

Industry Groups

Atlantic Salmon

Hatchery production and value

There are six Salmon and Trout hatcheries in Tasmania, four operating as hatcheries only, and two operating as part of integrated sea farming and processing operations.

Markets and opportunities

As Tasmanian Salmonid production has risen, an increasing proportion of production has been sold on the domestic market. In the mid-1990s around three-quarters of farmed Salmon production was sold on the domestic market, and a quarter exported to Asian markets.

More recently, based on calculations using state production data and ABS trade data, the proportion sold on the domestic market is estimated by ABARE to have increased to around 85 per cent in 2000-01.

The bulk of Salmon imported into Australia continues to be in the form of canned product.

In 2001-02, Australia imported 8140 tonnes of preserved (mainly canned) Salmon valued at \$43.1 million (average import unit value). With the exception of 2000-01 (when imports rose to 11 600 tonnes), annual preserved Salmon imports have been steady at around 8000 tonnes since 1995-96. Imports of smoked Salmon have been rising, with 577 tonnes imported in 2001-02 (compared with only 177 tonnes in 1995-96).

Imports of fresh chilled Salmon (sourced almost entirely from New Zealand) have also risen every year since fresh chilled imports commenced in October 1999. Imports in 2001-02 were 420 tonnes, compared with 220 tonnes in 2000-01 and 77 tonnes in 1999-2000.

Monthly imports rose to around 60 tonnes in the second half of calendar 2001, but declined again in the first half of calendar 2002. The import price of New Zealand product has fallen steadily since fresh chilled imports commenced, from around A\$10 a kilogram (average monthly import value) in October 1999 to just under A\$7 a kilogram in November 2002.

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World Salmon prices fell in 2001-02 due to rapidly rising production and exports of farmed Salmon in several exporting countries, notably Chile.

The Japanese import price for frozen 4–5 kilogram Atlantic Salmon from Norway (the largest European exporter of farmed Atlantic Salmon) fell from 500 yen a kilogram in May 2001 to 430 yen a kilogram in April 2002, while the import price for frozen 4–6 pound Coho Salmon from Chile fell from 460 yen a kilogram to 270 yen a kilogram over the same period. Japanese import prices for frozen farmed Salmon began to rise again around May 2002 and at October 2002 were back at their May 2001 levels.

Outlook and risks

Over the past decade, productivity in the Australian industry has risen substantially, and production has risen despite falling real farm gate prices. The Australian industry will need to continue to improve efficiency to remain competitive on both the domestic and export markets.

The extent to which Pacific Salmon imports from New Zealand could be expected to displace domestic supply in the Australian market will depend on the degree of substitution between the two products. There is empirical evidence that Atlantic and high quality Pacific Salmon are close but not perfect substitutes.

Since 2001, research into improved sea farming production methods and ecosystem environmental management has been accelerated through the [Aquafin CRC](#)).

A recent review of the industry identified three priority areas for research: improving the broodstock, grading to retain the best fish, and analysis of areas with potential market growth.

The industry is continuing to restructure to improve its efficiency and its ability to compete in the changing global market.

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Tasmania's disease free status and clean environment provide a high quality product and a market edge that is recognised worldwide.

At present, the Huon River and Port Esperance, and D'Entrecasteaux Channel Marine Farming Development Plans are being reviewed pursuant to the review provisions of the *Marine Farming Planning Act 1995*.

The draft review of the D'Entrecasteaux Channel Marine Farming Development Plan provides for a 22 per cent increase in the maximum leasable area while the draft Huon River and Port Esperance Plan proposes an increase of some 39 per cent. Most of this increase is intended for Salmonid production.

Industry associations

All growers of Atlantic Salmon and Ocean Trout in Tasmania are members of the Tasmanian Salmonid Growers Association.

([REF. Australian Aquaculture. Industry profiles for selected species](#))

[CLICK HERE FOR RELEVANT ASSOCIATIONS](#)