Independent Study of the Tasmanian Salmon Industry

Objective

To undertake a comprehensive independent study of the Tasmanian salmon industry that considers the effectiveness of regulation and management in achieving sustainable outcomes for Tasmania's natural and physical resources, consistent with Tasmania's Resource Management and Planning System.

Background

On 17 August 2025, the Premier, the Minister for Primary Industries and Water, and the Minister for Environment announced that the Tasmanian Government will launch an independent study of the salmon industry.

Building on evidence from previous inquiries and existing scientific literature, this study will provide a comprehensive evidence base for consideration of the socio-economic and environmental impacts and contributions of the industry, contemporary regulatory frameworks and management practices and international benchmarking.

The study will help inform future policy decisions that seek to balance a sustainable industry with positive outcomes for the Tasmanian environment and community.

Terms of Reference

1.0 Impact Analysis

The study is to consider and present the evidence associated with the impacts and benefits of the salmon industry in Tasmania across the following areas.

1.1 Environmental

- the impact of salmon farming operations on the environment, including the marine, freshwater and terrestrial environment and associated ecosystems.
- climate change threats, impacts and opportunities for adaptation and carbon management.

1.2 Social, Economic and Scientific

- the social benefits and costs to the Tasmanian community, including the effect of industry activities on infrastructure and amenity.
- the direct and indirect contribution of the salmon industry to the Tasmanian economy, including regional economies.
- the regional distribution of employment opportunities and career pathways, and the industry's role in developing skills and knowledge.
- the contribution of the industry to advancing scientific expertise, innovation and research capacity in Tasmania, including aquaculture science, technology, environmental monitoring, and biosecurity.

2.0 Regulatory and Management Framework

The study will benchmark the adequacy, transparency, and enforcement of the regulatory framework governing the Tasmanian salmon industry against other jurisdictions internationally, with particular regard to:

- The adequacy of regulations to balance sustainable industry development with outcomes for the Tasmanian environment and community, including:
  - The calculation and use of metrics such as stocking density, biomass, feed input, and total permissible dissolved nitrogen output as controls to ensure the effects of salmon farming operations are within the assimilative capacity of the environment.
  - The impacts of hatchery and farm discharges.
  - The adequacy of biosecurity arrangements to prevent and effectively manage disease outbreaks and mass mortality events.
  - The effectiveness of regulations in managing interactions between fish farms and native wildlife, and the extent to which these are consistent with animal welfare regulations.
  - Any other impacts on the health and welfare of animals and human health.
- Whether existing and planned monitoring, compliance and enforcement mechanisms are rigorous, timely and aligned with adaptive management principles.
- The adequacy of penalties for non-compliance with regulations in terms of both scope and scale.

The study should consider the outcomes of the multi-agency debrief following the 2025 salmon mortality event in the D'Entrecasteaux Channel and consider what changes, if any, are required to disease monitoring, management and mass mortality response practices.

3.0 Future Opportunities and Challenges

The study will consider emerging opportunities and risks for future industry development, including but not limited to:

- The technical and financial feasibility of alternative production models to address any identified environmental or social issues while supporting economic and regional development, including:
  - land-based recirculating aquaculture systems (RAS)
  - Hybrid (RAS/Offshore) production models
- Opportunities to strengthen value-added production, downstream processing and emerging bioproducts that support regional economies.
- The impacts of climate change on both the industry and the ecosystem in which it operates.

4.0 Regulatory Costs

Assess the appropriateness of the cost recovery model for regulation of the Tasmanian salmon industry, and whether the costs and benefits to Tasmania are being fully considered, and where relevant, recovered.

Study Process and Structure

The study is to be undertaken in a manner that supports active engagement with the Tasmanian community, industry, the science community and Members of Parliament. The study will be conducted by an independent off island specialist with appropriate credentials and reputation (Study Lead).

The Study Lead will be supported by experts, with relevant knowledge and experience in the matters to be considered in the study. The range of experts to be made available will be agreed with the Study Lead in the early stages of the study design.

Any experts or organisations undertaking the study and the Study Lead must be independent from any research institution receiving funding from the Tasmanian salmon industry. All actual or perceived conflicts for the Study Lead and experts will be publicly declared.

The Study Lead is to produce and release a stakeholder engagement plan during the early stages of the study.

The study should have regard to previous bodies of science and reviews/inquiries, including recommendations and responses of the State Government.

It is expected that the Study Lead will identify individuals and organisations that, in the Study Lead's opinion, can actively contribute evidence to support the Objective and Terms of Reference of the Study. Stakeholders will be given the option to provide input confidentially. All material relied on for observations or findings of the study will, however, be based on verifiable evidence and sources.

The analysis should, where relevant, include comparisons with industry internationally, including in Norway, Chile, Scotland, Canada and New Zealand.

Unless bound by commercial confidentiality or competition law, all evidence, data, and findings will be made publicly available to promote transparency and accountability.

The Independent Study is to be conducted in two phases:

- **Phase 1** will focus on consolidating and presenting expert evidence, including materials associated with previous Tasmanian and national Inquiries, on the social, environmental and economic impacts and benefits of the Tasmanian salmon industry.

The objectives of Phase 1 will be to provide a trusted evidence base for considering future regulatory and policy settings, and to minimise the degree of contested views on the industry, its impacts and its regulation.

The output from Phase 1 will be one, or a series of publicly available information papers covering the range of issues to be considered in the study. It is anticipated that this phase of the study will be completed within 12 months of commissioning.

- **Phase 2** will build on the work of Phase 1, providing expert advice on the risks and benefits of the salmon industry in Tasmania and the contemporary regulatory framework required for managing the opportunities and risks for the industry, the community and the environment.

  It should include examples of international best-practice, advice on the strategic directions for the Tasmanian salmon industry.

  Phase 2 should include an analysis of the feasibility of future opportunities, such as offshore or land-based production models for the industry.

The Phase 1 and Phase 2 reports will not provide recommendations for the Government or industry but will include observations and findings that support the Objectives of the study.

It is expected that the Study Lead will confirm delivery timeframes for both phases of the study and completion of the final report with the Tasmanian Parliament and broader Tasmanian community.