The economic contribution of commercial fishing 2025

Seafood New Zealand

August 2026

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Executive summary

Seafood New Zealand (Seafood NZ) commissioned Business and Economic Research Limited (BERL) to provide an economics-based estimate of the value of commercial fishing to the New Zealand economy.

At a glance

Economic contribution

- The Commercial Fishing industry, including both fish harvesting and seafood processing, generated an estimated $6.4 billion in total economic output in 2025
- The industry contributed an estimated $2.45 billion to New Zealand's gross domestic product (GDP) in 2025
- Seafood exports from New Zealand totalled $2.0 billion in the year ended March 2025
- The Fish Harvesting and Seafood Processing industries supported an estimated 14,506 full-time equivalent (FTE) roles across the New Zealand economy
- The average annual value of the commercial catch was estimated at $1.53 billion between 2023 and 2025
- Across New Zealand's ten fisheries management areas (FMA), average annual adjusted commercial catch was estimated at 344,541 tonnes between 2023 and 2025
- For each dollar of GDP generated by the Commercial Fishing industry, a further $1.24 of GDP is supported through indirect and induced effects. Each direct FTE supports a further 1.33 FTEs.

Regional impact

The regional impact of commercial fishing is concentrated in coastal and port-based economies, where the Fish Harvesting and Seafood Processing industries support employment, supplier activity, logistics, marine services, and household spending. Nationally, the Commercial Fishing industry accounts for around 0.6 percent of total employment and GDP. Nelson-Tasman-Marlborough has the strongest reliance on the industry with 5.9 percent of regional employment, and 6.2 percent of regional GDP, connected to commercial fishing. The West Coast and Southland also have above-average reliance on the industry, reflecting the importance of fishing and seafood-related activity to smaller regional economies.

In absolute terms, the largest regional contribution is from Nelson-Tasman-Marlborough. This region directly supports 1,954 FTEs in fish harvesting and seafood processing, and 4,546 FTEs once flow-on effects are included, alongside generating $767.5 million in total GDP. Canterbury and Auckland are the next largest contributors, each directly employing around 1,000 FTEs, and supporting approximately 2,400 total FTEs, and generating around $400 million in GDP after multiplier effects are included. Bay of Plenty and Southland also make material contributions.

Commercial fishing evolution since 2020

Since 2020, the Commercial Fishing industry has generated greater economic value from a smaller catch base. The total commercial catch declined from an average of 406,754 tonnes between 2016 and 2020 to 344,541 tonnes between 2023 and 2025, a decrease of 15 percent. Over the same period, the average annual commercial catch value increased from $1.29 billion to $1.53 billion, indicating that higher prices more than offset the reduction in catch volumes. This value growth was reflected in the overall economic contribution of fish harvesting and seafood processing, with total output increasing by 24 percent and total GDP contribution increasing by 12 percent between 2020 and 2025.

The change since 2020 has not been evenly distributed across fisheries management areas (FMAs) or regions. FMA7 – Challenger, and FMA6 – Sub-Antarctic, recorded volume declines. However, all FMAs recorded higher catch values, with FMA3 – South East Coast, and FMA5 – Southland, recording the largest increases and becoming the highest-value FMAs. The majority of New Zealand's commercial seafood harvest by volume is taken through trawling, seining and netting methods. Bottom trawling, where fishing gear comes into contact with the seabed at least once, accounts for approximately 70 percent of New Zealand's commercial catch by volume.

Summary of the contribution of the Commercial Fishing industry

New Zealand's long-term economic performance depends on productive, export-earning industries that generate sustainable value, support regional communities, and make efficient use of natural resources. The Fish Harvesting and Seafood Processing industries convert marine resources into domestic food supply, export revenue, employment, and wider economic activity across the country.

In 2025, the combined Fish Harvesting and Seafood Processing industries generated an estimated $6.4 billion in total economic output, contributed $2.45 billion to New Zealand GDP, and supported

14,506 full-time equivalent roles across the New Zealand economy. Seafood exports totalled $2.0 billion in the year ended March 2025, representing approximately three percent of New Zealand's total merchandise exports.

The industry is also economically important because it supports activity across a wider value chain. Fish harvesting provides the raw product, while seafood processing adds value through grading, filleting, freezing, packaging, and preparation for domestic and export markets. Seafood processing is therefore a major part of the value story. In 2025, the Seafood Processing industry generated an estimated $1.8 billion in direct output, contributed $1.8 billion in total GDP, and supported 8,129 FTEs, once direct, indirect, and induced effects are included.

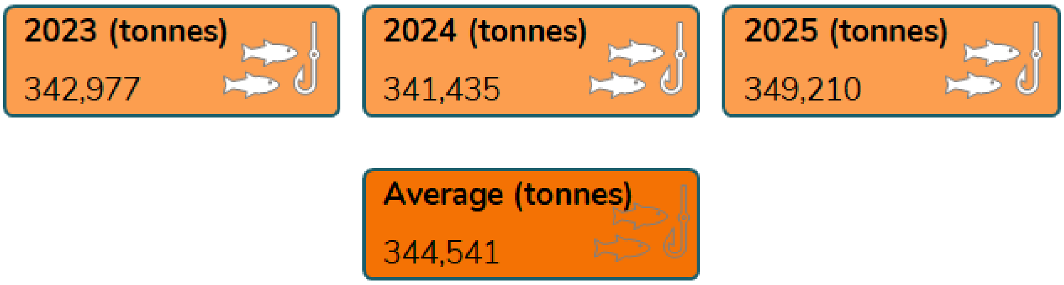
The industry is generating greater value from a smaller catch base. Across New Zealand's ten FMAs, average annual adjusted commercial catch was estimated at 344,541 tonnes between 2023 and 2025, down from 406,754 tonnes between 2016 and 2020. Over the same broad comparison, the average annual commercial catch value increased from $1.29 billion to $1.53 billion.

The regional dimension is central to the industry's economic contribution. Fish harvesting and seafood processing activity is concentrated in coastal and port-based communities, where the industry supports jobs, local suppliers, marine services, logistics, processing facilities, and associated household spending. The Nelson–Tasman–Marlborough region provides a clear example. In seafood processing alone, the region generated an estimated $480 million in direct output, $489 million in total GDP, and supported 2,198 FTEs.

Volume of the commercial catch

Across the ten FMAs included in New Zealand's Exclusive Economic Zone (EEZ), the average adjusted commercial fish catch between 2023 and 2025 was 344,541 tonnes.

Figure 1 Commercial catch volume by FMA, 2023-2025



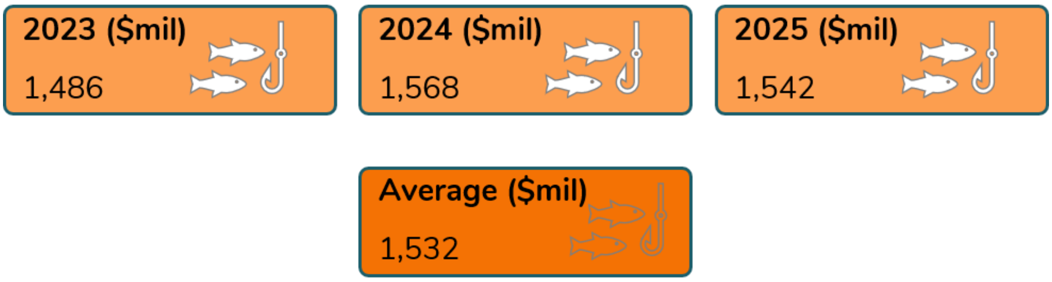
Source: MPI and BERL analysis

This is a decrease from the average adjusted commercial catch between 2016 and 2020, which was 406,754 tonnes.

Value of the commercial catch

Between 2023 and 2025, the average commercial catch value across all ten FMAs was $1.53 billion. This is an increase from an average commercial catch value of $1.29 billion between 2016 and 2020.

Figure 2 Commercial catch value (adjusted by FMA), 2023-2025



Source: MPI and BERL analysis

Economic contribution of the Commercial Fishing industry

The Commercial Fishing industry (comprising the Fish Harvesting and Seafood Processing industries) makes a significant contribution to GDP, employment, exports, and regional economies. The total contribution of the Fish Harvesting and Seafood Processing industries to the New Zealand economy in 2025 was $2.45 billion in GDP, and 14,506 FTEs employed. As depicted in Table 1, the Commercial Fishing industry contributed:

- Direct output of $3.3 billion, $1.1 billion in direct GDP, and the direct employment of 6,235 FTEs
- An estimated $6.4 billion in total economic output
- The support of an estimated 14,506 full-time equivalent roles across the New Zealand economy, underpinning regional economies across coastal New Zealand.

The total economic contribution of the Commercial Fishing industry accounts for the overlap between the Fish Harvesting and Seafood Processing industries to ensure that no double counting occurs when the output of one industry is an input into the other.

Table 1 Economic contribution of the Commercial Fishing industry, 2025

	Output (2025 $m)	GDP (2025 $m)	Employment (FTEs)
Direct	$3,307	$1,095	6,235
Indirect and Induced	$3,085	$1,354	8,271
Total	$6,392	$2,449	14,506

Source: BERL analysis

In the year ended March 2025, seafood exports from New Zealand totalled $2 billion. Seafood exports by value in 2025 accounted for three percent of total goods exports at $73.9 billion.

Economic contribution of the Fish Harvesting industry

In 2025, the Fish Harvesting industry (harvesting of fish only) earned just over $1.5 billion in direct output and directly employed 3,723 FTEs, as depicted in Table 2. Overall, the Fish Harvesting industry contributed a total of just over $1.4 billion in GDP[1] to the New Zealand economy, and supported a total of 11,670 FTEs.

Table 2 Economic contribution of the Fish Harvesting industry, 2025

	Output (2025 $m)	GDP (2025 $m)	Employment (FTEs)
Direct	$1,532	$521	3,723
Indirect	$1,246	$540	4,828
Induced	$728	$378	3,119
Total	$3,506	$1,440	11,670

Source: BERL analysis

[1] Readers should note that the definitions used in this report are set out in Appendix C

Economic contribution of the Seafood Processing industry

In 2025, the Seafood Processing industry earned nearly $1.8 billion in direct output and directly employed 2,512 FTEs, as depicted in Table 3. Overall, the Seafood Processing industry contributed a total of $1.8 billion in GDP to the New Zealand economy, and supported a total of 8,129 FTEs.

Table 3 Economic contribution of the Seafood Processing industry, 2025

	Output (2025 $m)	GDP (2025 $m)	Employment (FTEs)
Direct	$1,775	$573	2,512
Indirect	$1,743	$705	3,318
Induced	$1,019	$530	2,299
Total	$4,537	$1,808	8,129

Source: BERL analysis

Seafood processing represents a substantial source of value-added activity and employment within the wider commercial fishing value chain. It substantially enhances the value of the raw catch by generating additional economic value through downstream processing, export activities, and logistics services. Seafood processing increases the economic value of harvested catch by transforming raw seafood into higher-value products for domestic and export markets.

Definition of economic contribution and impact multipliers

Economic contribution is reported as direct, indirect, and induced contribution. Direct contribution refers to the activity generated by the Fish Harvesting and Seafood Processing industries themselves, including their output, GDP, and employment. Indirect contribution captures the additional activity generated through purchases from supplier industries. Induced contribution captures the further activity generated when workers in the directly and indirectly affected industries spend their wages and salaries in the wider economy.

Seafood processing has the highest total flow-on effects across each measure, with total multipliers of 1.56 for output, 2.15 for GDP, and 2.24 for employment. This reflects the industry's stronger linkages with upstream suppliers and household spending effects, relative to fish harvesting which has total multipliers of 1.29 for output, 1.76 for GDP, and 2.13 for employment.

The combined multipliers are lower than the standalone industry multipliers because they account for the overlap between fish harvesting and seafood processing, particularly since harvested seafood is an input into the processing activity. This adjustment is necessary to avoid double counting when estimating the combined economic contribution of the two industries.

The combined results indicate that for each dollar of direct GDP generated by the integrated industry, a further $1.24 of GDP is supported through indirect and induced effects. Similarly, each direct FTE supports a further 1.33 FTEs across supplier industries and household spending.

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1 Introduction

Seafood New Zealand (Seafood NZ) commissioned Business and Economic Research Limited (BERL) to provide an economics-based estimate of the value of commercial fishing to the New Zealand economy. This report is an update from BERL's 2022 report, which estimated the economic contribution of commercial fishing in New Zealand in 2020. [2]

The purpose of this report is to inform commercial fisheries' management decisions by providing a strong evidence base of the performance of commercial fishing over the course of a three-year period (2023 – 2025).

Within this report, estimates of catch value and economic contribution are provided by segments of the commercial Fish Harvesting industry, for example, by:

- Sectors – deepwater, highly migratory species (HMS), inshore, rock lobster, pāua and shellfish
- Geographic location
- Methods of catch
- Species
- Employment.

BERL have used the catch data held by the Ministry for Primary Industries (MPI) to provide these estimates.

1.1 Defining economic contribution

In this report, economic contribution is defined as the gross change in a nation's economy that can be attributed to a given industry.[3] Economic contributions occur from transactions in a market setting. Commercial fishing refers to commercial (that is, profit-oriented businesses) fishing for the capture of non-farmed marine, non-freshwater, fish species (including shellfish). The economic

[2] Fisheries Inshore New Zealand. (2022). *The Economic Contribution of Commercial Fishing*. Retrieved from: https://deepwatergroup.org/wp-content/uploads/2022/09/BERL-2022-Commercial-Fishing-Economic-Contribution-Final-Report.pdff

[3] The change is measured in terms of output, value added, and employment.

contribution of the commercial Fish Harvesting industry is set in both a historical and a global context.[4]

Key components of this report, and the 2022 report, include:

- Estimates of direct output for the Fish Harvesting industry are specifically designed to cover capture fishing and to exclude aquaculture
- Use of three-year average catch and value data, which is adjusted to reconcile with Annual Enterprise Survey (AES) data
- Use of the 2024 input-output tables, updated by BERL from the 2020 tables produced by Statistics New Zealand.

1.2 Limitations

This report measures the market-based economic contribution of commercial fishing to the New Zealand economy, using output, GDP, and employment as the core measures. It focuses on commercial wild-capture fishing and associated seafood processing activity, including direct, indirect, and induced effects estimated through BERL's input-output multiplier framework.

The report does not measure the total economic value of fisheries resources. It does not estimate non-market values such as recreational fishing benefits, customary values, biodiversity values, option values, bequest values, or existence values. It also does not assess environmental impacts, sustainability outcomes, distributional effects, profitability at firm level, or the costs and benefits of alternative fisheries management settings.

The analysis relies on several key assumptions. These include: that commercial catch volumes, port prices, export prices, industry revenue, and employment data provide an appropriate basis for estimating economic contribution; that port prices and export values can be used to allocate value between harvesting and processing activity; that Statistics New Zealand industry-level data can be reconciled with detailed catch-level data; and that national input-output multipliers provide a reasonable estimate of flow-on effects across the economy.

Three-year averages are used to smooth annual fluctuations in catch volumes, export activity, and industry revenue. Commercial fishing can vary materially from year to year because of biological,

[4] A more detailed breakdown of economic contribution is defined and illustrated in Appendix B.

environmental, regulatory, market, and operational factors. Using averages across the 2023 to 2025 period provides a more stable basis for estimating the economic contribution of the industry than relying on a single year.

Seafood NZ supplied key industry inputs, including 2024/25 port prices by stock and FMA (from Ministry for Primary Industries and Fisheries New Zealand), and advice on the allocation of species to fisheries and fishing methods where industry knowledge was required. MPI supplied commercial catch data, conversion factors, and reported commercial catch totals used to check and reconcile catch volumes. Statistics New Zealand data was used for export values and volumes, Annual Enterprise Survey revenue data, Linked Employer-Employee Dataset (LEED) employment data, and the underlying input-output tables. BERL analysis was used to clean, reconcile, allocate, and model these inputs, including the estimation of economic contribution by fishery, FMA, ANZSIC06 industry, and region.

Double counting has been addressed by treating the Fish Harvesting and Seafood Processing industries as an integrated activity where combined estimates are presented. This is necessary because the Seafood Processing industry purchases a significant share of its inputs from the Fish Harvesting industry. BERL therefore adjusts the multiplier treatment, to ensure that activity is not counted twice when the output of one industry is an input into the other industry.

2 Commercial Fishing industry overview

New Zealand's Exclusive Economic Zone (EEZ) comprises more than four million square kilometres and is 15 times our land area. With most New Zealanders living near the coast, the marine environment contributes to economic well-being, as well as to social and cultural well-being.

2.1 The Commercial Fishing industry

Between 2023 and 2025, the Fish Harvesting industry, on average, sustainably harvested around 344,500 tonnes of wild fish, with economic activity generated across fish harvesting and seafood processing valued at approximately $3.3 billion. In 2025 - the latest year available – there were 258 enterprises engaged in the fish trawling, seining, and netting industry, 261 enterprises in the line fish harvesting industry, 339 in the other fish harvesting industry, and 261 in the rock lobster and crab potting industry. Additionally, there were 114 enterprises engaged in the Seafood Processing industry.

The interests of the Seafood industry - including rock lobster, pāua, and Seafood New Zealand, including deepwater and inshore finfish - are represented by Sector Representative Entities (SREs).[5]

2.2 Exports

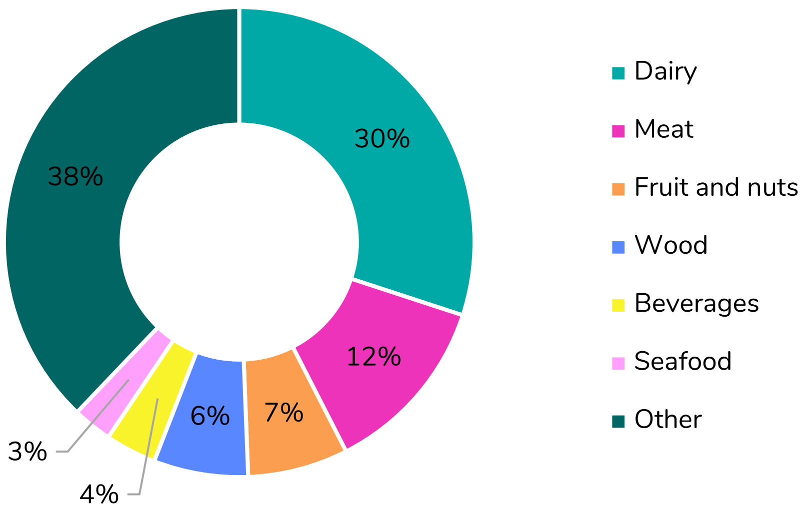
In the year ended March 2025, seafood exports[6] from New Zealand totalled $2 billion. These exports included seafood produced via aquaculture, although the rest of this report excludes aquaculture.

Seafood exports, by value, increased since March 2016 by $0.5 billion. As shown in Figure 3, seafood exports by value in 2025 accounted for three percent of total merchandise exports ($73.9 billion).

[5] For further information see, www.seafoodnewzealand.org.nz/industry/our-sectors/

[6] based on the HS03 code

Figure 3 NZ exports, selected merchandise exports, year to March 2025



Source: StatsNZ and BERL analysis

2.3 Fisheries management framework

New Zealand's commercial fishing sector is underpinned by a fisheries management framework combining secure harvesting rights, long-term incentives, and sustainability objectives.

Since the introduction of the Quota Management System (QMS) in 1986, commercial fisheries have been managed through scientifically informed catch limits coupled with secure and transferable harvesting rights. The system is designed to support both sustainability and utilisation, aligning the incentives for stewardship and investment with the health and productivity of fish stocks.

The economic contribution of commercial fishing is supported by long-term investment through the seafood value chain. The New Zealand QMS enables businesses and quota owners to invest in vessels, infrastructure, innovation, and environmental measures.

Legislation and management of New Zealand fisheries

New Zealand's fisheries resources in the territorial sea (TS), and the wider Exclusive Economic Zone (EEZ), are managed under the Fisheries Act 1996 which gives effect to the Treaty of Waitangi (Fisheries Claims) Settlement Act 1992. The Fisheries Act 1996 embodies the concepts of sustainable utilisation of fisheries resources, and ensuring the long-term viability and biodiversity of the aquatic environment. Environmental considerations are also managed under other Acts such as the Wildlife Act 1953, the Marine Mammals Protection Act 1978, the Marine Reserves Act 1971, and the Resource Management Act 1991.

However, the Fisheries Act 1996 is the primary legislation for managing the effects of fishing. This enables fisheries resources to be utilised in a way that ensures sustainability and the ongoing availability of resources for future generations.

2.4 New Zealand's fisheries management system

New Zealand's fisheries management system combines secure property rights, science-based catch limits, and strong incentives for long-term stewardship. At the centre of the system is the QMS, introduced in 1986, as a comprehensive rights-based fisheries' management framework.

The Quota Management System (QMS)

The QMS sets the harvest levels of fish species within the EEZ and the TS. The main provisions of the QMS are to:

- Maintain fisheries at a sustainable level through setting the Total Allowable Catch (TAC)
- Allocate that TAC to sectors
- Allocate the commercial allocation to the Total Allowable Commercial Catch (TACC)
- Provide economic incentives and enable rational industry participation
- Enable quota and Annual Catch Entitlement (ACE) to be tradable

New Zealand currently has 98 fish species, or groups of species, subject to the QMS. Each species has separate Quota Management Areas (QMAs) that are based on biological boundaries. The species are managed as 642 separate fish stocks. A stock is a species within a QMA.

Through the QMS, the Minister for Fisheries sets the annual Total Allowable Catch (TAC) and the Total Allowable Commercial Catch (TACC) within this area. The TAC is the total quantity of fishing-related mortality allowed for a QMS stock in a given fishing year. Effectively, the TACs for fish stocks are set so that sufficient fish remain for breeding at a sustainable level for the future. The Maximum Sustainable Yield (MSY) is the largest long-term average harvest that can be taken from a fish stock while maintaining its productive capacity and ability to replenish naturally over time, taking into account population dynamics and environmental conditions.

According to MPI, as of December 2025, 130 of the 149 assessed fish stocks are at a healthy status and 19 fish stocks are currently assessed as overfished.[7] From the TAC an allowance is made to provide for recreational fishing and customary use, as well as other sources of mortality, before the TACC is set. The TACC is the total quantity (tonnage) of each fish stock that the commercial Fish Harvesting industry can catch for that year. Once the TACC is set, the fishing rights are distributed as ACE to quota owners, proportional to their quota shareholdings in that stock. Quota is a right in perpetuity to a share of the available TACC. Both quota and ACE can be traded[8].

Some settings of the QMS are reviewed annually including the TACCs, deemed values, and government levies.

In addition to the species in the QMS that include both target and bycatch fish stocks, there are a number of other species that are managed outside the QMS. Most of these stocks are not perceived to be commercial targets, or have no sustainability or utilisation concerns that would warrant their inclusion in the QMS[9].

The MPI manages New Zealand's fisheries resources, policy development, and overall fisheries management, including science, monitoring and compliance roles. Strategic and operational fisheries plans are developed for a number of New Zealand's fisheries. These give rise to stock assessments and aquatic environment research.

Rights-based management

Unlike systems that rely primarily on input controls, New Zealand allocates secure and transferable harvesting rights through quota ownership. These rights are held in perpetuity and generate ACEs, creating certainty for investment and business planning. The rights-based approach aligns the interests of fishers and quota owners with the long-term health of fish stocks because the value of the quota depends on the continued productivity of the resource.

Long-term incentives

The system encourages quota owners and fishing companies to think beyond annual catch opportunities. Because quota ownership generates and ongoing annual allocation of a proportion of

[7] https://www.mpi.govt.nz/fishing-aquaculture/fisheries-management/fish-stock-status

[8] Except for quota delivered under the Treaty of Waitangi Fisheries Claims Act

[9] Some are highly migratory species (HMS) that are yet to have individual country allocations agreed internationally

the sustainable limit, there are strong incentives to ensure the long-term sustainability of stocks. Because quotas retain value over time, industry participants have incentives to support research, monitoring, innovation, and management measures that maintain stock productivity and fishery performance.

Sustainability outcomes

The Fisheries Act 1996 requires stocks to be managed at, or above, levels capable of producing maximum sustainable yield, supported by scientific assessments and periodic reviews of sustainability measures. The QMS is a structured mechanism to adjust catch limits in response to new information and stock status.

2.5 The Commercial Fishing industry multipliers

The economic impact of commercial fishing extends beyond the activity of fishing businesses and seafood processors themselves. Purchases from suppliers, and the subsequent spending of wages, generates further activity across the wider New Zealand economy. These flow-on effects are captured through the multiplier framework and are reported as indirect and induced contributions.

For the combined Fish Harvesting and Seafood Processing industries, the direct contribution in 2025 was estimated at $3.3 billion in output, $1.1 billion in GDP, and the support of 6,235 FTEs. Once indirect and induced effects are included, the total contribution increased to $6.4 billion in output, $2.45 billion in GDP, and the support of 14,506 FTEs. This means that for every $1.00 of GDP generated directly by the combined industries, a further $1.24 of GDP was supported elsewhere in the economy. Similarly, for every direct FTE supported by the combined industries, a further 1.33 FTEs were supported through supplier activity and household spending.

Multipliers for the Fish Harvesting industry, the Seafood Processing industry, and the combined Fish Harvesting and Seafood Processing industries can be found in Table 28.

2.6 The evolution of commercial fishing since 2020

Commercial fishing contribution since 2020

The contribution of the Commercial Fishing industry between 2020 and 2025 increased because of price growth, while volume and production fell. Commercial fishing output increased by 24 percent since 2020, while its GDP contribution increased by 12 percent and employment, in terms of FTEs, decreased by 12 percent.

The total catch volume declined from 406,754 tonnes to 344,541 tonnes since 2020, a decline of 15 percent. The increase in the value of the Commercial Fishing industry has come solely from price increases across the period. In total, of the ten FMA areas that cover New Zealand, just three (FMA3 – South East Coast, FMA4 – South East Chatham Rise, and FMA8 – Central West) saw small increases, averaging around 7,000 tonnes per FMA, in overall total catch volumes across the five years.

Of the six FMAs that saw declines, FMA7 – Challenger, saw the largest decrease with a 35,000 tonnes catch decline, followed by FMA6- Sub Antarctic with a decrease of almost 13,000 tonnes. The remaining four FMAs had declines of around 5,200 tonnes each.

Prices more than compensated for the reduction in the volume of catch. Between 2020 and 2025 every FMA saw an increase in the value of their catch. The overall value of the catch rose from $1.3b to $1.5b. FMA3- South East Coast, and FMA5 – Southland, saw the largest increases in their catch values between 2020 and 2025, both increasing by around $120 million. FMA3 and FMA5 became the top two highest value FMAs, overtaking FMA7 – Challenger which in 2020 was the most valuable FMA. Overall each FMA increased in value by around 57 percent between 2020 and 2025.

Changes in catch volume between fisheries management areas may reflect a range of factors, including stock management decisions, bycatch species composition, quota settings, environmental conditions, and the natural and changeable patterns of fishing activity.

In 2025, the average export prices per kg of greenweight were $2.45 for hoki, $4.90 for ling, and $12.50 for snapper. In 2020, these species had export prices of $1.80 for hoki, $4.50 for ling, and $10.40 for snapper. This represents a 36 percent increase in export prices for hoki, a 20 percent increase for snapper, and a nine percent increase for ling.

The majority of New Zealand's commercial seafood harvest by volume is taken through trawling, seining and netting methods, underpinning a significant proportion of seafood processing activity, export earnings and regional employment (as shown in Table 23).

Fish harvesting contribution since 2020

The value of fish harvesting rose from $1.3b in 2020 to $1.5b in 2025, an increase of 19 percent. Due to the multiplier effect, the total economic value of outputs has risen from $2.7b in 2020 to $3.5b in 2025, an increase of 30 percent. This increase in output value means that the GDP contribution from the Fish Harvesting industry has also increased by similar rates between 2020 and 2025. Meanwhile, employment in the Fish Harvesting industry fell over the same period with FTEs falling from 4,359 in 2020 to 3,723 in 2025, a decrease of 15 percent. This means productivity per FTE increased 39 percent between 2020 and 2025.

Seafood processing since 2020

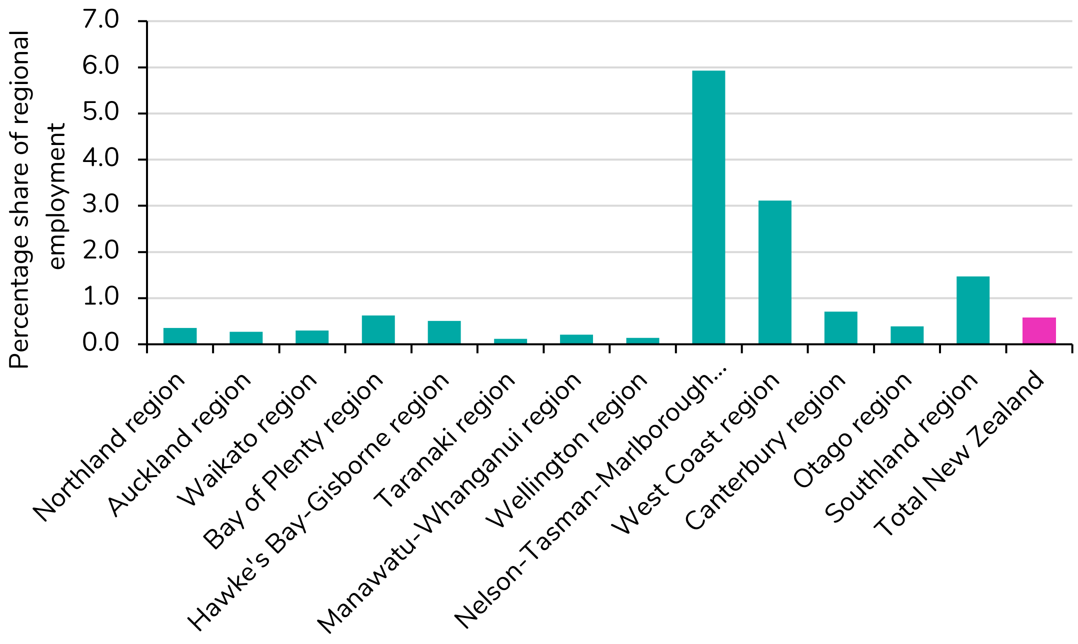
From 2020 to 2025, the output of the Seafood Processing industry increased by 15 percent, from $1.5b to $1.8b. At the same time, employment, in terms of FTEs, fell by 25 percent, from 3,371 FTEs in 2020 to 2,512 FTEs in 2025.

2.7 Regional economic contribution

2.7.1 Economic reliance on commercial fishing

Nationally 0.6 percent of total employment is attributable to commercial fishing (fish harvesting and seafood processing combined), with most regions having a percentage share in line with the national share. Three regions have more than one percent of employment from the Commercial Fishing industry; the combined Nelson-Tasman-Marlborough region where 5.9 percent of employment is connected to commercial fishing, the West Coast region with 3.1 percent, and the Southland region with 1.5 percent, as shown in Figure 4.

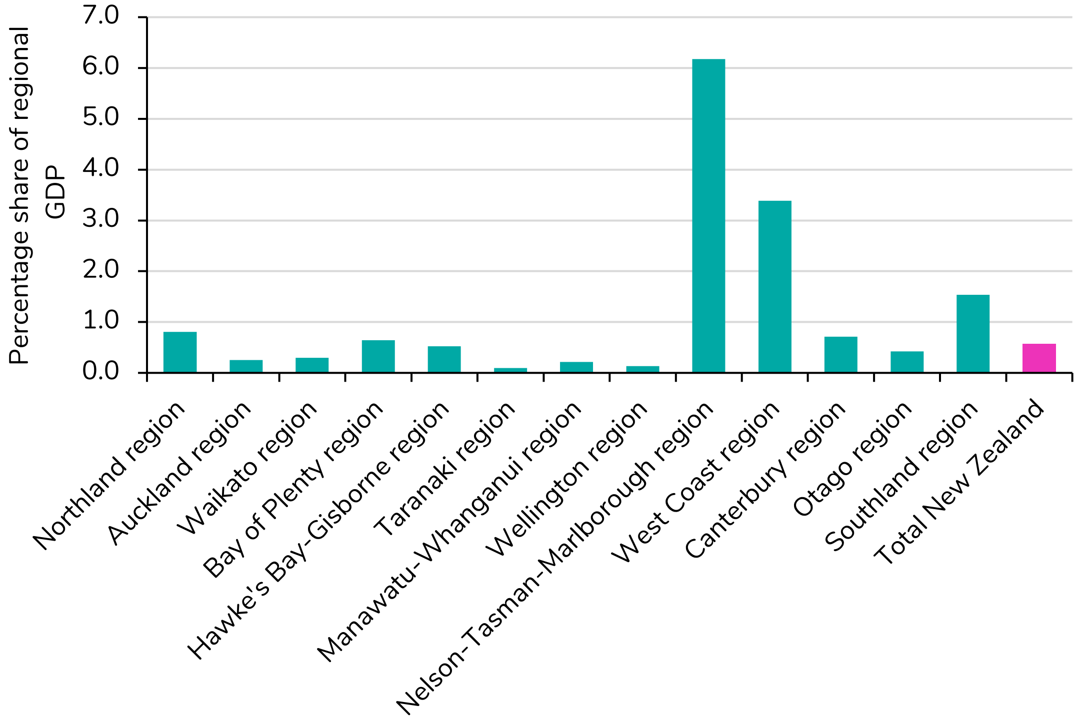
Figure 4 Share of regional employment (FTEs) attributed to the Commercial Fishing industry, 2025



Source: BERL analysis

As shown in Figure 5, the Commercial Fishing industry in total comprises 0.6 percent of total New Zealand GDP. In line with employment, the combined Nelson-Tasman-Marlborough region has commercial fishing as the largest share of its regional GDP at 6.2 percent.

Figure 5 Share of regional GDP (2025$m) attributed to the Commercial Fishing industry, 2025



Source: BERL analysis

The economic contribution of the top five commercial fishing regions is shown in Table 4. The Fish Harvesting and Seafood Processing industries support the employment of 1,954 FTEs in the Nelson-Tasman-Marlborough region which, after accounting for the multiplier effects, contributes a total impact of 4,546 FTEs and GDP of $767.5m. The Canterbury and Auckland regions have around 1,000 FTEs directly employed, contributing approximately 2,400 total FTEs and around $400m in GDP, after accounting for multipliers. The fourth and fifth regions are Bay of Plenty with 401 FTEs, and Southland with 340 FTEs, directly employed in the Fish Harvesting and Seafood Processing industries.

Table 4 Top five regions by commercial fishing employment and GDP, 2025

Region	Direct FTEs	Total FTEs	Total GDP ($m)
Nelson-Tasman-Marlborough region	1,954	4,546	767.5
Canterbury region	1,042	2,425	409.5
Auckland region	1,006	2,341	395.2

Bay of Plenty region	401	933	157.5
Southland region	340	790	133.5

Source: BERL analysis, Statistics New Zealand

There are some links between the locations of these regions and the FMAs. FMA7 is located at the top and west of the South Island, FMA5 is located off the south coast of the South Island, FMA3 is off the east coast of the South Island, and FMA1 and FMA9 are located to the east and west of the top of the North Island.

2.7.2 Other employment changes

Across the wider Commercial Fishing industry in New Zealand, between 2005 and 2024, two sectors experienced significant changes in the location of employment. These two sectors were:

- Fish trawling, seining, and netting
- Seafood processing, excluding aquaculture.

Fish trawling, seining, and netting employment

There was a transition of employment from the top of the South Island to Auckland between 2005 and 2024. Following this transition, however, there was an increase in employment in this sector across the country. In particular, the top of the South Island went from employing 681 people in 2014, to employing 1,695 people in 2019. This increase was largely caused by the registration of foreign charter boats and crews.

Seafood processing employment, excluding aquaculture

In 2024, the Seafood Processing industry, excluding aquaculture, employed a total of 4,382 people, a decrease from 7,194 people in 2005. There has been significant change in this industry in selected regions, most notably employment in Canterbury decreased from 1,260 people in 2014, to 837 people in 2024.

2.8 Māori participation in the seafood sector[10]

The 1992 Fisheries Deed of Settlement provided for the full and final settlement of Māori Treaty claims relating to fisheries. The settlement was designed to benefit Māori collectively and established an enduring basis for Māori participation in, and influence over, the management of New Zealand's fisheries resources (MPI, 2023).

The settlement has supported the re-emergence of Māori as significant participants in Aotearoa New Zealand's seafood industry. Based on 2018 data, the Māori fishing asset base was estimated at $2.9 billion, of which 81 percent was owned by collectives. Iwi collectively own more than 40 percent of all quota and many also hold interests in fishing companies, including entities such as Sealord and Moana New Zealand (MPI, 2023).

A large proportion of Māori collectives hold fishing quota but do not directly undertake fishing or seafood processing activity. For many of these collectives, commercial returns from fisheries are generated primarily through the sale of ACE to individual fishers or fishing companies, including companies with iwi shareholding interests (MPI, 2023).

Returns from commercial fishing support whānau, communities, and wider Māori economic development, including investment in other business activities. Māori communities are also increasingly emphasising that, alongside financial returns, commercial fisheries interests are expected to contribute to broader social, cultural, and intergenerational well-being outcomes (MPI, 2023).

2.9 Protein source and food security

Seafood contributes to New Zealand's food security by providing a domestically produced source of high-quality protein and essential nutrients. Seafood is an excellent source of protein and provides a wide range of nutrients beneficial for human health. These include omega-3 fatty acids, vitamins A, B12, D, and E, and minerals such as calcium, iodine, iron, zinc, selenium, copper, manganese, and phosphorus (Fish Coalition, 2025).[11]

[10] This section is largely drawn from: Ministry for Primary Industries (MPI) 2023, Draft Fisheries Industry Transformation Plan, Ministry for Primary Industries, Wellington, viewed 27 July 2026, <https://www.mpi.govt.nz/dmsdocument/56572-Draft-Fisheries-Industry-Transformation-Plan>.

[11] Fish Coalition. 2025. The Health Benefits of Eating Seafood. Fish Coalition. Viewed 27 July 2026. Available at: https://fishcoalition.org/wp-content/uploads/2025/05/The-Health-Benefits-of-Eating-Seafood.pdf.

According to the scientific review, The Health Benefits of Eating Seafood, evidence based science demonstrates that seafood is a valuable source of protein and other essential nutrients that support population health. [12] The review identified moderate to high levels of scientific evidence linking seafood consumption to positive health outcomes across multiple health domains (Fish Coalition, 2025).[13]

Sustainable management of fisheries supports both economic outcomes and the availability of healthy food for New Zealand households. The United Nations recognises that aquatic foods have an essential role in sustainable healthy diets and food and nutrition security, and that aquatic food systems are critical contributors to food security, nutrition, livelihoods, and economic resilience (UN Nutrition, 2021; United Nations, 2025).[14]

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[12] Fish Coalition. 2025. The Health Benefits of Eating Seafood. Fish Coalition. Viewed 27 July 2026. Available at: https://fishcoalition.org/wp-content/uploads/2025/05/The-Health-Benefits-of-Eating-Seafood.pdf.

[13] Fish Coalition. 2025. The Health Benefits of Eating Seafood. Fish Coalition. Viewed 27 July 2026. Available at: https://fishcoalition.org/wp-content/uploads/2025/05/The-Health-Benefits-of-Eating-Seafood.pdf.

[14] UN Nutrition. 2021. The Role of Aquatic Foods in Sustainable Healthy Diets: Policy Brief. UN Nutrition, Rome. Viewed 27 July 2026. Available at: https://www.unnutrition.org/wp-content/uploads/Policy-brief_Aquatic-foods-FINAL.pdf.

United Nations. 2025. Ocean Action Panel 9: Promoting the Role of Sustainable Food from the Ocean for Poverty Eradication and Food Security: Concept Paper Prepared by the Secretariat. United Nations Conference to Support the Implementation of Sustainable Development Goal 14, Nice, France. Viewed 27 July 2026. Available at: https://sdgs.un.org/sites/default/files/2025-05/25-00824%20ATT%20Formatted%20OAP9%20Food%20SecurityREV.pdf.

3 Volume and value of the commercial catch

This section of the report provides the commercial catch total volumes and values which were used to estimate the economic contribution of commercial fishing in New Zealand.

The commercial catch values and volumes used to estimate the economic contribution of the Fish Harvesting industry are based on 2024/25 port prices and catch volumes supplied by MPI. An adjustment process of the port prices and catch volumes was undertaken to account for missing catch volume data in the detailed MPI dataset, and to reconcile the total output calculated using port prices to the gross output reported for the Fish Harvesting industry in the Annual Enterprise Survey (AES) of Statistics New Zealand.

3.1 Commercial catch data

MPI supplied commercial catch volumes in kilograms (total greenweight) by year, month, species, fishing management area, and fishing method. Seafood NZ supplied 2024/25 port prices by stocks and FMA from MPI, for all target species, caught within the 200 nautical mile EEZ .

This dataset covered three fishing seasons from October 2022 to September 2025. BERL has, therefore, calculated a three-year average to smooth out annual fluctuations in catch volumes.

3.2 Commercial catch volumes

As detailed in Appendix A, the MPI catch data provided did not always match the reported commercial catch for a given fishing year. As a consequence of this mismatch, BERL adjusted the catch data to reconcile 56 QMS stocks totals with those reported by MPI.

3.3 Commercial catch volumes by FMA

Across the ten FMAs included in New Zealand's EEZ, the average adjusted commercial fish catch between 2023 and 2025 was 344,541 tonnes, as depicted in Table 5. This is a decrease from the average adjusted commercial catch between 2016 and 2020, which was 406,754 tonnes.

Table 5 Commercial catch volume by FMA, 2023-2025

	Total commercial catch (tonnes)			
Fishing management area	2023	2024	2025	Average
1 - Auckland East	22,375	26,645	27,693	25,571
2 - Central East	22,772	20,911	23,148	22,277
3 - South East Coast	74,884	73,354	72,989	73,743
4 - South East Chatham Rise	39,653	44,622	51,066	45,114
5 - Southland	34,218	36,082	39,038	36,446
6 - Sub-Antarctic	49,479	40,236	32,612	40,776
7 - Challenger	70,413	58,370	60,535	63,106
8 - Central West	21,679	28,553	26,572	25,601
9 - Auckland West	7,499	12,661	15,559	11,906
10 - Kermadec	5	1	0	2
Total	**342,977**	**341,435**	**349,210**	**344,541**

Source: MPI and BERL analysis

The leading FMA in New Zealand was South East Coast (FMA3), which had an average commercial fish catch of 73,743 tonnes between 2023 and 2025. This has increased from an average commercial fish catch of 64,513 tonnes between 2016 and 2020.

Second to FMA3 was Challenger (FMA7), which had an average commercial fish catch of 63,106 tonnes between 2023 and 2025. This has substantially decreased from an average of 97,722 tonnes of commercial fish catch between 2016 and 2020. The third largest, the South East Chatham Rise (FMA4), had an average commercial fish catch of 45,114 tonnes.

Overall, the average commercial fish catch of all ten FMAs between 2023 and 2025 has decreased in comparison to the average commercial fish catch between 2016 and 2019. However, this decrease in average catch was made up for by an increase in average commercial catch value.

3.4 Commercial catch values by FMA

Commercial catch values were estimated using 2024/25 port prices. These values can be interpreted as a measure of revenue of the Fish Harvesting industry for the detailed segments of the dataset.

As detailed in Appendix A, these values were then aggregated by the four ANZSIC06 industry groups within the Fish Harvesting industry (methods of fishing):

- Trawling, seining, and netting
- Line fishing
- Other fishing

- Rock lobster and crab potting.

The detailed values making up each aggregate value were then adjusted so that the aggregate reconciled with the corresponding values for the same industries, as reported in the AES of Statistics New Zealand.

Between 2023 and 2025, the average commercial catch value across all ten FMAs was $1.53 billion, as depicted in Table 6. This is a significant increase from an average commercial catch value of $1.29 billion between 2016 and 2020.

Table 6 Commercial catch value (adjusted by FMA), 2023-2025

	Estimated value of fish ($millions)			
Fishing management area	2023	2024	2025	Average
1 - Auckland East	132	164	146	147
2 - Central East	125	126	128	126
3 - South East Coast	253	277	264	265
4 - South East Chatham Rise	207	217	222	216
5 - Southland	256	281	273	270
6 - Sub-Antarctic	147	136	127	136
7 - Challenger	239	208	216	221
8 - Central West	63	83	79	75
9 - Auckland West	64	76	87	76
10 - Kermadec	0	0	0	0
Total	**1,486**	**1,568**	**1,542**	**1,532**

Source: MPI and BERL analysis

The FMA with the highest average annual catch value is Southland (FMA5), which had the fifth largest annual average catch volume. It is likely that this catch value increased due to the bulk of spiny red rock lobster being caught in this FMA. As expected, in second place, is South East Coast (FMA3) with a catch value of $265 million, to go with the highest annual average catch volume. Next is Challenger (FMA7), which had the second highest annual average catch volume and the third highest catch value at $221 million. This FMA is where a lot of hoki and arrow squid are caught. Finally, South East Chatham Rise (FMA4) had the fourth highest value at $216m, to go along with the third largest catch volume.

3.5 The value of outputs from the Seafood Processing industry

Output values from the Seafood Processing industry are more likely to reflect export prices than port prices. Accordingly, BERL sourced export volumes and values for all calendar months between

2023 and 2025 from Statistics New Zealand, to enable us to determine which fish species are exported and what export price per kilogram they receive. How export prices and volumes were used in calculating the value of the Seafood Processing industry is discussed in detail in Appendix A.

3.5.1 Commercial catch volume and value in the deepwater and inshore fishery sectors

The New Zealand commercial fisheries contain a variety of fish species, and include six sectors, which are:

- Deepwater
- Inshore
- HMS
- Rock Lobster
- Pāua
- Shellfish.

Deepwater fishery

Between 2023 and 2025, the average commercial fish catch within the deepwater fishery was 235,733 tonnes, which is a decrease from 292,223 tonnes between 2016 and 2020. As depicted in Table 7, the top commercial fish species for deepwater fishing were:

- Hoki, with an average commercial catch value of $187 million
- Ling, with an average commercial catch value of $148 million
- Southern blue whiting, with an average commercial catch value of $49.5 million.

At 107,442 tonnes, the average commercial catch of hoki was significantly higher than other fish species in the deepwater fishery. It was 46 percent of the total average commercial catch volume of the deepwater fishery. However, hoki only accounted for 29 percent of the total average commercial catch value of the deepwater fishery.

This reflects the lower per-unit value of hoki compared to other species, for example ling and orange roughy, despite the high-biomass of the species. Species such as ling, orange roughy, scampi, oreos, and alfonsino make a significant contribution to catch value, reflecting the importance of high value deepwater fisheries.

Table 7 Deepwater commercial catch volume and value by top species, 2023-2025

Fish species	Total commercial deepwater fish catch (tonnes), average (2023-2025)	Estimated value of fish ($millions), average (2023-2025)
Hoki	107,442	186.6
Ling	17,604	147.6
Southern Blue Whiting	21,226	49.5
Jack Mackerel	19,186	46.5
Arrow Squid	13,555	42.6
Orange Roughy	6,417	41.0
Scampi	1,076	31.7
Silver Warehou	9,363	22.3
Oreos	8,182	19.0
Alfonsino & Long-finned Beryx	1,754	10.2
Sub total	**205,808**	**597.2**
Other fish species	29,926	49.5
Total	**235,733**	**646.7**

Source: MPI and BERL analysis

Between 2023 and 2025, the top ten fish species accounted for 87 percent of the total average commercial catch volume of the deepwater fishery, and 92 percent of the total average commercial catch value.

Inshore fishery

As depicted in Table 8, the total average commercial catch of the inshore fishery between 2023 and 2025 was 97,172 tonnes, which was similar to the average catch between 2016 and 2020, of 96,225. The estimated total average value of the inshore fishery commercial catch was $487 million, with the top species being:

- Snapper, with an average commercial catch value of $86.2 million
- Jack mackerel, with an average commercial catch value of $63.6 million
- Blue cod, with an average commercial catch value of $55.2 million.

Table 8 Inshore commercial catch volume and value by top species, 2023-2025

Fish species	Total commercial Inshore fish catch (tonnes), average (2023-2025)	Estimated value of fish ($millions), average (2023-2025)
Snapper	7,419	86.2
Jack Mackerel	26,004	63.6
Blue Cod	1,589	55.2
Spiny Dogfish	5,417	39.9
Blue Mackerel	11,247	26.3
Tarakihi	3,586	24.1
Gurnard	3,751	23.4
School Shark	2,550	16.5
Gemfish	3,784	15.1
Trevally	2,683	13.7
Sub total	**68,029**	**363.9**
Other fish species	29,142	123.3
Total	**97,172**	**487.3**

Source: MPI and BERL analysis

The top ten species accounted for 70 percent of the total average commercial catch volume of the inshore fishery, but a significant 75 percent of the total average commercial catch value of the inshore fishery between 2023 and 2025.

Highly Migratory Species (HMS)

The total average commercial fish catch in the HMS fishery between 2023 and 2025 was 4,479 tonnes, as depicted in Table 9. This is a significant decrease from 9,758 tonnes between 2016 and 2012. Between 2023 and 2025, the total estimated average commercial fish catch value of the HMS fishery was $50.2 million.

The top species within the HMS fishery, by average commercial catch value between 2023 and 2025, were:

- Southern bluefin tuna, with an average commercial catch value of $21 million
- Albacore tuna, with an average commercial catch value of $9.8 million (non-QMS)
- Skipjack tuna, with an average commercial catch value of $5.1 million (non-QMS).

The top five species accounted for only 62 percent of the total average commercial fish catch volume within the HMS fishery. However, they accounted for 85 percent of the total estimated commercial fish catch value. This reflects the proportionately higher individual value of these species.

Table 9 HMS commercial catch and value by top species, 2023-2025

Fish species	Total commercial HMS fish catch (tonnes), average (2023-2025)	Estimated value of fish ($millions), average (2023-2025)
Southern Bluefin Tuna	891	21.0
Albacore Tuna	1,242	9.8
Skipjack Tuna	341	5.1
Pacific Bluefin Tuna	97	3.5
Swordfish	216	3.5
Sub total	**2,787**	**42.8**
Other fish species	1,692	7.4
Total	**4,479**	**50.2**

Source: MPI and BERL analysis

Rock lobster

Between 2023 and 2025, the total average commercial catch of rock lobster was 2,819 tonnes, as depicted in Table 10. This is an increase on the estimated average annual catch of 2,719 tonnes caught between 2016 and 2020. The estimated average commercial value of rock lobster between 2023 and 2025 was $227.6 million.

Table 10 Rock lobster commercial catch volume and value, 2023-2025

Fish species	Total commercial Rock Lobster fish catch (tonnes), average (2023-2025)	Estimated value of fish ($millions), average (2023-2025)
Spiny Red Rock Lobster	2,770	224.3
Packhorse Rock Lobster	49	3.3
Total	**2,819**	**227.6**

Source: MPI and BERL analysis

The average commercial value of rock lobster increased from $156 million, between 2016 and 2020, to the current average of $227.6 million, with only a small increase of 100 tonnes of increased catch between the two periods.

Pāua

Between 2023 and 2025, the total average commercial fish catch of pāua was 721 tonnes, as depicted in Table 11. The estimated average commercial value of pāua between 2023 and 2025 was $76 million.

Table 11 Pāua commercial catch volume and value, 2023-2025

Fish species	Total commercial pāua catch (tonnes), average (2023-2025)	Estimated value of pāua ($millions), average (2023-2025)
Pāua	721	76.0

Source: MPI and BERL analysis

Compared to the 2016-2020 period the average catch volume of pāua has not changed substantially, with 756 tonnes catch on average, although the value has dropped from $96 million.

Shellfish

Between 2023 and 2025, the total average commercial fish catch of the shellfish fishery was 3,617 tonnes, as depicted in Table 12. This has decreased from an estimated 5,071 tonnes between 2016 and 2020. The estimated average commercial shellfish catch value has also decreased, from $47 million to $44.2 million.[15]

Table 12 Shellfish commercial catch volume and value by top species, 2023-2025

Fish species	Total commercial Shellfish catch (tonnes), average (2023-2025)	Estimated value of fish ($millions), average (2023-2025)
Kina	1,024	18.8
Dredge Oyster	547	6.2
Cockle	902	5.2
Sea Cucumber	66	4.5
Deepwater (king) clam	33	2.9
Sub total	**2,571**	**37.6**
Other fish species	1,046	6.6
Total	**3,617**	**44.2**

Source: MPI and BERL analysis

The top species within the shellfish fishery, by estimated average commercial fish catch value between 2023 and 2025, were:

- Kina, with an average commercial catch value of $18.8 million
- Dredge oyster, with an average commercial catch value of $6.2 million
- Cockle, with an average commercial catch value of $5.2 million.

[15] In the 2016 to 2020 report pāua was included as part of shellfish, these numbers exclude pāua and so will not match the previous report.

The top five species accounted for 85 percent of the total estimated commercial fish catch value of the shellfish fishery, and for 71 percent of the total commercial shellfish catch volume.

4 Economic contribution of commercial fishing

The total average output of commercial fishing in New Zealand, including both the Fish Harvesting industry and the Seafood Processing industry, totalled $6.4 billion in 2025, as depicted in Table 13.[16] The total GDP contribution was $2.4 billion, an increase from $2.2 billion in 2020. Additionally, commercial fishing in New Zealand accounted for the employment of 14,506 FTEs.[17]

Table 13 Annual average economic contribution of commercial fishing, 2023,2025

Fishery	Measure	Direct	Indirect	Induced	Total
Deepwater	Output (2025$m)	1,623	1,190	328	3,141
	GDP (2025$m)	536	493	171	1,199
	Employment (FTEs)	2,953	3,069	982	7,004
HMS	Output (2025$m)	78	56	16	150
	GDP (2025$m)	26	24	8	58
	Employment (FTEs)	161	148	48	358
Inshore	Output (2025$m)	1,072	783	218	2,073
	GDP (2025$m)	355	326	113	794
	Employment (FTEs)	2,012	2,029	652	4,693
Rock Lobster	Output (2025$m)	316	226	66	608
	GDP (2025$m)	106	96	34	237
	Employment (FTEs)	678	600	198	1,476
Pāua	Output (2025$m)	107	76	22	206
	GDP (2025$m)	36	32	12	80
	Employment (FTEs)	228	203	67	498
Shellfish	Output (2025$m)	111	81	22	214
	GDP (2025$m)	36	34	12	82
	Employment (FTEs)	201	209	67	477
Overall total	**Output (2025$m)**	**3,307**	**2,412**	**673**	**6,392**
	GDP (2025$m)	**1,095**	**1,004**	**350**	**2,449**
	Employment (FTEs)	**6,235**	**6,258**	**2,013**	**14,506**

Source: BERL analysis

The largest contributors to the total output of commercial fishing of $6.4 billion in 2025 were the:

- Deepwater fishery which accounted for $3.1 billion

[16] This is an average, as the multipliers used the average fish catch between 2023 and 2025, and is noted as a contribution in 2025 as it is in 2025 dollars. This is the case for each industry included within this section.

[17] Appendix C provides information on the focus of the economic contribution analysis and relevant definitions.

- Inshore fishery which accounted for $2.1 billion
- Rock lobster fishery which accounted for $608 million.

4.1 Contribution of the Fish Harvesting and Seafood Processing industries

4.1.1 Economic contribution of the Fish Harvesting industry

Between 2023 and 2025, on average, the Fish Harvesting industry (harvesting of fish only) earned $1.5 billion in direct output and directly employed 3,723 FTEs, as depicted in Table 14. However, overall the Fish Harvesting industry contributed a total of $1.4 billion in GDP to the New Zealand economy, and supported a total of 11,670 FTEs.

Table 14 Annual average economic contribution of the Fish Harvesting industry, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	1,532	1,246	728	3,506
GDP (2025$m)	521	540	378	1,440
Employment (FTEs)	3,723	4,828	3,119	11,670

Source: BERL analysis

FMA breakdown of the Fish Harvesting industry

The Fish Harvesting industry includes the harvesting of fish species across New Zealand FMAs. Appendix E provides a breakdown of the economic contribution of each FMA individually. The following three FMAs had the most output:

- FMA5, with an average direct output of $270 million
- FMA3, with an average direct output of $264 million
- FMA7, with an average direct output of $221 million.

4.1.2 Economic contribution of the Seafood Processing industry

The Seafood Processing industry purchases raw fish and seafood from the Fish Harvesting industry, and then adds value by processing these raw materials for consumption by the domestic or export market. Between 2023 and 2025, on average, the Seafood Processing industry earned $1.8 billion in direct output and directly employed approximately 2,512 FTEs, as depicted in Table 15.

Table 15 Annual average economic contribution of the Seafood Processing industry, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	1,775	1,743	1,019	4,537
GDP (2025$m)	573	705	530	1,808
Employment (FTEs)	2,512	3,318	2,299	8,129

Source: BERL analysis

Overall the Seafood Processing industry contributed $1.8 billion in GDP to the New Zealand economy, and supported a total of 8,129 FTEs.

Regional breakdown of the Seafood Processing industry

A significant amount of Seafood Processing occurs in land-based factories, and so annual Linked Employer-Employee Data (LEED) employment data was used to allocate the output values of the Seafood Processing industry to regional council areas within New Zealand. This allocation is based on the assumption that the value, or revenue per worker, within the industry is identical and therefore where there are more workers more revenue is generated.

The following three regional areas had the most workers and generated the most revenue:

- Nelson – Tasman – Marlborough, with an average direct output of $480 million
- Canterbury, with an average direct output of $343 million
- Auckland, with an average direct output of $328 million.

4.1.3 Combined economic contribution of the Fish Harvesting and Seafood Processing industries

There is a significant amount of overlap between the Fish Harvesting industry and the Seafood Processing industry, with many New Zealand companies operating in both industries. The Fish Harvesting industry provides raw products (seafood) for processing, and relies on the Seafood Processing industry to purchase its harvest (raw products). This overlap enables companies to exploit synergies in their fishing, processing, and marketing.

However, the economic contribution of the two industries combined must account for this overlap to ensure no double count occurs when the output of one industry is an input into the other.

For example, the total impact of the Seafood Processing industry, at $1.8 billion in GDP, is composed of:

- $573 million generated directly by the Seafood Processing industry

- $705 million generated by industries that supply the Seafood Processing industry
- $530 million generated from purchases by households, which include employees of the Seafood Processing industry and other industries.

The Fish Harvesting industry is the biggest supplier to the Seafood Processing industry. To account for this overlap, we have treated the two industries as a single industry. Doing so, allows us to eliminate the double-counted economic impact that otherwise would have resulted.

Table 16 Annual average economic contribution of the combined Fish Harvesting and Seafood Processing industries, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	3,307	2,412	673	6,392
GDP (2025$m)	1,095	1,004	350	2,449
Employment (FTEs)	6,235	6,258	2,013	14,506

Source: BERL analysis

As depicted in Table 16, on average between 2023 and 2025, the combined Fish Harvesting and Seafood Processing industry contributed to direct output of $3.3 billion, $1.1 billion in direct GDP, and directly employed 6,235 FTEs. The total contribution of the two industries combined was $2.4 billion to New Zealand GDP, and the employment of 14,506 FTEs.

4.2 The economic contribution by the Fish Harvesting industry

Deepwater fish are caught at lower depths, which are generally found in New Zealand waters beyond the 12 nautical mile limit of the territorial sea and out to the 200 nautical mile boundary of the EEZ. The remainder are inshore species, including crustaceans such as rock lobster and crab, which are caught in much shallower waters. A small proportion of all fish harvested migrate between these two areas, and are known as HMS.

For this research we have split the inshore area into four fisheries: the inshore (which is composed of finfish), rock lobster, pāua, and shellfish fisheries. The reason for this is that the methods of fishing, and the species caught, are quite different between these four fisheries. Therefore, we want to treat them separately, rather than as a single combined fishery.

4.2.1 Economic contribution of the deepwater fishery

Table 17 shows that, on average between 2023 and 2025, deepwater fishing from the combined Fishing and Seafood Processing industry contributed a total of $3.1 billion in output to the New Zealand economy. Deepwater fishing contributed a total of $1.2 billion to New Zealand GDP and employed 7,004 FTEs.

Table 17 Annual average economic contribution of deepwater fishing, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	1,623	1,190	328	3,141
GDP (2025$m)	536	493	171	1,199
Employment (FTEs)	2,953	3,069	982	7,004

Source: BERL analysis

Deepwater fisheries are a significant contributor to the commercial fishing sector, representing approximately two-thirds of total commercial catch by volume, and generating almost half of the industry's total economic contribution in terms of output, GDP, and employment.

4.2.2 Economic contribution of the highly migratory species (HMS) fishery

Table 18 shows that, on average between 2023 and 2025, HMS fishing from the combined Fish Harvesting and Seafood Processing industry contributed a total of $150 million in output to the New Zealand economy. HMS fishing contributed a total of $58 million to New Zealand GDP and employed 358 FTEs.

Table 18 Annual average economic contribution of HMS, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	78	56	16	150
GDP (2025$m)	26	24	8	58
Employment (FTEs)	161	148	48	358

Source: BERL analysis

HMS generates a higher economic contribution per tonne harvested, reflecting the value of species such as southern bluefin tuna, albacore tuna, and swordfish.

4.2.3 Economic contribution of the inshore fishery

Table 19 shows that, on average between 2023 and 2025, the share for inshore species (finfish), of the combined Fish Harvesting and Seafood Processing industry's total economic contribution to the

New Zealand economy, comprised output of $2.1 billion, GDP of $794 million, and employment of 4,693 FTEs.

Table 19 Annual average economic contribution of inshore, finfish, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	1,072	783	218	2,073
GDP (2025$m)	355	326	113	794
Employment (FTEs)	2,012	2,029	652	4,693

Source: BERL analysis

Snapper, jack mackerel, and blue cod are the highest valued inshore species. Any reduction in the commercial catch of these species would have significant impacts on GDP and employment. Such a reduction could arise from a reduction in the total allowable commercial catch, or a depletion of stocks from an environmental hazard.

4.2.4 Economic contribution of the rock lobster fishery

Table 20 shows that, on average between 2023 and 2025, the total economic contribution of rock lobster to the New Zealand economy was an estimated $237 million in GDP, and total employment of approximately 1,476 FTEs.

Table 20 Annual average economic contribution of rock lobster, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	316	226	66	608
GDP (2025$m)	106	96	34	237
Employment (FTEs)	678	600	198	1,476

Source: BERL analysis

The $608 million in total output, and employment of 1,476 FTEs comes from an average annual catch of 2,819 tonnes of Rock Lobster.

4.2.5 Economic contribution of the pāua fishery

Table 21 shows that on average between 2023 and 2025, the total economic contribution of pāua to the New Zealand economy was an estimated $80 million in GDP, and total employment of approximately 498 FTEs.

Table 21 Annual average economic contribution of pāua, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	107	76	22	206
GDP (2025$m)	36	32	12	80

Employment (FTEs)	228	203	67	498

Source: BERL analysis

The $206 million in total output, and employment of 498 FTEs comes from an average annual catch of 721 tonnes of pāua.

4.2.6 Economic contribution of the shellfish fishery

Table 22 shows that, on average between 2023 and 2025, shellfish fishing, as part of the combined Fish Harvesting and Seafood Processing industry, contributed a total of $214 million in output to the New Zealand economy. Shellfish fishing contributed a total of $82 million to New Zealand GDP, and employed 477 FTEs.[18]

Table 22 Annual average economic contribution of shellfish fishing, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	111	81	22	214
GDP (2025$m)	36	34	12	82
Employment (FTEs)	201	209	67	477

Source: BERL analysis

4.3 The economic contribution by ANZSIC06 fishing industries

In this section we present the total economic contribution for the combined Fish Harvesting and Seafood Processing industry across the four ANZSIC06 fishing industries. These ANZSIC06 industries are based entirely on the fishing method being utilised to catch fish, rather than on the fish being caught. The economic contributions are based on the average gross revenue from 2023 to 2025.

4.3.1 Economic contribution of trawling, seining, and netting fishing

The trawling, seining and netting fishing industry includes fish caught using methods such as bottom trawl, Danish seine, set net, ring net, purse seine, and mid-water trawl. The most commonly caught species were hoki, jack mackerel, barracouta, southern blue whiting, and arrow squid.

[18] In the 2016 to 2020 report pāua was included as part of Shellfish, these numbers exclude pāua and so will not match the previous report.

Bottom trawling, where fishing gear comes into contact with the seabed at least once, accounts for approximately 70 percent of New Zealand's commercial catch by volume and is therefore a major contributor to domestic seafood supply and export revenue.

Table 23 Annual average economic contribution of trawling, seining, and netting fishing, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	2,327	1,706	471	4,503
GDP (2025$m)	768	706	245	1,719
Employment (FTEs)	4,323	4,400	1,407	10,130

Source: BERL analysis

On average between 2023 and 2025, this industry generated direct output of $2.3 billion, and contributed an overall total of $4.5 billion to New Zealand output, as depicted in Table 23. The trawling, seining, and netting fishing industry directly contributed $768 million to New Zealand GDP, and directly employed 4,323 FTEs. The total contribution to New Zealand GDP was $1.7 billion and total employment was 10,130 FTEs.

4.3.2 Economic contribution of line fishing

The line fishing industry includes bottom longline, hand-line, dropline, squid jigging, surface longline, and troll fishing methods. The main species caught within this industry include snapper and ling.

Table 24 Annual average economic contribution of line fishing, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	267	193	55	515
GDP (2025$m)	89	81	28	198
Employment (FTEs)	687	505	163	1,355

Source: BERL analysis

On average between 2023 and 2025, this industry generated direct output of $267 million, and contributed an overall total of $515 million to New Zealand output, as depicted in Table 24. The line fishing industry directly contributed $89 million to New Zealand GDP, and directly employed 687 FTEs. The total contribution to New Zealand GDP was $198 million and total employment was 1,355 FTEs.

4.3.3 Economic contribution of other fishing

Other fishing includes fishing methods such as fish caught by cod pots, octopus pots, hand gathering, fish traps, dredging, and diving. The main species caught within this industry include ling, blue cod, and pāua.

Table 25 Annual average economic contribution of other fishing, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	398	288	82	768
GDP (2025$m)	133	121	43	297
Employment (FTEs)	801	755	246	1,802

Source: BERL analysis

On average, between 2023 and 2025, this industry generated direct output of $398 million, and contributed an overall total of $768 million to New Zealand output, as depicted in Table 25. The other fishing industry directly contributed $133 million to New Zealand GDP, and directly employed 801 FTEs. The total contribution to New Zealand GDP was $297 million and total employment supported was 1,802 FTEs.

4.3.4 Economic contribution of rock lobster and crab potting

The economic contribution of the rock lobster and crab potting industry is very similar to that of the rock lobster fishery. This is because the spiny red rock lobster and the packhorse rock lobster, which comprise the rock lobster fishery, are the main two species caught by the rock lobster and crab potting industry. The industry does catch some other fish species, mainly a small amount of conger eel, octopus, and carpet shark, but this additional catch does little to separate the economic contribution of the rock lobster fishery, and the rock lobster and crab potting industry.

Table 26 Annual average economic contribution of rock lobster and crab potting, 2023 - 2025

	Direct	Indirect	Induced	Total
Output (2025$m)	315	225	66	606
GDP (2025$m)	106	96	34	236
Employment (FTEs)	508	598	197	1,303

Source: BERL analysis

On average, between 2023 and 2025, this industry generated direct output of $315 million, and contributed an overall total of $606 million to New Zealand output, as depicted in Table 26. The rock lobster and crab potting industry directly contributed $106 million to New Zealand GDP, and directly employed 508 FTEs. The total contribution to New Zealand GDP was $236 million and total employment supported was 1,303 FTEs.

5 Employment

Employment is an important measure of economic impact, in addition to revenue and GDP, as it measures the impact of the activity by industry type and the location of the worker. The data included in this section is annual LEED data from Statistics New Zealand, which is actual employment counts (not FTEs) derived from PAYE and IR3 taxation returns of individuals. Therefore, the geographic location is defined as the location of the business units where the individual is employed. The following section focuses on employment in the Fish Harvesting industry, and the employment in each sector that operates within this industry, and regional employment. Throughout this section, industry refers to a combination of sectors that operate within the one industry.

The employment statistics for the trawling sector have been impacted by the need for any chartered fishing vessels to be registered under New Zealand maritime laws. Whereas crew on those vessels would previously not have been counted, as they were part of the chartering arrangement, they are now registered as New Zealand employees and taxpayers. This change in status has resulted in the apparent increase in employment in the trawling sector, seen between 2014 and 2019, despite the number of registered commercial fishing vessels continuing to decline across this period.

5.1 Employment in the wider Fish Harvesting industry

Employment within the wider Fish Harvesting industry is spread across a variety of different sectors, including fishing, processing, and service provision. The following are the sectors that operate within the wider Fish Harvesting industry:

- Seafood processing (excluding aquaculture)
- Fish trawling, seining and netting
- Line fishing
- Other fishing
- Rock lobster and crab potting
- Shipbuilding and repair services
- Fish and seafood wholesaling.

5.1.1 Total Fish Harvesting industry employment

Between 2019 and 2024 the Fish Harvesting industry saw a decline in employment, from 11,964 people in 2019 to 10,815 in 2024, as depicted in Table 27.

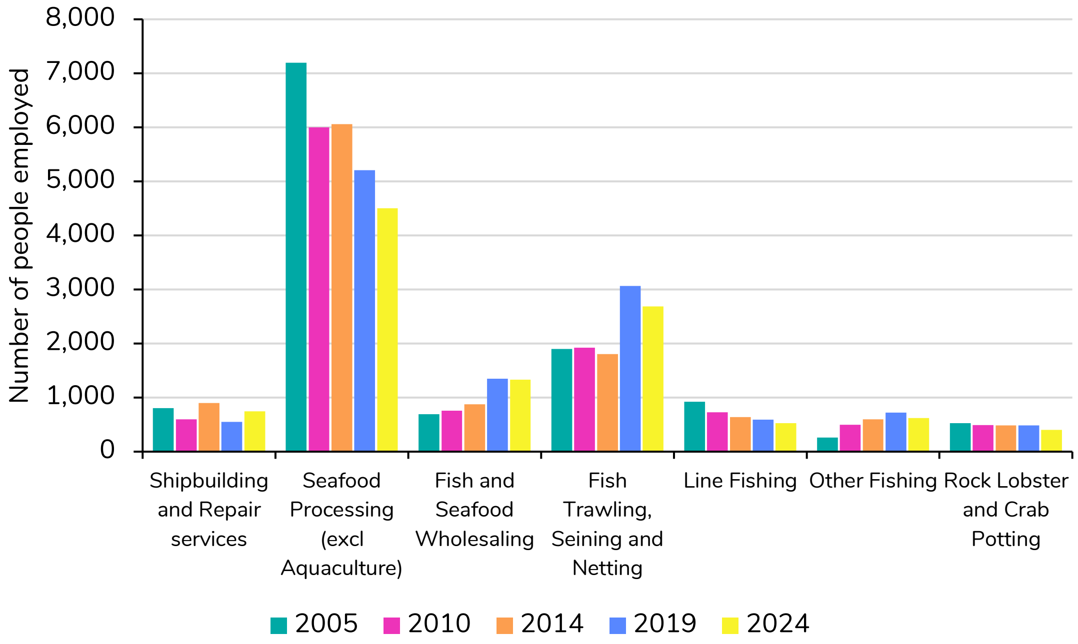
Table 27 Employment in the wider Fish Harvesting industry, by sector, 2005 - 2024

Sectors within the fishing industry	2005	2019	2024	Change between 2019 and 2024 (% per annum)
Shipbuilding and Repair services	807	552	744	6.2
Seafood Processing (excl Aquaculture)	7,194	5,205	4,503	-2.9
Fish and Seafood Wholesaling	693	1,350	1,332	-0.3
Fish Trawling, Seining and Netting	1,899	3,063	2,685	-2.6
Line Fishing	924	591	528	-2.2
Other Fishing	258	720	621	-2.9
Rock Lobster and Crab Potting	528	483	402	-3.6
Total fishing sector	**12,303**	**11,964**	**10,815**	**-2.0**

Source: Statistics NZ and BERL analysis

Across the five year period, only one of the seven sectors included in the wider Fish Harvesting industry experienced an overall increase in employment, as depicted in Table 27 and Figure 6. This sector is the shipbuilding and repair services sector where employment increased from 552 people in 2019 to 744 people in 2024, a per annum increase of 6.2 percent.

Figure 6 Wider Fish Harvesting industry employment, New Zealand, 2005 - 2024



Source: Statistics NZ and BERL analysis

The remaining six sectors (seafood processing excluding aquaculture, fish and seafood wholesaling, fish trawling, seining and netting, line fishing, other fishing, and rock lobster and crab potting) experienced relatively small per annum percentage decreases between 2019 and 2024. The largest per annum decrease was in the rock lobster and crab potting sector, where employment decreased from 483 people in 2019 to 402 people in 2024, a per annum decrease of 3.6 percent.

5.1.2 Fish Harvesting industry wage and salary employment

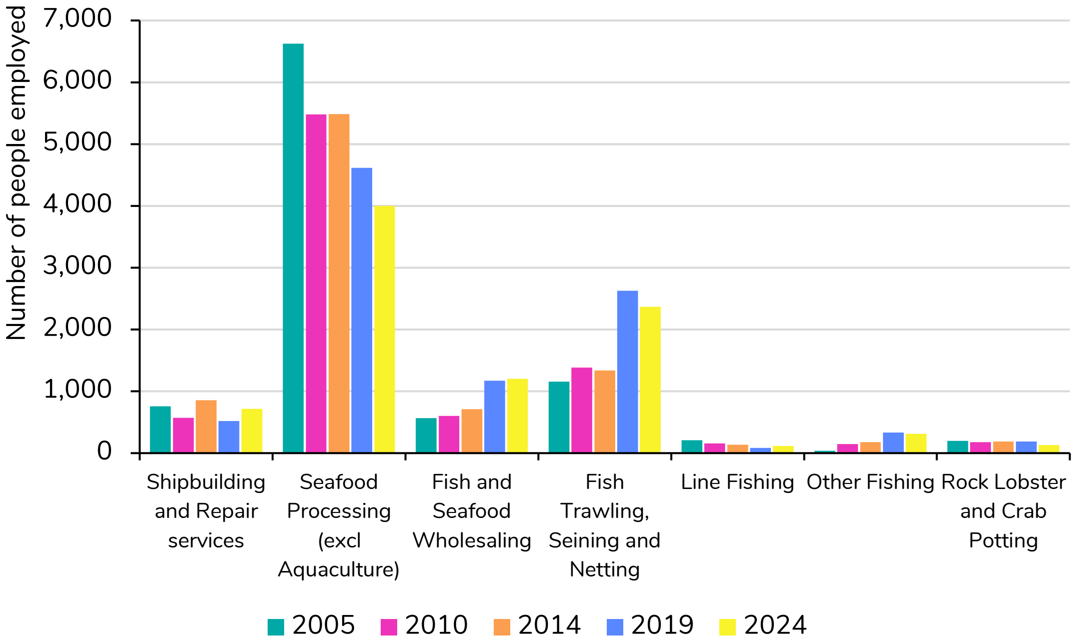
Total wage and salary employment in the wider Fish Harvesting industry slightly decreased (9,537 people to 8,847 people) between 2019 and 2024.[19] This came after an increase in wage and salary employment between 2014 and 2019, which saw employment in 2019 hit a similar level to that seen in 2005 (9,558 people).

As depicted in Figure 7, wage and salary employment decreased in four of the seven sectors included in the Fish Harvesting industry, between 2019 and 2024. These four sectors were:

- Rock lobster and crab potting, where employment decreased from 189 people to 132 people (a 6.9 percent per annum decrease)
- Seafood processing, excluding aquaculture, where employment decreased from 4,614 people to 3,999 people (a 2.8 percent per annum decrease)
- Fish trawling, seining, and netting, where employment decreased from 2,625 people to 2,370 people (a 2.0 percent per annum decrease)
- Other fishing, where employment decreased from 333 people to 315 people (a 1.1 percent per annum decrease).

[19] Wage and salary employment is referring to working for someone else rather than one's self.

Figure 7 Wider Fish Harvesting industry wage and salary employment, New Zealand, 2005 - 2024



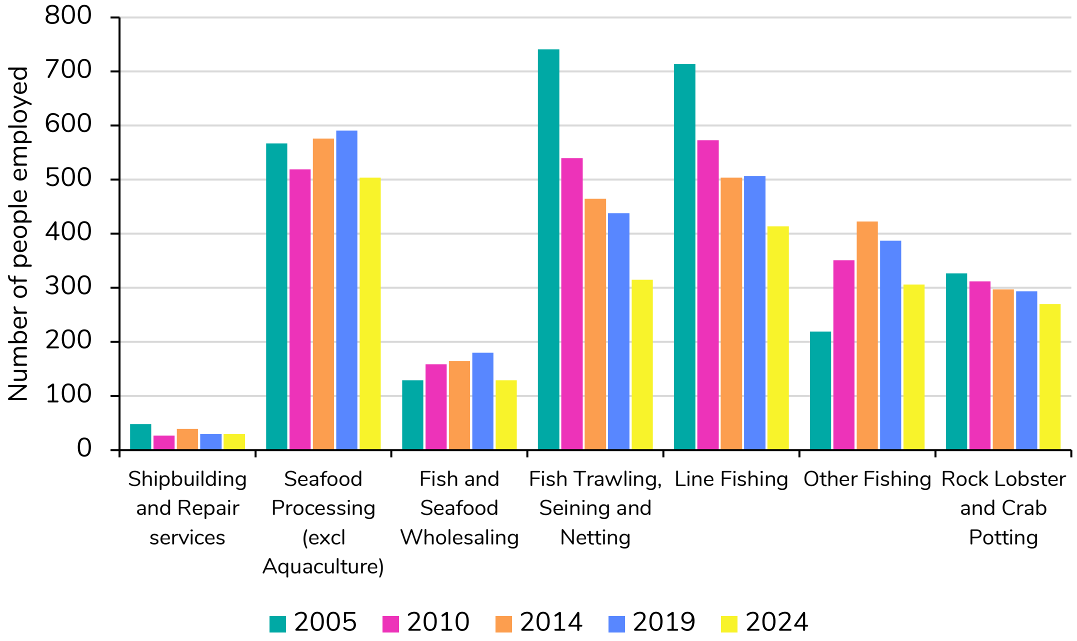
Source: Statistics NZ and BERL analysis

Between 2005 and 2024, employment increased in the following sectors: fish and seafood wholesaling; fish trawling, seining, and netting; and other fishing. Other fishing had a significant per annum percentage increase of 4.7 percent, followed by fish and seafood wholesaling with a 3.5 per annum percentage increase.

5.1.3 Wider Fish Harvesting industry self-employment

Total self-employment in the wider Fish Harvesting industry decreased slightly between 2005 and 2024, with a per annum change of negative 1.7 percent.

Figure 8 Wider Fish Harvesting industry self-employment, New Zealand, 2005 - 2024



Source: Statistics NZ and BERL analysis

As depicted in Figure 8, self-employment in the Commercial Fishing industry declined across five of the seven sectors. These sectors were: fish trawling, seining, and netting; line fishing; shipbuilding and repair services; rock lobster and crab potting; and seafood processing, excluding aquaculture. However, the following two sectors did not experience a decrease in self-employment between 2005 and 2024:

- Other fishing, where self-employment increased from 219 people to 306 people, although this is down from its peak in 2014 of 423
- Fish and seafood wholesaling, where self-employment has remained at 129 people, again this is down from a peak of 180 in 2019.

5.2 Employment changes by region

Across the wider Commercial Fishing industry in New Zealand, between 2005 and 2024, two sectors experienced significant changes in the location of employment. These two sectors were:

- Fish trawling, seining, and netting
- Seafood processing, excluding aquaculture.

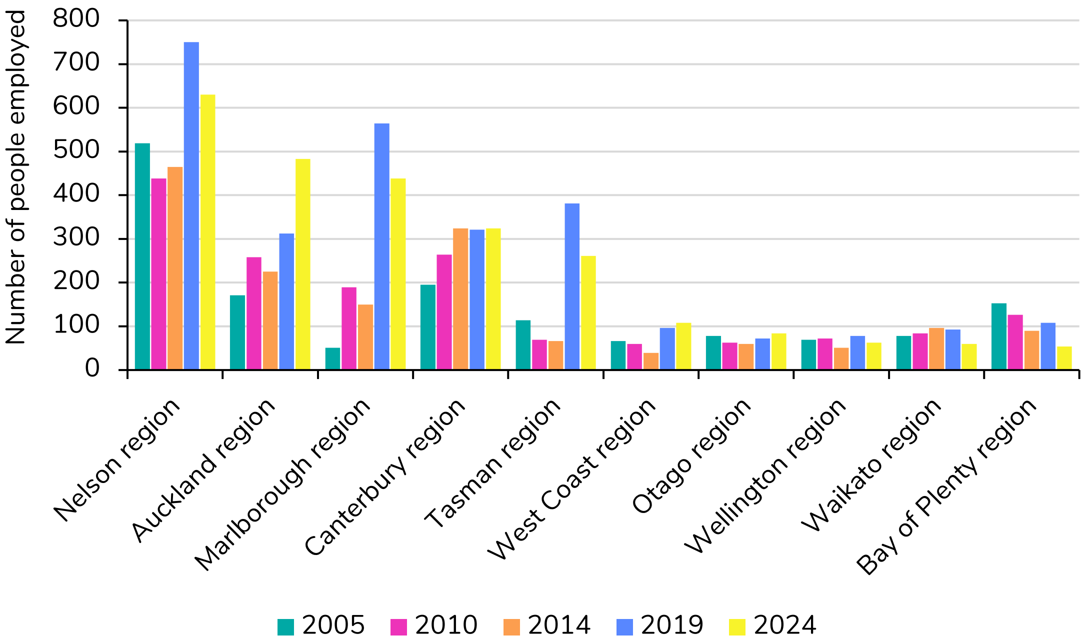
The other industries, mentioned previously, did not experience such significant changes in the location of employment, across the 2005 to 2024 period.

5.2.1 Fish trawling, seining, and netting employment

As depicted in Figure 8, there was a transition in employment from the top of the South Island to Auckland between 2005 and 2024. However, following this transition there was a significant increase in employment across the country, particularly in the top of the South Island where employment increased from 681 people in 2014, to 1,695 people in 2019. This was largely caused by the registration of foreign charter boats and crews (as noted earlier). The following regions experienced decreases in employment between 2019 and 2024:

- Marlborough, where employment decreased from 564 people to 438 people
- Nelson, where employment decreased from 750 people to 630 people
- Tasman, where employment decreased from 381 people to 261 people.

Figure 9 Fish trawling, seining, and netting industry employment by top ten regions, 2005 - 2024



Source: Statistics NZ and BERL analysis

Four of the top ten regions experienced increases in total employment in the fish trawling, seining, and netting industry between 2019 and 2024. The following regions did see an increase in employment in that industry during the period:

- Auckland, where employment increased from 312 people to 483 people
- Otago, where employment increased from 72 people to 84 people

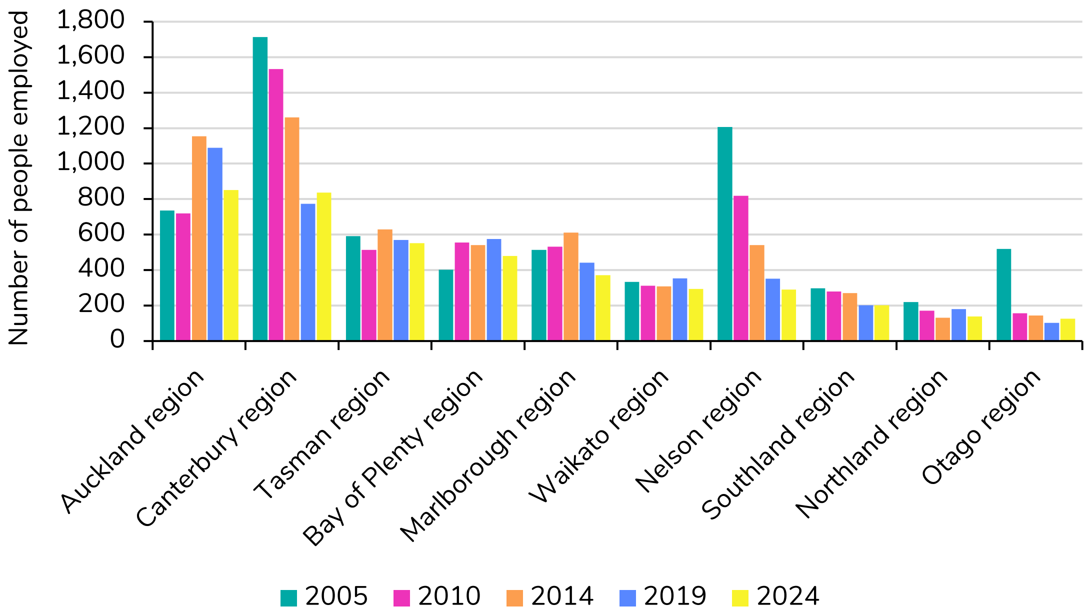
- West Coast, where employment increased from 96 people to 108 people
- Canterbury, where employment increased from 321 people to 324 people.

5.2.2 Seafood Processing industry employment, excluding aquaculture

In 2024, the Seafood Processing, excluding aquaculture, industry employed a total of 4,382 people, which was a significant decrease from 7,194 people in 2005. Figure 10 highlights the change in employment counts in the Seafood Processing, excluding aquaculture, industry between 2005 and 2024 for the top ten regions in New Zealand. There has been significant change in a few regions. Most notably, employment in the Seafood Processing, excluding aquaculture, industry in Canterbury decreased from 1,260 people in 2014, to 837 people in 2024. The following regions also experienced decreases in employment between 2019 and 2024:

- Auckland, where employment decreased from 1,089 people to 852 people
- Bay of Plenty, where employment decreased from 576 people to 480 people
- Marlborough, where employment decreased from 441 people to 372 people
- Nelson, where employment decreased from 351 people to 291 people
- Waikato, where employment decreased from 353 people to 294 people.

Figure 10 Seafood Processing industry employment by top ten regions, 2005 - 2024



Source: Statistics NZ and BERL analysis

Only three of the top ten regions for employment did not see a decrease in employment in the Seafood Processing, excluding aquaculture, industry between 2019 and 2024, these being:

- Canterbury, where employment increased from 774 people to 837 people
- Otago, where employment increased from 102 people to 126 people
- Southland, where employment stayed the same with 201 people.

Appendix A Methodology

In this section BERL presents the conceptual framework of economic contribution and its components, along with the empirical methodology used to estimate the economic contribution of commercial fishing to the New Zealand economy.

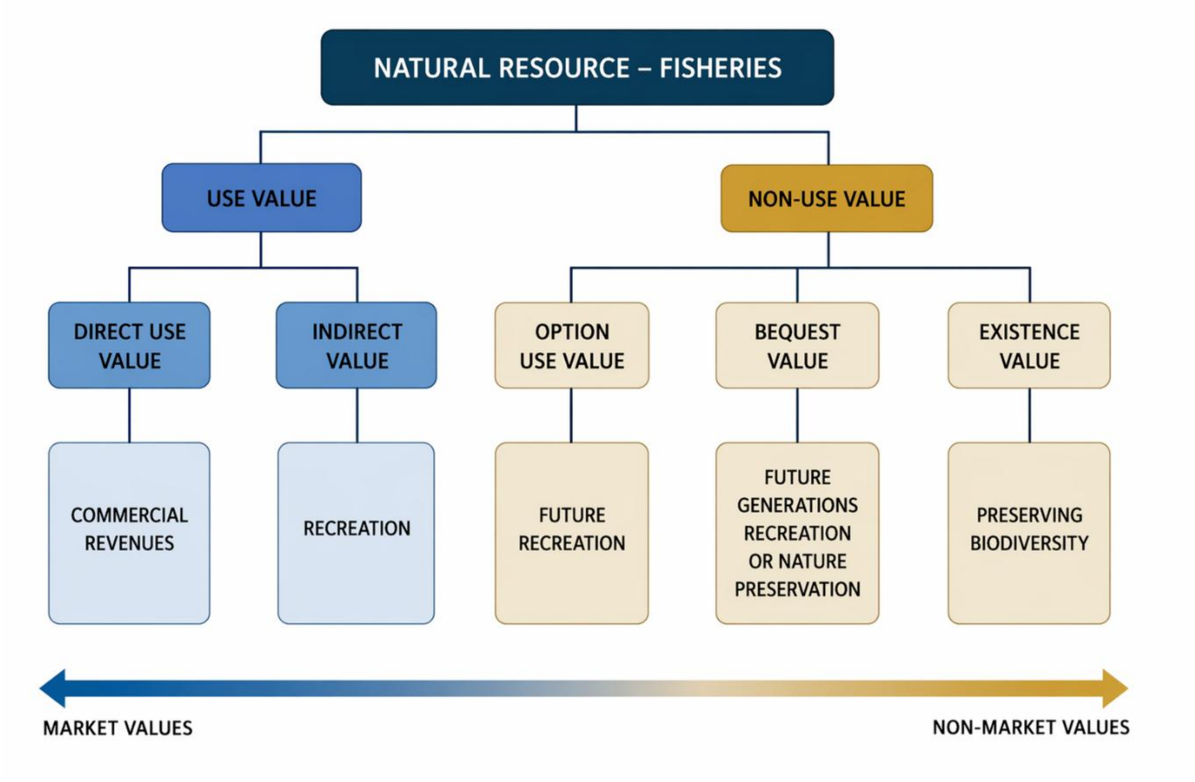
Economic contribution and economic value

In its simplest terms, economic contribution from an economic activity is the cost to the nation if the activity stops. More precisely, an economic contribution is defined as the gross changes in a nation's existing economy that can be attributed to a given industry. Economic contributions occur from transactions in a market setting.

Economic contribution is one part of a suite of contributions to the total economic value of a fishery resource. As shown in Figure 11, the total economic value of a natural resource comprises:

- Use values derived from the actual use of the resource together with other factors in production, including:
    - Direct use - actual use resulting in a marketed output
    - Indirect use - recreational use resulting in a non-marketed output
    - Option use - the right to use the resource in the future for direct or indirect uses
    - Bequest use - the conferring of a right to another to use in the future.
- Non-use values, where the values are independent of the individual's present use, including:
    - Bequest value - the conferring of a right on another to enjoy in the future
    - Existence value – the enjoyment or displeasure in the present of knowing that a resource exists.

Figure 11 Total economic value of a fisheries resource



Source: BERL

The use value from commercial fishing can be measured with the associated market-based transactions. The economic contribution is the measure of the use value.

The non-market use value of recreational fishing is not part of the measure of its economic contribution. The non-market use value can be estimated by the willingness of recreational fishers to pay for their enjoyment. This is not easily measured and will differ for different people.

Option values are linked to potential future uses. They can change with changes in future conditions. In the present, if few substitutes exist for a use, then the option value is high. In the future, if many substitutes are likely to be available, then the future option value is likely to diminish.

Bequest values can have either “use” or “non-use” values. This depends on whether the future recipient is able to “use” or simply “enjoy” the natural resource.

Existence values are personal and not objective. They can be simultaneously beneficial and detrimental to different people. Hence, changes in them can result in an increase or decrease in value to each person. For example, one person may enjoy rainfall, while another may take displeasure in it.

Components of economic contribution

Since the economic contribution of an activity is measured in a market setting, the process for its measurement is well-defined and there are a number of useful guiding principles.

These include the following:

- The definition of the activity should correspond with the industry classification of an official statistics agency. This means that there is a clear link to the impact of this activity on the national accounts in terms of output, GDP, wages, and employment
- The share of the activity that is directly relevant should be determined because not all industry activities are solely concerned with one type of output. For example, not all boat building is marine-based
- Multiple counting of the impact of an activity must be avoided
- Land-based processing/distribution of resources should be included, where the resource does not undergo drastic transformation. For example, seafood marketing and processing should be included.

Commercial fishing is a collection of market-based activities. These activities are set within the sectors that make-up the combined Fish Harvesting and Seafood Processing industry. Fish Harvesting and Seafood Processing industry consist of five sub-industries:

- Trawling, seining, and netting
- Line fishing
- Other fishing
- Rock lobster and crab potting
- Seafood Processing.

Commercial fishing generates revenues (outputs) and it has associated costs. It requires capital investment in vessels, and the wages it pays and the number of people employed are well-defined. Firms in this industry purchase goods and services and create revenue in closely associated firms, for example, shipbuilding and repairs, and in more distantly related firms, for example in road transportation.

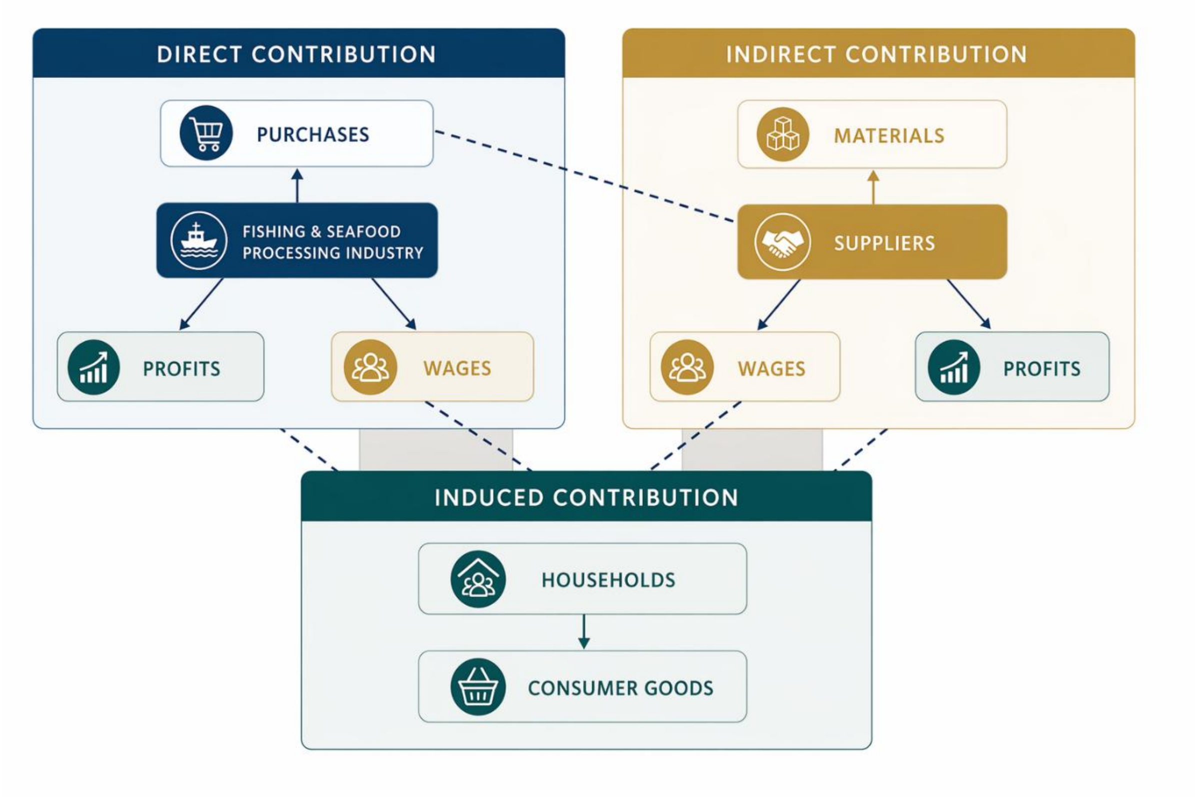
The economic contributions of the combined Fish Harvesting and Seafood Processing industry are made up by:

- Profits from commercial fishing
- Remuneration paid to fishing company employees
- Taxes paid (less subsidies)
- Depreciation of assets
- Revenue of firms supplying goods and services to commercial fishers
- Revenue created in subsequent market transactions of households, whose members derived income from employment in Fish Harvesting and Seafood Processing industry firms and their supplier firms.

Figure 12 shows how the direct economic contributions of the combined Fish Harvesting and Seafood Processing industry (listed above) affect other parts of the New Zealand economy. In particular, the figure shows how purchases made by the industry generate income for suppliers to the industry, who then buy materials, pay staff and make profits. It also demonstrates how wages, paid directly by the combined Fish Harvesting and Seafood Processing industry and by suppliers, provide households with income which fuels their purchases of consumer goods.

For further details on the multiplier process, as well as direct, indirect, and induced effects and contributions see Appendix C.

Figure 12 Economic contribution of the Fish Harvesting and Seafood Processing industry



Source: BERL

Measuring economic contribution

In order to calculate the economic contribution of the Fish Harvesting industry to New Zealand, BERL undertook the following steps:

1. Sourced commercial fish catch data for the 2023 to 2025 fishing years (October to September) from MPI
2. Converted unit catch data to greenweight (unprocessed) catch volumes using MPI provided conversion factors
3. Checked the annual reported fish catch in the provided data against the reported total commercial catch for 56 fish species, which represented over 95 percent of the annual catch
4. Allocated each fish stock to one of six fisheries (inshore, deepwater, highly migratory species (HMS), rock lobster, pāua, and shellfish) based on the MPI management groups
5. Allocated the fish catch to one of the four fishing sub-industries (trawling, seining and netting, line fishing, other fishing, rock lobster and crab potting) based on the method used to catch the fish. Upon expert advice from the rock lobster industry we altered the fishing method of rock

lobster caught via the other potting fishing method and diving, to the rock lobster potting fishing method.

6. Sourced 2023 to 2025 monthly fish exports data from Statistics New Zealand, so that the export volume and export price per kilogram could be determined
7. Sourced 2024/2025 port prices from Seafood NZ
8. Used export volumes, export prices per kilogram, and port prices to determine the final value of the annual fish catch, and split that value across the Fish Harvesting and Seafood Processing industries. Further details of these calculations to determine the value of each fish species, and how it is split across the Fish Harvesting and Seafood Processing industries, are available on page 40 of this report
9. Sourced Annual Enterprise Survey (AES) data for 2022, 2023, and 2024, for the four fishing sub-industries and the Seafood Processing industry, to provide the reported total revenue for these industries
10. Adjusted the value of the fish catch to match the AES total revenue totals for the four fishing sub-industries and the Seafood Processing industry
11. Sourced annual employee count data from Statistics New Zealand's Linked Employer-Employee Dataset (LEED), which showed the number of self-employed, and wage and salary employees, who worked in the four fishing sub-industries, the Seafood Processing industry, and marine services industries
12. Used employment data, and average annual total value data, to calculate the economic contribution to New Zealand of the four fishing sub-industries, the six fisheries, the overall Fish Harvesting industry and the Seafood Processing industry. In addition, BERL calculated the economic contribution of the six fisheries and the four sub-industries when combined with the Seafood Processing industry.

More detail on each of these twelve steps is detailed next.

Sourcing fish catch data

In this step BERL sourced fish catch data from MPI, for the period from October 2023 to September 2025. The dataset provided by MPI had a total of 537,590 rows of data, and contained the month, species caught, FMA the fish was caught in, fishing method used to catch the fish, and either greenweight in kilograms, or the number of fish caught (unit number). To better enable the analysis of the data, each month was assigned to an annual fishing year, for example October 2022 to September 2023 were assigned to the 2023 fishing year.

Converting unit catch data to greenweight

Of the 537,590 rows of data, 8,886 had unit catch data. Most commonly these records were for tuna, shark, or shellfish species. For this data to be used alongside the greenweight (kilograms) data, this unit catch data had to be converted into kilograms. To undertake this conversion BERL used the MPI conversion factor (converting units to kilograms) for each specific fish species, which was then multiplied by the unit catch number for that fish species. In total, 34 fish species had unit catch data converted to kilograms, so that this catch could be used alongside the greenweight catch data.

Matching total annual catch to reported commercial annual catch

On the fisheries infosite operated by MPI the reported commercial catch, for each fish stocks in the QMS, is recorded for each fishing year. To ensure that the catch per stock per fishing year in the analysis dataset matched, BERL initially identified the top 56 stock, by average annual volume of fish catch. These 56 stock represented around 95 percent of the annual fish catch on average.

For each of the three fishing years covered in the dataset, the reported commercial catch of the top 56 fish stock was recorded and then checked against the calculated totals. Where there was a difference in the numbers, BERL adjusted the calculated totals to match the reported commercial catch for that fishing year.

In addition, once BERL had identified the value of each fish stock by Fish Harvesting industry and fishery, any fish stock with a significant value was added to the initial list of 56 stock if they were not already included. This was to ensure that their catch volumes per fishing year matched the reported commercial catch. In total, 56 fish stock had their calculated annual catch matched to MPI's reported commercial catch.

Allocating fish stocks to fisheries

For this research, Seafood NZ wanted to analyse the economic contribution by fishery and industry. To that end, Seafood NZ provided a list of fish species to BERL, detailing which of the six fisheries, inshore, deepwater, HMS, rock lobster, pāua, and shellfish, each fish species was allocated to. While almost all of the 488 fish stocks were allocated to a single fishery, three fish species (jack mackerel, blue mackerel, and barracouta) were split across deepwater and inshore, depending on QMA.

Allocating fish catch to fishing industries

Within the ANZSIC06, there are four different fishing industries in New Zealand:

- Trawling, seining, and netting
- Line fishing
- Other fishing
- Rock lobster and crab potting.

As these industries are defined and based on the method of catch, BERL has used the fishing method used to catch each fish to split the annual fish catch across these industries. In total, there were 35 different fishing methods used to commercially catch fish across the three years covered in this research. Each fishing method was assigned to one of the four industries.

Once completed, each of the 537,590 rows within the fish catch dataset was assigned to a fishery and an industry. Though it should be noted that while, for example, all spiny red rock lobster will be part of the rock lobster fishery, not all of the catch will be within the rock lobster and crab potting industry, as small amounts of this rock lobster are caught using a small number of different fishing methods. The rock lobster industry provided expert advice to BERL that the number reported for rock lobster caught using the other potting and diving fishing methods should be changed to the rock lobster potting fishing method, due to known misreporting errors which are to be fixed in 2026 by MPI.

Sourcing fish export data

Statistics New Zealand provided BERL with data, covering the 2023 to 2025 calendar months, detailing exports of fish at the Harmonised System level 10 (HS10), which is the most detailed level of the export classification system. The export data included export volumes and values. For each export record, BERL matched the export record to a fish species. For each fish species exported across the three year period BERL determined the average export volume, and average export price, per kilogram.

Because most fish exports comprise part of a fish not a whole fish, BERL used MPI conversion factors to convert the volume of, for example, snapper fillets, to greenweight of snapper. This enabled a more robust examination of the amount of fish catch by volume and species being exported from New Zealand.

Sourcing port prices

As part of this research, Seafood NZ provided BERL with 2024/2025 port prices for around 103 of the 488 fish stocks caught in New Zealand over the three year period. For all other fish stock, BERL assumed a port price of $1 a kilogram (this is an increase from the $0.50 used in previous reporting). Overall, these 385 fish stocks comprise around 3.5 percent of the total annual fish catch. Port prices are calculated on an annual basis for each fish stock by MPI, which surveys licensed fish receivers, and reflect the prices paid to a fisher landing fish to licensed fish receivers.

Determining initial value of the Fish Harvesting and Seafood Processing industry

In this step, BERL firstly combined the average annual fish catch for each fish species with the average annual exports by fish species. To do this, BERL took average annual volume of exports (in kilograms of processed fish) for each fish species, and compared it to the average annual volume of catch (in greenweight kilograms or unprocessed weight), to find the percentage share of total catch that was exported. Because the export volume is processed weight and the catch is unprocessed weight, the percentage share of exports will always be smaller than if it had been converted back to greenweight. To account for this BERL used MPI conversion factors to convert the exported weight of the fish back into greenweight based on the fish species and the type of processing undergone. For example, snapper fillets have a conversion factor of 2.4, therefore one tonne of exported snapper fillets would have a greenweight conversion of 2.4 tonnes.

To further account for this, BERL set the benchmark for a species to be exported at ten percent. For any fish species that met this mark BERL used the export price per kilogram, multiplied by the average annual fish catch, to determine the total value for this fish species. For any fish species that did not meet this mark BERL used 2.5 times the port price, multiplied by the average annual fish catch, to determine the total value for this fish species. The 2.5 times was set after reviewing the difference between port prices and export prices for exported fish in 2020. This showed that the export price per kg was generally more than 2.5 times higher than the port price. Therefore 2.5 times was selected as being close, but still below, the ratio between port prices and export prices in 2020.

To split the total value for each fish species between the Fish Harvesting industry and the Seafood Processing industry, BERL used the port prices multiplied by the average annual fish catch as the value going to the Fish Harvesting industry. Therefore, the difference between the total value and the value going to the Fish Harvesting industry is the value going to the Seafood Processing industry. For example, for hake, which is an export focused fish species with around 97 percent of catch volume being exported, the export price is $5.66 a kilogram, while the port price is $2.47 a kilogram. Therefore, to estimate the initial value to the Fish Harvesting industry we multiply catch by port price, and for Seafood Processing we take the difference between the export price and the port price ($3.19) and multiply by the catch volume. With an average fish catch of 2,498 tonnes, it has an initial value of $14.1 million (before the value is adjusted to match AES data), with $6.2 million ($2.47 * 2,498 tonnes) going to the Fish Harvesting industry, and $8 million ($3.19 * 2,498 tonnes) going to the Seafood Processing industry.

Sourcing Annual Enterprise Survey data

Annual Enterprise Survey (AES) data is collected from businesses between 1 October in one year and 30 September the following year. For example, the AES 2023 financial year covers 1 October 2022 to 30 September 2023. As the coverage period for AES matches the fishing year, we can use annual reported total revenue for each of the four fishing industries, as well as for the Seafood Processing industry, to match to the overall calculated revenue totals.

As the Seafood Processing industry includes aquaculture processing, BERL adjusted the total revenue for the Seafood Processing industry down by 12.4 percent, to account for the value of aquaculture processing. The 12.4 percent figure was calculated by determining the average share of revenue for the aquaculture industries (caged offshore aquaculture, longline and rack offshore aquaculture, and onshore aquaculture) when combined with the four fishing sub-industries over the last three years (2023-2025). For example, across 2023-2025, the three aquaculture industries had a combined revenue of $652 million, compared to the four fishing sub-industries which had a combined revenue of $4.6 billion. Thus, $652 million is 12.4 percent of the combined $4.6 billion.

Adjusting calculated values to match AES data

For each of the three fishing years, the total calculated Fish Harvesting industry and Seafood Processing industry values were adjusted to match the AES data for the corresponding year. This provides a consistent annual revenue or value for the four fishing industries and the Seafood Processing industry, which can be broken down by FMA, fishery, and fish species, to provide a richer picture of the make-up of these top level industry values.

In determining the split of seafood processing across the four ANZSIC industries, BERL used three different approaches to determine the most robust estimate of the breakdown. These three approaches were: first, using each industry’s average annual outputs to determine the share; the second approach was to use each industry's average annual catch volume to determine the share; and finally, using each industry's average annual export volumes to determine the share. After reviewing these three approaches, we averaged the share from each approach to provide each industry their final share of the overall value of seafood processing. For example, the fish trawling, seining, and netting industry comprised 60 percent of total outputs, 92 percent of total catch volume, and 85 percent of total export volumes. Averaging these three percentages gave us 79 percent, which was the overall share of $1.8 billion in seafood processing assigned to fish caught via the fishing methods making up this industry.

At this point BERL had a three year fish catch dataset that was consistent with total reported commercial catch, and total revenue for the Fish Harvesting industry and the Seafood Processing industry.

Sourcing employment data

The last set of data sourced for this research was Linked Employer-Employee Data (LEED) provided by StatsNZ. This dataset provided regional annual employment data for each of the four fishing industries, as well as the Seafood Processing industry, and marine service industries. This employment data was split between self-employed and wage and salary employees.

Having regional employment count data for each industry allowed BERL to use this employment data in the multiplier analysis, rather than relying on the multiplier model to calculate employment per million dollars of revenue. In addition, this data enabled BERL to determine employment data for each fishery and FMA, for use in the multiplier calculations.

Similar to the AES data, BERL needed to remove from seafood processing the proportion of employment due to aquaculture. To do this, BERL determined the percentage share of employment in aquaculture as a proportion of the combined Fish Harvesting and Aquaculture industry. Using this method, it was determined that around 34 percent of Seafood Processing employment is due to Aquaculture and, therefore, this proportion was split out from the overall number of people employed in Seafood Processing. The remainder were assumed to work in processing seafood that came from the Fish Harvesting industry.

3.3.12 Determining economic contribution

In this last step BERL used multiplier analysis, derived from inter-industry input-output tables, to estimate the total impact on GDP, revenue, and employment of an initial direct impact to the economy. Multipliers allow us to identify the indirect, induced, and total effects of additional activity or expenditure in terms of output, GDP, and FTEs.

To undertake this analysis, BERL used the total value/revenue for the four fishing industries, the six fisheries, the overall Fish Harvesting industry, and the Seafood Processing industry, along with employment, to determine the economic contribution of each. The economic contribution is shown in terms of direct, indirect, induced and total output, GDP, and employment.

Lastly, BERL determined the economic contribution of a combined Fish Harvesting and Seafood Processing industry. To do this BERL had to use revised multipliers to account for the overlap between the Fish Harvesting and Seafood Processing industries. This was required to remove the double counting that would otherwise take place with the Seafood Processing industry purchasing a significant portion of its inputs from the Fish Harvesting industry (which is already accounted for).

Industry multipliers

BERL used 2024 input-output tables, updated from the 2020 input-output tables produced by Statistics New Zealand, to generate national level multipliers for the Fish Harvesting, Aquaculture, and Seafood Processing industries.

Input-output tables produced by Statistics New Zealand include 106 industries, which represent the total economy. This means that there is just one multiplier for the fishing industry, which includes a combination of industries comprising the entire Fish Harvesting and Aquaculture industries, as represented in Table 28. Also included in the table are the multipliers for the Seafood Processing industry, which is a single input-output industry, and the combined Fish Harvesting and Seafood Processing industry.

Table 28 Multipliers by industry

Multiplier Industry	Indirect	Induced	Total
Fish Harvesting and aquaculture			
Output	0.81	0.48	1.29
GDP	1.04	0.73	1.76
Employment	1.30	0.84	2.13
Seafood processing			
Output	0.98	0.57	1.56
GDP	1.23	0.92	2.15
Employment	1.32	0.92	2.24
Combined			
Output	0.73	0.20	0.93
GDP	0.92	0.32	1.24
Employment	1.00	0.32	1.33

Source: BERL analysis

These multipliers were used to calculate the estimates for the national economic impact of the Fish Harvesting and Seafood Processing industries separately. For the estimates of the combined economic value of the joint Fish Harvesting and Seafood Processing industries, BERL created overall multipliers for each of the calculations in the report.

Appendix B Definitions of industry classifications

This appendix provides definitions of fishing methods and industries mentioned throughout this report, as well as providing the primary activities involved and the appropriate classifications. All definitions have been sourced from the Australia and New Zealand Standard Industrial Classification 2006 (ANZSIC06), Australia Bureau of Statistics.

Rock lobster and crab potting (Class 0411)

This class consists of units mainly engaged in catching Rock Lobsters or Crabs from their natural habitats of ocean or coastal waters, using baited pots.

Primary activities

Primary activities in rock lobster and crab potting are:

- Crab fishing or potting
- Rock lobster fishing or potting
- Saltwater crayfish fishing.

Exclusions/References

Units mainly engaged in:

- Wholesaling fresh or frozen rock lobsters are included in Class 3604 Fish and Seafood Wholesaling
- Farming crustaceans in tanks or ponds onshore are included in Class 0203 Onshore Aquaculture.

Line fishing (Class 0413)

This class consist of units mainly engaged in line fishing in inshore, mid-depth, or surface waters. This class includes units engaged in several fishing methods, including surface or bottom long lining, trolling, or hand or powered-reel fishing.

Primary activities

The primary activities in line fishing are:

- Bottom long line fishing
- Line fishing

- Ocean trolling
- Squid jigging
- Surface long line fishing.

Exclusions/References

Units mainly engaged in:

- Trawling, seining, or netting are included in Class 0414 Fish Trawling, Seining. and Netting.

Fish Trawling, Seining, and Netting (Class 0414)

This class consists of units mainly engaged in trawling, seining, or netting in mid-depth to deep-ocean or coastal waters using a variety of net fishing methods. Trawling methods involve one or two boats towing a very large bag net, either on the sea bed or in mid-depth waters. Seining methods include purse, Danish or beach seining. Netting methods include surface or bottom gill netting.

Primary activities

The primary activities in Fish Trawling, Seining and Netting are:

- Beach seining, fishing
- Bottom gill netting, fishing
- Danish seining, fishing
- Finfish trawling
- Pair trawling
- Purse seining
- Set netting, fishing
- Surface netting, fishing.

Exclusions/References

Units mainly engaged in:

- Line fishing are included in Class 0413 Line fishing

- Hatching or farming fish in controlled environments are included in the appropriate classes of Group 020 Aquaculture
- Wholesaling fresh or frozen finfish are included in Class 3604 Fish and Seafood Wholesaling.

Other fishing (Class 0419)

This class consists of units mainly engaged in fishing not elsewhere classified, or in other types of marine life gathering.

Primary activities

Primary activities in Other fishing are:

- Abalone/pāua fishing
- Freshwater eel fishing
- Freshwater fishing n.e.c.
- Marine water fishery product gathering
- Oyster catching (except from cultivated oyster beds)
- Pearling (except oyster farming)
- Seaweed harvesting
- Spat catching
- Turtle hunting.

Exclusions/References

Units mainly engaged in:

- Hatching or farming seaweed, fish, crustaceans or molluscs in controlled environments are included in the appropriate classes of Group 020 Aquaculture
- Potting for rock lobster or crabs are included in Class 0411 Rock Lobster and Crab potting.

Seafood Processing (Class 1120)

This class consists of units mainly engaged in processing fish or other seafoods. Processes include skinning or shelling, grading, filleting, boning, crumbing, battering, and freezing of the seafood. This class also includes units mainly engaged in operating vessels which gather and process fish or other seafoods.

Primary activities

Primary activities in seafood processing are:

- Crustacean, processed, manufacturing (including cooked and/or frozen) n.e.c.
- Fish cleaning or filleting
- Fish fillet manufacturing
- Fish loaf or cake manufacturing
- Fish paste manufacturing
- Fish pate manufacturing
- Fish, canned, manufacturing
- Fish, dried or smoked, manufacturing
- Mollusc, processed, manufacturing (including shelled)
- Oyster, shelling, freezing or bottling in brine
- Scallop, preserved, manufacturing
- Seafood canned, manufacturing
- Seafood, preserved, manufacturing
- Whole finfish freezing.

Exclusions/References

Units mainly engaged in: gathering fish or other seafoods are included in the appropriate classes of Group 041 Fishing.

Shipbuilding and Repair services (Class 2391)

This class consists of units mainly engaged in manufacturing or repairing vessels of 50 tonnes and over displacement, submarines, or major components for ships and submarines not elsewhere classified.

Primary activities

Primary activities in Shipbuilding and Repair services are:

- Drydock operation
- Hull cleaning
- Ship repairing
- Ship wrecking
- Shipbuilding
- Submarine construction.

Exclusions/References

Units mainly engaged in:

- Building boats are included in Class 2392 Boatbuilding and Repair Services.

Fish and Seafood Wholesaling (Class 6604)

This class consists of units mainly engaged in wholesaling fresh or frozen fish or other seafood (except canned).

Primary activities

Primary activities in Fish and Seafood Wholesaling are:

- Crustacean wholesaling (including processed, except canned)
- Fish wholesaling
- Mollusc wholesaling (including processed, except canned)
- Seafood, fresh or frozen, wholesaling.

Exclusions/References

Units mainly engaged in:

- Operating vessels which both catch and process fish or other seafood are included in the appropriate cases of Group 041 Fishing
- Cleaning, cooking, or freezing crustaceans or molluscs (including shelling and bottling oysters) or in freezing filleted fish (including whole finfish) are included in Class 1120 Seafood Processing

- Wholesaling canned fish or seafood are included in Class 3609 Other Grocery Wholesaling
- Wholesaling fish or seafood in conjunction with a wide variety of other grocery items included in Class 3601 General Line Grocery Wholesaling.

Appendix C Economic contributions definitions

Information on economic contribution analysis

Section 4 breaks down BERL's estimates of the economic contribution of commercial fishing in 2025. This analysis focuses on:

- The Fish Harvesting industry, which catches fish
- The Seafood Processing excluding Aquaculture Industry, which processes the catch
- The combined Fishing and Seafood Processing excluding Aquaculture Industries seen as one integrated industry
- Fishing by sector – Deepwater, Inshore, HMS, Rock Lobster, Pāua and Shellfish
- ANZSIC06 Fish Harvesting industry by fishing method – Fish Trawling, Seining and Netting, Line fishing, Other fishing, and Rock Lobster and Crab potting
- FMA – Geographic marine locations
- Regions – Geographic land-based locations
- Average annual catches.[20]

Standard multiplier analysis techniques are used to determine the direct, indirect, and induced economic contributions for outputs (gross revenue), GDP (value added) and employment (FTEs). Output values underpin the multiplier analysis and are derived from commercial catch values by FMA, fishing method, and main species.

Definitions

The following will include definitions of output, GDP, employment (FTEs), and the difference between direct, indirect, and induced effects used in a multiplier analysis.

Definition of output (gross revenue)

Gross output is the value of production, built up through the national accounts as a measure, in most industries, of gross sales or turnover. This is expressed in $million at constant prices. Gross output is made up of the sum of:

[20] It is not possible to reconcile the FMAs and the regions as one is marine-based and the other is land-based. Additionally, the Hawke's Bay and Gisborne regions are grouped together, as are Nelson, Tasman, and Marlborough.

- Compensation of employees (i.e. salaries and wages)
- Income from self-employment
- Profits
- Indirect taxes less subsidies
- Intermediate purchases of goods (other than stock in trade)
- Intermediate purchases of services.

Definition of GDP (value added)

Value added multipliers measure the increase in output generated along the production chain, which, in aggregate, totals Gross Domestic Product (GDP). Value added is made up of the sum of:

- Compensation of employees (i.e. salaries and wages)
- Income from self-employment
- Profits
- Indirect taxes less subsidies.

Definition of employment (FTEs)

Employment impact multipliers determine the number of FTE roles that are created for every $1 million spent in an industry for one year. It provides a measure of total labour demand associated with gross output.

An FTE is an estimate of numbers employed assuming full-time positions equal one employee, and part-time positions equal 0.5 of an employee.

Differentiating between direct, indirect, and induced effects

The underlying logic of multiplier analysis is relatively straightforward. An initial expenditure (direct effect) in an industry creates flows of expenditures that are magnified, or “multiplied”, as they flow on to the wider economy.

This flow occurs in two ways:

- The industry purchases materials and services from supplier firms, who in turn make further purchases from their suppliers. This generates an indirect (upstream) effect

- People employed in the direct development, and in firms supplying services, earn income (mostly from wages and salaries, but also from profits) which, after tax is deducted, is then spent on consumption. There is also an allowance for some savings. These are the induced (downstream) effects.

Hence, for any amount spent in an area (direct effect), the actual output generated from that spend is greater once the flow-on activity generated (indirect and induced effects) is taken into account.

Leakages

Generally the more developed, or self-sufficient an industry in a region or country is, the higher the multiplier effects. Conversely, the more reliant an industry is on supply inputs from outside the region or country, the lower the multipliers. These outside factors can be referred to as "leakages".

To put this another way, if a house was purchased in the Taranaki region, and all the materials and labour were sourced in the Taranaki region, and all the materials and labour that went into making the housing materials were made in the Taranaki region, and then the labour spent their wages or salaries in the Taranaki region, again on goods or services produced solely in the Taranaki region, then all the multiplier effects would be captured by the Taranaki region. Whereas if inputs or outputs came from outside the Taranaki region, leakages are said to exist, and the multiplier effect is reduced.

Limitations of multiplier analysis

Multiplier analysis is only a "partial equilibrium" analysis, assessing the direct and indirect effects of the development being considered, without analysing the effects of the resources used on the wider national and regional economy.

In particular, it assumes that the supply of capital, productive inputs and labour can expand to meet the additional demand called forth by the initial injection and the flow-on multiplier effects, without leading to resource constraints in other industries. These constraints would lead to price rises and resulting changes in the overall patterns of production between industries.

To assess inter-industry impacts in full would require economic modelling within a "general equilibrium" framework. Applying such models becomes more relevant where the particular development is considered significant within the overall economy.

Related to "partial equilibrium", using multipliers for economic impact assessments assumes that the event is something that would not have been undertaken anyway and that it will not displace existing activity. That is, the event is additional to existing activity. If it does either of the above, then the economic impact is less than that determined by the multiplier and it would be necessary to subtract both the activity that would have occurred anyway and the displacement effect.

Again related to "partial equilibrium", multiplier analysis assumes that an event will not have an impact on relative prices. However, in a dynamic environment, it can be assumed that a large event would have an impact on demand and supply and hence prices. Hence, the larger the event and the more concentrated it is in a single industry or region, the more likely it is that the multipliers would give an inaccurate analysis of impacts. For example, if multiplier analysis was used to determine the effect of residential building construction nationally, it would likely be inaccurate as residential building construction accounts for over six percent of GDP.

Aggregation

Industries outlined in input-output tables are aggregates of smaller sub-industries. Each sub industry has unique inputs and outputs. The higher the level of aggregation the less accurate these inputs and outputs become. Thus, if determining the multiplier effect of a very specific event using highly aggregated data, there will be a lower level of accuracy. Similarly, if an event encompasses a range of industries and multipliers from a single industry are applied the accuracy levels will diminish.

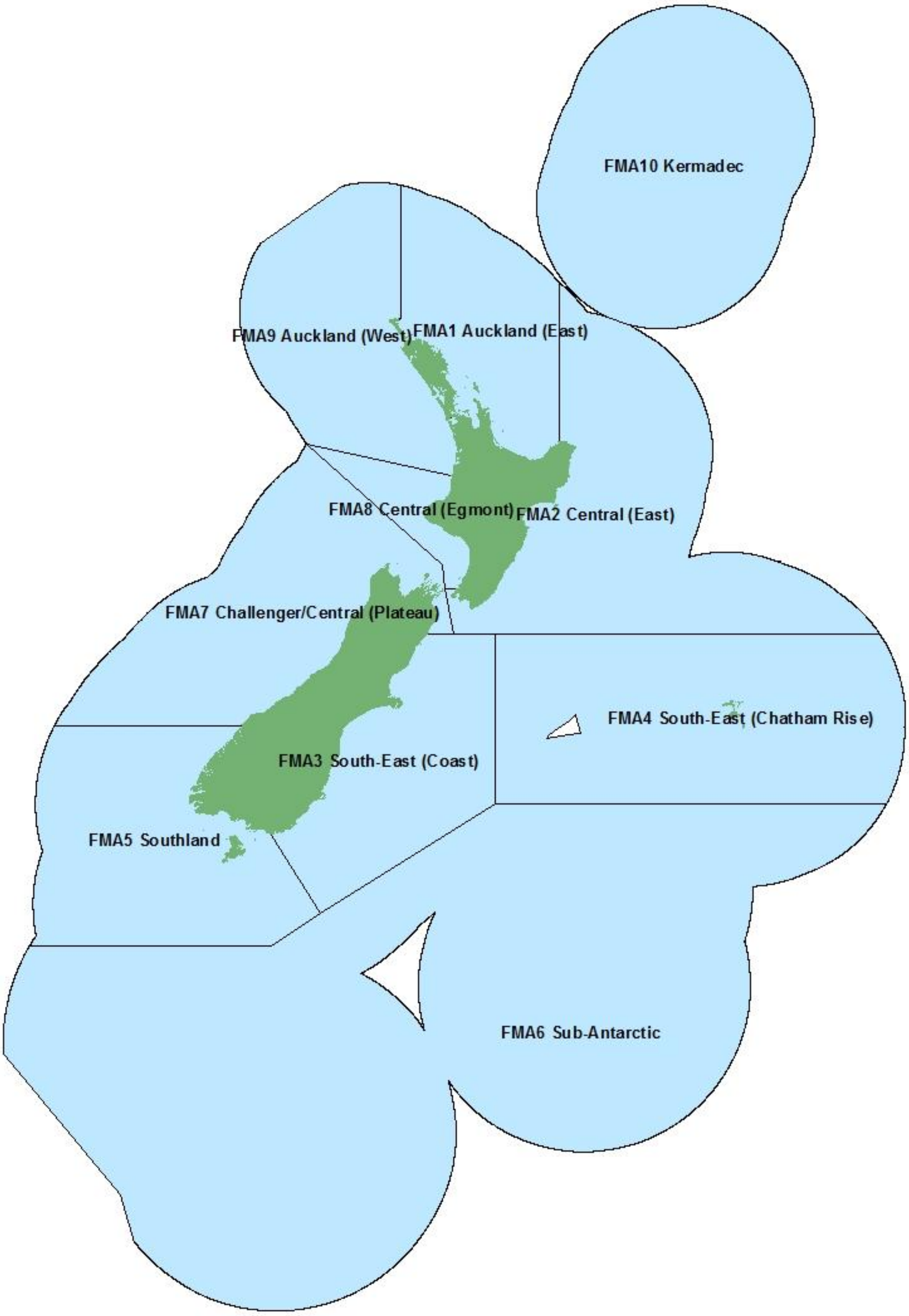
Regions and boundaries

The smaller or less defined a region and its boundaries, the less accurate the multiplier analysis will be. Similarly, the easier it is to move across boundaries, the less accurate the analysis will be. For example, at the national level, the multipliers will be very accurate as it is easy to determine the inputs and outputs crossing through a country's borders.

Similarly, it would also be more accurate to determine a regional split where there is a clear geographic boundary. As smaller regions, without obvious geographic boundaries are selected, more assumptions need to be made and the multipliers become less accurate. For example, an individual could work in the Auckland region but live in the Waikato region and spend a large proportion of his/her recreation money in the Bay of Plenty region.

For any regional analysis the level of accuracy will have to be accepted. As a rule of thumb, the larger and more defined the region, the more accurate the analysis will be.

Appendix D Fisheries Management Area (FMA) map



Appendix E Economic contribution of Fishing Harvesting by FMA

This section provides a breakdown of the economic contribution (harvesting only) of the main nine FMAs in New Zealand's EEZ in 2025 (as illustrated in Appendix D). The Kermadacs (FMA10) is not included due to the small quantity of fish caught in the FMA each year (as shown in Table 5).

Table 29 Annual average economic contribution of FMA1, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	147	120	70	337
GDP (2025$m)	50	52	36	139
Employment (FTEs)	358	464	300	1,122

Source: BERL analysis

Table 30 Annual average economic contribution of FMA2, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	126	103	60	289
GDP (2025$m)	43	45	31	119
Employment (FTEs)	307	398	257	963

Source: BERL analysis

Table 31 Annual average economic contribution of FMA3, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	265	216	126	606
GDP (2025$m)	90	93	65	249
Employment (FTEs)	644	835	539	2,018

Source: BERL analysis

Table 32 Annual average economic contribution of FMA4, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	216	175	102	493
GDP (2025$m)	73	76	53	203
Employment (FTEs)	524	679	439	1,642

Source: BERL analysis

Table 33 Annual average economic contribution of FMA5 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	270	220	128	618
GDP (2025$m)	92	95	67	254
Employment (FTEs)	657	852	550	2,058

Source: BERL analysis

Table 34 Annual average economic contribution of FMA6, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	136	111	65	312
GDP (2025$m)	46	48	34	128
Employment (FTEs)	331	430	278	1,039

Source: BERL analysis

Table 35 Annual average economic contribution of FMA7, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	221	180	105	506
GDP (2025$m)	75	78	55	208
Employment (FTEs)	537	696	450	1,683

Source: BERL analysis

Table 36 Annual average economic contribution of FMA8, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	75	61	35	171
GDP (2025$m)	25	26	18	70
Employment (FTEs)	181	235	152	569

Source: BERL analysis

Table 37 Annual average economic contribution of FMA9 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	76	61	36	173
GDP (2025$m)	26	27	19	71
Employment (FTEs)	184	238	154	576

Source: BERL analysis

Appendix F Economic contribution of Seafood Processing by region

This section provides a breakdown of the economic contribution (processing only) of regions in New Zealand in 2025.

Table 38 Annual average economic contribution of Northland region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	53	52	30	136
GDP (2025$m)	17	21	16	54
Employment (FTEs)	75	99	69	243

Source: BERL analysis

Table 39 Annual average economic contribution of Auckland region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	328	322	188	838
GDP (2025$m)	106	130	98	334
Employment (FTEs)	464	613	425	1,501

Source: BERL analysis

Table 40 Annual average economic contribution of Waikato region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	114	112	66	292
GDP (2025$m)	37	45	34	116
Employment (FTEs)	162	214	148	523

Source: BERL analysis

Table 41 Annual average economic contribution of Bay of Plenty region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	187	184	107	478
GDP (2025$m)	60	74	56	191
Employment (FTEs)	265	350	242	857

Source: BERL analysis

Table 42 Annual average economic contribution of Hawke's Bay-Gisborne region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	32	32	19	83
GDP (2025$m)	10	13	10	33
Employment (FTEs)	46	61	42	148

Source: BERL analysis

Table 43 Annual average economic contribution of Manawatū-Whanganui region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	23	22	13	58
GDP (2025$m)	7	9	7	23
Employment (FTEs)	32	42	29	104

Source: BERL analysis

Table 44 Annual average economic contribution of Wellington region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	23	22	13	58
GDP (2025$m)	7	9	7	23
Employment (FTEs)	32	42	29	104

Source: BERL analysis

Table 45 Annual average economic contribution of Nelson-Tasman-Marlborough region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	480	471	275	1,227
GDP (2025$m)	155	191	143	489
Employment (FTEs)	679	897	622	2,198

Source: BERL analysis

Table 46 Annual average economic contribution of West Coast region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	46	45	26	117
GDP (2025$m)	15	18	14	47
Employment (FTEs)	65	86	59	210

Source: BERL analysis

Table 47 Annual average economic contribution of Canterbury region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	343	337	197	878
GDP (2025$m)	111	136	102	350
Employment (FTEs)	486	642	445	1,573

Source: BERL analysis

Table 48 Annual average economic contribution of Otago region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	53	52	30	136
GDP (2025$m)	17	21	16	54
Employment (FTEs)	75	99	69	243

Source: BERL analysis

Table 49 Annual average economic contribution of Southland region, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	81	80	46	207
GDP (2025$m)	26	32	24	83
Employment (FTEs)	115	151	105	371

Source: BERL analysis

Appendix G Economic contribution by rock lobster fishing area

This section provides a breakdown of the economic contribution (harvesting only) of the nine rock lobster FMAs in New Zealand in 2025. This only includes rock lobster catch which was undertaken to target rock lobster, so bycatch is not included.

Table 50 Annual average economic contribution of CRA1, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	9	7	4	20
GDP (2025$m)	3	3	2	8
Employment (FTEs)	21	28	18	67

Source: BERL analysis

Table 51 Annual average economic contribution of CRA2, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	5	4	2	11
GDP (2025$m)	2	2	1	5
Employment (FTEs)	12	16	10	38

Source: BERL analysis

Table 52 Annual average economic contribution of CRA3, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	9	7	4	20
GDP (2025$m)	3	3	2	8
Employment (FTEs)	22	28	18	68

Source: BERL analysis

Table 53 Annual average economic contribution of CRA4, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	15	12	7	35
GDP (2025$m)	5	5	4	14
Employment (FTEs)	37	48	31	116

Source: BERL analysis

Table 54 Annual average economic contribution of CRA5, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	30	24	14	68
GDP (2025$m)	10	10	7	28
Employment (FTEs)	72	94	61	227

Source: BERL analysis

Table 55 Annual average economic contribution of CRA6, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	24	20	11	55
GDP (2025$m)	8	9	6	23
Employment (FTEs)	59	76	49	184

Source: BERL analysis

Table 56 Annual average economic contribution of CRA7, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	8	7	4	19
GDP (2025$m)	3	3	2	8
Employment (FTEs)	20	26	17	64

Source: BERL analysis

Table 57 Annual average economic contribution of CRA8, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	115	93	54	262
GDP (2025$m)	39	40	28	108
Employment (FTEs)	278	361	233	873

Source: BERL analysis

Table 58 Annual average economic contribution of CRA9, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	4	4	2	10
GDP (2025$m)	2	2	1	4
Employment (FTEs)	11	14	9	34

Source: BERL analysis

Appendix H Economic contribution by pāua statistical area

This section provides a breakdown of the economic contribution (harvesting only) of the seven of the nine Pāua QMAs in New Zealand in 2025. This only includes Pāua catch which was undertaken to target Pāua , so Pāua caught as bycatch is not included. Two of the nine Pāua QMAs (PAU1 and PAU6) have less than a $1m worth of catch on average across the last three years and therefore are not included.

Table 59 Annual average economic contribution of PAU2, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	32	26	15	74
GDP (2025$m)	11	11	8	30
Employment (FTEs)	13	17	11	42

Source: BERL analysis

Table 60 Annual average economic contribution of PAU3, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	19	15	9	42
GDP (2025$m)	6	7	5	17
Employment (FTEs)	8	10	6	24

Source: BERL analysis

Table 61 Annual average economic contribution of PAU4, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	48	39	23	110
GDP (2025$m)	16	17	12	45
Employment (FTEs)	20	26	17	62

Source: BERL analysis

Table 62 Annual average economic contribution of PAU5A, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	26	21	12	60
GDP (2025$m)	9	9	6	24
Employment (FTEs)	11	14	9	34

Source: BERL analysis

Table 63 Annual average economic contribution of PAU5B, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	27	22	13	61
GDP (2025$m)	9	9	7	25
Employment (FTEs)	11	14	9	34

Source: BERL analysis

Table 64 Annual average economic contribution of PAU5D, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	16	13	8	38
GDP (2025$m)	6	6	4	15
Employment (FTEs)	7	9	6	21

Source: BERL analysis

Table 65 Annual average economic contribution of PAU7, 2023-2025

	Direct	Indirect	Induced	Total
Output (2025$m)	16	13	8	37
GDP (2025$m)	5	6	4	15
Employment (FTEs)	7	9	6	21

Source: BERL analysis