

Salmon Scotland:

Growing Salmon. Growing Scotland.

Briefing Note for the Scottish Affairs Committee

In advance of Committee session on 4 December and subsequent SAC visit to Na h-Eileanan an Iar

Salmon Scotland is the trade body representing farmers and the supply chain of Scottish salmon. The Scottish salmon sector is a cornerstone of our rural and marine economy, harvesting over 150,000 tonnes of healthy, nutritious Scottish salmon annually. This makes Scotland the third largest producer of Atlantic salmon globally.

Our sector directly employs over 2,500 people and supporting a further 10,000 in indirect and induced roles. The farmgate value of our salmon production is estimated at over £1.1 billion, contributing in excess of £760 million to the Scottish economy through direct, supply chain, and employment impacts annually.

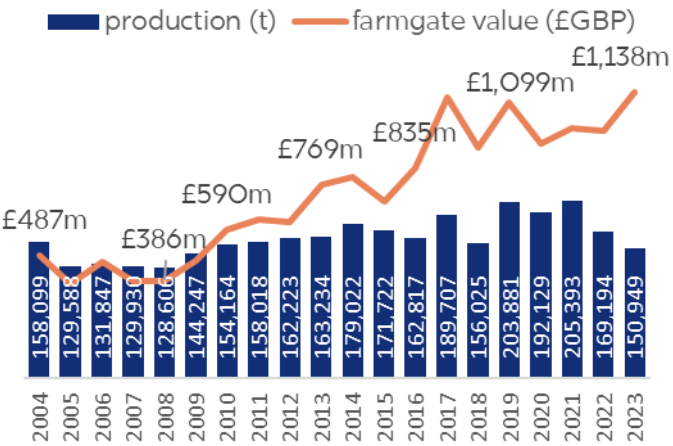
There are around 210 active farms around the west coast, highlands and islands of Scotland. Despite this significant scale, the area of waters farmed is less than half the size of Edinburgh airport. Our farming companies include **Mowi Scotland, Bakkafrøst Scotland, Scottish Sea Farms, Loch Duart, Cooke Scotland and Organic Sea Harvest.**

There are **over 3,600 Scottish supply chain companies** across the length and breadth of the country. The Highlands and Islands is home to more than 2,300 Scottish businesses with over 1,000 more firms located across lowland and central belt regions. Supply chain and induced benefits contribute over £450 million in terms of GVA annually.

We look forward to providing more detail in the upcoming evidence session and also when welcoming you to see our colleagues, when you visit later in December.

Production and farm gate value

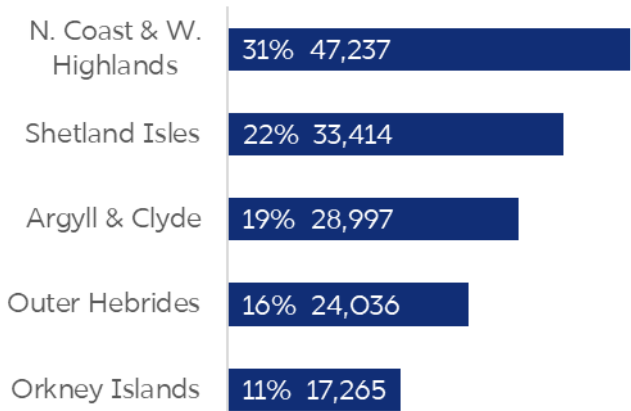
Scottish salmon, 2004-2023;
by volume (t) and value (£GBP)



Source: Salmon Scotland; Scottish Fish Farm Production Survey 2023

Production by farming region

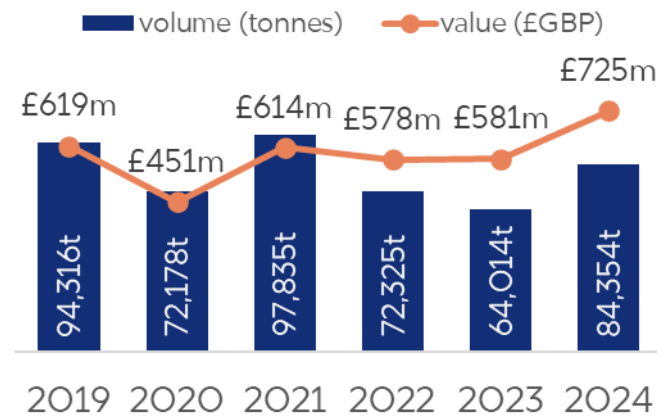
Scottish salmon, 2023;
by volume (t) and total share (pct)



Source: Scottish Fish Farm Production Survey 2023

Exports of Scottish salmon

2019-2023;
by volume (t) and export value (£GBP)



*current year represents 12 month Moving Annual Total (MAT)

Source: HMRC UKTradeInfo; Salmon Scotland

A rural and coastal success for all Scotland

Volume growth across the sector has been modest over the last twenty years with volumes similar in 2023 as they were in 2004.

Value growth (not adjusted for inflation) has increased 4.6 per cent per annum in the twenty years to 2023 to surpass £1.1 billion in 2023.

As a sector, Scottish salmon contributes more than £760 million to the Scottish economy, consisting of over £300 million in direct benefit with an additional £460 million in supply chain and induced value.

Over 2,500 people are employed in farming across rural and coastal regions and supports a further 10,000 in indirect and induced roles which are located across the central belt and southern Scotland.

Supply chain businesses total more than 3,600 covering: further processing; engineering and manufacturing; boat building; logistics; innovation; infrastructure; modelling; and diving to name a few.

Spotlight: Western Isles

Around one in six salmon farmed across the country are grown in the Western Isles making the islands an integral part of the sector.

There are 230 jobs and 300 supply chain businesses supported, contributing some £60 million in direct GVA and over £150 million with supply chain and employment effects considered.

The expertise and activity represents a significant boost to the local economy, fostering community resilience, maintaining employment, and supporting development in one of our most remote regions.

Salmon take up to three years to grow to harvest weight. Once harvested it is critical to get our fish to consumers in prime condition and as quickly as possible. Effective and efficient processes are essential so that consumers get the very best salmon.

Internationally renowned – by customers and investors

As well as significant domestic consumption, we export to over 50 countries annually from some of the outermost regions of Scotland.

Supply chains and processes need efficiencies. These are required from both a regulatory and physical (logistics) perspective. We are working with both UK and Scottish governments on making sure that we are world-leading across all aspects of production and marketing.

France is the number one market for export in both volume and value terms - accounting for almost two-thirds of all our exports. This is a result of French consumers desire to have excellent quality fish—of which, Scottish salmon was the first non-French (and also the first seafood) product to receive the highly acclaimed Label Rouge certification. It is also key for accessing other European consumers.

North America and Asia are other key regions for export growth.



Scottish salmon survival rates

Monthly survival, 2021-2024;

by population pct



Source: Salmon Scotland

Average sea lice counts

Weekly count, 2021-2024

by average number of lice per fish

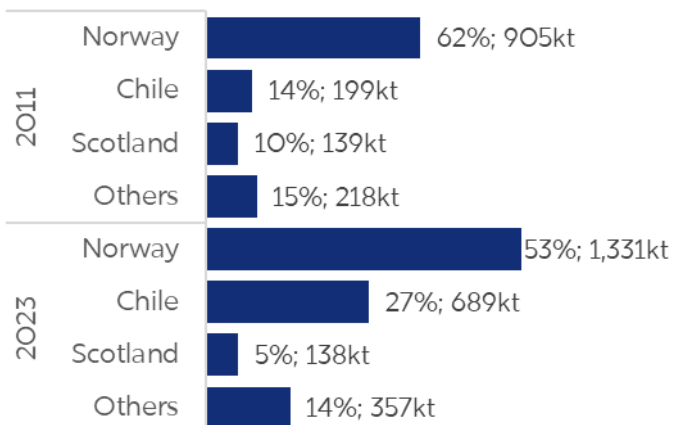


Source: Scotland's aquaculture - sea lice data; Salmon Scotland calcs

Global salmon production

Key producers, 2011 vs 2023;

by volume (gwt) and global share (pct)



Source: Mowi Integrated Annual Reports; Salmon Scotland calcs

Sustainability a priority

Since 2018, salmon farming companies have spent c.£975 million on capital projects and operational activities focused on safeguarding and improving fish health and welfare.

Our farmers have a responsibility to their fish and the environment in which they farm. They are also answerable to regulators, communities, stakeholders, retailers and customers, and investors. As a result there is significant transparency on performance:

- Scottish salmon is the only livestock sector in the UK to publish detailed mortality statistics for its farms.
- We publish monthly mortality for all our marine farms, as well as the full production cycle mortality for each farm (once harvested).
- Our latest figures cover October 2024, with an average monthly mortality of 2.5%. This is the lowest since 2020.
- Over the course of 2024, monthly mortalities have averaged 1.4%. This compares to 2.2% in 2023, 2.0% in 2022 and 1.6% in 2021 (for the same period, Jan. to Oct.).
- Weekly reporting of naturally occurring lice have returned to low levels following investment in monitoring and treatments.

Modelling new (and monitoring existing) sites is a huge investment that ensures the local environment has the capacity for a salmon farm. It also confirms that the fish are in the best conditions while the local environmental impact is minimised.

Salmon farmers dominate the Collier-FAIRR protein producer index - a sustainability assessment of protein producers, including aspects of performance against environmental, social and governance metrics.

Scotland and the UK's retailers also have their own sourcing policies and requirements for primary food producers in addition to numerous other independent sector auditing organisations which provide customer assurance. This is in addition to the government regulatory landscape which farmers must navigate and comply.

Delivering for Scotland and the UK

In 2011, salmon production in Scotland accounted for 10 per cent of global production, the share in 2023 was nearer five per cent.

The sector is supportive of Scottish government work to create a simpler (although no less robust) regulatory process for aquaculture.

We are also engaging positively with UK government officials in Defra to establish smoother trading relations with the EU in the form of a Sanitary and Phytosanitary (SPS) agreement and to develop electronic -export health certificates so that access to international markets is more competitive.

Progress on these ambitions will allow Scottish salmon production and trade to occur in the very highest of standards in order to maintain and recover market share which will further attract investment and activity across the sector.



42 active Sustainability Charter actions



210 active farm sites around Scotland



850 million nutritious, healthy meals

