



NELSON-TASMAN

Located at the northern tip of the South Island, Nelson-Tasman is a nationally significant area for primary production within New Zealand, accompanied by high technology, innovation and strong tourism potential.

Nelson-Tasman is the leading national hub for New Zealand's fisheries industry, and also has long-standing strengths in aquaculture, horticulture (particularly pipfruit) and forestry. Developing high-value primary industries, including hop-growing and apiculture, are further diversifying Nelson-Tasman's primary production and food and beverage sector.

Nelson-Tasman's geography and the needs of its primary industries have helped to create a concentrated cluster of aviation, marine and high-tech engineering businesses. The region is also increasingly known for innovative natural products and biotechnology, supported by a national-level research institute.

Boasting national parks, a famously mild and sunny climate, and a range of cultural, artistic and outdoor attractions within easy reach of its main centre, Nelson-Tasman also offers potential for investment in tourism and in supporting accommodation and infrastructure.



REGIONAL HIGHLIGHTS

Hub for value-added food products

Aviation, marine and engineering expertise

Untapped tourism potential

AREAS OF OPPORTUNITY

Food and beverage hub

Alongside traditional strengths in primary production such as seafood and pipfruit, Nelson is increasingly developing as a producer of quality food and beverages. The burgeoning craft beer and hop growing industries are adding to the regions' quality offerings in horticulture, viticulture and aquaculture. Apiculture is a small but increasingly important industry for the region.

Specialised manufacturing and engineering

Nelson-Tasman offers specialised high-tech expertise, including long-established strengths in aviation and marine engineering and servicing. World-class forestry machinery and innovative natural products and extracts technologies are further examples of leading-edge development in the region. Nelson-Tasman is also home to the Cawthron Institute of scientific research, and Innovate, a further enabler of innovation.

High-potential tourist destination

Nelson-Tasman offers three national parks, a sunny and mild climate, a wide range of outdoor activities and a thriving arts

scene. The area is well-connected and welcomes visitors from New Zealand and internationally, with several airlines servicing Nelson and a new terminal planned for the city. Opportunities exist to invest further in attractions and supporting infrastructure including accommodation.



PRODUCTIVE, ATTRACTIVE AND WELL-CONNECTED

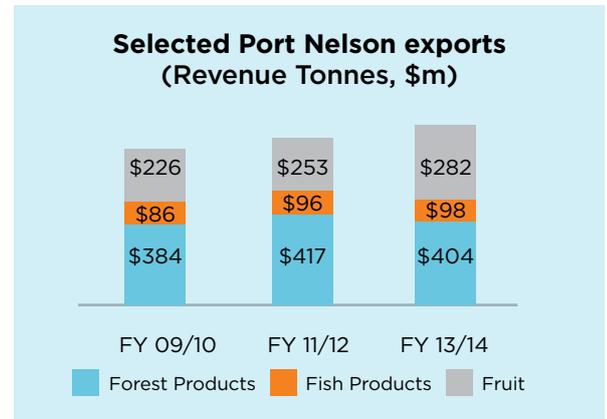
Key attributes of the region

Based at the northern tip of New Zealand's South Island, with the Cook Strait along its coastline, Nelson-Tasman has a mild and sunny climate well suited to horticulture, viticulture and primary industries.

Nelson-Tasman's strong engineering and marine capabilities are centred at Port Nelson, a growing bulk and container export port and the base for New Zealand's deep-sea fishing fleet. These strengths are well supported by excellent research and development institutions.

Thanks to a combination of its central location in New Zealand and the needs of primary industry, Nelson-Tasman is also home to significant expertise in aviation, both rotary and fixed-wing. The national airline, Air New Zealand, operates a maintenance and engineering base in Nelson for its regional turboprop fleet.

Nelson-Tasman is well-connected by air and road. Goods can be exported by sea from Port Nelson, or transported by road to Christchurch for air freight.



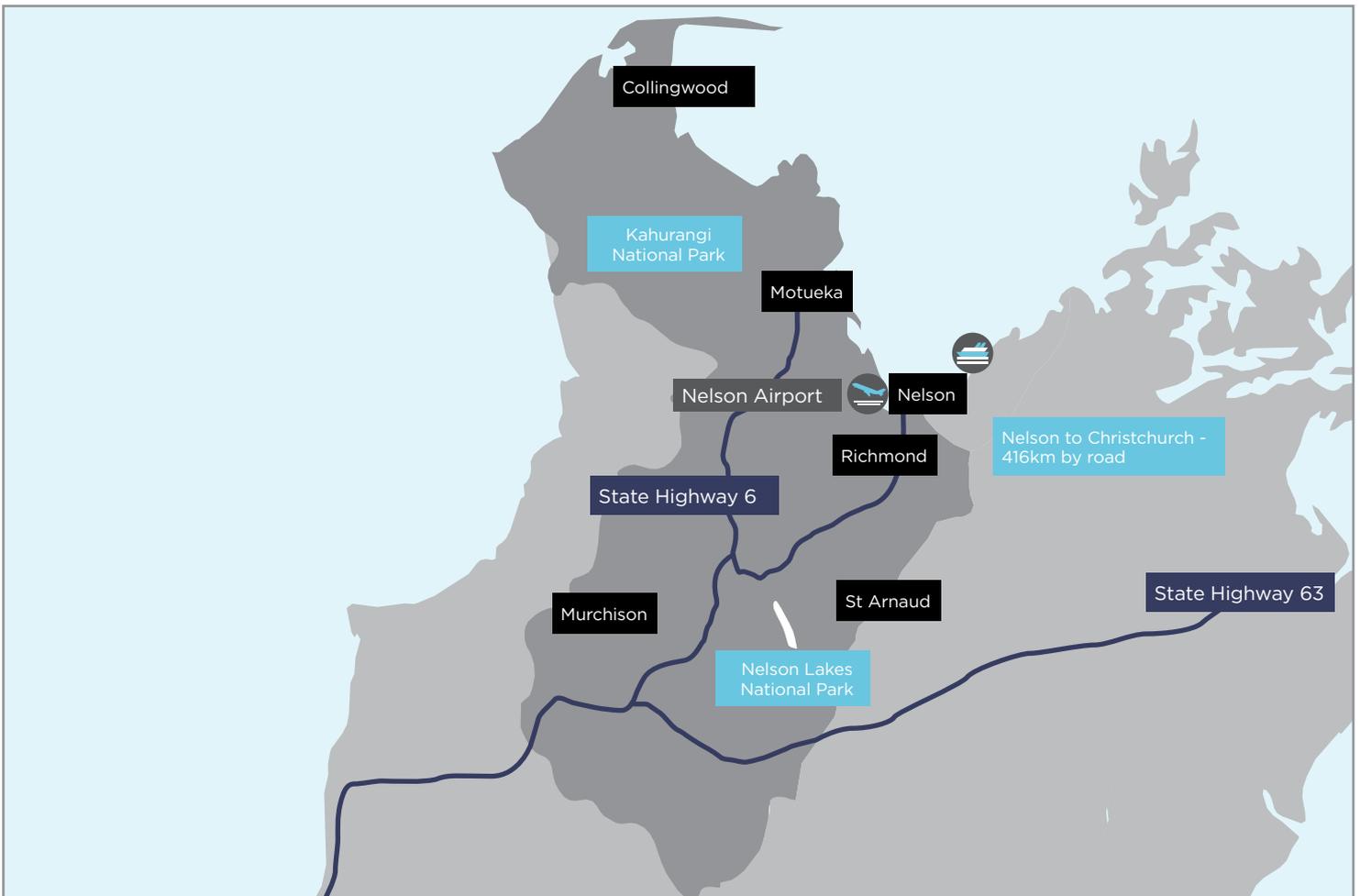
Largest
fishing port in Australasia

Second
largest pipfruit producer in New Zealand

Growing
tourism industry

Regional
aviation hub

NZ's largest
independent science and research centre





HUB FOR VALUE-ADDED FRUIT, SEAFOOD AND NATURAL HEALTH PRODUCTS

Nelson-Tasman is an established centre for primary and food and beverage production within New Zealand. Its long sunshine hours and favourable growing conditions contribute to it being the world's largest producer of boysenberries, New Zealand's largest producer of pears, and the second-largest producer of apples, with other pipfruit growing also a significant activity in the area. Nelson-Tasman is also steadily growing its natural products and nutraceuticals industry.

Nelson-Tasman is New Zealand's only commercial hop-growing region and has developed the distinctive Nelson Sauvignon hop, among others. Nelson hops are used by producers within New Zealand and are also exported to the United States. The region also supports a vibrant craft brewing industry, with Nelson-brewed beers found in places as diverse as South America and Ireland.

Port Nelson is the largest fishing port in Australasia, and is home to New Zealand's deep-sea fishing fleet and its largest fisheries companies. The region also boasts a sizeable and growing aquaculture sector. These factors create an attractive proposition for investment in value-added seafood products.



People

\$23,873

annual median earnings for primary industries in 2014 (NZ median was \$28,480)

Support

from Aquaculture New Zealand and Cawthron Aquaculture Park to expand commercial operations

Innovation hub

operates at the campus of the Nelson Marlborough Institute of Technology, for students and start-up companies

Fresh products, fresh thinking

Nelson-Tasman has a strong focus on food innovation and R&D, and hosts a number of leading research facilities in the food, plant, and aquaculture sectors.



Infrastructure

Industrial land

available for processing industry development

28%

of New Zealand's apple orchards (2,366+ ha)

Largest

fishing port in Australasia

Ready access, nationally and globally

Goods can be exported from Port Nelson or can be transported to Christchurch's port via road.



Business

135

food and beverage manufacturers

Largest boysenberry producer

in the world - Tasman Bay Berries

Second largest apple producer

in New Zealand

Established partnerships leading the way

Nelson-Tasman has already attracted a number of national and global investors in its food and beverage sector, including ENZA and the New Zealand King Salmon Company.

Added-value natural products – growing success in Nelson-Tasman

Cawthron Aquaculture Park is a world-class research and technology centre for the New Zealand aquaculture sector and its stakeholders. Located 15 minutes outside of Nelson, the park offers globally unique opportunities for innovation in aquaculture and aquatic technologies, with fully-serviced land units for lease, purpose-designed wet and dry laboratories, algae culture facilities and a nursery with managed algae ponds. The Park hosts a range of aquaculture firms as well as university teaching labs and its own aquaculture and biotechnology research group.

The New Zealand King Salmon Co Limited is the world's largest farmer of the rare king salmon species, with an annual production of 14,037 tonnes (harvested greenweight). The company owns two processing facilities in Nelson and three hatcheries in Golden Bay and Canterbury, as well as five sea farms in the Marlborough Sounds (with a further three farms approved). It also owns two processing facilities in Nelson and three hatcheries in Golden Bay and Canterbury. Key export markets include Japan, Australia and North America.

Supreme Biotech, a Nelson-based company, has developed a proprietary indoor algae production system to commercially grow difficult-to-grow algae species continuously. The company extracts the potent antioxidant astaxanthin from the algae it grows and formulates this into high-value products for the global nutraceutical market. Supreme Biotech products are sold under the AstaSupreme brand through multiple sales channels.



SPECIALISED MANUFACTURING AND ENGINEERING

Nelson-Tasman has a heritage of engineering excellence derived from its high performing aviation and marine industries. Its primary production strengths have also led to the development of advanced engineering in the forestry and food and beverage processing sectors.

The Nelson-Tasman region hosts a local manufacturing base that accounts for 13 per cent of regional GDP.

Local firms have developed a high level of expertise borne out of the local need for fixed-wing and rotary maintenance and engineering, and the needs of the deep-sea and inshore fisheries sector.



People

\$42,818

annual median earnings for manufacturing (NZ median is \$46,010)

5,150

employees in manufacturing sector

National aircraft engineering training

based in nearby Marlborough, ready to hand for Nelson-based businesses

Advanced skills for future needs

Nelson Marlborough Institute of Technology has recently opened a new Applied Technology facility focused on trade and engineering training.



Infrastructure

Access to markets

nationally and globally, via Port Nelson and links to Christchurch for air freight

Third largest

slipway in New Zealand for marine engineering

Collaborative location

with a group of design and construction businesses supporting engineering contracts



Business

30

aviation operators in Nelson-Tasman

Aviation engineering hub

delivering maintenance, repair and overhaul services

Industry-driven expertise

Nelson has developed a manufacturing base to service a range of sectors including aviation, heavy marine, forestry and food and beverage manufacturing.

The region has four stainless steel fabrication companies, and produces heavy engineering for the mining industry.

Nelson-Tasman engineering – driving growth, creating value

Engineering Nelson Limited is a consortium formed to bring together the full suite of Nelson-Tasman engineering expertise for large projects. The consortium includes 16 companies with strong expertise in marine engineering, including plating and fabrication, electrics, communications and navigation, coatings and survey work. It also provides services to forestry, coal, cement and other industries.

Nelson-based **Brightwater** is an industrial engineering solutions provider to Australasia's resources, industrial energy, quarry and minerals, and wood and forestry sectors. Brightwater comprises of three business units - Brightwater Engineering, Brightwater Manufactured Products, and Brightwater Services - enabling the company to deliver total project and product solutions across a wide range of industries, and represents a comprehensive range of specialist technologies and service delivery agencies.

Air New Zealand Regional Maintenance Limited (ANZRML) is a wholly owned subsidiary of Air New Zealand, launched in April 2015. Created as a dedicated turboprop maintenance and support provider, ANZRML is a leading centre of excellence in the Oceania region, serving the Air New Zealand turboprop fleet and other operators. ANZRML employs 210 staff, made up of heavy maintenance, line maintenance, and support staff, with a further 32 staff operating in five other locations around New Zealand.



HIGH-POTENTIAL TOURIST DESTINATION

The Nelson-Tasman region is home to three of New Zealand's most spectacular national parks, with a wide range of outdoor and adventure tourism pursuits, including sky diving, hiking, sea-kayaking and cruises, rafting, jetboating and horse riding among many others. It is also a national centre for creative arts. Biking is a particular attraction – Nelson is one of the country's key cycling regions for all ages and skill levels, and is home to two of New Zealand's Great Rides, the Dun Mountain Ride and the Tasman's Great Taste Trail. Last year the International Mountain Bike Association awarded the region Gold Status.

Nelson-Tasman's compact geography means most activities are within one to two hours' drive of Nelson, offering opportunities for tourism operators, accommodation providers and other businesses to efficiently provide a complete experience to visitors.

Upcoming significant tourism development opportunities include the Nelson Gondola and the Kohatu Motorsports Park. These will add to the region's existing points of interest and its potential for increased tourist numbers.



People

\$43,973

median annual earnings for construction – a proxy for tourism infrastructure (NZ median is \$45,200)

3,520

workers in accommodation and food services

Training

at Nelson Marlborough Institute of Technology (NMIT), ranging from adventure tourism to hospitality, operations endorsement, and tourism and travel



Infrastructure

56

regional flights per day to and from Nelson Airport

Accessible attractions

with many activities within two hours' drive of Nelson

13,175

hotel beds available per month, with a further 38,175 in motels and apartments



Business

594

accommodation and food services businesses in the region

\$647 million

spent on regional tourism in 2015

24.8%

increase in international visitor visits in the year ended March 2016

Unique experiences, high-performing businesses

Nelson's **Happy Valley Adventures** offers visitors to the region a range of unique adventures, from its world-famous "Sky-Wire" (the world's longest flying fox), to the excitement of driving a quad-bike through the native bush, horse trekking into the hills for spectacular views, or a lifelike paintball battle arena. Happy Valley Adventures offers a uniquely New Zealand experience, where guests can see and experience the atmosphere of a working New Zealand farm, combined with the chance to explore native bush above the scenic Cable Bay.

Trail Journeys provides a range of services for cycle tourism in the Nelson-Tasman area, with over 500 hire bikes, passenger, luggage and bike transport, and a free itinerary planning and booking service. The company specialises in high-quality guided tours and employs passionate locals as guides. Trail Journeys has been recognised with repeated awards in the last ten years, including the Supreme Tourism Business award winner at the 2010 Otago Business Excellence awards, and serves visitors from around New Zealand and internationally.

Abel Tasman AquaTaxi is a family-owned business based on the doorstep of Abel Tasman National Park, New Zealand's most popular national park. The company offers transport into and out of the park, including one-way trips to drop off walkers, and offers six departures a day in summer from its all-weather water taxi base, stopping at every major bay in the park. AquaTaxi also has a Department of Conservation (DOC) concession as well as a DOC Marine Mammal Watching Permit, allowing its guests to visit the New Zealand fur seal colony on Tonga Island in the Marine Reserve. The company has partnered with Awaroa Lodge, which is only otherwise accessible by helicopter, growing both businesses.

WHO HAS INVESTED IN NELSON-TASMAN?



HNZ Global (Canada)

Canadian-owned HNZ New Zealand Limited (HNZ) provides helicopter operations and flight training, with a significant presence throughout New Zealand, Australia, Southeast Asia and Antarctica. With a fleet of 30 single and twin-engine helicopters, the company provides services to commercial customers including the offshore oil and gas industry as well as governments. Canadian Helicopters Group Inc acquired HNZ in 2011 forming the current HNZ group.

HNZ's head office is based at Nelson Airport, directing the company's activities internationally and also providing flight training (including type ratings and role training for sling use) for helicopter crews. It also maintains engineering capability in Nelson to support operations in New Zealand and Australia.



BayWa Enza (Germany)

BayWa was founded in Munich, Germany in 1923 and has approximately 17,000 employees over 3,000 locations in 34 countries. BayWa is listed on the SDAX. A leading international trading and services group, BayWa has activities focused in agriculture, energy and building materials. The company purchased 72.5 percent of T&G Global (formerly Turners and Growers) in 2012. A long-term investor, BayWa supports T&G Global's investment strategy and has provided over \$200 million in capital expenditure for new acquisitions, technology and improved health and safety for the company. T&G Global celebrates its 120th anniversary in 2017 and is New Zealand's largest exporter of apples by volume with ambitious growth plans. T&G's ENZA quality mark appears on apples and pears in both domestic and export markets with the fruit coming from a large grower presence and base in the Nelson-Tasman region.



Nelson Pine Industries and Tasman Pine Forests (Japan)

Nelson Pine Industries is owned by Sumitomo Forestry Co, Ltd (Japan) and is one of the world's largest single-site producers of medium-density fibreboard, marketed under the name of GoldenEdge. The company produces MDF (medium density fibreboard) and LVL (laminated veneer lumber) from radiata pine grown in Nelson's plantation forests.



Nelson Pine's plant incorporates advanced technology and computerised production control. This capability, combined with radiata pine fibre used in the manufacture of MDF, provides a high-quality product for markets in Asia, India, North America, the Middle East and South Africa.

Tasman Pine Forests Limited (TPFL) was also recently formed by Sumitomo, after the purchase of 30,000 hectares of local radiata pine plantation. TPFL manages this estate and supplies Nelson Pine with chip wood and peeling logs for processing, as well as supplying logs directly to domestic sawmills and to export markets.



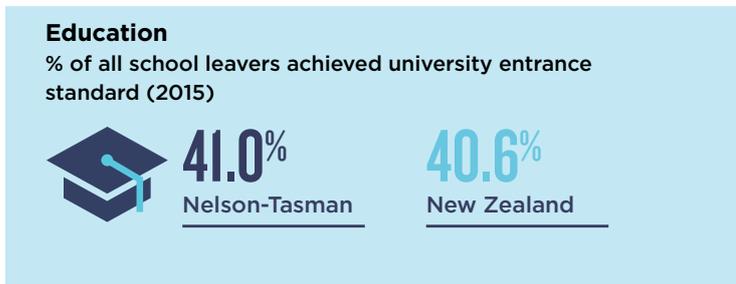
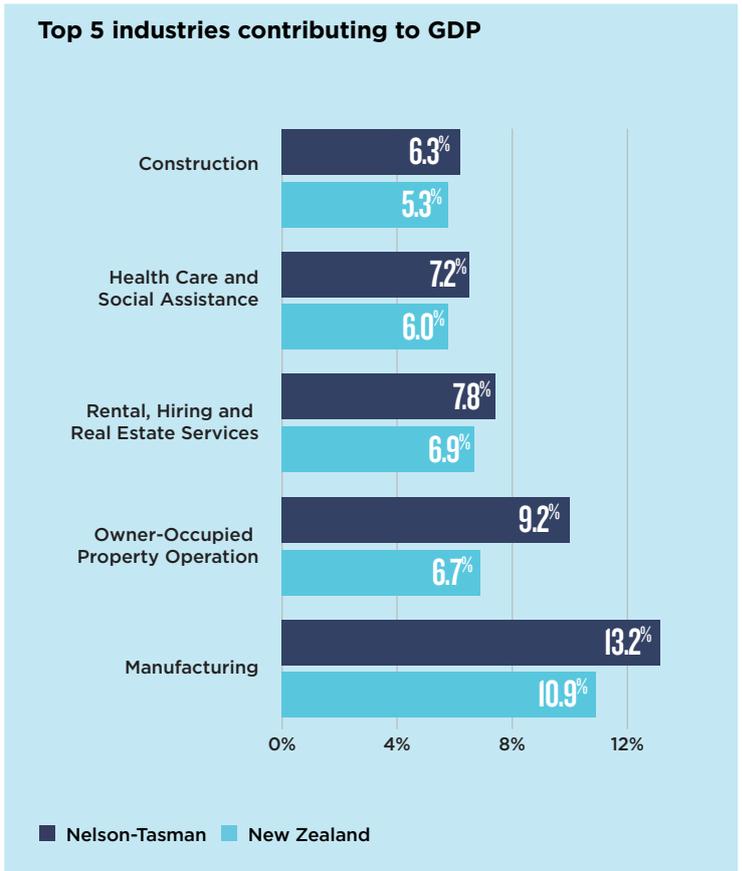
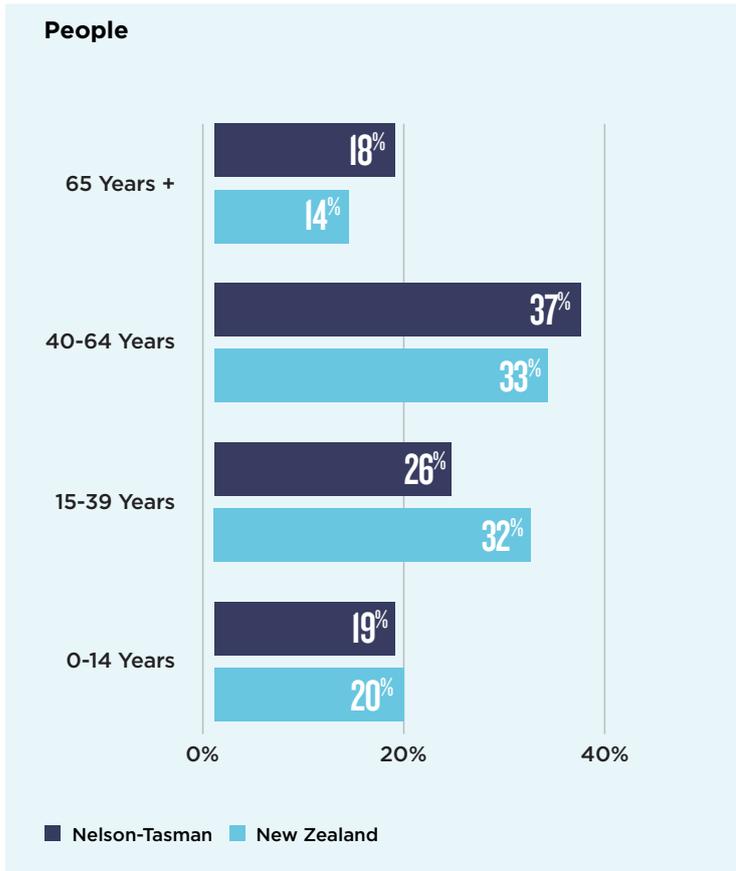
Nippon Suisan Kaisha (Japan)

Nippon Suisan Kaisha (Nissui) is a Japanese seafood company established in 1911, which today employs 8,466 staff with a revenue of 605 billion yen. Nissui holds a joint-venture ownership in deep-sea fishing company Sealord, in partnership with the Māori-owned Aotearoa Fisheries Limited.

Sealord is a Nelson-based international company which has been fishing for more than fifty years. The company manages all aspects of its deep water operations, from harvest through to sales, and operates seven deep-sea vessels in New Zealand waters from its Nelson base. The company has processing plants in Nelson and around the world through its links to Nissui, and is one of the largest seafood companies in the Southern Hemisphere.

Sealord processes 120,000 tonnes of fish each year and its products are sold worldwide. The company holds approximately 21 percent (122,366 tonnes) of New Zealand's total fishing quota. Sealord employs more than 1,100 people in New Zealand and 400 people overseas, with NZ\$775 million of assets and revenues of just over NZ\$450 million in the 2016 fishing year.

HOW NELSON-TASMAN COMPARES



WELCOMING INVESTORS



The Nelson Regional Development Agency (NRDA) is a council-controlled organisation jointly funded by Nelson City Council and Tasman District Council.

The NRDA works closely with regional stakeholders to promote and facilitate initiatives that contribute to sustainable development of the region.

Economic development strategy

NRDA's goals are to:

- Facilitate smart and sustainable economic growth to enhance economic vitality, in support of the region's cultural and environmental values
- Facilitate economic development projects that build national and international competitiveness
- Provide economic advice
- Provide an ongoing assessment of the region's performance.

How we help investors

NRDA supports investors by:

- Investigating options for capital investment, and matching investors with suitable companies
- Supporting innovation, research and development
- Encouraging industry collaboration
- Supporting education and training
- Analysing information and assisting with planning
- Supporting infrastructure development and national and international economic linkages.



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Region-led initiatives

NRDA helped the Cawthron Institute source funding for its aquaculture research facility. This complemented Cawthron's contribution, resulting in joint-venture research with three private seafood businesses and further significant investment for research programs including shellfish breeding, algal biotechnology and biosecurity.

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