of climates and suitable coastal and land-based sites give South Australia the ability to farm a variety of species for the domestic and international markets.

The Limestone Coast Region is already home to the only Atlantic salmon farm on the Australian mainland, operating in the cool, coastal waters off Cape Jaffa, and there is also land-based operation at Robe that uses warm artesian water to produce barramundi in another thriving enterprise.

The success of these ventures and the LCRDB's study of the region's aquaculture potential underline the opportunities for investors to participate in the industry's expansion.



A sheltered anchorage for crayfishing boats at Robe.

The Limestone Coast Region offers a number of advantages:

Climate

The region has a mild climate that is suitable for the culture of a number of freshwater and marine species. The area is considered one of Australia's most reliable rainfall zones with one of the lowest incidences of drought, an important consideration for ensuring reliable groundwater resources.

Water

The region has high quality coastal and inland water resources. Groundwater is the main source of water through two regional aquifers, which are used extensively for irrigation under supervision of a regional management authority.

The region also has areas of inland saline water that have potential for use in the production of marine finfish, one of the aquaculture industry's new directions. Pilot projects in South Australia using this technique are showing promising results and it provides a valuable environmental benefit through lowering salt levels that harm native vegetation and crops.

The Limestone Coast's extensive coastline provides a vast resource of clear, unpolluted waters that have a reputation for producing high-quality seafood products for domestic and export markets.

Soil

The Tatiara area in the northern part of the region has a large expanse of cracking clay, a soil suitable for lining aquaculture ponds. This area, which stretches from the area surrounding the town of Bordertown to the Victorian border and south, combined with a groundwater level below two metres, provides favorable conditions for developing ponds.



Existing pond development.

A fishing culture

Fishing has been one of the region's key industries for more than a century. Not only does this mean there is a strong body of local knowledge about marine issues, but there is also significant infrastructure, such as jetties, launching ramps and support services, including processing and transport services. These can be shared with aquaculture projects.

The State Government also supports the industry through economic development and management advice, environmental and safety monitoring, quality assurance and research.

Marine sites

The region's designated management zones for seawater aquaculture have scope for new projects. Although the Kingston zone is fully utilised for offshore cage farming of Atlantic Salmon near Cape Jaffa, there are 120 hectares in other areas. The Fobe zone has 20 hectares available and there are 100 hectares on offer in the Port McDonnell zone*. Additional areas may be allocated with the release of the revised South East Aquaculture Management Plan in late 2002.

Access to markets

The region's location midway between Melbourne and Adelaide is a strategic advantage. Two major highways connect the Limestone Coast Region to Adelaide and Melbourne, providing access to major domestic markets and shipping facilities for the export of products. The deepwater port at Portland, about 100 kilometres south-east of Mount Gambier, also provides a major gateway for export products.



Fishing is already an established industry in the Limestone Coast Region.



*Refer to Primary Industries and Resources web site www.pir.sa.gov.au/pages/aquaculture/

BUILDING ON A SOLID FOUNDATION

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According to research prepared for the LCRDB and SELGA, aquaculture contributed an estimated \$6.3 million to the economy of the Limestone Coast Region in 2000/01. Direct business turnover generated within the region was estimated at \$3.0 million and flow-ons to other sectors, including manufacturing, trade, business and transport, was estimated at \$3.2 million.

Based on this outcome, the region's aquaculture enterprises employed about 50 people, with a further 20 jobs maintained through flow-on business activity.

The region has 73 licensed operators, concentrated in the production of freshwater crayfish and finfish, using land-based and offshore production systems



Atlantic Salmon production off Cape Jaffa.

It is from this strong base that the LCRDB and SELGA are supporting expansion of the Limestone Coast Region's aquaculture industry.

Recirculation and pond systems produce a variety of species and there is scope to introduce new fish to the Limestone Coast Region.

Actual and Projected Value, quantity and employment for aquaculture in the Limestone Coast Region

	Value (\$m)	Annual % Change	Production (tonnes)	Annual % Change	Employ. (FTE)	Annual % Change
1999/00	2.7		282		39	
2000/01	3	14	339	20	48	23
2001/02	3.4	13	385	14	60	24
2002/03	4.1	20	476	24	77	30
2003/04	6.1	50	647	36	89	16

a. Actual Sales 1999/00 & 2000/01; estimated sales 2001/2002 - 2003/2004

Source: Accent on Aquaculture Report, April 2002.

SUITABLE SPECIES – land-based projects

Freshwater crayfish (yabbies and marron)

The region produces about 2.5 tonnes annually, selling locally and to wholesalers in Adelaide and Melbourne. In addition to domestic markets, strong international prices offer scope for exports if production can reach a level to provide consistent supplies.

The Tatiara area, which includes the towns of Keith and Bordertown, in the region's north, and the Naracoorte/Lucindale areas have a low water table and salinity, providing opportunities for expansion of pond production.



Marron



Yabby

Barramundi

The region has a significant barramundi farming operation at Robe that uses warm artesian water to produce about 200 tonnes of quality seafood each year.

The region's saline groundwater resources and the promising results of marine projects using this technique offer great potential. The Cooke Plains area near Tailem Bend, north of the Limestone Coast Region, has an aquaculture enterprise which is producing marine finfish in full-strength bore water, with the Bedford Salt Interception Project.

While export markets are restricted because of the high volumes of barramundi produced in northern Australia and South East Asia, there is a strong domestic market in South Australia and Melbourne and Sydney.

As South Australia's barramundi are grown in closely controlled systems, producers are able to supply markets with fish all-year round.

The lack of natural barramundi populations means there are no natural diseases of the species in local waters, so aquaculture operations have experienced less disease problems.



Silver perch and Murray Cod

Production is small in South Australia, but the closure of the commercial freshwater fisheries in eastern Australia and, more recently, in South Australia the end of commercial licences along the River Murray may lead to expanded market opportunities for aquaculture-produced fish.

The low output has led to niche markets, particularly in New South Wales, where live-plate-size silver perch have attracted around \$20 per kg.

However, prices for silver perch and Murray cod can vary significantly, ranging from \$8 (silver perch) to \$30 (Murray cod) depending on demand and availability.



Silver Perch



Recirculation system for cultivation of fin fish.

The Limestone Coast region produces about 4 tonnes of Murray cod each year using flow-through tank systems.

What appear to be strong seasonal prices on the domestic market and the potential for exports indicate these species have strong potential for aquaculture.

Algae/brine shrimp

The Limestone Coast's inland saline water resources offer potential for extensive culture of algae or brine shrimp.

Although this form of aquaculture is still in its infancy in South Australia, trials and the amount of land with saline groundwater available in the state suggest this production technique can be developed with worthwhile results.

SUITABLE SPECIES – offshore projects

Offshore production in the Limestone Coast Region is based around sea cages, but there is scope to expand into long-line culture and offshore holding systems to enhance species before they are sold.



Atlantic Salmon

Atlantic salmon

While the South Australian environment is generally unsuited to this species, the cool upwelling off the Limestone Coast provides a favourable environment. Atlantic salmon are produced in sea cages off Cape Jaffa and at Rivoli Bay between Beachport and Southend, with annual output estimated at 100 tonnes.



Atlantic salmon are an excellent eating fish and enjoy good market acceptability, as they can be sold as fresh, chilled or frozen, and there is potential for value-added products, such as caviar.

Although the domestic market is well serviced by high production in Tasmania, the South Australian product also has developed a market locally and interstate where they are sold on capital city markets. The major export market for Australian salmon is Japan.

Development of this species depends on establishment of relatively large operations based on sites of 20 hectares to meet servicing, capital and equipment costs.

Sea trout

Sea trout are produced offshore in conjunction with the Atlantic salmon operations. Annual production is about 12 tonnes.

Abalone

South Australia has developed a valuable export market for wild-caught abalone, which is worth about \$30 million annually, based on shipments of about 250 tonnes into South East Asia, China and Japan.



Abalone

However, there are opportunities to expand this production, as the market is generally considered to be undersupplied and the fishery is under pressure.

Many of the world's abalone wild stocks are collapsing through over-exploitation and many Asian aquaculture ventures are failing because of pollution and declining water quality.

At 60mm-100mm, Australian farmed abalone is considered an ideal size for Asian consumers and marketing channels into the Asian market are well defined.

Green and blacklip abalone can be farmed in coastal locations by pumping seawater to a nearby onshore production facility. These systems are ideally located in sheltered sites, such as bays and behind reefs, away from high-energy seas.





Other species

Long-line culture systems are suitable for production of oysters, mussels and scallops.

Oysters and mussels offer significant potential, as South Australia already has several aquaculture operations producing commercial quantities. These are located on the West Coast, near Port Lincoln, Yorke Peninsula and Kangaroo Island.

The Limestone Coast shares the qualities of these regions, which are recognised internationally for their clean waters and suitable sheltered locations for the production of quality shellfish.

South Australia's oyster industry, based on the Pacific Oyster, has expanded considerably in recent years, with strong demand pushing production to 3.5 million in 2000/2001, based on significant domestic sales and export orders.

Both species are supported by strong industry groups - the SA Oyster Growers' Association and the SA Mussel Growers' Association.

Yellowtail kingfish, snapper, mulloway and King George whiting

Offshore cage culture can be considered for production of snapper, mulloway, yellowtail kingfish and King George whiting.

Yellowtail kingfish are considered a good species for aquaculture production because there is a growing demand in domestic and export markets. A significant factor for Australian producers is the



Long-line oyster cultivation.

Japanese market where the yellowtail kingfish is highly regarded for fresh consumption as sushi or sashimi.

The species is hardy and is known to adjust well to sea cage culture. Smaller yellowtail kingfish from colder waters are generally considered better quality, a factor which supports their commercial culture in South Australia.

Southern rock lobster

Offshore holding systems are suitable for fattening or enhancement of southern rock lobster, which already has a significant presence in the region's traditional fishing industry.

Holding lobster has a number of aims, including retention of the animals until market prices are high and increasing weight or changing colour through supplementary feeding. Trials using these systems have produced encouraging results.

Holding systems are also suitable for growing abalone to market size.

Offshore zones in the Limestone Coast Region have the potential to host a range of species, particularly as new areas are expected to be allocated under the revised South East Aquaculture Management Plan.



Live southern rock lobster processing at Robe.

PROJECT APPROVALS

The State Government's management of aquaculture projects recently underwent a major overhaul with introduction of a new Aquaculture Act 2001 in response to the industry's rapid growth and changing technology.

The Act establishes an integrated licensing and tenure system that aims to promote the ecologically sustainable development of the state's marine and land-based aquaculture and streamline its management. The Act is expected to be introduced early in July 2002.

The Act was developed by a steering group representing government bodies involved in regulating the aquaculture industry in consultation with a community reference group that included industry representatives, the conservation movement, local government and the scientific community.

The Act recognises the need to ensure consistency between aquaculture policies and other planning initiatives, particularly the proposed marine planning framework.

The Act also requires anyone conducting an aquaculture project to have a licence granted by the Minister for up to 10 years, a requirement which applies to projects undertaken in both State waters and land-based sites. This provision overcomes the inconsistency of previous legislation, which provided separate regulation of marine and land-based projects.

The Act also provides a more flexible approach to granting leases for use of State waters, which gives greater security for aquaculture operators while protecting community interests.

The Environment Protection Authority is assigned a key role under the Act for approval and monitoring of aquaculture projects. The EPA has been given additional responsibilities and it will retain existing powers to enforce the general environmental harm and duty requirements under the Environment Protection Act 1993.

Government regulations require approval for construction of buildings, undertaking associated activities, such as processing, and for a change of land use.



New government controls of aquaculture respond to the industry's rapid expansion and new technology.

For most land-based projects, the local council in the area will be responsible for the development approval. However, if some component of the development is outside individual council boundaries, the Development Assessment Commission becomes the relevant approval authority

Pond construction needs to be approved by the EPA and the Department of Water, Land and Biodiversity Conservation and the department provides approvals for groundwater access and bore construction. The South East Catchment Water Management Board is responsible for development and management of Water Allocation Plans in the Limestone Coast Region. The plans identify how water will be allocated, the amount of water for allocation and rules for transferring licences and how trading will occur. The plans also consider strategies to maintain the quality and quantity of the region's water resources.



REGIONAL SUPPORT

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The Limestone Coast Region's strong output from industry and primary production has led to an advanced infrastructure network to service the region. Expansion of the aquaculture industry can share in these advantages.

Transport

The region is linked to the capital cities of Adelaide and Melbourne by major highways, which provide ready access to major domestic markets and shipping facilities for export products. The Port of Portland, east of Mount Gambier, in Victoria, is also a major export point for a number of the region's products, including timber logs and woodchips.

Several operators provide refrigerated road transport for fresh produce and seafood produced in the region. These companies run regular services to Adelaide and Melbourne, servicing these cities up to three times a week.

Mount Gambier's regional airport has several links each day to Melbourne and Adelaide. Although the airlines are primarily a passenger service, some aquaculture operators have used their freight capability. Specific air freight services are not available at present, but the South Australian Airfreight Council is investigating this issue. The reinstatement and standardisation of the region's rail network is currently being developed, which will also link the service with the National Rail Network.

Energy

Three-phase power, which is essential for many land-based aquaculture projects, is available within the region at Mount Gambier, in and around major townships and within some rural areas. ETSA Utilities, which is the primary distributor of electricity in South Australia, works with industrial customers to assess needs and the practicality of network connections. Extensive aquaculture facilities, such as those using dams to culture inland crayfish, may not require access to three-phase power.

Origin Energy has gas production facilities at Katnook, south of Penola, which service industrial and domestic customers in Mount Gambier and other areas, including large industrial customers at Nangwarry and Millicent. The company has been awarded the contract to reticulate gas in the region from the new pipeline linking Adelaide with the Victorian gas fields.

Water

Mount Gambier and major towns have reticulated water. SA Water's main pipeline from Tailem Bend runs into the region to a point south-east of the town of Keith. This pipeline has capacity for customers in the region's north to purchase off-peak water for commercial applications. In addition to these resources, the region is noted for its abundant supply of groundwater, which is used extensively in primary production.



Jetty facilities at Cape Jaffa which service offshore Atlantic Salmon production.

Marine facilities

Offshore projects require facilities for boats servicing aquaculture sites. The Limestone Coast's extensive fishing industry provides a broad range of services, including safe moorings, jetties, boat ramps and storage and processing facilities.

These are located at the key fishing towns of Port MacDonnell, Carpenter Rocks, Southend, Beachport, Robe, Cape Jaffa and Kingston.



Mobile phone coverage

Coverage along the Limestone Coast's major highways is extensive. This includes the Dukes Highway (Tailem Bend to the Victoria border), Princes Highway (Mount Gambier to Tailem Bend) and the Riddoch Highway (Keith to Mount Gambier).

Telstra's MobileNet CDMA and the Optus coverage using a car kit and antennae are also quite broad.

Coverage on minor roads using hand-held units is limited.

Housing

Strong economic growth in the Limestone Coast Region has created a high demand for housing, particularly in areas associated with the wine industry. The Office of Regional Development in conjunction with other key state and local agencies have undertaken a detailed review of the housing issue, and are currently formulating strategies to manage the regions housing requirements, particularly in relation to addressing shortages in low-cost and management-level accommodation.

Industry access

The region's towns are home to many businesses and government agencies involved in the fishing and aquaculture industries, such as:

- Trade and equipment suppliers
- Export and processing facilities
- Regional Development Board
- Primary Industries and Resources SA (PIRSA) Fisheries
- Environmental Protection Agency (EPA)
- Department of Water, Land and Biodiversity Conservation



INDUSTRY VALUE-ADDING AND DIVERSIFICATION

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Aquaculture has the capacity to generate additional economic returns for the Limestone Coast Region through value-added products, associated service industries and integration with complementary activities.

Markets can be expanded by enhancing the quality of the product through an emphasis on key considerations, such as product size, colour and freshness. These issues can be addressed by grading before shipment, feed development to ensure prime condition and use of the best form of packaging and transport to the end user or market place. Typically, in the seafood market, the fresher the product the higher the value, with live product attracting the highest price.

New species can generate additional returns. For example, the Limestone Coast's established lobster fishery presents an opportunity for possible enhancement through offshore holding sites that can retain stock to take advantage of higher prices or for feeding to improve quality and colour.



Expansion of the region's aquaculture industry will create additional business and job opportunities.

New products linked to existing aquaculture production can create additional income for the region. The gourmet food market offers scope for products such as yabby pate and smoked Atlantic salmon and freshwater crayfish tails. These products require additional production levels to justify establishment of processing facilities.

There is also scope for the establishment of dedicated hatcheries with broodstock, to supply offshore Atlantic Salmon and sea trout growers with eggs for hatching.

Expansion of the Limestone Coast Region's aquaculture industry will generate opportunities in the chain of supply area, including refrigerated transport, engineering and machinery, by products and feed manufacturing.

Integration of aquaculture with other activities can lead to additional economic benefits. This approach can add stability and growth to a business, make better use of overheads, retain skilled staff and use by-products created by the primary business.

The benefits of integration are demonstrated by the combination of barramundi and lettuce production on the east coast of Australia. This operation uses recirculation systems to allow wastewater to provide nutrients to hydroponically grown lettuce. Given the success of barramundi culture in the Limestone Coast Region, the potential for integration with hydroponics appears high.

The region's significant viticulture and forestry industries offer opportunities through the use of wastewater from aquaculture projects to provide valuable secondary use as irrigation for grape and tree production.

There are also demonstrated benefits from linking aquaculture and tourism. Several yabby and freshwater fish farms have opened their properties to visitors with encouraging results. As the Limestone Coast Region enjoys high visitation rate from Victoria and South Australia, this strategy offers positive openings.

INDUSTRY BACKING

The South Australian Government, the LCRDB and local councils recognise the economic benefits of aquaculture and provide a broad range of support to continue the industry's expansion. This commitment includes legislative support, advisory services on technical and management issues and scientific research.

Primary Industries and Resources SA has a dedicated industry section, PIRSA Aquaculture, which has a key role in the development of the industry through its management role, including licensing.

Legislation which supports maintenance of a pollution-free environment is also a high priority of the Government and a critical factor in maintaining a safe climate for aquaculture's development.

The industry is backed by a high-level aquatic research capability, delivered through PIRSA's research organisation, the South Australian Research and Development Institute (SARDI), the Seafood Industry Development Board (SA) and the universities of Flinders, Adelaide and South Australia. South Australian aquaculturists also benefit from national research funding through the Fisheries Research and Development Corporation.

South Australia's aquaculture industry is also supported by a number of sector groups and associations that work proactively to develop their species.



South Australia has a highly respected fishing industry research capability.

These groups have significant local knowledge and are generally willing to assist people interested in joining the industry.

They also work closely with PIRSA on key industry issues, such as codes of practice and legislation.



EDUCATION AND TRAINING

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In response to the rapid growth of South Australia's aquaculture industry, tertiary and higher education institutions in the State provide courses that cater to the industry's specialist needs.

Flinders University offers a three-year Bachelor of Technology (Aquaculture), which can be undertaken full-time or part-time at the university's Adelaide campus.



Teaching and higher education institutions in South Australia offer students courses which are specific to the aquaculture industry.

Students can also undertake higher education studies at the Spencer Institute of TAFE, Port Lincoln, for a Diploma of Aquaculture.

Flinders University and the Spencer Institute TAFE are investigating development of appropriate studies for students in the Limestone Coast region. Industry and educational representatives are actively supporting the proposal.

Spencer Institute of TAFE has also joined with a Millicent aquaculture company to provide training and assessment for students enrolled in the Government's traineeship program.

The Kingston Community School, in conjunction with the Australian Fisheries Academy and Limestone Coast fishing interests, have established a regional industry training centre to assist students contemplating a career in the fishing industry. The centre offers level 1 units from the Seafood Industry Training Training Package to years 10-12 students, covering aquaculture and wild catch.

The school recently expanded its training curriculum through Federal and State government funding for development of a state-of-the-art aquaculture facility using advanced recirculation technology

A number of other schools in the region offer aquaculture modules through the Vocational Educational Education and Training program.

WANT TO KNOW MORE?

Visit our web site at www.lcrdb.com/aquaculture

Councils and the LCRDB have skilled staff who can help with information about the development of the aquaculture industry in the Limestone Coast Region.

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