Chapter 2

Overview of the fin-fish aquaculture industry in Tasmania

2.1 This chapter provides an overview of the fin-fish aquaculture industry including its development, companies involved in the industry and the Tasmanian Government regulatory framework. The committee also canvasses research and development activities and third-party certification of fin-fish aquaculture companies. Finally, the committee discusses community perception of the industry.

Development of the fin-fish aquaculture industry in Tasmania

2.2 The Tasmanian salmonid marine farming industry has its origin in the establishment of fresh water trout farms at Bridport in 1964 and at Russell Falls in 1974. This led to the first successful seawater trial at Nubeena (on the Tasman Peninsula) in the early 1980s, where rainbow trout hatched in fresh water were transferred to seawater for grow out.

2.3 Atlantic salmon ova were imported from NSW in 1984 and the first commercial harvest of 55 tonnes of Atlantic salmon occurred in 1985–86. The industry was established as a joint venture agreement between the State Government, a Norwegian company, Noraqua, and local salmon growers. The agreement allowed the transfer of technology from Noraqua to assist in the development of the industry which was considered a crucial factor in the early days of development.[1]

2.4 The agreement also established Salmon Enterprises of Tasmania Pty Ltd (SALTAS) which was responsible for the culture and distribution of smolt to its shareholders. Until the late 1990s, SALTAS was the only producer of Atlantic salmon smolt in the State. A number of private companies have now established hatcheries to produce Atlantic salmon smolt.[2]

2.5 Over the decade to 2013–14, there was a significant expansion of salmonid production in Australia from 16 686 tonnes in 2003–04 to 41 615 tonnes in 2013–14. Almost all of this growth is a result of the expansion of salmon aquaculture farms in Tasmania.[3]

2.6 Currently, eight entities hold salmonid marine farming leases within Tasmanian state waters. There are four main companies, Tassal Group Ltd (Tassal), Huon Aquaculture Group, Petuna Pty Ltd, and Van Diemen Aquaculture Pty Ltd of which Petuna Pty Ltd is a major shareholder. Three of these companies are fully

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1 Tasmanian Government, *Submission 33*, pp 1–2.

2 Tasmanian Government, *Submission 33*, p. 2.

3 Department of Agriculture, *Submission 10*, p. 3.

vertically integrated and also provide product for a number of businesses who value add for niche markets.[4]

2.7 There are 48 licenced salmonid farming leases in Tasmanian State waters which occupy a total of 2196 hectares in six marine farming development plan areas. Farming takes place in south east Tasmania including the Huon River estuary and D'Entrecastaux Channel; in Macquarie Harbour on the west coast; and the Tamar Estuary in the north of the State.

Figure 2.1: Marine lease areas in Tasmania

Source: Tasmanian Government, Submission 35, p. 3.

2.8 In the south east, leases are held by Tassal, Huon Aquaculture and Alstergren Aquaculture although Alstergren does not currently undertake any marine farming operations. In Macquarie Harbour, leases are held by Tassal, Huon Aquaculture, Petuna and Russfal Pty Ltd (subleased to Tassal and Huon Aquaculture). Van Diemen Aquaculture Pty Ltd holds a marine farming lease in the Tamar River.

4 Tasmanian Seafood Industry Council, *Submission 19*, p. 2.

2.9 There are currently 18 licenced salmonid inland fish farm activities in Tasmania. Two have not been developed. The two SALTAS hatcheries are joint ventures between industry and government with the Tasmanian Government being a minor shareholder. Additionally, there is one new activity in construction and two new development proposals under review by the Environment Protection Authority. Of the existing activities, four are currently undergoing development works.[5]

State government regulatory framework

2.10 The Tasmanian Government stated that the National Strategy for Ecologically Sustainable Development was endorsed by the Council of Australian Governments in 1992. The strategy provides the objectives for aquaculture development. The three core objectives are :

- to enhance individual and community well-being and welfare by following a path of economic development that safeguards the welfare of future generations;
- to provide for equity within and between generations; and
- to protect biological diversity and maintain ecological processes and life support systems.[6]

2.11 The strategy is implemented under the guidance of a number of ecological and development principles. In its submission, the Tasmanian Government stated:

> The strategy emphasises that a balanced approach is required for ecologically sustainable development and these guiding principles and core objectives need to be considered as a package. No objective or principle should predominate over the others.
>
> Management judgments have to be based on the available scientific evidence of risk, and the levels of short and long-term impacts that are acceptable in the socio-economic as well as ecological contexts.[7]

2.12 The environmental planning and management system in Tasmania is established under the Resource Management and Planning System (RMPS). The RMPS is based on principles of sustainable development and aims to achieve sustainable outcomes for the use and development of the State's natural and physical resources.[8]

2.13 In 1995, the Tasmanian Government passed legislation to provide a comprehensive regulatory regime for the management of aquaculture operations and protection of the environment. The legislation addresses both marine farming and the

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5 Tasmanian Government, *Submission 35*, p. 3.

6 Tasmanian Government, *Submission 35*, p. 4.

7 Tasmanian Government, *Submission 35*, p. 4.

8 Tasmanian Government, *Submission 35*, p. 5.

freshwater farming operations of the salmonid industry as well as other aquaculture activities. Following the passing of this legislation, a development process for marine farming was initiated, with a number of marine farming regions around the State being identified as marine farming development areas.

Marine farming operations

2.14 The regulation of marine salmonid farming operations is primarily managed under the *Marine Farming Planning Act 1995* (MFP Act) and *Living Marine Resources Management Act 1995* (LMRMA). The Acts are administered by the Marine Farming Branch of the Department of Primary Industries, Parks, Water and Environment (DPIPWE).

2.15 The Tasmanian Government stated:

> The *Marine Farming Planning Act 1995* and the *Living Marine Resources Management Act 1995* provide an integrated and robust framework that ensures the ongoing sustainable management of the salmonid farming industry in Tasmania.[9]

Marine Farming Planning Act 1995

2.16 The MFP Act aims to achieve well-planned sustainable development of marine farming activities, having regard for the need to:

- integrate marine farming activities with other marine uses;
- minimise any adverse impact of marine farming activities;
- set aside areas for activities other than for marine farming activities;
- take account of land uses; and
- take account of the community's right to have an interest in those activities.[10]

2.17 The MFP Act, and associated regulations, provide for:

- zoning areas of State waters, through marine farming development plans (MFDPs), where future marine farming operations may occur;
- amendments to MFDPs; and
- reviews of MFDPs.

2.18 MFDPs contain management controls to manage and mitigate negative effects of marine farming operations. Management controls may include provisions relating to:

- the activities that may take place;

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9 Tasmanian Government, *Submission 35*, p. 17.

10 Tasmanian Government, *Submission 35*, p. 5.

- specific marine farming activities that may take place;
- the environmental monitoring that must be undertaken by a lease holder;
- the limits for any water quality indicators;
- the restrictions on noise, light, or presence in a marine farming zone;
- the size of structures in a marine farming zone; and
- any other appropriate matter.[11]

2.19 In preparing an MFDP, or an amendment to an existing MFDP, the proponent is required to prepare an Environmental Impact Statement (EIS). The EIS must disclose any available information relating to the environmental impact of a proposal and contain information appropriate to the significance of the proposal to the environment.[12]

Marine Farming Planning Review Panel

2.20 The Marine Farming Planning Review Panel is established under the MFP Act to assess draft plans and draft amendments to plans, for example, expansions. There are eight members of the Panel.

2.21 Prior to 2011, the Panel was able to make binding determinations. In doing so, the Panel was required to take into account public submissions, the recommendation of the Marine Farming Branch of DPIPWE and the sustainable development objectives of the MFP Act. With amendment of the MFP Act in late 2011, the Panel may now only make a recommendation to the minister in relation to a draft amendment to a MFDP.[13]

Living Marine Resources Management Act 1995

2.22 All marine farming operations must be licensed under the LMRMA. Each licence includes environmental conditions specific to that licence to ensure that the marine farming operation is sustainable and does not have an unacceptable impact on the marine environment.

2.23 Conditions that expand on the provisions of management controls are contained in marine farming licences issued for salmonid marine farming. The Tasmanian Government stated that licences are renewed annually and conditions may be varied at any time, which provides flexibility in the management of ongoing farming operations.[14]

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11 Tasmanian Government, *Submission 35*, pp 17–18.

12 Tasmanian Government, *Submission 35*, p. 17.

13 EDO Tasmania, *Submission 70*, p. 8.

14 Tasmanian Government, *Submission 35*, p. 5.

Freshwater farming operations

2.24 The *Inland Fisheries Act 1995* regulates freshwater salmonid farming operations. The freshwater operations supply salmon smolt or rainbow trout from freshwater hatcheries for on-growing at sea.

2.25 The Inland Fisheries Service is responsible for the regulation of hatcheries and freshwater fish farms under the *Inland Fisheries Act 1995*.[15]

2.26 The Director of Inland Fisheries has power to grant fish farm licences to grow declared fish in inland waters. If Atlantic salmon is involved then the agreement of the minister administering the LMRM Act is required. Fish farm licences contain conditions to regulate matters including the species of fish permitted to be grown; the location and size of the farm; the source of supply of fish stock; notification requirements; disease management; and measures to prevent the escape of fish from the farm. Licences can also include conditions that require participation in the DPIPWE salmonid health surveillance program and monitoring of water quality and effluent.[16]

2.27 In addition to the Inland Fisheries Act, the *Land Use Planning Approvals Act 1993, Environmental Management and Pollution Control Act 1994* and the State Policy on Water Quality Management 1997 apply to inland farming operations.[17]

2.28 The *Environmental Management and Pollution Control Act 1994* is administered within the Environment Protection Authority (EPA) Division of DPIPWE and establishes the authority of the Director, EPA, and the Board of the EPA to conduct the assessment of level 2 and 3 activities, as defined the Act. The Director also has authority to 'call-in' activities for assessment by the Board. The Act is also subject to the objectives of the Resource Management and Planning System.

2.29 The Act defines serious and material environmental harm and environmental nuisance and lists offences and penalties. The EPA Division, on behalf of the Director, regulates Environment Protection Notices that are issued by the Director, and conducts enforcement action for offences against the Act, including non-compliance with Environment Protection Notices or environmental permit conditions.[18]

15 Tasmanian Government, *Submission 35*, p. 5.

16 Tasmanian Government, *Submission 35*, p. 13.

17 Tasmanian Government, *Submission 35*, p. 14.

18 Tasmanian Government, *Submission 35*, p. 14.

Adaptive management

2.30 The MFP Act, marine farming lease conditions, management controls contained within MFDPs and marine farming licence conditions are the principal instruments for managing marine farming activities. These provide for the adaptive management framework adopted by the Tasmanian Government which stated:

> Both the planning and operational regulatory frameworks applied to the salmonid farming industry employ recognised best practice adaptive management principles. These frameworks takes into account the dynamic nature of the environment within which marine farming occurs and accordingly provide the capacity and flexibility to manage future marine farming operations in an environmentally sustainable manner.[19]

2.31 Dr John Whittington, Secretary, DPIPWE, added that:

> …we are very confident that our adaptive management approach to regulation is the right approach and the sensible approach...it is an approach that relies on assessing the environment where the farming is to occur. It involves an iterative process of decision making, monitoring and evaluation, and that feeds back into decision making. As a regulatory agency, we are confident that this adaptive management approach provides a sound way for the industry to be managed and to grow.[20]

2.32 Support for the Tasmanian Government's adaptive management approach was provided by the Tasmanian Seafood Industry Council which commented:

> Despite some differences, the entire seafood industry shares one common value: to continue to operate as a fully sustainable seafood industry. Our capacity to achieve this is underpinned by world's best ecosystem based and adaptive regulatory framework. As a foundation, this framework requires comprehensive scientific input into the decision-making processes.[21]

2.33 The pre-development and operational components of the adaptive management cycle employed for ongoing environmental management and regulation of operation of operational fin-fish marine lease areas were provided in the Tasmanian Government's submission.

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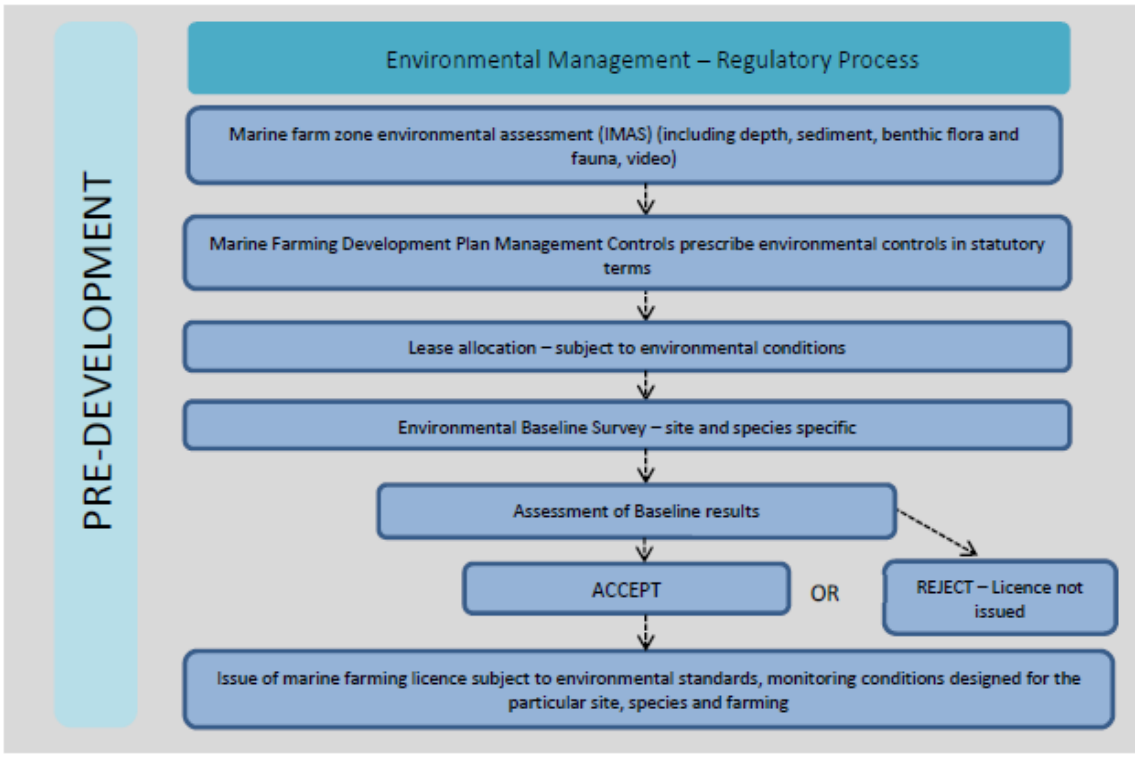
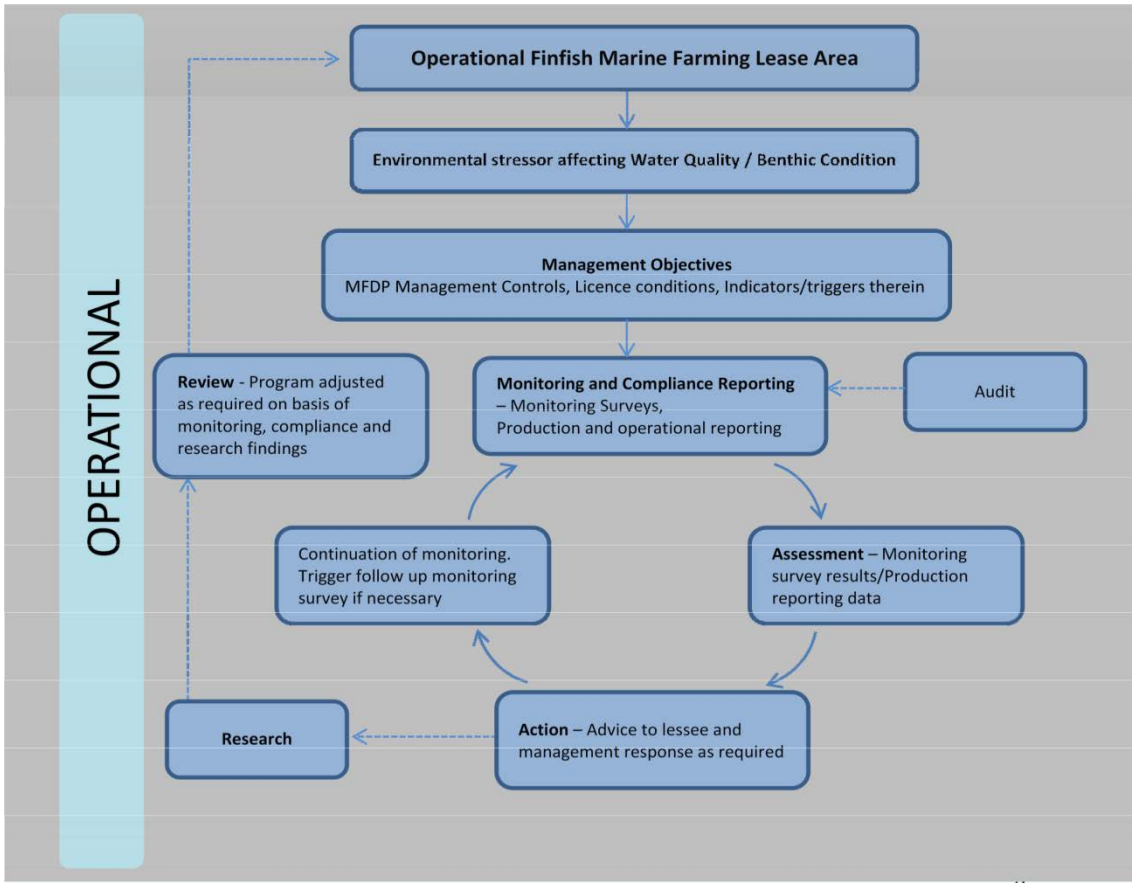
19 Tasmanian Government, *Submission 35*, p. 18.

20 Dr John Whittington, Secretary, Department of Primary Industries, Parks, Water and Environment, *Committee Hansard*, 15 July 2015, p. 2.

21 Mr Julian Harrington, Project Manager, Tasmanian Seafood Industry Council, *Committee Hansard*, 15 July 2015, p. 46.

Figure 2.2: Pre-development and operational components





Source: Tasmanian Government, Submission 35, p. 9.

Research and development

2.34 Research and development plays a key role in the salmonid industry in Tasmania. Dr Whittington, DPIPWE, commented that 'we are really fortunate in Tasmania to have a very strong and vibrant research and environmental consultant community'.[22]

2.35 Industry and government work in collaboration with CSIRO, the University of Tasmania's Institute for Marine and Antarctic Studies (IMAS), other interstate and international research institutes and small independent consultancies. Research projects are undertaken across all aspects of the industry: environment; breeding and genetics; and fish health and welfare.

2.36 The Fisheries Research and Development Corporation (FRDC) is a co-funded partnership between the Commonwealth Government and the fishing and aquaculture industry.[23] The FRDC invests in research, development, and extension (RD&E) activities that support aquaculture, commercial fishing, Indigenous fishing and recreational fishing. The FRDC partners with other organisations that have the necessary capabilities to undertake the varied specialised activities. The FRDC facilitates the extension, adoption and commercialisation of research and development and evaluates the benefits.[24]

2.37 Through the FRDC, the Commonwealth and industry have invested significantly in the development of the Tasmanian fin-fish aquaculture industry. Between 1991 and 2015, 96 research projects valued in excess of $25 million were undertaken in support of the sustainable development of the fin-fish aquaculture industry. The FRDC has 20 active research projects across the Tasmanian fin-fish aquaculture sector and, as at June 2015, there were a further four approved projects awaiting commencement.[25]

2.38 Principal areas of investment have included:

- environmental management;
- industry development;
- farm management, animal health and disease mitigation; and
- threatened and endangered species.[26]

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22 Dr John Whittington, Secretary, Department of Primary Industries, Parks, Water and Environment, *Committee Hansard*, 15 July 2015, p. 2.

23 See Department of Agriculture, *Submission 10*, p. 7 for details of funding arrangements.

24 Fisheries Research and Development Corporation, *Submission 8*, p. 4.

25 Fisheries Research and Development Corporation, *Submission 8*, p. 1; see also Annex 1.

26 Fisheries Research and Development Corporation, *Submission 8*, pp 4–5.

2.39 The FRDC's research and development investment decisions in the Tasmanian fin-fish aquaculture sector are made in consultation with the Tasmanian Fisheries Research Advisory Body (TasFRAB) and the Tasmanian Salmonid Growers Association (TSGA) under the Industry Partnership Agreement (TSGA-IPA).[27]

2.40 The TSGA also pointed to the significant investment by industry in research and development with the salmonid industry contributing in excess of $200 million in recognised research expenditure to a broad range of topics over the last 30 years. This was predominantly through co-partnering with UTAS and CSIRO. Current research projects are valued at $5.6 million.[28] The TSGA submitted that, with further contributions from the FRDC, supportive research bodies and organisations and businesses associated with the industry, the total industry expenditure on research and development is in excess of $275 million.[29]

2.41 IMAS, and its predecessors, has over the last 20 years undertaken research which has significantly contributed to knowledge of environmental impacts and interactions of fin-fish aquaculture in Tasmania. IMAS commented that it provides independent advice and understanding to support decisions regarding the management and regulation of the salmonid farming industry and has been central to the development, implementation, and review of the aquaculture environmental monitoring programs currently employed in Tasmania. IMAS added that its 'researchers have played key roles in both identifying and responding to "knowledge gaps" and will continue to do so in the future'.[30]

2.42 In its submission, IMAS outlined the development of its research focus for the industry and commented that initially, local scale benthic impacts were the focus, and research was integral to developing management controls. With research suggesting that farming in the Huon River/D'Entrecasteaux Channel region was approaching capacity, concern then shifted to broadscale effects of dissolved wastes. A limit on further development was imposed, and a Broadscale Environmental Monitoring Program (BEMP) initiated that has since been highlighted as world's best practice. IMAS noted that concern now focuses on potentially adverse interactions between marine farming and reefs, and on declines in oxygen in Macquarie Harbour. IMAS is currently providing research advice on these issues as part of the adaptive management process.[31] These issues are discussed further in chapters 4 and 6.

2.43 One of the main bodies providing research for aquaculture related issues is IMAS. IMAS research is often undertaken in collaboration with other organisations

27 Fisheries Research and Development Corporation, *Submission 8*, p. 5.

28 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 26.

29 Tasmanian Salmonid Growers Association, *Submission 33*, p. 19.

30 Institute for Marine and Antarctic Studies, *Submission 20*, p. 2.

31 Institute for Marine and Antarctic Studies, *Submission 20*, p. 2.

and it stated that it responds to concerns raised not only by industry and government, but also the broader community and matters identified by IMAS researchers. IMAS commented that 'in making management recommendations we have sought to promote multi-use management solutions and to provide advice that supports sustainable management practices for all stakeholders'. IMAS added that its 'aquaculture research is acknowledged as world class, and our environmental research has been identified as world's best practice in international standards…and is regularly cited in relation to the development of aquaculture management strategies globally'.[32]

2.44 The IMAS submission provides a comprehensive review of research undertaken in relation to the salmonid industry.

2.45 An experimental aquaculture facility has been established at the IMAS campus, Taroona. Collaborative aquaculture research, particularly with the Atlantic salmon industry, will be undertaken. It is the only facility in the South Hemisphere for large production sized fin-fish.[33]

2.46 In commenting on the research resources available to the aquaculture industry, Dr Adam Main, Chief Executive Officer, TSGA, noted that the industry was fortunate in not only being able to access the resources of CSIRO but also the University of Tasmania:

> We have been able to tap into that knowledge set, that ability, that think tank on marine science for 30 years. That is not understating the influence of the Institute for Marine and Antarctic Studies or UTAS more generally. There are not only the marine scientists, but the economists and the social scientists. We have been so lucky in regard to having all of that at our fingertips and to be able to incorporate that in with the regulator to make sure that we get a system that is robust and world's best. As much as there is a pull factor for us to be demonstrating that we are the best, there is a significant push factor within the industry and within the companies to achieve that for themselves.[34]

International certification of the industry

2.47 Tasmanian salmonid companies participate in third-party sustainability certifications. The TSGA noted that third-party certifications are robust, transparent and independent. They require companies to comply with numerous standards that cover environmental impacts; fish health and disease management; sustainability of feed ingredients; wildlife management; employee safety and working conditions;

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32 Institute for Marine and Antarctic Studies, *Submission 20*, p. 3.

33 University of Tasmania, 'Good progress on $6.5m Taroona aquaculture facility', 25 February 2015 http://www.utas.edu.au/latest-news/utas-homepage-news/good-progress-on-$6.5m-taroona-aquaculture-facility (accessed 28 July 2015).

34 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 37.

transgenic animals; escapes; energy efficiency and biosecurity; as well as the mandatory regulations required by the government. The TSGA stated that these voluntary standards typically have higher requirements than Commonwealth and state regulations.[35] Dr Main, TSGA observed that:

> When you bring in the community aspect and you bring in some of the other environmental measures which are not required under the currently regulatory framework, it is a push from industry to strive even further and harder past the agreed regulatory framework.[36]

2.48 The TSGA noted that certification procedures include auditing, with the auditors also having the opportunity to bring in third parties to review procedures and data, make comments and provide direction on the practices of the company.[37]

2.49 The cost of gaining international certification is significant with the industry spending $0.5 million per annum.[38] However, the TSGA commented that:

> …the extra compliance costs involved may be offset by increased production through the reduction of mortality from disease and stress, and increased growth under better environmental conditions. Certified products also have greater market access and can obtain a higher market price.[39]

2.50 Companies make their own decision about which certification they wish to obtain.[40] The Tasmanian salmonid companies participate in the following certification schemes:

- Best Aquaculture Practices (BAP) – Van Diemen Aquaculture, Tassal and Petuna;
- Global G.A.P. – Huon Aquaculture;
- Global Salmonid Initiative (GSI) – Huon Aquaculture;
- Aquaculture Stewardship Council (ASC) – Tassal; and
- Global Reporting Initiative (GRI) – Tassal.[41]

2.51 The TSGA submission provides a summary of the key aspects of the ASC, BAP and Global GAP schemes which is provided below.[42]

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35 Tasmanian Salmonid Growers Association, *Submission 33*, p. 31.

36 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 33.

37 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 32.

38 Tasmanian Salmonid Growers Association, *Answers to questions on notice*, No. 4.

39 Tasmanian Salmonid Growers Association, *Submission 33*, p. 27.

40 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 32.

41 Tasmanian Salmonid Growers Association, *Submission 33*, pp 28–29.

Table 2.1: Comparison of industry certification and accreditation schemes

Requirement of Standard	Aquaculture Stewardship Council (ASC)	Best Aquaculture Practices (BAP)	Global GAP
Third party certification body	✓	✓	✓
Audit reports made publicly available	✓	-	-
Local and national legal requirements and regulations			
Compliance with local and national legal requirements and regulations	✓	✓	✓
Local biodiversity and ecosystem function			
Benthic Biodiversity and benthic effects	✓	✓	✓
Water quality	✓	✓	✓
Nutrient release from production	✓	✓	✓
Critical or sensitive habitats and species	✓	✓	✓
Interactions with wildlife	✓	✓	✓
Biosecurity			
Biosecurity Management	✓	✓	✓
Area Management Agreement	✓	✓	✓
Escapes Management	✓	✓	✓
Resource Use			
Third party certification of feed suppliers	In development	-	✓
Raw materials in feed	✓	✓	✓
Non-biological waste from production	✓	✓	✓
Non-therapeutic chemical inputs	✓	✓	✓
Energy consumption and GHG emission accounting	✓	-	✓
Fish Health			
Animal welfare	✓	✓	✓
Fish Health Management Plan	✓	✓	✓
Dedicated Fish Health professionals	✓	✓	✓
Stocking densities	-	✓	✓
Responsible disposal of mortalities	✓	✓	✓
Controls on chemical, therapeutant and antibiotic use	✓	✓	✓
Maximum level of viral disease-related mortality	✓	-	-
Maximum unexplained mortality rate	✓	-	-
Harvest, transport and handling criteria	✓	✓	✓
Social Responsibility			
Workplace Health and Safety criteria	✓	✓	✓
Human Resources criteria (discrimination, access to union, wages, conflict resolution)	✓	✓	✓
Contractor management criteria	✓	✓	✓
Education and training criteria	✓	✓	✓

42 Tasmanian Salmonid Growers Association, *Submission 33*, Appendix 4, pp 47–48.

Stakeholder Engagement			
Community Engagement criteria	✓	✓	✓
Indigenous Engagement criteria	✓	✓	-
Assessment of company's impact on access to resources	✓	✓	✓
Freshwater			
Smolt Production	✓	-	✓
Third party certification of smolt suppliers	-	-	✓
Food Safety			
Food safety criteria	✓	✓	✓
Transparency of farm-level performance data			
Requirement for transparency of farm-level performance data	✓	-	o
Publicly available information			
Lethal Wildlife Interactions	✓	-	o
Unidentifiable transmissible agents	✓	-	-
OIE-notifiable disease detected on farm	✓	-	-
Estimated Unexplained Loss (EUL) by production cycle	✓	-	-
Therapeutic Treatments	✓	-	o

o Represents information made publicly available which is not a requirement of the certification

Source: Tasmanian Salmonid Growers Association, Submission 33, pp 47–48

2.52 The industry pointed to the substantial benefits arising from third-party certification including that certification acts 'as a driver for achieving ongoing improvements in environmental performance'.[43] The TSGA added that 'the attainment of third-party sustainability certification has also fostered a transformation of attitudes and abilities within the companies to consider management at the ecosystem level'.[44] In addition, the TSGA commented that certification supports industry growth, helps to develop and maintain markets, helps consumers to make informed decisions and provides evidence to a range of stakeholders that the industry is acting responsibly and sustainably.[45]

2.53 The TSGA also pointed to the transparency aspects of certification. Dr Main commented that certification requires companies to provide large amounts of information and 'a huge amount of trust on behalf of the company to open up their books and all of the information, warts and all, and let the auditors have a look at it'.[46]

2.54 Other witnesses also commented on third-party certification of the industry. Ms Jessica Feehely, EDO Tasmania, commented:

43 Tasmanian Salmonid Growers Association, *Submission 33*, p. 31.

44 Tasmanian Salmonid Growers Association, *Response to submissions*, p. 11.

45 Tasmanian Salmonid Growers Association, *Submission 33*, pp 20, 31.

46 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 32.

> …the fact that industry is going through these processes is commendable. They are globally recognised and they are quite stringent. As for whether or not that then means that they meet the criteria under the Tasmanian legislation, I cannot say, but you would hope that any global certification would be equally rigorous.[47]

2.55 Both WWF-Australia and the Tasmanian Abalone Council commented specifically on certification by the ASC. WWF-Australia stated that it considered the ASC standard to be 'the most credible, independent, third-party certification for responsible aquaculture' and that 'the ASC provides a high social and environmental standard for salmon aquaculture globally'. While noting that certification is not a substitute for an effective regulatory regime, WWF-Australia commented that certification provides 'third-party validation of compliance and an additional means to implement a stringent set of checks and balances on environmental impacts, as well as providing consumers with assurance that the food they eat is responsibly produced according to third-party standards'.[48]

2.56 Mr Dean Lisson, Tasmanian Abalone Council, also supported the ASC and commented that the Council believes that, of all the third-party certification systems for aquaculture, the ASC is probably the most independently robust. While not agreeing that the ASC 'is 100 per cent perfect', Mr Lisson commented that 'it stacks up well against all of the other third-party certification systems'.[49]

2.57 The Tasmanian Abalone Council commented that the ASC is 'a form of assessment that is positive for Tasmania' and aligns with the Tasmanian Abalone Council's aim of both the salmonid and abalone industries 'flourishing as it brings together all areas of compliance with a final certification that seeks to drive accountable improvements in environmental and social responsibility'.[50] The Council concluded that the current Tasmanian regulatory regime 'could be further strengthened through Government endorsement of the ASC as the preferred accreditation framework for Salmonid farming in Australia'.[51]

Committee comment

2.58 Tasmanian fin-fish aquaculture companies have gained a range of third-party certifications of their operations. The committee considers that third-party certification provides additional confidence to stakeholders that the aquaculture industry is

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47 Ms Jessica Feehely, Principal Lawyer, EDO Tasmania, *Committee Hansard*, 15 July 2015, pp 59–60.

48 WWF-Australia, *Submission 13*, p. 1.

49 Mr Dean Lisson, Chief Executive, Abalone Council Tasmania, *Committee Hansard*, 16 July 2015, pp 18–20.

50 Tasmanian Abalone Council, *Submission 74*, p. 13.

51 Tasmanian Abalone Council, *Submission 74*, p. 14.

committed to environmental, biosecurity, fish health and social responsibility standards.

2.59 There a number of third-party certifications available and each company makes its own decision about which one it will seek to obtain. However, the committee notes that the Aquaculture Stewardship Council certification was supported by some submitters and that it includes standards for publicly available information including lethal wildlife interactions and therapeutic treatments.[52]

Community perception

2.60 The issue of community perception of the fin-fish industry was discussed extensively in evidence, particularly in regard to the negative perception of monitoring activities and transparency of regulation.

2.61 For example, the Kingborough Council commented that while it appeared that environmental impact monitoring and reporting of the salmon industry has improved significantly over the last decade, there appears to be an 'ongoing perception that the industry is not sustainable and that a steady degradation of the waterways is occurring'.[53] In addition, the community considers that the 'approval process is predetermined' and 'the industry is monitoring itself'.[54] The Council commented that this had arisen as the outcomes of monitoring activities are not adequately articulated in a manner that is readily available and understood by the community.

2.62 The Kingborough Council went on to suggest that there was a need for improved communications from the industry, particularly in reporting on monitoring or scientific activities, so that the community can understand what is occurring. Mr Gary Arnold, Kingborough Council, elaborated:

> The scientific data needs to be gathered and communicated—sure, we all agree with that—but it also needs to be communicated in a way that is easily understood for people who are not necessarily endowed with a scientific background. We feel, from feedback from our community, that that is the main point we can make as advocates on their behalf. They need to be convinced that the improvements that the scientific community and the industry talk about are in fact understood by them, which does not appear to be the case.[55]

2.63 Kingborough Council suggested that the regulator could make himself available to engage directly with the community. The Council noted that the state

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52 Tasmanian Salmonid Growers Association, *Submission 33*, p. 48.

53 Kingborough Council, *Submission 1*, p. 1.

54 Mr Gary Arnold, General Manager, Kingborough Council, *Committee Hansard*, 15 July 2015, pp 13, 15.

55 Mr Gary Arnold, General Manager, Kingborough Council, *Committee Hansard*, 15 July 2015, p. 15.

Auditor-General undertakes such an activity by attending audit panel meetings of council.[56]

2.64 Councillor Rosalie Woodruff also raised concerns about community consultation. Councillor Woodruff noted that in the recent past, companies have appeared to be favouring more constructive community engagement and negotiation. However, this willingness appears to have diminished recently with 'discussions with residents about serially problematic issues' being stalled.[57]

2.65 In response to these concerns, Mr Chris Dockray, Chairman, TSGA, acknowledged that the industry has to work hard to ensure that the community comes along with industry as it expands.[58] In this regard, the TSGA outlined the industry's stakeholder engagement activities:

> The industry continually engages with key stakeholders to ensure the calibre and relevance of regulations and the ongoing development environmentally and socially responsible practices. The industry has developed and initiated a modern and adaptive stakeholder engagement approach to ensure that there are ample opportunities for communities, interest groups and other stakeholders to engage in a range of consultative processes and discussions in relation to marine farming management and ongoing industry development.[59]

2.66 Dr Main, TSGA, added that there are some strong voices in the Tasmanian community that held a negative view of the industry. Dr Main went on to cite a 2014 study which found that:

> …90 per cent of people answered either 'yes; strongly in favour' or 'yes; somewhat in favour' to the question: are you in favour or against the aquaculture industry in general? So that was Tasmania. In Australia—mainland—it was 78 per cent plus 17, so it is even more than 90 per cent. We do have significant support from our community—and we have to keep working with them on that.[60]

2.67 The Tasmanian Seafood Industry Council provided its view on the engagement of the fin-fish industry with the community. Mr Julian Harrington stated that the industry has an 'open and transparent community relationship'. Mr Harrington noted that the fin-fish industry holds forums to discuss planning developments as well as being involved in a diverse range of community programs, projects and

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56 Mr Gary Arnold, General Manager, Kingborough Council, *Committee Hansard*, 15 July 2015, p. 16.

57 Councillor Rosalie Woodruff, *Submissio*n *37*, p. 1.

58 Mr Chris Dockray, Chairman, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 27.

59 Tasmanian Salmonid Growers Association, *Response to submissions*, p. 6.

60 Dr Adam Main, Chief Executive Officer, Tasmanian Salmonid Growers Association, *Committee Hansard*, 15 July 2015, p. 37.

sponsorships. Mr Harrington concluded that 'relative to the seafood industry they would be the standout performers for community engagement'.[61]

2.68 A further mechanism allowing the engagement of the community and stakeholders was the conference hosted in 2012 by EDO Tasmania. The conference looked at the experience of marine farming planning and operation in Tasmania and internationally. Participants included scientists, Tasmanian Conservation Trust and the TSGA.[62] Ms Jessica Feehely, EDO Tasmania, commented that the conference was held as a consequence of community concerns about lack of transparency and lack of public debate about the industry. Ms Feehely, stated that:

> ….we saw the conference as an opportunity to bring together all the stakeholders—both the industry stakeholders concerned and also industry and government—to have a conversation about what the industry looks like, what the community concerns are and how industry is responding to those concerns…
>
> As much as anything, it was a conversation starter. It certainly performed that role. It highlighted areas where the regulation in New Zealand and Canada is something that we would want to emulate. It also identified lots of areas where the Tasmanian regulatory framework is in fact working quite well.
>
> It certainly was not a conference that was designed to bash the industry; it was quite the opposite. It was an opportunity for the industry to talk about where it plans to go and think about how we might want to design our laws to make sure that happens effectively.[63]

Committee view

2.69 The committee notes the efforts by the industry to actively engage with stakeholders and the community generally and to provide information on its operations that is accessible and easily understood. The committee also notes the activities of other stakeholders in engaging with the industry and applauds the EDO Tasmania's efforts to bring together stakeholders to discuss issues of concern under the auspices of the 2012 conference on marine planning and operation.

2.70 The committee considers a greater understanding of industry activities would be beneficial, particularly as the industry seeks to expand its operations. One avenue of achieving this would be by making available a wider range of information about marine farming monitoring and regulatory activities, particularly those undertaken by the Tasmanian Government. This matter has been considered in chapter 3 of the report.

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61 Mr Julian Harrington, Project Manager, Tasmanian Seafood Industry Council, *Committee Hansard*, 15 July 2015, p. 50.

62 'Managing Marine Farming – Have We Achieved Best Practice?', March 2012.

63 Ms Jessica Feehely, Principal Lawyer, EDO Tasmania, *Committee Hansard*, 15 July 2015, p. 54.