NSW TOTAL ALLOWABLE FISHING COMMITTEE

ABALONE FISHERY

DETERMINATION FOR THE 2026/27 FISHING PERIOD

25 May 2026

Executive Summary

Preamble

The New South Wales (NSW) Total Allowable Fishing Committee (TAFC) has statutory responsibilities set out in Part 2A of the *Fisheries Management Act 1994* (the Act) to determine the Total Allowable Commercial Catch (TACC) or Total Allowable Commercial Effort (TACE) by NSW fishers holding the relevant shareholding or endorsement in some commercial fisheries. Various fishing regulations under the Act also contain provisions requiring the making of fishery determinations.

The TAFC is an independent statutory body established under Schedule 2 of the Act. In making a determination on catch or effort in a commercial fishery, the TAFC must consider the ecological, economic and social issues associated with each fishery and make determinations that 'on balance' pursue the objectives of the Act. Currently, there is no formal harvest strategy for the Abalone fishery.

The TAFC is not subject to the control or direction of the Minister as to any determination made. However, the Minister may direct the TAFC on the procedures to be followed and the matters to be taken into account in making a fishing determination.

A preliminary draft Harvest Strategy for the Abalone Fishery was developed in 2015 in consultation with industry and a working group (that included industry representatives and national abalone fishery scientists). No further progress has been made to finalising this draft strategy.

This Determination is for the Abalone Fishery for the period 1 July 2026 to 30 June 2027.

Management recommendations & supporting actions

The TAFC provides the following recommendations to the Minister, NSW DPIRD (Fisheries) and the fishing industry towards improving the management of the fishery:

1. the TAFC encourages the current management review to consider past recommendations of the TAFC, including the finalisation of a harvest strategy for the fishery; reviewing size limits across zones and sectors; improved spatial monitoring, assessment and measurement, and addressing IUU fishing.

Determination

The Total Allowable Fishing Committee (TAFC), pursuant to Part 2A of the *Fisheries Management Act 1994*, determines that the commercial catch of Abalone should be controlled and allocated through the following measure:

1. A TACC of **52 tonnes** during the fishing period 1 July 2026 to 30 June 2027.

2. That the catch in each of the SMUs is restricted as recommended in the following table:

SMU	Catch Limits 2026/27 (tonnes)
1	2
2	5
3	25
4	20

Introduction

The NSW Abalone Fishery extends the entire length of the coastline of NSW and is managed as a single stock, although there are four identified spatial management units (SMUs) in the fishery, which assist in pursuing sustainable fishing and monitoring the performance of the fishery (Table 1). The Abalone Fishery was developed through the 1960s and annual catches peaked around 1,200 tonnes (t) in the early 1970s. This catch was not sustainable and the fishery was restricted in 1980 to control over-exploitation. Quota management was introduced in 1989 at 10 t per licence. In the early 2000s, the fishery experienced a sustained period of lower catches, with the TACC dropping to 110 t in 2007/08 and 75 t in 2009/10. The TACC was then increased and ranged between 120 and 130 tonnes from 2012/13 to 2017/18. In 2018/19, the TACC was set at 100 t and this was maintained for subsequent fishing periods up to 2024/25. It was reduced to 88 t in 2025/26.

There are currently 41 shareholders in the fishery with shareholdings between 10 and 90 shares from a total pool of 3,454 shares. 34 shareholders hold the required minimum number of shares (70) to have an endorsement that authorises the taking of abalone. Quota can be traded within each fishing period.[1]

Table 1: Spatial management units and fishing areas in the NSW Abalone Fishery

Spatial Management Unit	Fishing areas
1	Tweed, Port Stephens, Kiama, Ulladulla, South Brush, Batemans
2	Tuross, Narooma, Bermagui, Bunga, Moon Bay, Turingal, Long Beach
3	Eden, Saltwater, Bittagabee, Green Cape, City Rock
4	Wonboyn, Saltlake, Howe

The Abalone Fishery is subject to a range of spatial closures arising from the comprehensive system of marine protected areas in NSW waters. These include marine parks, aquatic reserves and intertidal protected areas in which commercial fishing is restricted or prohibited.

Abalone are subject to a regulated legal minimum length (LML) to assist in protecting the stock from over exploitation and ensure fish mortality does not result in the depletion of reef systems, whereby all abalone are removed. The LML for commercially harvested abalone was increased from 117 mm to 119 mm in 2018 and further increased to 120 mm and to 125 mm south of Womboyn in 2019. Recreational fishers are subject to a LML of 117 mm.

An annual assessment of the Abalone Fishery has been commissioned each year by the Department of Primary Industries and Regional Development (DPIRD), with support from the Abalone Council of NSW, however for 2026, no updated assessment was commissioned and DPIRD provided a status report on the fishery. The TAFC met on-line with fishery scientists, fishery managers, compliance officers

[1] DPIRD (2026) Abalone Fishery Management Report 2026

and participants in the Abalone fishery on 25 March 2026 to discuss the current fishery assessment, economic conditions and compliance in the fishery. It was acknowledged by most participants at the meeting that the stock was subject to continued unsustainable fishing pressure with significant Illegal, Unreported and Unregulated (IUU) catch.

Biological considerations

Blacklip Abalone (*Haliotis rubra*) in New South Wales are managed across four Spatial Management Units (SMUs). The species occurs at small spatial scales, has limited larval dispersal with strong dependence on local recruitment, making them highly vulnerable to localised depletion and slow population recovery.

SMU 1 and SMU 2 have been recently classified as **depleted** based on low catch rates and reduced legal-size biomass. SMU 1 has long-term impacts from Perkinsus-associated mortality in the 1990s and early 2000s, and high fishing pressure prior to that. Recent catch rates have shown limited signs of rebuilding. SMU 2 has recently changed from a depleting status and has experienced major IUU extraction and decline in biomass.

SMU 3 and SMU 4 are classified as **depleting**. SMU 3 has experienced major biomass losses following the 2016 storm and subsequent fishing pressure concentrated on smaller remaining areas, accelerating depletion. Catch rates have dropped to ~35 kg/hr in 2024–25, with biomass declining >30% since 2015. SMU 4 which has recently changed to depleting from a sustainable status, maintains higher catch rates (>60 kg/hr) and larger legal biomass, but recent declines in both indicators suggest that current catches are exceeding optimal sustainable levels.

Catch rates in all SMUs display hyperstability, meaning they can remain high even when biomass declines due to divers relocating to productive patches. Biomass indices from GPS logger data show sharper declines than catch rates, suggesting abundance is eroding faster than catch rates imply.

Recommendations

The following TACC and SMU restrictions are proposed for 2026-27:

	Status	TACC 2025/26 (tonnes)	Catch (t) 2024/25 (2025/26*)	Harvest Strategy Policy consideration	TACC 2026/27 (tonnes)
SMU 1	Depleted (Below 20%)	2	0.8 (0.34)	Already effectively closed. Serious corrective action and stock rebuilding.	2
SMU 2	Depleted (Below 20%)	25	5.2 (10.1)	Status changed from depleting to depleted and is subject to large IUU. Serious corrective action and stock rebuilding based on a reduction in mortality is required to ensure that the biomass does not become further depleted.	5
SMU 3	Depleting (Above 20%)	33	31.8 (8.9)	Re-building is uncertain.	25
SMU 4	Depleting (Above 20%)	28	35 (8.1)	Status changed from sustainable to depleting. A reduction in mortality is required to ensure that the biomass does not become depleted.	20
TOTAL					52

** Catch for 2025/26 as at 11 March 2026 - therefore not for the full fishing period.*

Economic considerations

From 2023/24 onwards, abalone beach price information has been provided directly by industry. Previously, prices, and therefore Gross Value of Production (GVP)were based on Sydney Fish Market (SFM) prices. However, the industry considered SFM prices to be unrepresentative, as they were based on less than 1% of the total catch and tended to be higher than average prices. As a result, the use of different data sources for beach price means that long-term trends in beach price and GVP over time are not directly comparable.

However, some salient short-term trends can be drawn from the industry provided data and this allows for some recent comparisons through time. In real terms, the beach price of abalone using industry information for the 2025/26 financial year (to date) has declined to $25.00 from $30.14 in 2023/24 and $27.50 in 2024/25. This decline has been attributed to several factors, including the closure of the Mallacoota cannery, increased availability of farmed abalone, significant decline in the export market, and the presence of illegal, unreported, and unregulated (IUU) product being sold domestically at lower price points.

The economic situation for the abalone industry is difficult. Historically, except for COVID impacted years, the abalone TACC was close to fully caught, even when the TACC was substantially higher than the current level. For example, in 2016 and 2017 approximately 99% of the 130 t quota was caught. However, in 2024/25 only 74% of the 100 t quota was caught and for the 2025/26 season to date[2] only 32% of the 88 t quota has been caught. Due to the economic circumstances in the fishery, some industry members have indicated the TACC will not be fully caught this year.

The clearest indicator of the economic stress in the industry is:

a) the submissions from some industry shareholders recommending the fishery be temporarily closed; and

b) the uptake of the DPIRD fee waiver for management charges for fishery shareholders quota.

The latter was implemented based on the information that some fishers were catching their quota solely to cover management costs. The TAFC received information from DPIRD that as of 13 March 2026, 18 of the 41 fishery shareholders remain eligible for the fee waiver representing 43% of the total number of shares and 38.7 tonnes of quota. Based on this clear indication of reduced commercial fishing capacity, the abalone catch for the 2025/26 financial year is likely to be approximately 50 t or less from an 88 t TACC.

The TAFC were also informed by DPIRD (Fisheries Compliance) that the domestic market for illegally caught abalone of any size is both strong and sophisticated. This suggests that there remains substantial capacity in the market to absorb product volume. However, the licenced commercial sector is unable to compete at the price point that illegal operators can provide product, as they are unencumbered by the costs and controls of commercial fishing. DPIRD (Fisheries Compliance) outlined targeted multifaceted enforcement campaigns, including at point of sale, targeting the illegal distribution of abalone and despite these campaigns the illegal sale of abalone continues.

Further compounding the economic circumstances in this fishery is the recent significant increase in fuel price due to geo-political issues. This will increase the cost of fishing but also potentially put more pressure on prices and demand as wholesalers and retailers seek savings themselves and consumers have less discretionary spend – recognising that abalone is not a staple food. The increase in fuel price may make it less economically viable for commercial fishers to fish more remote locations, where standing stocks of abalone may be higher due to less fishing pressure. The increased fuel price may provide further impetus for illegal harvesting that can target areas with lower catch rates and/or smaller abalone.

The reduction in TACC recommended by the TAFC is unlikely to have a significant impact on industry, given the current higher quota volume for this season will not be caught and the economic situation in the fishery will not be resolved in the short term. It is highly unlikely that export demand will recover to approximate its historical

[2] As at 11 March 2026, with ~75% of the fishing period complete.

levels. The volume and prices for product in the domestic market will remain depressed due to unlicenced sales and cost-of-living pressures. Although there is uncertainty, fuel prices are likely to be significantly elevated for a considerable period of time imposing greater costs on production.

While fuel price and the status of export markets are not in the purvey of DPIRD, controlling illegal fishing activities is. The TAFC recognises the inherent difficulties of controlling the illegal take of abalone (regardless of jurisdiction) and the significant investment of resources by DPIRD to-date in attempting to impact illegal operators. From an economic perspective, continued focus and investment by DPIRD should remain a high priority.

Fishery management considerations

The NSW Abalone Fishery is a limited entry fishery managed through legislative instruments and a co-management arrangement between the NSW DPIRD and the Abalone Council of NSW.

A TACC is applied to the fishery under which individual transferable quota (ITQ) is allocated among all shareholders in the fishery on an annual basis. The TAFC determines the TACC for each fishing period, which is divided into a weight value in kg per share. Other fishery controls are minimum legal sizes, controls on fishing gear, areas closed to fishing (including marine protected areas) and mandatory use of GPS loggers.

The TACC has historically been fully caught, except for some disruptions during the COVID-19 pandemic which led to variations to the usual pattern of fishing. However in 2024/25, catches only reached 74% of the TACC and in 2025/26 catches are expected to be well below the TACC, as noted above. DPIRD and industry have indicated that management changes, including the management fee waiver noted above, as well as market conditions are contributing to the decline in catches.

The TAFC is concerned about the long-term southward contraction of the fishery to its current focal areas, with potentially limited stock recovery in areas historically fished. This contraction is likely driven by a combination of overfishing and environmental impacts, including climate change, The fishery is now operating principally in the south and far south of the state.

Fisheries for sessile invertebrates such as abalone are vulnerable to localised and serial stock depletion. Management aims for such fisheries typically include attempting to ensure that local harvested populations have the capacity to recover from such depletion, and therefore spatial management measures are an important consideration in the assessment and management of these types of fisheries. The TAFC recognises the difficulty and cost of implementing finer scale spatial management, although finer spatial scale monitoring and management has become more accessible with the implementation of mandatory GPS loggers in recent years. Given the risk of continued localised depletion and hyperstability undermining sustainability, the TAFC continues to encourage DPIRD and industry to explore practical improvements to spatial management.

Recreational catch of abalone is managed with a daily possession limit of two abalone per person and a minimum size limit of 117 mm. DPIRD estimates that the recreational catch from this sector is between 1.1-3.3 tonnes per annum. A small amount of catch (estimated to be less than 1 tonne per year) is also taken by the Aboriginal cultural fishing sector, which has a daily limit for take and possession of 10 and permits available for larger harvests for cultural events.

There remain differences in abalone minimum size limits between the recreational (117mm) and commercial (117, 120 & 125 mm) sectors. These differences within and between sectors make management and compliance more complex, and DPIRD are encouraged to monitor and review them to ensure that all size limits are achieving the intended effect.

IUU fishing remains a major issue in this fishery, with high levels of IUU activity undermining stocks, management and the market for legal catches. DPIRD has estimated IUU catches between 25 and 35 tonnes over the past two years, primarily made up of undersized fish, however the certainty of that estimate is low. DPIRD Fisheries Compliance use deterrence and prosecutions to counteract offenders, including targeted compliance operations. Recent legal changes related to the application of powers to enforce size and bag limits in certain areas, have driven a greater focus of enforcement activities on post-harvest trafficking of abalone. Despite these efforts, the illegal take of abalone continues to pose a substantial risk to the sustainability of this fishery, and the high levels of illegal activity in the southern SMUs are threatening the remaining resilient populations. Illegal abalone catch is a serious issue, involving organised crime in those jurisdictions with abalone fisheries, and in NSW it appears to have been exacerbated by poor resource sharing arrangements.

DPIRD is currently undertaking a management review of the fishery which will consider options including rezoning the fishery, resource sharing and a process to transition to new management arrangements. This is being informed by a newly established Abalone Industry Consultation Working Group, which is facilitating industry input to the review and provide input on options for a future management framework. The intention is that the outcomes of the management review will be made available in 2026, with implementation to follow.

The TAFC welcomes this strategic review of management, noting the current challenges, including stock contraction, biomass declines, market conditions and resource sharing issues, as well as the vulnerability of abalone to climate change. In addition to the above matters, the TAFC encourages the review to consider past recommendations of the TAFC, including the finalisation of a harvest strategy for the fishery; reviewing size limits across zones and sectors; improved spatial monitoring, assessment and measurement, and addressing IUU fishing.

The most recent stock status classification identifies the fishery as **depleted** in SMU1 and SMU2 and **depleting** in SMU3 and SMU4. The downgrading of the status of the stocks in SMUs 2 and 4 since last year is concerning and requires a further reduction in the commercial catch to arrest the severe decline in the stock. There remain several uncertainties and risks as discussed in this report, including the spatial contraction of fishing effort and the illegal harvest. The TAFC therefore recommends that the TACC be reduced to 52 t for the 2026/27 fishing season.

Pending the outcome of the management review currently underway, it may be necessary or appropriate for the TACC to be reviewed in the context of any new management arrangements.

Determination

The Total Allowable Fishing Committee (TAFC), pursuant to Part 2A of the *Fisheries Management Act 1994*, determines that the total allowable commercial catch of Abalone should be controlled and allocated through the following measures:

1. A TACC of **52 tonnes** during the fishing period 1 July 2026 to 30 June 2027.

Species	TACC 2026/27 (tonnes)
Abalone (*Haliotis rubra*)	52

2. That the catch in each of the SMUs is restricted as recommended in the following table:

SMU	Catch Limits 2026/27 (tonnes)
1	2
2	5
3	25
4	20

William Zacharin

Chair, TAFC

25 May 2026

Rich Little - Scientific member

Alice McDonald - Fisheries Management member

Daryl McPhee - Natural Resource Economist member