

SCOTLAND'S AQUACULTURE



Introduction

Aquaculture or fish farming is the breeding and harvesting of plants and animals in water. It can take place in natural water bodies such as ponds, lakes, marshland or brackish water and the ocean. It can also be conducted in tanks, commonly found in fish hatcheries. Typical species found in aquacultural systems include salmon, trout, mussels, oysters, other finfish and shellfish.

Currently only 2% of food production is in the ocean. Over the last decade, aquaculture has gained momentum as a **viable method to produce seafood**. Its role in **feeding a growing world population** will continue to increase as **capture fishery stocks decline**, pressures for available land and resources to grow crops and animal protein intensify and pressure from climate change. The UN Food & Agriculture Organisation (FAO) estimate aquaculture will provide nearly two thirds of global fish consumption by 2030.

Importance of aquaculture to Scotland

The Scottish Government is supportive of sustainable aquaculture. It provides employment and investment, particularly in some of the most remote, coastal communities and is estimated to generate economic activity in Scotland worth **£1.86 billion** every year, **supporting 8,300 jobs**. If industry's growth targets are met - to grow 210,000 tonnes (whole wet fish) marine finfish and 13,000 tonnes shellfish sustainably by 2020 - that value rises to well over £2 billion per annum in revenues and over 10,000 jobs. **Fresh salmon is Scotland's top food export**.

Rural communities have been reinvigorated by jobs, re-population and local spending power of aquaculture companies. The Scottish Salmon Producers' Organisation (SSPO) estimate salmon industry spend on suppliers and services in 2014 was £570.4 million with Capital invested by the salmon industry £53.3 million. Salmon farming also employed **91 Modern Apprentices** in 2014.

Scottish production

Scotland has the most developed salmon aquaculture industry in the EU with about 94% of the EU's total farmed salmon production.

2014 saw the highest ever recorded farmed salmon and mussel production in Scotland.

The Scottish Fish Farm Production Survey 2014 was published 8 September 2015

www.gov.scot/Publications/2015/09/6580

- Atlantic salmon production (whole, wet fish) in 2014 was 179,022 tonnes (up 9.7%).
- Total rainbow trout production was 5,882 tonnes (up 4.8%). This includes 1,909 tonnes marine grown rainbow trout.
- Brown trout/sea trout was 48 tonnes. Halibut was 66 tonnes.
- Total marine production was 181,045 tonnes (whole, wet fish)
- Cleaner fish ova laid: 1 million wrasse, 10.2 million lumpsucker.
- Total direct employment was 1,796 jobs

The Scottish Shellfish Farm Production Survey 2014 was published 18 May 2015

www.gov.scot/Publications/2015/05/2049

- Total (all species) production for the table in 2014 was 7,980 tonnes.
- Estimated value of the industry at first sale was £10.5 million (up 18%).
- Blue mussel production was 7,683 tonnes (up 14%).
- Pacific oyster production for the table was 271 tonnes or 3,392,000 shells (up 9%).
- Queen scallop was 1 tonne/ 18,000 shells (down 45%). King scallop was 6 tonnes / 48,000 shells (up 20%). Native oyster was 19 tonnes / 242,000 shells (down 7%).
- Total employment was 345 jobs directly (up 4%).

Useful information sources

- An Assessment of the Benefits to Scotland of Aquaculture published 20 May 2014: www.gov.scot/Topics/marine/Publications/publicationslatest/farmedfish/AqBenefits
- UK Multi-Annual National Plan for the Development of Sustainable Aquaculture published 30 November 2015: www.gov.uk/government/publications/sustainable-aquaculture-the-united-kingdom-multiannual-national-plan-manp.
- Scotland's National Marine Plan adopted on 25 March 2015 and laid before Scottish Parliament on 27 March 2015: www.gov.scot/Topics/marine/seamanagement/national/nmp
- MGSA Science and Research Working Group's Aquaculture Science & Research Strategy published 7 July 2014: www.gov.scot/Publications/2014/07/4459
- A Technical Standard for Scottish Finfish Aquaculture published 11 June 2015: www.gov.scot/Publications/2015/06/5747
- Scotland's Aquaculture website brings together regulatory data collected by Scottish Environment Protection Agency (SEPA), Marine Scotland, Food Standards Scotland (FSS) and The Crown Estate and makes it publicly accessible through search tool and interactive map: aquaculture.scotland.gov.uk/
- Marine Scotland Fish Health Inspectorate operational activity: www.gov.scot/Topics/marine/Fish-Shellfish/FHI/CasInformation.
- Scottish Salmon Farming Economic Report published June 2015 scottishsalmon.co.uk/wp-content/uploads/2015/03/sspo_economic_report_2015_FINALALLOW.pdf

