The status and outlook of marine aquaculture development in South Africa

Sustainable Aquaculture Development

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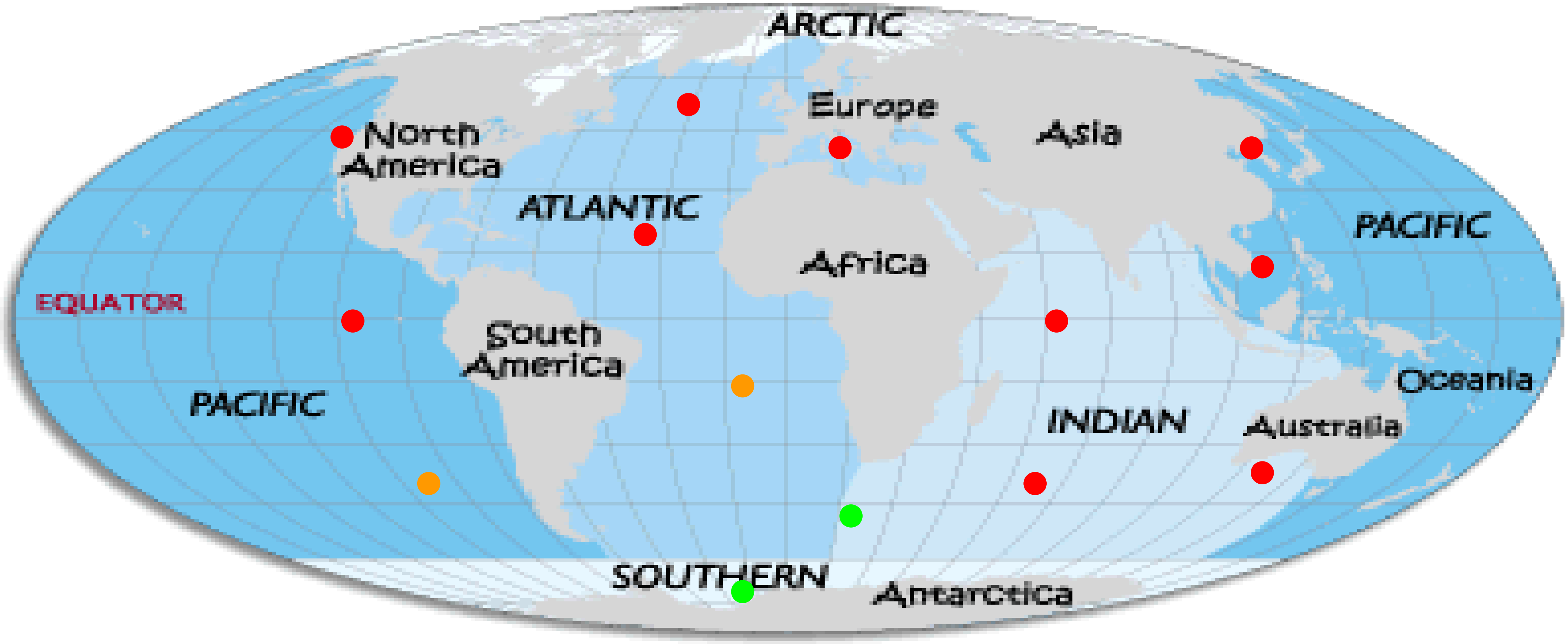
Status of World Oceans



13 of 15 Oceans Overexploited

Aquaculture in Africa

- 670 000 tons annually, 1.5 % of global production
- Lack of seed, feed, knowledge and financing
- 90% produced in inland waters
- Egypt largest, Nigeria 2nd
- SA 5th largest producer in Africa

Marine Aquaculture in SA

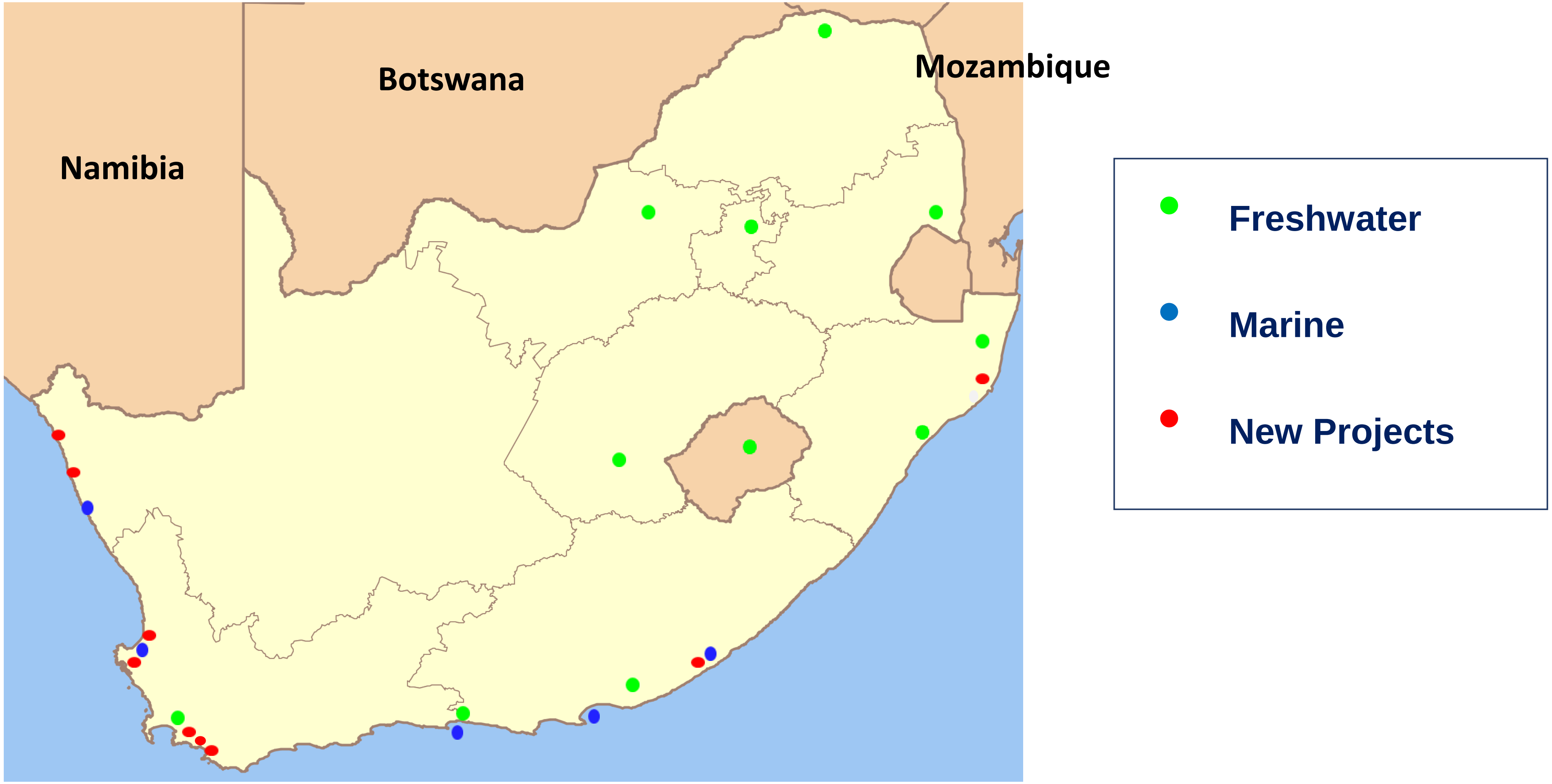
1. 4 600 tons in 2014, value approximately R 485 million
2. Essentially a niche market industry, high value products
3. Marine species contributed about 70% of production by quantity and 85% by value
4. Abalone: 1 400 tons, value at ± R410 million in 2013
5. Mussels: 1 500 tons, value at ± R 42 million in 2013
6. Oyster: 380 tons, value at ± R 27 million in 2013
7. Finfish: 125 tons, value at ± R 5 million in 2013








Marine Aquaculture in SA

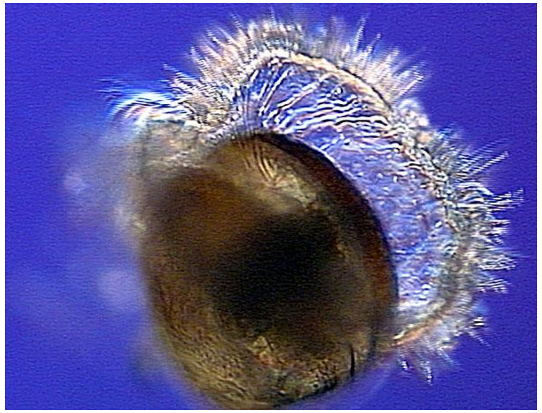


Abalone – *Haliotis midae* **15 Farms**

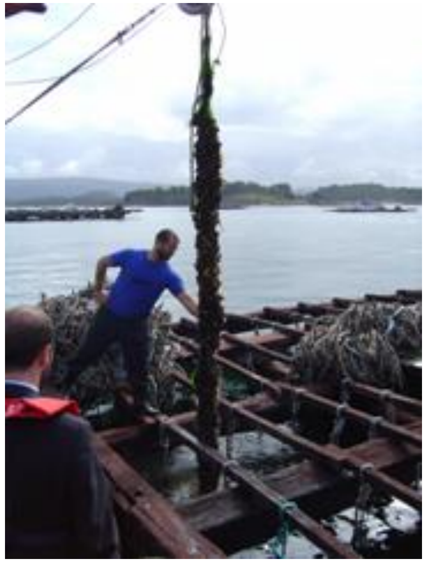
Abalone Sector Analysis

Markets	International, local
Resources	Good
Risks	Medium
Sustainability	Good
Technology	Established
Services	Established
Growth prospects	Very good

Mussels – *Mytilus galloprovincialis* 3 Farms








Mussel Sector Analysis

Markets	Local, regional
Resources	Limited
Risks	Low to medium
Sustainability	Good
Technology	Established
Services	Established
Growth prospects	Good

Oysters – *Crassostria gigas* 7 Farms

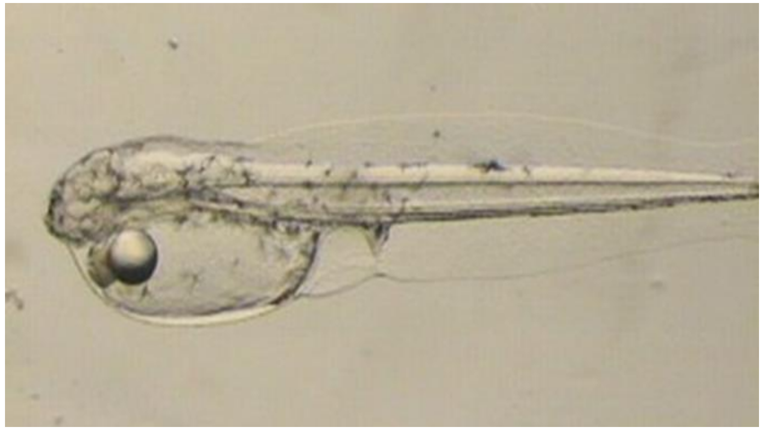





Oyster Sector Analysis

Markets	Local, regional
Resources	Limited
Risks	Low to medium
Sustainability	Good
Technology	Established
Services	Established
Growth prospects	Moderate

Marine Finfish Production 4 farms






Marine Finfish Sector Analysis

Kob (*Argyrosomus japonicus*)

Yellowtail (*Seriola lalandi*)

Atlantic salmon (*S. salar*)

White steenbras (L. lithognathus)

Markets	Local, regional
Resources	Limited
Risks	High
Sustainability	Good
Technology	Developing
Services	Developing
Growth prospects	Moderate

Development Advantages

1. Well developed infrastructure (transport, processing facilities, marine infrastructure)
2. Reputation as a high quality seafood supplier
3. Diversified marine species resource base
4. Abalone sub-sector success
5. Pristine marine environment
6. New growth priority and strategy

Development Constraints

1. Environmental and technical constraints
    - High energy coastline
    - Limited marine sites
2. Distance to markets
3. Difficult to access capital
4. Increasing input costs:
    - Rate of inflation (> 6%)
    - Electricity
    - Labour
5. Inflexible legislative framework / Biodiversity legislation

Development Goals

Short Term next 5 years	• Abalone – 2 500 tons • Marine finfish – 4 000 tons
Medium Term 5 – 10 years	• Total production – 20 000 tons • New species R&D
Long Term 10 – 15 years	• New species production • Stock enhancement