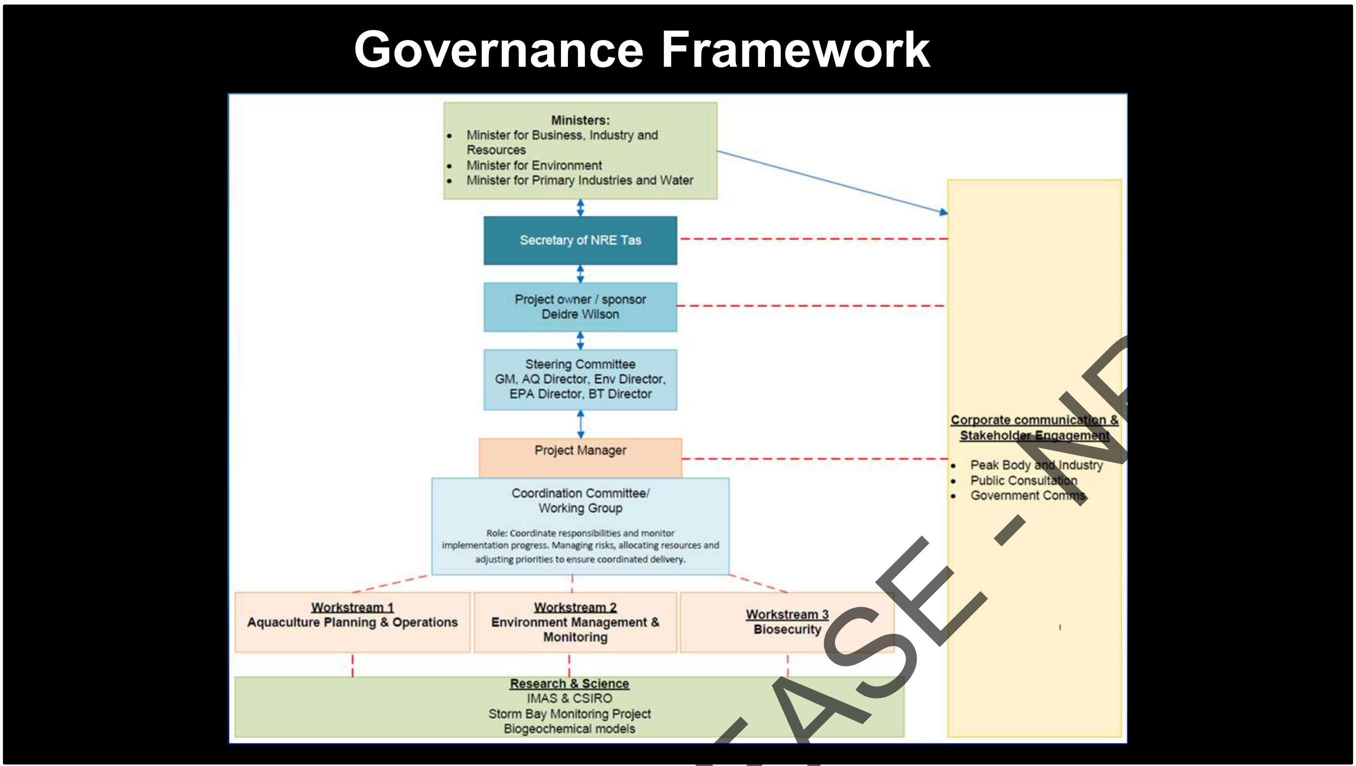
# STORM BAY & SOUTH-EAST TASMANIA OFFSHORE AQUACULTURE PLANNING PROJECT

## Scoping Options

**Deputy Secretary Briefing**
**March 2025**

Department of Natural Resources and Environment Tasmania

Tasmanian Government


Governance Framework
Ministers:
Minister for Business, Industry and Resources
Minister for Environment
Minister for Primary Industries and Water
Secretary of NRE Tas
Project owner / sponsor
Deidre Wilson
Steering Committee
GM, AQ Director, Env Director, EPA Director, BT Director
Project Manager
Coordination Committee/ Working Group
Role: Coordinate responsibilities and monitor implementation progress. Managing risks, allocating resources and adjusting priorities to ensure coordinated delivery.
Workstream 1
Aquaculture Planning & Operations
Workstream 2
Environment Management & Monitoring
Workstream 3
Biosecurity
Research & Science
IMAS & CSIRO
Storm Bay Monitoring Project
Biogeochemical models
Corporate communication & Stakeholder Engagement
Peak Body and Industry
Public Consultation
Government Comms

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Questions / Discussion
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# Offshore Aquaculture Tasmania

## Background Scoping Paper

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# Contents



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# Introduction

In 2022, the Tasmanian Legislative Council released the results of its inquiry into the management and operation of the Tasmanian finfish aquaculture industry (Forrest et al. 2022). In 2023, following recommendations set out in the Inquiry, the Tasmanian Government released its Tasmanian Salmon Industry Plan (the Plan) (NRE Tas 2023) and associated Implementation Program (NRE Tas 2023b). One of the priority actions and outcomes of the Plan is to provide industry with investment certainty through sustainable growth options including through scoping a government-led process to support future farming in offshore areas.

The following scoping paper will review the key planning pathways, regulatory and policy needs to enable future industry expansion into offshore locations. The paper will also discuss the challenges, risks and opportunities along with a summary of global innovation and emerging technologies associated with offshore aquaculture.

# Background

With increasing pressure on wild fisheries from population declines and over-fishing, aquaculture is filling the demand gap for global aquatic protein. Globally, aquaculture now accounts for over half (57 percent in 2022) of the world's aquatic protein (FAO 2024). With the emerging threat of climate change, and significant declines in marine biodiversity, the upward trend for aquaculture production and demand is expected to exponentially increase over the next decade (FAO 2024).

In 2021-22 the Australian wild catch and aquaculture fisheries Gross Value of Production (GVP) grew 8 percent to $3.42 billion (Aquaculture – 56 percent $1.94 billion of the total value) (Tunyman et al. 2023).

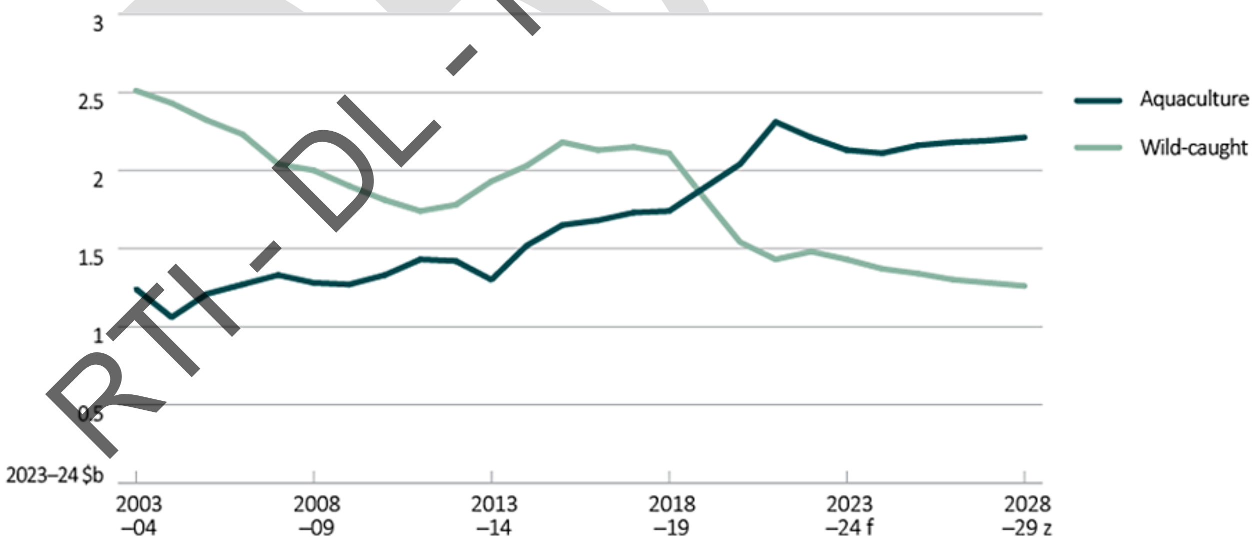


**Figure 1**: GVP of Australian aquaculture and wild catch fisheries, 2003-04 to 2028-29 (Tunyman et al. 2024)

The Tasmanian salmonid aquaculture sector has rapidly grown over the past decade and now constitutes the majority of Australia's aquaculture production by volume and value, with a GVP in 2021-22 valued at $1.19 billion, 61 percent of national aquaculture production (Tunyman et al. 2024).

The salmon industry is a significant contributor to Tasmania's economy and regional communities. Statistics from the Institute for Marine and Antarctic Studies (IMAS) indicated that in 2020-21, 1,933 people were directly employed by the Tasmanian salmon industry (Rust 2023). A further 3,255 were estimated to be indirectly employed through a range of businesses that provide services such as vessel and infrastructure manufacturing and maintenance, transport needs, manufacture and supply of fish food and health products, fuel supplies, plus the supply of goods and services to the workforce. Estimates also showed that over three quarters of direct spending by the industry for the year was on local suppliers and wages, with only approximately 22 percent allocated to imports (Figure 2).

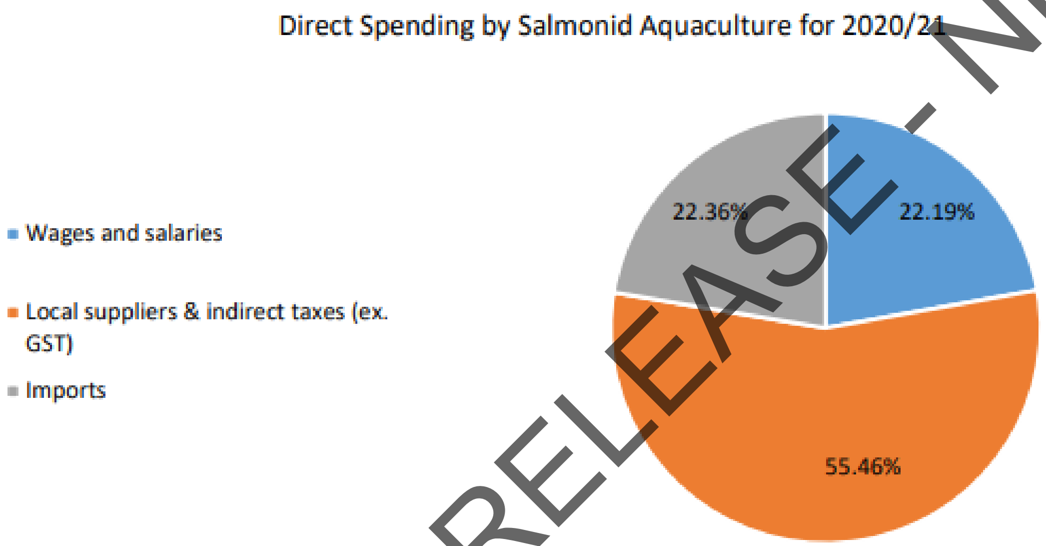


**Figure 2:** Direct Spending by Salmonid Aquaculture 2020/21 (Rust 2023)

The direct employment of staff, plus the distribution of revenue into surrounding businesses and communities, has helped to reinvigorate regional communities that were previously experiencing decades of economic decline, due in part to the downturn of traditional industries, notably forestry and mining. The industry has been recognised as being of such significance to the State that it was noted by the Commonwealth Environment and Communications References Committee (2015) as being inextricably linked to the future economic prosperity of Tasmania.

# Future Growth

Finfish farming in Tasmania has been developed in sheltered waters; including areas adjacent to coastlines, bays, rivers, channels and harbours. These are areas which have generally been preferred by industry globally, as they provide protection from high energy conditions as well as minimising transit times to site, lowering costs and maximising available work times. Weather conditions in these areas provide preferable conditions for day-to-day operations associated with stock husbandry and infrastructure management compared to conditions found in more exposed locations.

Development and expansion of inshore finfish aquaculture has given rise to a range of challenges including public opposition and adverse impacts on the receiving environment. Increased public awareness and concern around environmental impacts has challenged social licence, while shallower depths, limited flushing and long-term trends in coastal water temperatures provide challenges to fish health and productivity levels.

Most salmon farming in Tasmania is situated in the south-east, with the oldest sites in the D'Entrecasteaux Channel and a growing presence in Storm Bay. The future of operations on the west coast of Tasmania are currently subject to a federal review and operations on the east coast are limited to a single lease in Okehampton Bay. The Tamar River, northwest of Launceston, also supports one salmon farm lease at Rowella.

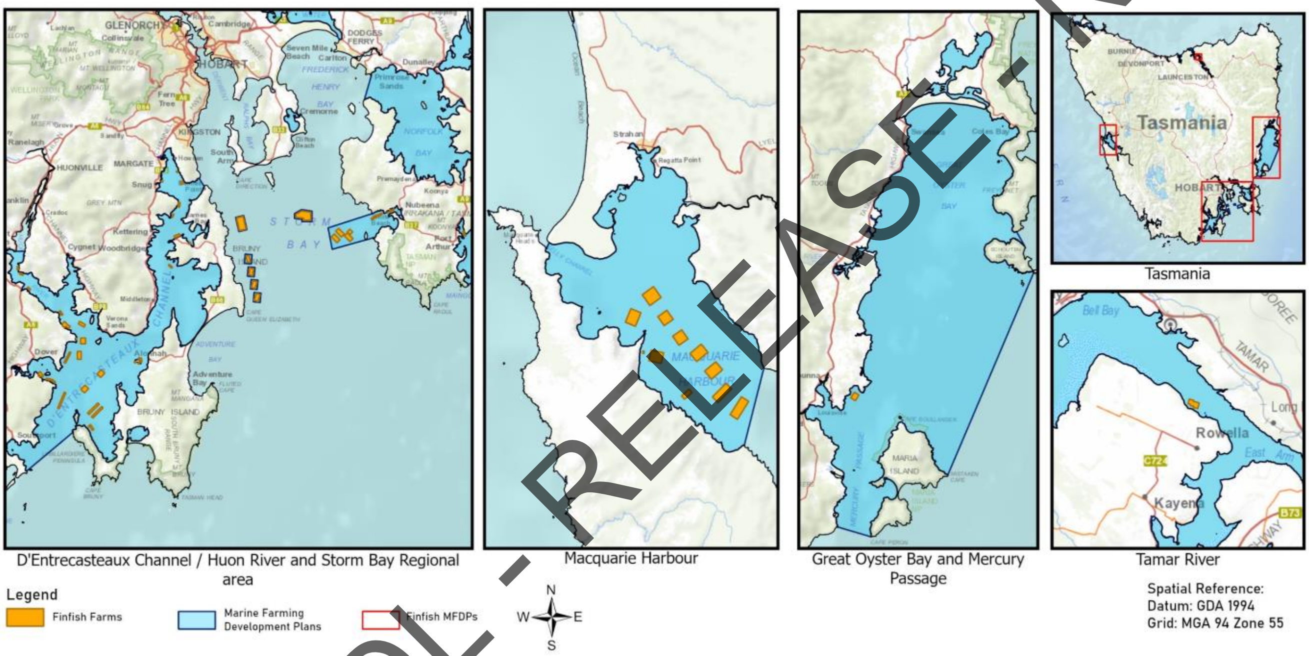


**Figure 3:** Map of current finfish aquaculture areas in Tasmania

Finfish aquaculture commenced in Storm Bay in 2014, and the three main operators continue to seek opportunities to grow their presence within the area. Currently, the more exposed waters of Storm Bay provide the only realistic opportunity for further expansion as state policy supports planning proposals for new sites further from land and to investigate ways to incentivise the relocation of inshore sites (NRE Tas 2023). Current government policy also exempts further aquaculture expansion on the East Coast, further pointing to deeper exposed waters south of Storm Bay as the only long-term viable option for growth.

# Offshore Aquaculture

It is generally accepted that 'offshore' aquaculture will be conducted in more exposed locations, characterised by rough weather conditions with strong currents and powerful waves (Hvas et al. 2021). Room for expansion, better growing conditions and increased public opposition to inshore aquaculture are all reasons driving operators and regulators to explore the concept. However, offshore aquaculture is still in its infancy and there are many challenges to be addressed before it can be undertaken in any large capacity.

There are several definitions for offshore aquaculture. While there is some variance between them (i.e. regarding specific distances), most broadly focus on similar themes such as water depth, distance from shore, and mean wave height.

## Tasmanian Definition

The Tasmanian Salmon Industry Plan (NRE Tas 2023) describes offshore as farther away from land, in higher energy, more exposed and deeper waters and to include areas of State waters identified through marine spatial planning approaches or, potentially in the future, in Commonwealth waters managed under a joint agreement.

"An arbitrary distance 'further offshore' has not been set as it is dependent on the environmental context. Beyond three nautical miles in Commonwealth waters is, for example, considered offshore. In some areas, such as Storm Bay, sites closer to shore are also deeper more exposed sites subject to higher wave energy. Existing Tasmanian salmonid farms are predominantly located in sheltered coastal waters, however there are a number of leases in locations further from the coastline." (NRE Tas 2023)

Chu *et al* (2020) defines offshore aquaculture as:

i. An unsheltered site which is seaward of a straight line joining the two closest major capes or promontories and at least about 3km seaward of the shoreline but within the Exclusive Economic Zone (EEZ),
ii. A water depth greater than 50m,
iii. Current velocity up to 1m/s, and
iv. A significant wave height exceeding 3m.

## FAO Definition

In a Food and Agriculture Organization of the United Nations (FAO) technical workshop paper (Lovatelli 2010) the definitions of coastal, off the coast and offshore mariculture are listed as:

| Parameters | Coastal mariculture | Off the coast mariculture | Offshore mariculture |
|---|---|---|---|
| **Location/ hydrography** | • <500m from coast<br>• <10m water depth<br>• Within sight<br>• Usually sheltered | • 500m-3km from coast<br>• 10-50m water depth<br>• Often within sight<br>• Somewhat sheltered | • >2km generally within continental shelf zones, possibly open ocean<br>• >50m depth |
| **Environment** | • Hs* usually <1m<br>• Short period winds<br>• Localised coastal currents<br>• Possible strong tidal streams | • Hs <3-4m<br>• Localised coastal currents<br>• Some tidal streams | • Hs 5m or more, regularly 2-3m<br>• Oceanic swells<br>• Variable wind periods<br>• Possibly less localised current effect |
| **Access** | • 100% accessible<br>• Landing possible at all times | • >90% accessible on at least once daily basis<br>• Landing usually possible | • Usually >80% accessible<br>• Landing may be possible, periodic, eg. every 3-10 days |
| **Operation** | • Manual involvement, feeding, monitoring and more | • Some automation eg feeding, monitoring and more | • Remote operations, automated feeding, distance monitoring, system function |
| **Exposure** | • Sheltered | • Partly exposed (eg<br>• >90° exposed) | • Exposed (eg >180°) |

* Hs – significant wave height

**Table 1:** Aquaculture definitions

Appropriate planning and exploration may identify suitable locations statewide. However, it is also recognised that potential locations deemed suitable for expansion in the short-medium term could likely be further from shore in the southeast of Tasmania.

The development of aquaculture operations in exposed locations farther from shore can provide benefits to all stakeholders. However, there are considerable challenges which both industry and government will need to address as part of the planning process if it is to be sustainably realised.

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## Industry Incentives

Offshore aquaculture will only be developed to a significant scale if it is profitable. This cannot be possible if lower-cost inshore farms can fully meet demand at prices below the cost of offshore farming (Knapp 2013).

There are three mechanisms by which offshore farming can become profitable (Knapp 2013):

1. Growth in demand through:
   a. a growing global population and subsequent need for increased supplies of protein.
   b. a growing global middle class/aging population showing preference for food considered healthy, ethical, or sustainable. (MOWI 2023, Nordic Credit Rating 2024).
2. Reduction in offshore costs through:
   a. technological advances.
   b. reduced red tape.
3. Reduction in alternative supply through:
   a. Reduction of available inshore space.
   b. increased regulation of inshore farming by governments to reduce environmental impacts, in turn raising costs of farming inshore compared to the costs of farming offshore (Knapp 2013).

There are various ways a regulator can encourage industry operators to take steps towards offshore aquaculture, ranging from streamlining planning processes through to financial incentives, some of which are outlined below.

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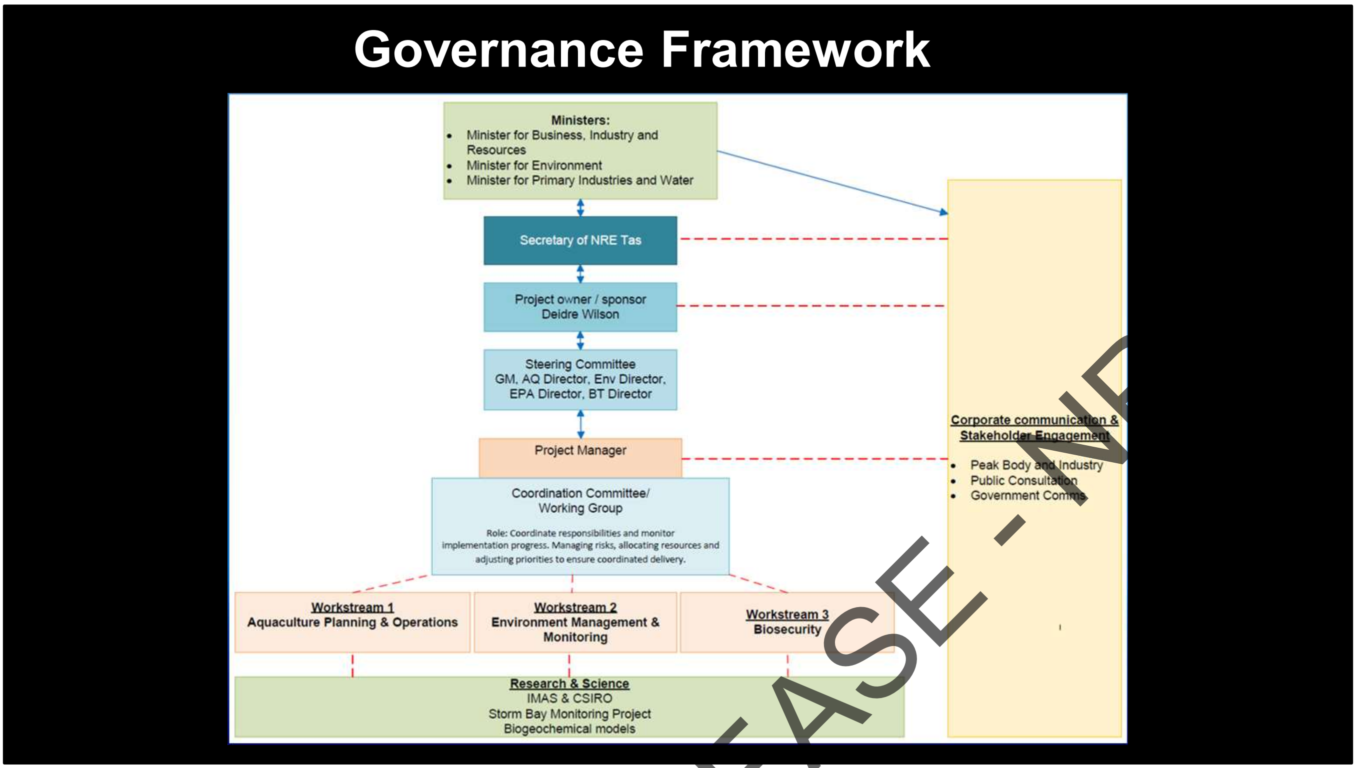
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