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Fisheries Research Services

Scottish Fish Farms
Annual Production Survey, 2005

ISBN : 1363-5859

SCOTTISH EXECUTIVE
Environment and Rural Affairs Department

SCOTTISH FISH FARMS

Annual Production Survey 2005

This report was prepared for
the Scottish Executive by
FRS Marine Laboratory

FRS Marine Laboratory is a division of
Fisheries Research Services,
an agency of the Scottish Executive

Foreword

The annual production survey of fish farms in Scotland for 2005 was carried out by Fisheries Research Services (FRS), an agency of the Scottish Executive. This survey collates annual production data from registered Scottish fish farm sites. Surveys conducted by other organisations are produced independently of FRS and may not be directly comparable. The production tonnage obtained is for the wet weight of fish at harvest.

Responses to questionnaires from Scottish fish farming companies covering the period 1 January - 31 December 2005 are summarised in this survey. The questionnaires are given in Appendix 1a-d. The survey is structured to allow readers to follow industry trends within the trout, salmon and other farmed species sectors. Where available, statistics are given for the 14-year period 1991-2005. Data from previous years have been reassessed and updated where necessary. To allow direct comparison to data provided in previous surveys, production information by region is presented in defined areas.

The cooperation of the fish farming industry in completing the questionnaires is gratefully acknowledged.

R J Smith

November 2006

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SUMMARY

The tables below summarise the results from the 2005 fish farms annual production survey.

Rainbow Trout (*Oncorhyncus mykiss*)

		2004	2005
Total production	(tonnes)	6,352	6,989
Production for the table	(tonnes)	5,416	6,170
Production for restocking	(tonnes)	936	819
Number of staff employed		152	143
Mean productivity	(tonnes/person)	41.8	48.9
Number of ova laid down to hatch	(millions)	32.5	20.2
Number of ova imported	(millions)	31.9	19.9

In 2005, rainbow trout production increased by 637 tonnes. Employment decreased by nine staff members and productivity per person increased to 48.9 tonnes. There was a decrease of 12.3 million ova laid down to hatch and the number of ova imported also decreased.

Other Species (including Arctic charr, *Salvelinus alpinus*; Brown trout, *Salmo trutta*; Cod, *Gadus morhua*; Halibut, *Hippoglossus hippoglossus*)

		2004	2005
Total production	(tonnes)	365	467
Number of staff employed	(full-time)	61	73
	(part-time)	18	18
Number of ova laid down to hatch	(millions)	37[a]	45[a]
Number of ova imported	(millions)	0[b]	0.015[b]

[a] Excluding cod ova laid down to hatch from foreign sources.
[b] Excluding cod ova imported.

In 2005 the production of other species increased by 102 tonnes on the 2004 total. This was due to increases in cod and halibut production. Overall employment increased by twelve due to continued development of the other species sector. There were also increases in the number of ova laid down to hatch, but due to the small number of companies involved it is not possible to summarise these data without potentially revealing the figures for individual companies.

Number of Incidents of Escape from Fish Farms Notified to the Scottish Executive

Species	Number of escape notifications	Number of fish escaped
Rainbow trout	6	7,967
Atlantic salmon (freshwater stages)	5	367,043
Atlantic salmon (seawater stages)	19	510,840
Other species	0	-

Atlantic salmon (*Salmo salar*)

Smolts

		2004	2005
Number of ova produced	(millions)	128.9	73.2
Number of ova laid down to hatch	(millions)	70.6	75.7
Number of ova exported	(millions)	5.9	13.3
Number of ova imported	(millions)	17.0	16.8
Number of smolts produced	(millions)	40.0	36.3
Number of smolts put to sea	(millions)	38.2	37.2
Number of staff employed		319	274
Mean productivity (000s smolts/person)		125.4	132.6

The production of ova decreased by over fifty five million in 2005, and the number of ova laid down to hatch increased by over five million. Imports of ova decreased slightly, while there was an increase in exports of ova. Smolt production was down by over three million. The number of staff employed decreased by 45, and mean productivity increased.

Production fish

		2004	2005
Total production	(tonnes)	158,099	129,588
Production of 0-year fish	(tonnes)	319	-
Production of grilse	(tonnes)	27,710	22,972
Production of pre-salmon	(tonnes)	58,082	44,766
Production of salmon	(tonnes)	71,988	61,850
Mean fish weight 0-year	(Kg)	1.9	-
Mean fish weight grilse	(Kg)	4.1	4.1
Mean fish weight pre-salmon	(Kg)	4.5	4.7
Mean fish weight salmon	(Kg)	4.6	4.4
Number of staff employed		1,161	979
Mean productivity	tonnes/person	136.2	132.4

Production tonnage decreased by 18% with a reduction in harvest at later stages of production. Staff numbers decreased by 182. Mean productivity showed a slight decrease.

Smolt survival (percentage harvested)

Survival (%)	Years 0+1	Year 2	Total
2002 input year class	45.6	31.1	76.7
2003 input year class	45.7	32.3	78.0

Overall smolt survival increased by 1.3% compared with the 2002 year class.

1. RAINBOW TROUT (*Oncorhynchus mykiss*)

Annual production survey questionnaires were sent to all 42 companies registered with the Scottish Executive and engaged in the production of rainbow trout in Scotland during 2005. Returns were received from all 42 companies, covering the 70 sites currently in production.

Production

Table 1a: Total production (tonnes) of rainbow trout during 1992-2005

Year	Tonnes	Year	Tonnes
1992	3,953	1999	5,834
1993	4,023	2000	5,154
1994	4,263	2001	5,466
1995	4,683	2002	6,659
1996	4,630	2003	7,085
1997	4,653	2004	6,352
1998	4,913	2005	6,989

Production increased in 2005 by 637 tonnes, an increase of 10%. This was mainly due to an increase in production from freshwater cages, ponds and raceways for the table trade. Within the table trade, significant increases were observed in the large and small sizes of fish, with a decrease in medium sized fish. In the restocking trade, the production of large fish showed an increase, while small and medium sized fish production showed a decrease.

Table 1b: Production (tonnes) for the table trade during 1995-2005 according to weight category

Year	‹450 g	450-900 g	›900 g	Total
	‹1 lb	1-2 lbs	›2 lbs	Tonnes
1995	2,736	199	1,149	4,084
1996	2,701	181	1,002	3,884
1997	2,646	104	1,098	3,848
1998	3,009	173	887	4,069
1999	3,151	144	1,562	4,857
2000	3,005	203	1,103	4,311
2001	3,053	404	1,217	4,674
2002	2,937	1,056	1,718	5,711
2003	2,531	1,181	2,477	6,189
2004	1,553	1,946	1,917	5,416
2005	2,856	1,203	2,111	6,170

Production for the table was 6,170 tonnes, an increase of 754 tonnes (13.9%) on the 2004 total and accounted for 88.3% of the total rainbow trout production, an increase in the proportion from that produced in 2004. Supply was mainly of fish weighing up to 900 g, encompassing 66% of total production for the table.

Table 1c: Production (tonnes) for the restocking trade during 1995-2005 according to weight category

Year	‹450 g	450-900 g	›900 g	Total
	‹1 lb	1-2 lbs	›2 lbs	Tonnes
1995	107	411	81	599
1996	188	484	74	746
1997	97	589	119	805
1998	69	538	237	844
1999	237	553	187	977
2000	41	609	193	843
2001	18	526	248	792
2002	28	484	436	948
2003	63	490	343	896
2004	64	509	363	936
2005	21	390	408	819

Production for the restocking of angling waters decreased in 2005 and accounted for 11.7% of total rainbow trout production in 2005. In 2005, production totalled 819 tonnes, a decrease of 117 tonnes (12.5%) on the 2004 total. These figures represent the tonnage of fish supplied to angling waters for restocking purposes; they do not account for the catch taken by anglers.

Escapes

There were six reported escapes from rainbow trout sites in 2005, involving the loss of 7,967 fish.

Production by Site

Table 2: Numbers of sites grouped by tonnage produced during 1995-2005

Year	Number of sites per production tonnage				Total number of sites
	‹1-25	26-100	101-200	›200	
1995	26	15	13	5	59
1996	24	14	12	6	56
1997	19	22	12	4	57
1998	26	14	8	8	56
1999	18	14	8	9	49
2000	16	12	8	8	44
2001	17	12	6	10	45
2002	16	13	4	12	45
2003	17	9	6	11	43
2004	14	14	5	10	43
2005	18	12	6	11	47

Production was reported from 47 sites. The number of producers in the size brackets, ‹1-25 tonnes, 101-200 tonnes and ›200 tonnes, increased in 2005, while those producers in the size bracket, 26-100 tonnes decreased. These figures do not include those sites specialising in the production of ova or young fish for on-growing.

Production by Method

Table 3: Grouping of rainbow trout sites by production tonnages, main method of production in 2005 and comparison with production in 2004

Production method	Production grouping (tonnes) in 2005					Total tonnage and (%) by method		Number of sites	
	‹10	10-25	26-50	51-100	›100	2004	2005	2004	2005
FW cages	1	2	0	0	7	3,320 (52.3)	3,771 (53.9)	9	10
FW ponds and raceways	5	7	5	7	5	1,910 (30.1)	1,972 (28.2)	27	29
FW tanks and hatcheries	3	0	0	0	0	8 (0.1)	4 (0.1)	3	3
SW cages	0	0	0	0	5	1,114 (17.5)	1,242 (17.8)	4	5
SW tanks	0	0	0	0	0	0	0	0	0
Total	9	9	5	7	17	6,352	6,989	43	47

Freshwater production accounted for 5,747 tonnes (82.2%) and seawater production for the remaining 1,242 tonnes (17.8%). The main rearing facilities were freshwater cages, ponds and raceways. There was an increase in production in seawater cages, but a decrease in production in freshwater tanks.

Company and Site Data

Table 4: Number of companies and sites in production during 1992-2005

Year	No. of companies	No. of sites
1992	53	72
1993	52	74
1994	56	72
1995	54	69
1996	52	69
1997	51	69
1998	51	71
1999	54	68
2000	54	63
2001	50	57
2002	39	57
2003	37	56
2004	38	62
2005	42	70

The number of companies registered with the Scottish Executive as being actively engaged in rainbow trout production was 42 in 2005. The number of sites registered and in production during 2005 was 70.

Staffing and Productivity

Table 5: Number of staff employed and productivity per person during 1992-2005

Year	Full-time	Part-time	Total	Productivity (tonnes/person)
1992	135	73	208	19.0
1993	134	73	207	19.4
1994	139	70	209	20.4
1995	132	64	196	23.9
1996	129	60	189	24.5
1997	130	52	182	25.6
1998	137	49	186	26.4
1999	126	51	177	33.0
2000	121	47	168	30.7
2001	118	41	159	34.4
2002	114	46	160	41.6
2003	107	41	148	47.9
2004	115	37	152	41.8
2005	108	35	143	48.9

The overall number of staff employed in 2005 decreased by nine to 143. During 2005 the number of full-time staff decreased by seven and the number of part-time employees decreased by two.

Productivity, measured as tonnes produced per person, increased by more than seven tonnes per person in 2005. No distinction was made between full and part-time employees when calculating productivity.

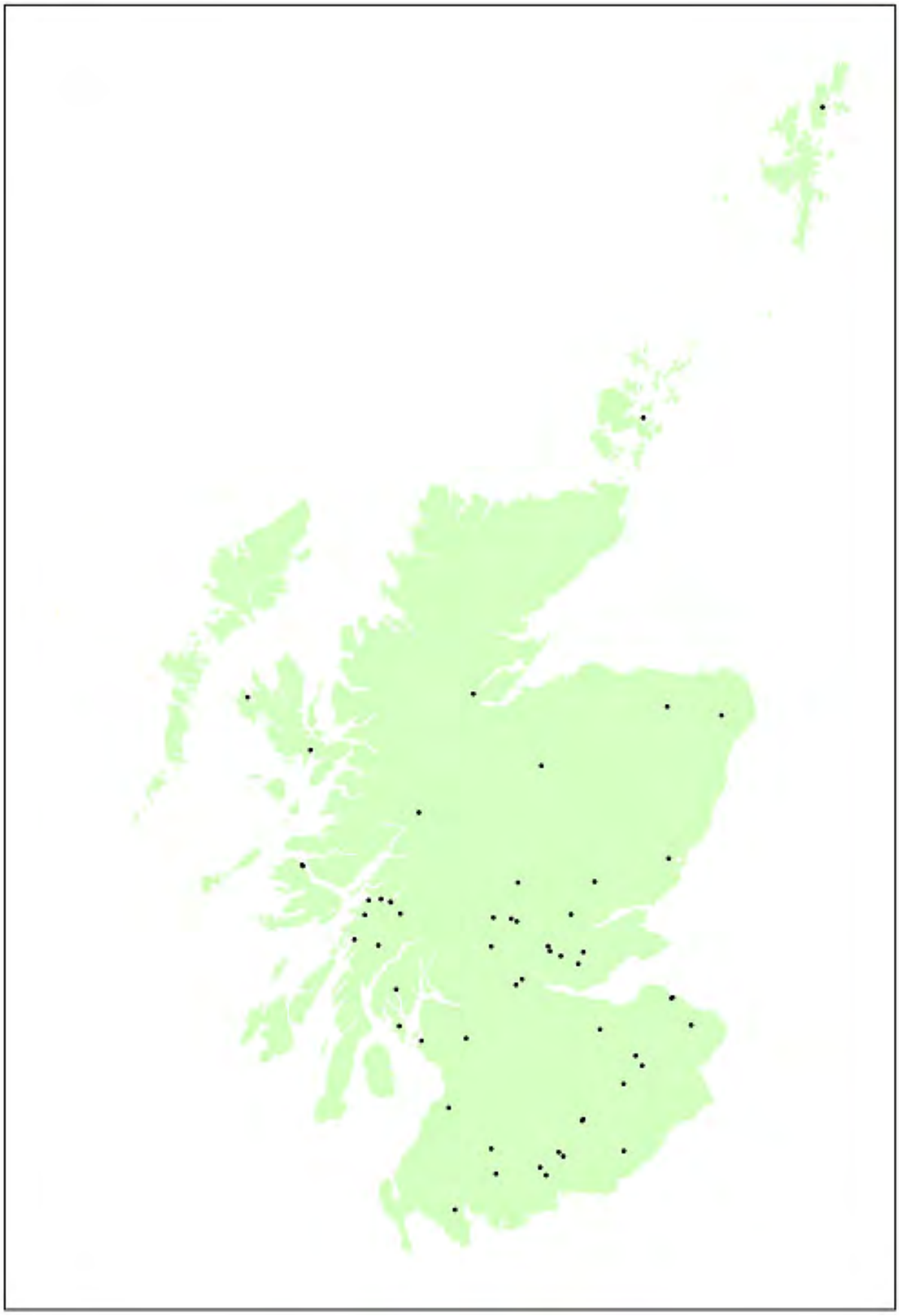
Production by Area

Table 6: Production and staffing by area in 2005

Area	No. sites	Table production (tonnes)	Restocking production (tonnes)	Mean tonnes per site	Staffing			Productivity tonnes/person
					F/T	P/T	Total	
North	14	917	96	72.4	16	4	20	50.6
East	19	1,516	294	95.3	34	8	42	43.1
West	21	3,009	89	147.5	35	9	44	70.4
South	16	728	340	66.8	23	14	37	28.9
All	70	6,170	819	99.8	108	35	143	48.9

Productivity per site was greatest in the west, 147.5 tonnes per site, a reflection of some of the production being in sea water rather than fresh water in this area. Productivity per person was also greatest in the west, at 70.4 tonnes per person.

Figure 1: The Distribution of Active Rainbow Trout Sites 2005



Type of Ova Laid Down

Table 7: Number (000s) and proportions (%) of ova types laid down to hatch during 1994-2005

Year	All female diploid no.(%)	Triploid no. (%)	Mixed sex diploid no. (%)	Total ova
1994	18,105 (92)	1,134 (6)	365 (2)	19,604
1995	19,546 (94)	1,170 (6)	119 (<1)	20,835
1996	21,308 (94)	935 (4)	435 (2)	22,678
1997	21,117 (90)	1,386 (6)	1,000 (4)	23,503
1998	23,222 (92)	1,515 (6)	504 (2)	25,241
1999	16,324 (88)	1,853 (10)	456 (2)	18,633
2000	17,264 (82)	1,202 (6)	2,513 (12)	20,979
2001	20,788 (90)	2,107 (9)	140 (1)	23,035
2002	19,733 (89)	1,822 (8)	570 (3)	22,125
2003	24,692 (94)	1,586 (6)	60 (<1)	26,338
2004	29,272 (90)	3,146 (10)	138 (<1)	32,556
2005	16,773 (83)	1,729 (8)	1,745 (9)	20,247

Source of Ova Laid Down

Table 8: Number (000s) and sources of ova laid down to hatch 1994-2005

Year	Ova produced in Great Britain (GB)			Imported ova			Total
	Own stock	Other stock	Total	Northern hemisphere	Southern hemisphere	Total	
1994	479	625	1,104	13,055	5,445	18,500	19,604
1995	165	360	525	12,485	7,825	20,310	20,835
1996	420	988	1,408	13,247	8,023	21,270	22,678
1997	1,232	837	2,069	11,594	9,840	21,434	23,503
1998	2,559	60	2,619	11,038	11,595	22,633	25,252
1999	878	392	1,270	11,415	5,946	17,361	18,631
2000	1,397	900	2,297	10,161	8,525	18,686	20,983
2001	918	525	1,443	13,515	8,075	21,590	23,033
2002	530	200	730	12,385	9,010	21,395	22,125
2003	430	280	710	25,578	50	25,628	26,338
2004	330	320	650	31,906	0	31,906	32,556
2005	281	105	386	16,977	2,884	19,861	20,247

In 2005, the total number of eyed-ova laid down to hatch decreased by over twelve million (38%) on the 2004 figure. The proportion of ova from GB broodstock decreased to 1.9% of the total, and the rainbow trout industry remained reliant on imported ova. Data on importation of ova into Scotland are also available from the import licences and are shown in Table 9a. Any discrepancy between the figures in Tables 8 and 9a is due to data being obtained from two independent sources.

Imports of Ova from Official Import Licences

Table 9a: Number (000s) and sources of ova imported into Scotland during 1998-2005

Source	1998	1999	2000	2001	2002	2003	2004	2005
N. Ireland	2,065	3,335	1,085	710	-	-	405	1,710
Isle of Man	3,273	4,222	5,842	6,670	6,775	6,855	8,012	1,700
Denmark	5,700	4,546	4,225	6,135	5,000	5,270	6,370	9,225
South Africa	11,585	6,036	7,762	8,075	7,750	50	-	-
USA	-	-	-	-	1,700	11,035	17,335	4,440
France	-	-	-	-	-	875	800	200
Australia	-	-	-	-	-	-	-	2,600
Totals	22,623	18,139	18,914	21,590	21,225	24,085	32,922	19,875

Table 9b: Seasonal variation in numbers (000s) and sources of ova imported into Scotland during 2005

Month	France	Australia	Isle of Man	Denmark	N. Ireland	USA
January	-	-	900	1,450	500	125
February	200	-	-	1,300	-	200
March	-	-	-	1,000	-	500
April	-	-	50	2,700	-	200
May	-	-	-	900	-	225
June	-	-	-	-	10	690
July	-	600	-	-	-	560
August	-	1,000	-	200	-	400
September	-	1,000	-	-	-	840
October	-	-	400	-	800	180
November	-	-	100	900	400	320
December	-	-	250	775	-	200
Totals	200	2,600	1,700	9,225	1,710	4,440

Suppliers within the EU accounted for 65% of ova imported into Scotland during 2005, with the USA accounting for 22% and Australia 13%. To maintain their ability to regulate production throughout the year and produce a constant supply of fish for their markets, producers have had to rely upon supplies of out of season ova from stocks in the southern hemisphere. This accounts for an import trade being established with Australia.

Trade in Fry and Fingerlings

Table 10: Number (000s) of fry and fingerlings traded during 1994-2005

Year	Fry and fingerlings bought			Total number bought	Total number sold
	All female diploid nos. (%)	Triploid nos. (%)	Mixed sex diploid nos. (%)		
1994	9,854 (90)	1,017 (9)	47 (<1)	10,918	10,379
1995	12,449 (95)	683 (5)	0	13,132	10,912
1996	12,174 (93)	572 (5)	283 (2)	13,029	11,578
1997	15,028 (94)	889 (5)	98 (1)	16,015	10,330
1998	13,035 (96)	410 (3)	80 (1)	13,525	11,000
1999	11,264 (94)	90 (1)	616 (5)	11,970	9,759
2000	13,410 (92)	287 (2)	892 (6)	14,589	12,505
2001	16,065 (96)	685 (4)	0	16,750	13,961
2002	10,031 (88)	670 (6)	667 (6)	11,368	10,101
2003	17,500 (94)	1,007 (5)	193 (1)	18,700	17,451
2004	18,859 (91)	1,536 (7)	364 (2)	20,759	19,166
2005	14,618 (83)	1,532 (9)	1,480 (8)	17,630	16,919

The established trade between hatcheries and on-growing farms continued in 2005. Some companies specialised in the production of fry and fingerlings. The total number of fry and fingerlings purchased by producers decreased by 15%, and the total number sold by producers also decreased by 12%. The disparity between supply and demand is met by supplies being bought from England, Wales and Northern Ireland. The shortage in supply was less than that noted in 2004.

Use of Vaccines

Table 11: Number of sites rearing fish vaccinated against enteric redmouth disease (ERM) during 1994-2005

Year	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
No. of sites	35	31	33	35	31	40	35	33	34	38	42	37

Vaccines continued to be widely used as a preventative treatment against ERM, a potentially serious bacterial disease, caused by the bacterium *Yersinia ruckeri*. A total of 30 million fish were vaccinated. Vaccination is generally carried out as a bath treatment at the fingerling stage, although some vaccines were administered by intra-peritoneal injection.

2. ATLANTIC SALMON (*Salmo salar*) - OVA AND SMOLTS

Annual production survey questionnaires were sent to all 41 companies registered with the Scottish Executive as being actively engaged in the freshwater production of Atlantic salmon in Scotland during 2005. Returns were received from all companies, covering the 148 sites currently in production.

Company and Site Data

Table 12: Number of companies and sites in production during 1997-2005[c]

Year	No. of companies	No. of sites
1997	65	171
1998	64	177
1999	65	189
2000	60	184
2001	56	169
2002	55	173
2003	48	176
2004	48	172
2005	41	148

In 2005 the number of companies registered with the Scottish Executive as being actively engaged in the freshwater production of Atlantic salmon decreased to 41. A total of 278 freshwater sites were registered and of these, 104 sites were inactive and 174 active. One hundred and forty eight of the active sites were in commercial production, the difference being accounted for by farms which were not used during 2005.

Production and Staffing

Table 13: Number (000s) of smolts produced, staff employed and smolt productivity during 1995-2005

Year		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Number (000s) of smolts produced		26,539	33,619	38,187	44,853	39,763	45,583	47,546	47,161	44,414	39,999	36,326
Staffing	Full-time	279	308	344	318	300	341	317	312	291	259	200
	Part-time	117	133	166	96	124	103	111	93	82	60	74
	Total	396	441	510	414	424	444	428	405	373	319	274
Productivity, 000s of smolts per person		67.0	76.2	74.9	108.3	93.8	102.7	111.1	116.4	119.1	125.4	132.6

[c] Under the terms of the Registration of Fish Farming and Shellfish Farming Business Order 1985, as amended, all persons engaged in the practice of fish farming in Scotland are required to register the details of their business within two months of the commencement of commercial activity. Fisheries Research Services is the Scottish Executive agency responsible for administering the fish farms business register and is the point of contact for farmers who wish to change registration details or register a new business. Although registration details of specific sites and businesses are confidential under Section 9 of the Diseases of Fish Act 1983, the company and site information is published here in summary form, in accordance with the terms of the Act.

Smolt production in 2005 decreased by over 3.6 million, a decrease of 9.2% compared to 2004. The number of staff employed decreased by 45 and productivity increased by 6%, to a figure of 132,600 smolts produced per employee.

Escapes

There were five reported escapes from freshwater Atlantic salmon sites in 2005, involving the loss of 367,043 fish.

Smolts by Age Group

Table 14: Number of smolts (000s) produced by type during 1994-2005

Year	S½	S1	S1½	S2	Total
1994	1,672	20,712	511	222	23,117
1995	2,663	22,705	365	806	26,539
1996	6,298	26,334	523	464	33,619
1997	9,333	27,679	692	483	38,187
1998	8,478	35,383	686	306	44,853
1999	10,770	28,345	586	62	39,763
2000	11,841	33,722	0	20	45,583
2001	14,684	32,732	110	20	47,546
2002	15,791	30,527	843	0	47,161
2003	14,907	28,836	671	0	44,414
2004	14,428	24,862	709	0	39,999
2005	12,639	22,197	1,489	1	36,326

In 2005, production was dominated by S1 smolts, although numbers produced decreased by 11%. The production of S½ smolts decreased by 12%. There were increases in the production of S1½ and S2 smolts.

Production Systems

Table 15: Number and capacity of production systems during 2001-2005

System	No. of sites with system					Total capacity, 000s cubic metres				
Year	2001	2002	2003	2004	2005	2001	2002	2003	2004	2005
Cages	76	81	80	76	61	328	409	391	365	378
Tanks and Raceways	93	92	96	96	87	48	41	40	43	38
Total	169	173	176	172	148	376	450	431	408	416

The principal types of facility used for the production of smolts in fresh water are cages or tanks and raceways. In 2005, the number of farms employing tanks and raceways decreased by 9, and the number of farms employing cages decreased by 15. In terms of volume, tank and raceway capacity decreased by 5,000 m^3, and cage volume increased by 13,000 m^3. This resulted in a net increase in volume of 8,000 m^3 available for the production of smolts in Scotland during 2005.

Table 16: Number (000s) of smolts produced and stocking densities by production system during 2001-2005

	Number of smolts produced (000s)					Stocking densities (smolts /m^3)				
Year	2001	2002	2003	2004	2005	2001	2002	2003	2004	2005
Cages	25,237	27,076	24,094	17,575	15,380	77	66	62	48	41
All others	22,309	20,085	20,320	22,424	20,946	465	490	508	521	551
Total	47,546	47,161	44,414	39,999	36,326	-	-	-	-	-

The average stocking densities of cages decreased compared to 2004, whilst the stocking densities of tanks increased; in the case of cages from 48 to 41 fish per m³ and in the case of tanks, from 521 to 551 fish per m³.

Ova Production

Table 17: Number (000s) of salmon ova produced during 1998-2005

Year	1998	1999	2000	2001	2002	2003	2004	2005
No. of ova	151,841	122,649	124,619	99,921	107,996	115,569	128,866	73,211

Just over seventy three million ova were stripped in 2005, a decrease of over fifty five million (43%) on the 2004 season.

Table 18: Source, number (000s) and previous year's estimate of ova laid down to hatch during 1994-2006

Year	In-house broodstock	Out-sourced GB broodstock	GB wild broodstock	Foreign ova	Total	Previous year's estimate
1994	25,883	14,991	450	5,347	46,671	49,064
1995	37,176	25,063	475	2,160	64,874	46,538
1996	46,545	23,784	65	8,045	78,439	71,635
1997	60,421	23,308	323	1,750	85,802	76,629
1998	49,207	19,085	0	1,010	69,302	69,632
1999	52,122	25,804	4,291	500	82,717	68,644
2000	38,674	33,592	1,605	4,660	78,531	69,220
2001	40,086	32,002	615	10,720	83,423	83,458
2002	40,732	30,664	120	15,184	86,700	80,679
2003	38,766	21,138	0	20,822	80,726	73,193
2004	31,390	20,024	27	19,138	70,579	74,464
2005	43,261	22,465	71	9,896	75,693	65,741
2006	-	-	-	-	-	58,385

The number of ova laid down to hatch was 75.7 million, an increase of over five million (7.2%) on the 2004 figure. The majority of the ova (57%) were derived from producers' own broodstock, the proportion being more than that noted in 2004. Supplies from other producers' broodstock were proportionally larger, with a decreasing proportion being derived from sources outside Great Britain. Producers' estimates for the number of ova to be laid down in 2006 show a projected decrease compared to the actual number of ova laid down in 2005. The ova derived from wild stocks are generally held and hatched for wild stock enhancement by the aquaculture industry in cooperation with wild fisheries managers.

Smolts Produced and Put to Sea

Table 19: Actual and projected smolt production and smolts put to sea (millions) during 1996-2007

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Actual smolts put to sea	32.8	42.8	45.9	41.1	45.2	48.6	50.1	43.8	38.2	37.2		
Smolts produced	33.6	38.2	44.8	39.8	45.6	47.5	47.2	44.4	40.0	36.3		
Estimated production	31.8	41.6	45.3	49.6	42.1	50.2	49.3	44.2	40.0	36.2	33.2	40.4
Ratio of ova laid down to smolts produced	2.3	2.2	1.5	1.7	1.8	1.8	1.8	1.8	1.8	2.1		

The figure for the number of smolts put to sea includes smolts produced in England and fish imported from elsewhere, whereas smolt production data relate only to those produced in Scotland. Any discrepancy may be due to smolts that were produced in Scotland but were not put to sea in Scotland. Farmers estimate putting 33.2 million smolts to sea in 2006.

The ratio of ova laid down to hatch to smolts produced in 2005 was greater than the ratio in 2004.

Scale of Production

Table 20: Smolt producing sites grouped by numbers (000s) of smolts produced during 1993-2005

Year	Scale of production								No. of sites in production	Total smolts produced
	1-10	11-25	26-50	51-100	101-250	251-500	501-1,000	>1,000		
1993	1	9	15	17	32	21	9	0	104	21,043
1994	4	5	13	24	37	17	13	0	113	23,117
1995	1	6	15	29	30	26	14	1	122	26,540
1996	1	7	13	29	33	26	17	3	129	33,619
1997	0	3	13	22	39	24	18	6	125	38,187
1998	1	3	12	24	33	29	20	8	130	44,853
1999	1	1	15	25	29	24	21	7	123	39,763
2000	1	2	10	17	36	24	24	9	123	45,583
2001	0	1	7	19	30	26	13	14	110	47,546
2002	1	1	11	17	29	34	17	10	120	47,161
2003	2	0	7	20	32	31	12	10	114	44,414
2004	3	3	9	14	31	22	18	7	107	39,999
2005	2	1	4	15	25	22	21	4	94	36,326

Note: These data refer only to sites producing smolts. The sites holding only ova, fry or parr are excluded.

There has been a decrease in the number of sites producing smolts since 2004. The number of sites producing less than 101,000 smolts has decreased by seven, and there has been a decrease of six in the number of sites producing more than 100,000 smolts. The number of sites producing in excess of one million smolts per year decreased by three, with an increase in the number of sites producing between 501,000 and one million smolts per year. This drop in the number of sites producing smolts has coincided with an overall decrease in smolts produced.

Production of Ova and Smolt by Production Area

Table 21: Staffing and ova laid down to hatch, 2004-2005, smolt production 2004-2005 and estimated production 2006-2007 by region

Region	Number of staff employed in 2005		Ova laid down to hatch (000s)		Smolt production (000s)		Estimated smolt production (000s)	
	F/T	P/T	2004	2005	2004	2005	2006	2007
Northwest	103	31	38,217	33,726	19,737	18,783	16,939	20,920
Orkney	2	6	210	100	754	185	90	100
Shetland	14	6	2,475	1,644	2,087	1,528	710	810
West	36	19	13,819	19,488	9,572	9,491	8,315	9,680
Western Isles	34	7	12,909	16,615	6,141	4,934	5,119	6,220
East and South	11	5	2,949	4,120	1,708	1,405	2,041	2,650
All Scotland	200	74	70,579	75,693	39,999	36,326	33,214	40,380

The north west, west and the Western Isles were the main ova and smolt producing areas in Scotland in 2005, and employed the greatest number of staff.

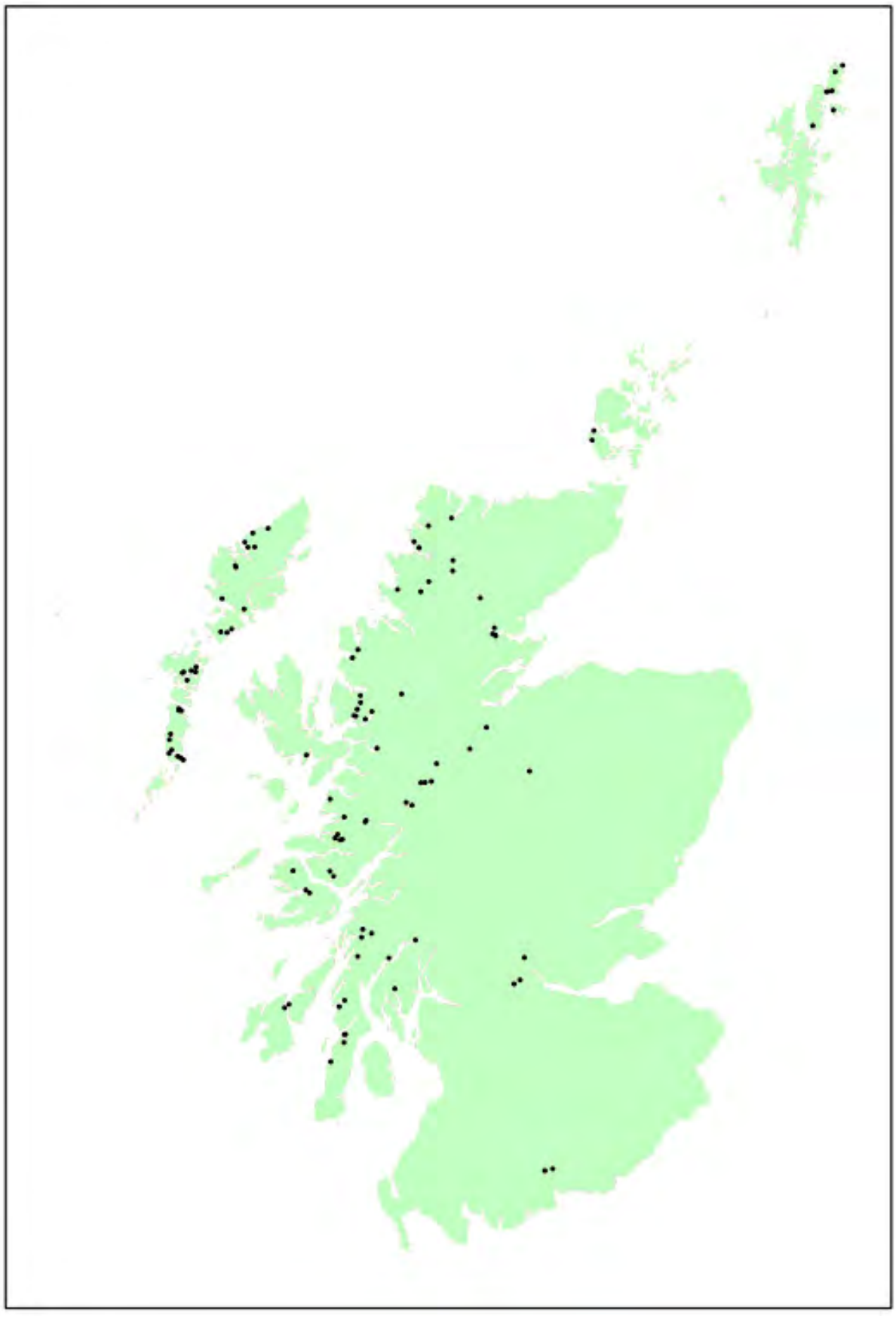
International Trade in Ova

Since the introduction of the EU single market on 1 January 1993 and the associated Fish Health Regulations common to all EU member states, a trade in live salmon and ova has been established.

In addition, the European Economic Area (EEA) Agreement allows trade between the EU and the member states of the European Free Trade Association (EFTA). Until 2003, trade under the EEA Agreement was restricted to halibut alevins and salmonid eggs or gametes. With the cessation of these restrictions, trade became based on the same rules as are established within the EU regarding approval of farms and zones for listed diseases. Norway has an equivalent status to Great Britain with regard to List II diseases, but additional guarantees granted to Great Britain in respect of *Gyrodactylus salaris* have prevented trade in live fish. Changes to these protective measures in 2003 mean the importation of salmonid ova is permitted from Norway.

Trade with Third Countries has also been established, but only from sites that have met the same health standards as are established within the EU regarding the approval of farms and zones for listed diseases. Exports to countries outside the EU are subject to the health conditions placed by the importing country. FRS advises potential exporters to ascertain with the importing country any specific health testing requirements that may be a condition of import.

Figure 2: The Distribution of Active Smolt Sites 2005



Imports and Exports

Table 22a: Source and number (000s) of ova, parr and smolts imported during 1994-2005 derived from import licences

Import Year	Ova						Parr and Smolts
	EU Member States	EFTA		Third Countries		Total	EU Member States
		Iceland	Norway	Australia	USA		
1994	5,823	-	-	240	-	6,063	72
1995	1,470	-	-	600	-	2,070	2,902
1996	6,690	-	-	1,355	-	8,045	2,849
1997	2,305	-	-	1,200	-	3,505	2,168
1998	260	-	-	750	-	1,010	2,140
1999	244	-	-	500	-	744	900
2000	0	4,610	-	500	-	5,110	3,436
2001	8,173	10,833	-	1,620	-	20,626	2,475
2002	8,650	11,623	-	1,800	500	22,573	2,879
2003	7,820	9,518	2,900	550	400	21,188	2,570
2004	4,450	3,475	6,750	1,860	450	16,985	824
2005	2,610	570	13,210	-	450	16,840	150

The decrease in the numbers of ova imported was not significant. The number of parr imported decreased.

Table 22b: Destination and number (000s) of salmon ova exported during 1995-2005 derived from export certificates

Export year	Farmed origin				Total	Wild origin total
	Chile	EU	Faroes	Others		
1995	19,542	7,770	0	40	27,352	450
1996	19,720	20,445	0	20	40,185	435
1997	44,810	12,525	0	0	57,335	270
1998	23,375	4,459	0	20	27,854	492
1999	16,880	13,054	0	0	29,934	52
2000	9,740	25,311	0	0	35,051	50
2001	2,675	8,542	0	0	11,217	0
2002	1,600	6,627	0	0	8,227	0
2003	0	2,171	0	0	2,171	0
2004	2,215	3,699	0	0	5,914	0
2005	8,560	3,130	1,566	0	13,256	0

In 2005, a total of 13.2 million ova were exported. Exports of ova to other EU member states decreased by 15% to 3.1 million in 2005. The trade with Chile increased by over six million ova. Overall, exports more than doubled compared with the 2004 figure.

Vaccines

Table 23: Number of sites using vaccines and number (millions) of fish vaccinated during 1997-2005

Year	1997	1998	1999	2000	2001	2002	2003	2004	2005
No. of sites	118	122	115	114	106	108	104	98	84
No. of fish (millions) vaccinated	39.7	43.7	43.9	45.8	51.3	47.5	41.7	39.4	33.8

Vaccines were used to provide protection against furunculosis, a disease caused by the bacterium *Aeromonas salmonicida*, which was the cause of serious losses within the fish farming industry in the late 1980s and early 1990s. Vaccination is normally carried out at the pre-smolt stage by intra-peritoneal injection. In addition, some sites vaccinated fish against enteric redmouth disease (ERM), infectious pancreatic necrosis (IPN) and *Vibrio*sis. A total of 33.8 million fish were vaccinated across 84 sites.

3. ATLANTIC SALMON - PRODUCTION

Production

Production survey information was collected from all 50 companies actively involved in Atlantic salmon production, farming 278 active sites. This figure represents the entire industry operating in Scotland.

Table 24: Annual production of Atlantic salmon (tonnes) during 1986-2005 and projected production in 2006

Year	Tonnes	Percentage difference	Year	Tonnes	Percentage difference
1986	10,337	-	1997	99,197	19
1987	12,721	23	1998	110,784	12
1988	17,951	41	1999	126,686	14
1989	28,553	59	2000	128,959	2
1990	32,351	13	2001	138,519	7
1991	40,593	25	2002	144,589	4
1992	36,101	-11	2003	169,736	17
1993	48,691	35	2004	158,099	-7
1994	64,066	32	2005	129,588	-18
1995	70,060	9	2006	137,018*	
1996	83,121	19			

*farmers' estimate of projected tonnage based on stocks currently being on-grown

The total production of Atlantic salmon during 2005 was 129,588 tonnes, a decrease of 28,511 tonnes (-18%) on 2004 production. This continues the recent trend of decreasing production.

Escapes

There were nineteen reported escapes from seawater Atlantic salmon sites in 2005, involving the loss of 510,840 fish.

Table 25: Number (000s) and production (tonnes) of salmon harvested and mean fish weight (Kg) per year class during 1995-2005

	Year of smolt input	Year of harvest	Number (000s)	Production (tonnes)	Mean weight at harvest (Kg)
Harvest in year 0 (i.e. in year of input)	1995	1995	207	369	1.8
	1996	1996	315	638	2.0
	1997	1997	282	585	2.1
	1998	1998	696	2,048	2.9
	1999	1999	1,000	2,763	2.8
	2000	2000	765	2,673	3.5
	2001	2001	557	1,227	2.2
	2002	2002	272	824	3.0
	2003	2003	82	276	3.4
	2004	2004	168	319	1.9
	2005	2005	0	0	0
Harvest in year 1	1994	1995	14,420	47,775	3.3
	1995	1996	17,132	57,998	3.4
	1996	1997	20,245	71,349	3.5
	1997	1998	29,014	86,783	3.0
	1998	1999	22,556	83,823	3.8
	1999	2000	23,077	89,963	3.9
	2000	2001	22,726	96,539	4.2
	2001	2002	23,528	90,230	3.8
	2002	2003	22,602	96,205	4.3
	2003	2004	19,596	85,792	4.4
	2004	2005	15,075	67,738	4.5
Harvest in year 2	1993	1995	5,137	21,916	4.3
	1994	1996	5,408	24,485	4.5
	1995	1997	6,195	27,263	4.4
	1996	1998	5,148	21,953	4.3
	1997	1999	9,027	40,100	4.4
	1998	2000	8,450	36,323	4.3
	1999	2001	9,096	40,754	4.5
	2000	2002	11,354	53,535	4.7
	2001	2003	15,619	73,255	4.7
	2002	2004	15,555	71,988	4.6
	2003	2005	13,920	61,850	4.4

Table 26: Number (000s) and production (tonnes) of grilse and pre-salmon harvested during 1995-2005

Year	Grilse (January-August)			Pre-salmon (September-December)		
	Number	Tonnes	Average weight (Kg)	Number	Tonnes	Average weight (Kg)
1995	7,610	22,235	2.9	6,809	25,540	3.8
1996	8,669	25,776	3.0	8,462	32,222	3.8
1997	10,489	34,227	3.3	9,756	37,122	3.8
1998	16,740	38,963	2.3	12,275	47,820	3.9
1999	12,448	41,259	3.3	10,109	42,564	4.2
2000	12,561	45,229	3.6	10,516	44,734	4.2
2001	11,072	42,065	3.8	11,654	54,474	4.7
2002	9,872	33,609	3.4	13,656	56,621	4.1
2003	8,560	32,977	3.8	14,042	63,228	4.5
2004	6,824	27,710	4.1	12,772	58,082	4.5
2005	5,662	22,972	4.1	9,413	44,766	4.7

Table 27: Percentage (by weight) of annual production by growth stage harvested during 1997-2005

Year	1997	1998	1999	2000	2001	2002	2003	2004	2005
Growth stage	-	-	-	-	-	-	-	-	-
Input year fish	<1	2	2	2	<1	<1	<1	<1	0
Grilse	35	35	32	35	30	23	19	17	18
Pre-salmon	37	43	34	35	39	39	37	37	34
Salmon	27	20	32	28	30	37	43	45	48

Survival and Production in Smolt Year Classes

Table 28: Survival and production in smolt year classes during 1990-2005

Year of smolt input	Smolt input (000s)	Harvest year 0				Harvest year 1				Harvest year 2				Total % of year class harvested	Year class weight (tonnes)	Yield per smolt (Kg)
		Number (000s)	Weight (tonnes)	Mean weight (Kg)	% harvested	Number (000s)	Weight (tonnes)	Mean weight (Kg)	% harvest	Number (000s)	Weight (tonnes)	Mean weight (Kg)	% harvest			
1990	21,408	-	-	-	-	8,877	21,026	2.4	41.5	4,315	14,728	3.4	20.1	61.6	35,754	1.67
1991	20,227	-	-	-	-	8,864	21,373	2.4	43.8	4,675	15,875	3.4	23.1	66.9	37,248	1.84
1992	20,527	-	-	-	-	11,102	32,738	3.0	54.1	5,096	21,812	4.3	24.8	78.9	54,550	2.65
1993	20,541	46	78	1.7	0.2	13,446	41,865	3.1	65.5	5,135	21,916	4.2	25.0	90.7	63,859	3.10
1994	21,953	260	388	1.5	1.2	14,420	47,775	3.3	65.7	5,408	24,485	4.5	24.6	91.5	72,629	3.31
1995	26,786	206	269	1.8	0.8	17,132	57,998	3.4	64.0	6,195	27,263	4.4	23.1	87.8	85,530	3.19
1996	32,906	315	638	2.0	1.9	20,245	71,349	3.5	61.5	5,148	21,953	4.3	15.6	78.1	93,940	2.85
1997	42,766	282	585	2.1	0.7	29,014	86,783	3.0	67.8	9,027	40,098	4.4	21.1	89.6	127,466	2.98
1998	45,870	696	2,048	2.9	1.5	22,556	83,823	3.7	49.2	8,450	36,323	4.3	18.4	69.1	122,194	2.66
1999	41,106	1,000	2,763	2.8	2.4	23,077	89,963	3.9	56.1	9,096	40,754	4.5	22.1	80.6	133,480	3.25
2000	45,185	765	2,673	3.5	1.7	22,726	96,539	4.2	50.3	11,354	53,535	4.7	25.1	77.1	152,747	3.38
2001	48,643	557	1,227	2.2	1.1	23,528	90,230	3.8	48.4	15,619	73,255	4.7	32.1	81.6	164,712	3.39
2002	50,086	272	824	3.0	0.5	22,602	96,205	4.3	45.1	15,555	71,988	4.6	31.1	76.7	169,017	3.37
2003	43,083	82	276	3.4	0.2	19,596	85,792	4.4	45.5	13,920	61,850	4.4	32.3	78.0	147,918	3.43
2004	38,182	168	319	1.9	0.4	15,075	67,738	4.5	39.5							
2005	37,168	-	-	-	-											

In 2003, the last year for which survival can be calculated, the survival rate from smolt input to harvest was 78%. The 2003 year class displayed a higher survival rate than that noted in 2002, but was lower than the survival averaged over the last 14 year-classes.

Of the 2004 year class, 39.9% of the input has been harvested, approximately 5.8% lower than the average harvest of fish one year after input in the 2003 year class. The average weight increased by 0.1Kg to 4.5 Kg. This may indicate an increased harvest in 2006 of two sea winter (2SW) fish.

In 2005, there was no harvest of fish from the 2005 smolt input. This was a decrease compared with the proportion of fish harvested from the same year class in 2004.

Smolts to Sea

Table 29: Number (000s) and origin of smolts put to sea during 1993-2005

Year	Smolts put to sea (000s)				Total (000s)	Scottish Origin	English Origin		Other Origin	
	S½	S1	S1½	S2		%	(000s)	%	(000s)	%
1993	-	19,843	-	698	20,541	96	827	4	-	-
1994	1,865	19,701	113	274	21,953	93	1,451	7	-	-
1995	2,442	23,081	589	674	26,786	97	852	3	-	-
1996	5,527	26,157	180	974	32,838	90	1,166	4	1,936	6
1997	8,936	33,274	182	374	42,766	88	2,957	7	2,028	5
1998	12,796	32,649	190	235	45,870	92	2,714	6	1,080	2
1999	11,585	29,119	335	68	41,107	94	2,221	5	600	1
2000	9,517	35,176	399	93	45,185	92	3,396	8	0	0
2001	14,118	34,321	171	33	48,643	98	1,183	2	0	0
2002	15,850	32,761	1,475	0	50,086	94	1,564	3	1,676	3
2003	14,534	28,283	986	0	43,803	93	2,590	6	325	>1
2004	13,713	23,248	1,221	0	38,182	97	634	2	541	>1
2005	13,051	22,501	1,616	0	37,168	96	1,594	4	0	0

The total number of smolts put to sea in 2005 was over 37 million. The smolt input comprised mainly S1 smolts (61%), and the proportion of photoperiod adjusted fish (S½ smolts and S1½ smolts) input remained at 39%. Approximately 4% of smolts input into Scottish salmon farms were sourced from outwith Scotland. This is an increase compared with the proportion observed in 2004.

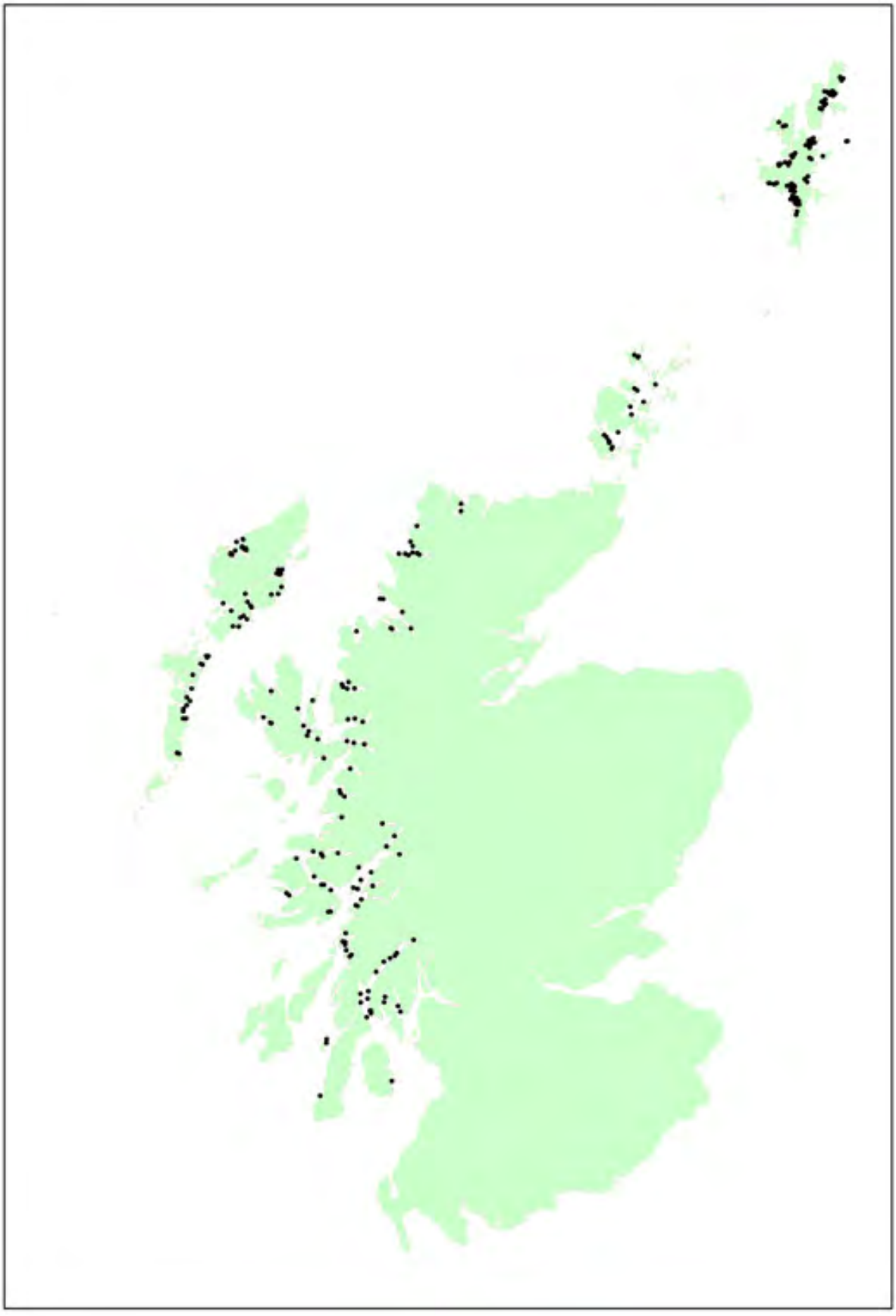
Survival and Production in Smolt Year Classes by Production Area

Table 30: Number (000s) of smolts put to sea and year class survival by area during 1994-2005

Region	Smolts put to sea (000s)		Harvest in year 0			Harvest in year 1			Harvest in year 2			Total Harvest (=survival)	
	Year	No	Year	No	%	Year	No	%	Year	No	%	No	%
North West	1994	7,914	1994	108	1.4	1995	4,721	59.6	1996	1,438	18.2	6,267	79.2
	1995	9,428	1995	60	0.6	1996	7,500	79.6	1997	1,153	12.2	8,713	92.4
	1996	12,438	1996	99	0.8	1997	8,335	67.0	1998	1,818	14.6	10,252	82.4
	1997	11,228	1997	112	1.0	1998	7,253	64.6	1999	2,183	19.4	9,548	85.0
	1998	17,808	1998	315	1.8	1999	9,075	50.9	2000	1,614	9.1	11,004	61.8
	1999	11,393	1999	288	2.5	2000	9,422	82.7	2001	1,198	10.5	10,908	95.7
	2000	11,308	2000	457	4.0	2001	6,754	59.7	2002	2,144	19.0	9,355	82.7
	2001	13,767	2001	93	0.7	2002	8,112	58.9	2003	2,455	17.8	10,660	77.4
	2002	12,634	2002	135	1.1	2003	7,007	55.5	2004	3,113	24.6	10,255	81.2
	2003	13,103	2003	-	-	2004	7,667	58.5	2005	2,847	21.7	10,514	80.2
	2004	9,642	2004	168	1.7	2005	4,516	46.8					
	2005	10,888	2005	-	-								
Orkney	1994	754	1994	-	-	1995	399	52.9	1996	222	29.4	621	82.3
	1995	1,127	1995	-	-	1996	508	45.1	1997	430	38.1	938	83.2
	1996	1,175	1996	-	-	1997	428	36.4	1998	291	24.8	719	61.2
	1997	1,506	1997	-	-	1998	971	64.5	1999	257	17.1	1,228	81.6
	1998	2,409	1998	75	3.1	1999	986	40.9	2000	259	10.8	1,320	54.8
	1999	3,235	1999	10	0.3	2000	1,614	49.9	2001	782	24.2	2,406	74.4
	2000	2,604	2000	-	-	2001	670	25.7	2002	597	22.9	1,267	48.6
	2001	2,932	2001	-	-	2002	1,369	46.7	2003	1,464	49.9	2,833	96.6
	2002	2,741	2002	-	-	2003	1,169	42.6	2004	742	27.1	1,911	69.7
	2003	2,964	2003	-	-	2004	1,141	38.5	2005	980	33.1	2,121	71.6
	2004	1,843	2004	-	-	2005	480	26.0					
	2005	2,192	2005	-	-								
Shetland	1994	5,012	1994	24	0.5	1995	3,055	61.0	1996	1,846	36.8	4,925	98.3
	1995	5,811	1995	41	0.7	1996	3,021	52.0	1997	2,622	45.1	5,684	97.8
	1996	6,234	1996	-	-	1997	3,828	61.4	1998	1,141	18.3	4,969	79.7
	1997	13,276	1997	-	-	1998	7,265	54.7	1999	3,835	28.9	11,100	83.6
	1998	12,617	1998	78	0.6	1999	5,498	43.6	2000	4,783	37.9	10,359	82.1
	1999	12,663	1999	65	0.5	2000	5,576	44.0	2001	4,139	32.7	9,780	77.2
	2000	15,096	2000	-	-	2001	5,102	33.8	2002	4,578	30.3	9,680	64.1
	2001	17,398	2001	123	0.7	2002	6,465	37.2	2003	7,973	45.8	14,561	83.7
	2002	17,260	2002	-	-	2003	5,850	33.9	2004	5,675	32.9	11,525	66.8
	2003	14,446	2003	-	-	2004	6,031	41.7	2005	4,071	28.2	10,102	69.9
	2004	12,372	2004	-	-	2005	4,220	34.1					
	2005	10,824	2005	-	-								

Region	Smolts put to sea (000s)		Harvest in year 0			Harvest in year 1			Harvest in year 2			Total Harvest (=survival)	
	Year	No	Year	No	%	Year	No	%	Year	No	%	No	%
South West	1994	4,614	1994	-	-	1995	2,994	64.9	1996	1,460	31.6	4,454	96.5
	1995	6,437	1995	25	0.4	1996	3,268	50.8	1997	1,349	20.9	4,642	72.1
	1996	9,924	1996	64	0.6	1997	3,317	33.4	1998	1,408	14.2	4,789	48.2
	1997	11,540	1997	-	-	1998	4,126	35.7	1999	2,305	20.0	6,431	55.7
	1998	6,505	1998	41	0.6	1999	2,543	39.1	2000	1,501	23.1	4,085	62.8
	1999	5,370	1999	226	4.2	2000	1,626	30.3	2001	2,131	39.7	3,983	74.2
	2000	7,851	2000	110	1.4	2001	4,554	58.0	2002	2,925	37.3	7,589	96.7
	2001	7,667	2001	-	-	2002	3,014	39.3	2003	3,022	39.4	6,036	78.7
	2002	7,403	2002	-	-	2003	3,761	50.8	2004	2,808	37.9	6,569	88.7
	2003	6,834	2003	-	-	2004	2,110	30.9	2005	3,646	53.3	5,756	84.2
	2004	5,926	2004	-	-	2005	3,281	55.4					
	2005	6,589	2005	-	-								
Western Isles	1994	4,002	1994	125	3.1	1995	3,252	81.3	1996	442	11.0	3,819	95.4
	1995	3,983	1995	80	2.0	1996	2,836	71.2	1997	641	16.1	3,557	89.3
	1996	5,137	1996	152	3.0	1997	4,340	84.5	1998	491	9.5	4,983	97.0
	1997	5,274	1997	170	3.2	1998	3,900	73.9	1999	447	8.5	4,517	85.6
	1998	6,559	1998	187	2.8	1999	4,455	67.9	2000	294	4.5	4,936	75.2
	1999	8,445	1999	411	4.9	2000	4,839	57.3	2001	847	10.0	6,097	72.2
	2000	8,325	2000	198	2.4	2001	5,646	67.8	2002	1,110	13.3	6,954	83.5
	2001	6,879	2001	341	5.0	2002	4,568	66.4	2003	705	10.2	5,614	81.6
	2002	10,048	2002	137	1.4	2003	4,815	47.9	2004	3,217	32.0	8,169	81.3
	2003	6,456	2003	82	1.3	2004	2,647	41.0	2005	2,377	36.8	5,106	79.1
	2004	8,399	2004	-	-	2005	2,578	30.7					
	2005	6,675	2005	-	-								

Figure 3: The Distribution of Active Salmon Production Sites 2005



Staffing

Table 31: Number of staff employed in salmon production during 1995-2005

Year		1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Staff	F/T	1,104	1,150	1,088	1,117	1,036	1,141	1,066	1,083	1,066	1,019	851
	P/T	251	241	207	192	268	256	191	223	151	142	128
Total staff		1,355	1,391	1,295	1,309	1,304	1,397	1,257	1,306	1,217	1,161	979
Productivity (tonnes/person)		51.7	59.8	76.6	84.6	97.2	92.3	110.2	110.7	139.5	136.2	132.4

The total number of staff employed in salmon production in 2005 was 979 a decrease of 182 compared with 2004. The staffing figures collected refer specifically to the production of salmon and do not include figures for staff involved with processing or marketing activities. Productivity decreased from 136.2 to 132.4 tonnes production per person.

Production Methods

Table 32: Production methods, capacity, tonnage and average stocking densities (Kg/m^3) during 2003-2005

Method	Number of sites			Total capacity (000s cubic metres)			Production (tonnes)		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
Seawater tanks	1	1	1	5.5	5.8	5.8	0	0	0
Seawater cages	325	314	277	15,632	15,531	15,569	169,736	158,099	129,588
For cage sites: ratio of production (Kg) to cage capacity (m^3)							10.9	10.2	8.3

All of the fish were produced in seawater cages. The fact that there was no production from seawater tank sites in 2005 reflects the continued high installation and running costs incurred in operating seawater tank systems. Thirteen active seawater tank sites were registered in Scotland, but none were actively producing salmon. Most seawater tank capacity has now been re-deployed for the production of other species or salmon broodstock.

Sea cage capacity increased by 38,000 m^3 during 2005. This reflects an increase in the use of the production capacity of sites as the number of sites in production decreases. Production efficiency in cages, measured as the ratio of fish weight in kilograms produced per cubic metre, decreased by 1.9 Kg in 2005. In cage sites, the ratio of production, expressed in kilograms, to cage capacity, expressed in cubic metres, was 10.9, 10.2 and 8.3 in 2003, 2004 and 2005 respectively. This indicates that on average across all production stages in any year, the stocking density is just below 10 kilograms per cubic metre.

Scale of Production by Site

Table 33: Number of sites shown in relation to their production grouping and percentage share of production 1995-2005

Production grouping (tonnes)	0	1-50	51-100	101-200	201-500	501-1,000	>1,000	Total Sites*	Total Tonnes
1995	162	24	23	37	68	32	13	359	70,060
1996	125	20	28	49	66	25	21	334	83,121
1997	120	21	22	41	63	43	28	338	99,197
1998	130	32	16	31	66	39	29	343	11,784
1999	158	21	17	21	53	42	39	351	126,686
2000	183	8	20	15	40	40	40	346	128,959
2001	148	9	4	28	41	39	51	320	138,519
2002	131	10	10	25	50	51	51	328	144,589
2003	125	6	14	13	53	45	70	326	169,736
2004	122	10	7	25	41	55	55	315	158,099
2005	112	8	13	16	41	37	51	278	129,588
1995	0	1	2	8	31	32	26	-	-
1996	0	1	3	9	26	22	39	-	-
1997	0	1	2	6	20	28	43	-	-
1998	0	1	1	4	21	23	50	-	-
1999	0	1	1	2	13	24	59	-	-
2000	0	0.6	1.4	1.9	10.9	25.1	60.5	-	-
2001	0	0.2	0.2	2.9	10.0	20.8	65.9	-	-
2002	0	0.2	0.5	2.7	12.8	26.5	57.3	-	-
2003	0	0.1	0.6	1.2	10.4	19.7	68	-	-
2004	0	0.1	0.4	2.4	9.4	26.1	61.6	-	-
2005	0	0.2	0.7	1.9	10.8	20.5	65.9	-	-

*Includes farms stocked but having no production.

In 2005, there was a decrease of five in the number of sites producing less than 500 tonnes and a decrease of twenty two in those sites producing over 500 tonnes. This reflects the decrease in the overall number of sites in production and the decrease in the number of smolts being put to sea.

Company Productivity

Table 34: Number of companies grouped by production (tonnes), manpower and productivity (tonnes per person) during 2004-2005

Total Tonnage		0-100	101-200	201-400	401-700	701-1,000	1,001-2,000	>2,000	Total
No. of Companies	2004	15	6	6	4	11	9	18	69
	2005	13	3	6	2	6	6	14	50
No. of tonnes	2004	55	941	1,534	2,188	9,599	12,038	131,744	158,099
	2005	126	391	1,712	927	5,239	9,360	111,833	129,588
Manpower (total)	2004	27	30	29	12	82	77	904	1,161
	2005	38	11	28	8	66	100	728	979
Productivity (tonnes/person)	2004	2	31	53	182	117	156	146	136
	2005	3	35	61	116	79	94	154	132

Productivity may be used as a measure of efficiency, and was found to be related to the scale of production. The greatest productivity (154 tonnes per person) was achieved in those companies having a production of over two thousand tonnes, and the least (three tonnes per person) in the companies producing the smallest tonnages. In comparison with 2004 the average company productivity decreased from 136 to 132 tonnes per person.

Overall production was dominated by 14 companies in 2005, which between them accounted for over 86% of the salmon production in Scotland.

Manpower and Production by Production Area

Table 35: Manpower and production (tonnes) by area 1996-2005 and projected production in 2006

Region	Year	Staff		Annual Production	Productivity (t/person)	Year of input		Grilse		Pre salmon		Salmon	
		F/T	P/T			Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)
North west	1996	405	45	32,282	72	200	2.0	14,824	3.1	10,789	3.9	6,469	4.5
	1997	392	40	35,218	82	221	2.0	14,879	3.2	14,669	3.9	5,449	4.7
	1998	396	43	32,213	73	1,139	3.6	12,847	3.0	10,973	3.8	7,254	4.0
	1999	403	72	39,635	83	670	2.3	18,618	3.1	12,538	4.0	7,809	3.6
	2000	365	62	45,486	106	1,795	3.9	20,360	3.5	16,374	4.4	6,957	4.3
	2001	373	38	34,120	83	130	1.4	14,062	3.5	13,334	4.8	6,594	5.5
	2002	366	77	40,156	91	437	3.2	11,819	3.2	17,772	4.0	10,128	4.7
	2003	259	32	40,425	139	-	-	12,250	3.7	15,971	4.3	12,204	5.0
	2004	321	38	48,609	135	319	1.9	10,912	4.0	22,586	4.6	14,792	4.7
	2005	267	31	32,439	109	-	-	8,816	3.9	10,608	4.7	13,015	4.6
	2006			40,399*									
Orkney	1996	55	13	2,444	36	-	-	511	2.5	1,023	3.3	910	4.1
	1997	36	20	3,063	67	-	-	277	2.6	1,119	3.5	1,667	3.9
	1998	66	15	4,485	55	150	2.0	1,884	3.4	1,378	3.3	1,073	3.4
	1999	78	20	4,902	50	22	2.2	1,162	3.2	2,486	4.0	1,232	4.8
	2000	91	15	6,370	60	-	-	3,338	3.6	2,089	3.1	943	3.6
	2001	75	15	5,588	62	-	-	810	4.2	1,892	4.0	2,886	3.7
	2002	80	11	6,565	72	-	-	1,949	3.2	2,649	3.5	1,967	3.3
	2003	121	15	10,740	79	-	-	1,016	3.6	3,508	4.0	6,216	4.2
	2004	68	10	6,600	85	-	-	1,877	3.3	2,107	3.6	2,616	3.5
	2005	47	4	5,183	102	-	-	989	3.5	805	4.1	3,389	3.5
	2006			4,672*									
Shetland	1996	209	114	19,710	61	-	-	2,042	2.8	8,814	3.9	8,854	4.8
	1997	224	83	24,630	84	-	-	3,207	2.9	10,002	3.7	11,421	4.4
	1998	218	93	33,404	107	222	2.8	11,162	1.5	16,690	4.2	5,330	4.7
	1999	227	100	36,228	111	221	3.4	4,449	2.7	15,111	4.0	16,447	4.3
	2000	258	77	43,133	129	-	-	7,189	3.7	16,360	4.5	19,584	4.1
	2001	227	52	39,745	142	130	1.1	4,905	3.7	16,441	4.3	18,269	4.4
	2002	238	46	49,341	174	-	-	7,107	3.6	19,646	4.4	22,588	4.9
	2003	222	48	61,685	228	-	-	3,898	3.9	21,698	4.5	36,089	4.5
	2004	185	27	53,101	250	-	-	6,732	4.2	20,543	4.6	25,826	4.5
	2005	162	33	38,946	200	-	-	3,424	4.4	16,296	4.7	19,226	4.7
	2006			39,569*									

Region	Year	Staff		Annual Production	Productivity (t/person)	Year of input		Grilse		Pre salmon		Salmon	
		F/T	P/T			Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)	Tonnes	Mean weight (Kg)
South West	1996	273	44	17,223	54	68	1.1	3,889	2.8	6,895	3.7	6,371	4.4
	1997	197	19	17,194	80	-	-	6,186	3.2	4,705	3.4	6,303	4.7
	1998	223	14	23,722	100	88	2.1	8,783	3.2	8,936	3.8	5,915	4.2
	1999	108	26	23,929	179	741	3.3	5,064	3.4	5,594	5.2	12,530	5.4
	2000	166	87	14,088	56	325	3.0	2,894	3.4	3,385	4.3	7,484	5.2
	2001	165	48	32,574	153	-	-	9,113	4.2	13,166	5.4	10,295	4.8
	2002	196	54	26,351	105	-	-	2,992	3.5	9,112	4.2	14,247	4.9
	2003	218	35	33,583	133	-	-	4,329	4.1	13,407	4.9	15,847	5.2
	2004	219	34	23,911	95	-	-	2,733	4.1	6,832	4.7	14,346	5.1
	2005	188	36	33,056	148	-	-	4,675	4.7	11,430	5.0	16,951	4.6
	2006			25,737*									
Western Isles	1996	208	25	11,462	49	370	2.4	4,510	2.8	4,701	3.8	1,881	4.3
	1997	239	45	19,082	67	364	2.1	9,678	3.5	6,627	4.2	2,413	3.8
	1998	214	27	17,073	71	449	2.4	4,287	3.2	9,843	3.8	2,494	5.1
	1999	220	50	21,992	81	1,109	2.7	11,966	4.1	6,835	4.5	2,082	4.7
	2000	261	15	19,882	72	553	2.8	11,448	3.7	6,526	3.8	1,355	4.6
	2001	226	38	26,493	100	967	2.8	13,176	3.8	9,640	4.4	2,710	3.2
	2002	203	35	22,176	93	387	2.8	9,742	3.6	7,442	4.0	4,605	4.2
	2003	246	21	23,303	87	276	3.4	11,484	3.9	8,644	4.6	2,899	4.1
	2004	226	33	25,878	100	-	-	5,456	4.1	6,014	4.5	14,408	4.5
	2005	187	24	19,964	95	-	-	5,068	3.8	5,627	4.5	9,269	3.9
	2006			26,641*									
All Scotland	1996	1,150	241	83,121	60	638	2.0	25,776	3.0	32,222	3.8	24,485	4.5
	1997	1,088	207	99,197	77	585	2.0	34,227	3.3	37,122	3.8	27,263	4.4
	1998	1,117	192	110,784	85	2,048	2.9	38,963	2.3	47,820	3.9	21,953	4.3
	1999	1,036	268	126,686	97	2,763	2.8	41,259	3.3	42,564	4.2	40,100	4.4
	2000	1,141	256	128,959	92	2,673	3.5	45,229	3.6	44,734	4.2	36,232	4.3
	2001	1,066	191	138,520	110	1,227	2.2	42,066	3.8	54,473	4.7	40,754	4.5
	2002	1,083	223	144,589	111	824	3.0	33,609	3.4	56,621	4.1	53,535	4.7
	2003	1,066	151	169,736	139	276	3.4	32,977	3.8	63,228	4.5	73,255	4.7
	2004	1,019	142	158,099	136	319	1.9	27,710	4.1	58,082	4.5	71,988	4.6
	2005	851	128	129,588	132	-	-	22,972	4.1	44,766	4.7	61,850	4.4
	2006			137,018*									

*Estimated production in 2006

Company and Site Data

Table 36: Number of companies and sites engaged in salmon production during 1995-2005

Year	Number of companies			Number of sites		
	Producing	Non-producing	Total	Producing	Non- producing	Total
1995	108	12	120	268	91	359
1996	106	1	107	278	56	334
1997	98	3	101	275	65	340
1998	95	11	106	289	54	343
1999	94	1	95	264	87	351
2000	68	22	90	163	183	346
2001	81	6	87	238	82	320
2002	73	11	84	197	131	328
2003	63	18	81	201	125	326
2004	57	12	69	193	122	315
2005	40	10	50	166	112	278

The number of companies registered and actively producing salmon in 2005 was 40, a decrease of seventeen on the 2004 figure. Ten companies remained active and registered, although not producing salmon for harvest in 2005. This continued the trend of salmon production being concentrated within fewer companies. These 50 companies have 278 registered active sites, although not all active sites may have produced fish for harvest in 2005.

Fallowing

Table 37: Number of seawater sites employing a fallow period during 1996-2005

Year	Fallow Period (weeks)						Total
	0	<4	4-8	9-26	27-51	52	
1996	112	12	71	70	13	56	334
1997	122	6	54	77	11	65	335
1998	118	10	55	84	22	54	343
1999	94	12	49	90	33	73	351
2000	74	23	61	86	25	75	344
2001	80	10	76	94	15	45	320
2002	99	8	85	85	24	27	328
2003	95	14	68	80	40	29	326
2004	82	9	52	95	42	35	315
2005	75	11	36	86	37	33	278

Of the 278 sites recorded as being active in 2005, 170 farms were fallow for a variable period, whilst a further 33 farms were fallow for the whole of 2005. The normal production cycle in sea water varies in length between 18 months and two years, and a fallow period at the end of production can break the cycle of disease or parasitic infections. There were 75 sites that had no fallow period in 2005. These may have been stocked late in 2004 with out of season smolts, or may not follow recommended practice of incorporating a fallow period in the production cycle.

Broodstock Sites

Table 38: Number of sites holding broodstock during 1994-2005

Year	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Broodstock sites	24	18	28	37	25	20	18	15	19	20	15	15

In 2005, the number of freshwater and seawater sites holding broodstock remained at 15. The number of sites holding broodstock in any one year is variable, as can be seen from the previous years' figures, which indicate no obvious trend. Ten thousand and thirty three female fish were stripped, yielding just over 73 million ova, compared with almost 129 million in 2004, which can be calculated to show an average ova yield per fish of 7,297.

4. OTHER SPECIES

There has been continued interest in the farming of other species. Brown trout (*Salmo trutta*) has been farmed for many years for the restocking market, but there is an increasing interest in farming marine species. These provide diversification from the production of rainbow trout and Atlantic salmon, allowing some of the smaller companies to remain within the aquaculture sector, and the larger companies to broaden their production base. As the marine species sector expands and markets are established, the employment provided and the contribution to the total production of the Scottish aquaculture industry is expected to increase.

Staffing

Table 39: Number of staff employed in farming other species during 1999-2005

Year	Full-time	Part-time	Total
1999	54	18	72
2000	73	25	98
2001	75	22	97
2002	69	30	99
2003	73	24	97
2004	61	18	79
2005	73	18	91

Company, Site and Production Data

Table 40: Number of companies and sites producing other species and production of other species (tonnes) during 2002-2005 and estimated production in 2006

Species	No of companies	No of sites	2002 Production tonnage	2003 Production tonnage	2004 Production tonnage	2005 Production tonnage	2006 Production tonnage*
Arctic Charr	4	6	7.2	3.1	3.25	3	11
Brown trout/ Sea trout	28	44	175.7	198.3	167	122	243
Cod	12	17	0	82.1	8	69.6	851
Halibut	8	18	187.2	231.8	186.8	272.4	423

*farmers' estimates based on stocks currently being on-grown

Not all of this production is for the table market. There is some production of Arctic charr (*Salvelinus alpinus*) and brown trout for the angling restocking market.

Escapes

There were no reported escapes from sites rearing other species in 2005.

Ova Laid Down to Hatch

Table 41: Source of other species' ova laid down to hatch during 2005

Species	Source of ova laid down to hatch (000s)		
	Own broodstock	Other GB broodstock	Foreign ova
Arctic charr (*Salvelinus alpinus*)	200	0	5
Cod (*Gadus morhua*)	27,447	300	[d]
Brown trout/Sea trout (*Salmo trutta*)	2,619	245	10
Halibut (*Hippoglossus hippoglossus*)	14,018	0	0

[d] There were companies which laid down cod ova from foreign sources but due to the small number of companies involved it is not possible to summarise these data without potentially revealing the figures for individual companies.

Trade in Small Fish

Table 42: Trade in other species' small fish in 2005

Species	Bought (000s)	Sold (000s)
Cod	2,525	1,621
Halibut	26	24
Brown trout / Sea trout	324	789

There were also sites stocked with brook charr (*Salvelinus fontinalis*), carp (*Cyprinus carpio*), Dover sole (*Microstomus pacificus*), haddock (*Melanogrammus aeglefinus),* lemon sole (*Microstomus kitt*), tench (*Tinca tinca*) and turbot (*Scophthalmus maximus*). There was production of brook charr and carp, but due to the small number of companies in production it is not possible to summarise these data without revealing the production of individual companies.

5. CONCLUSIONS

Rainbow trout (*Oncorhynchus mykiss*)

The production of rainbow trout increased by 10% in 2005 to 6,989 tonnes and was directed at the table (88.3%) and restocking (11.7%) markets. The total numbers of staff employed by the sector decreased by nine to 143. As a consequence, the overall productivity of the industry increased to 48.9 tonnes per person. One of the reasons for this was the increase in the production from freshwater and seawater cage sites for the table market.

The number of ova laid down to hatch decreased by over twelve million and was mainly all-female diploid (83%) stock. Only 1.9% of these ova were sourced within GB reflecting a continued rise in the numbers imported from abroad and a decline in the numbers of home-produced ova. There were no imports from South Africa during 2005. To meet the needs of out of season production, the industry established a trade with Australia (13% of total ova imported). There was also a 74% decline in the number of ova imported from the USA. The trend reflecting the high dependence of the Scottish trout industry on imported ova was maintained.

There was a continuing trade in fingerlings, with the majority still being sourced within Scotland.

A high percentage of stock was vaccinated against ERM, indicating producers' awareness of the risk of infectious diseases.

Atlantic salmon (*Salmo salar*)

The survey shows decreased production of salmon, reduced productivity per person and an increased yield from smolts. There was a decrease in the production of smolts and the yield from ova decreased.

Smolt production decreased by 9.2% to 36.3 million with slightly under two thirds (61.1%) being S1 and the majority of the remainder being S½ (34.8%) smolts. The number of staff directly employed on freshwater sites decreased by 45. This resulted in an increase in productivity to over 132,000 fish per person. Although productivity per person increased, the actual number of smolts produced decreased by 9.2%. The number of ova laid down to hatch has increased by 7.2%. The ratio of ova laid down to smolts produced has increased to 2.1 in 2005. Projected estimates for 2006 suggest that fewer ova were laid down to hatch and that less smolts will be produced in 2006, followed by an increase in 2007.

The majority of ova for the production of Scottish salmon were derived from Scottish farmed stocks, with 13% derived from non-Scottish stocks, a decrease of 14% on reliance from foreign sources. The export of ova to other countries within the EU decreased by 15% and the trade with Chile increased by almost four fold.

The production tonnage in sea water decreased by 18% in 2005, this was due mainly to a reduction in the number of smolts being put to sea. The number of staff directly employed on site decreased, with the loss of 182 jobs in the seawater industry. The estimated smolt placement in 2006 has decreased to 33.2 million but an increase in production is expected in 2006 given the decrease in the number of fish harvested one year after input from the 2004 year class. The estimated harvest forecast for 2006 is 137,018 tonnes, an increase of 5.7% on the 2005 total.

With the production tonnage decreasing in 2005, the number of sites in production decreased from 315 to 278. The trend towards increasing the size of producing sites continued with 65.9% of production being concentrated in the sites producing over 1,000 tonnes per annum. This was an increase of 4% on the 2004 figure.

Other Species

Interest in the diversification of aquaculture was maintained. Staff numbers increased mainly due to expansion within the cod sector. In 2005 there was a significant increase in the tonnages of cod and halibut produced. There was also a decrease in the tonnage of brown trout produced. Industry has predicted significant increases in production for 2006, particularly for the cod sector.

APPENDIX 1

Questionnaires sent to Fish Farmers

ANNUAL RETURN of INFORMATION from SCOTTISH FISH FARMS for the PERIOD 1 JANUARY to 31 DECEMBER 2005

RAINBOW TROUT - DATA

Please complete and return by 31 JANUARY 2006 to R J Smith, FRS Marine Laboratory PO Box 101, Victoria Road, Aberdeen, AB11 9DB

Reg No FB/

Name of site

Please correct site name here (if necessary)

Please correct main method of production on each site (if necessary), ie fresh water cages or tanks

1 How many staff were employed in RAINBOW TROUT production (company total) **Full time** ☐☐☐ **Part time** ☐☐☐

	Site 1	Site 2	Site 3	Site 4
2 How many eyed ova were laid down for hatching in 2005				
a from own broodstock	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b from other GB broodstock	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c from abroad (Northern Hemisphere **incl**, N Ireland and Isle of Man)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
d from abroad (Southern Hemisphere)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
3 How many of the above ova were				
a all female diploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b mixed sex diploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c all triploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
4 How many fry/fingerlings were				
a bought	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b sold	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
5 How many bought fry/fingerlings were				
a all female diploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b mixed sex diploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c all triploid	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
6 How many of these fish were vaccinated against ERM				
a vaccinated on site	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b bought vaccinated	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
7 What was your total production in TONNES for the TABLE TRADE				
a <450 g (<1 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b 450-900 g (1-2 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c >900 g (>2 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
8 What was your total production in TONNES for the RESTOCKING TRADE				
a <450 g (<1 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b 450-900 g (1-2 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c >900 g (>2 lb)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐

SEERAD ANNUAL PRODUCTION SURVEY 2005

GUIDANCE NOTES FOR QUESTIONNAIRE

RAINBOW TROUT

GENERAL NOTES

1. Please check that the pre-printed information on the sheet is correct.
2. If a site is inactive and **not part of a fallowing cycle**, please write "INACTIVE" after the site name.
3. When completing the boxes please start from the right, if NONE then enter a **zero** in right hand box eg

					0

Hopefully all questions are self explanatory but you may wish to note that:

Q1. How many staff

a Please give the total number of full and part-time workers employed by the company in rainbow trout production

b Please ensure that the same staff are NOT included more than once if the company/business operates more than one site

c Staff employed solely in processing dead fish for marketing should NOT be included

Q2. Ova laid down for hatching

Give the TOTAL NUMBER of ova laid down, if the number exceeds six figures please indicate the total number clearly in margin beside the appropriate box - this also applies to questions 3-5

Q7-8. Weight of fish sold for:

Please record the weight of fish sold to the nearest **tonne** (not in kgs), for part tonnes please indicate strongly using a decimal point, eg **31.5**

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2006 to allow the Annual Survey Report for 2005 to be produced.

ANNUAL RETURN OF INFORMATION FROM SCOTTISH FISH FARMS FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 2005

ATLANTIC SALMON - SMOLT DATA

Please complete and return by 31 JANUARY 2006 to R J Smith, FRS Marine Laboratory
PO Box 101, Victoria Road, Aberdeen, AB11 9DB

Reg No FB/

Name of site	Please correct site name here (if necessary)	Please correct main method of production on each site (if necessary) ie fresh water cages or tanks

1 How many staff were employed in smolt production (company total) — **Full time** ☐☐☐ **Part time** ☐☐☐

2 How many ova were produced in the winter of 2004-2005 (company total) ☐☐☐☐☐☐☐☐

		Site 1	Site 2	Site 3	Site 4
3	**How many eyed ova were laid down for hatching in winter of 2004-2005**				
a	From own farmed broodstock	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	From other GB farmed broodstock	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c	From GB wild broodstock	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
d	From foreign sources	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
4	**How many eyed ova do you expect to hatch this winter (2005-2006)**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
5	**How many fry or parr were**				
a	Transferred into the site	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	Transferred out of the site	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
6	**How many smolts were produced as**				
a	**S$^{1}/_{2}$s** (ie from 2005 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	**S1s** (ie from 2004 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c	**S1$^{1}/_{2}$s** (ie from 2004 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
d	**S2s** (ie from 2003 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
7	**How many smolts were sold as**				
a	**S1s** (incl S$^{1}/_{2}$s)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	**S2s** (incl S1$^{1}/_{2}$s)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
8	**How many smolts do you expect to produce for sea winter on-growing next spring (2006) as**				
a	**S1s** (incl S$^{1}/_{2}$s)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	**S2s** (incl S1$^{1}/_{2}$s)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
9	**How many smolts do you plan to produce in 2007**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
10	**What is the fish holding capacity of each site in cubic metres**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
11	**Duration of FALLOW PERIOD in WEEKS (cage sites only)**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
12	**How many fish did you vaccinate**				
a	against furunculosis	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	against ERM	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c	against IPN	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
d	against *Vibrio* spp.	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐

SEERAD ANNUAL PRODUCTION SURVEY 2005

GUIDANCE NOTES FOR QUESTIONNAIRE
ATLANTIC SALMON SMOLTS

GENERAL NOTES

1. Please check that the pre-printed information on the sheet is correct.
2. If a site is inactive and **not part of a fallowing cycle**, please write "INACTIVE" after the site name.
3. When completing the boxes please start from the right, if NONE then enter a **zero** in right hand box eg

					0

4. If the numbers for any box exceeds 6 figures please indicate the total number clearly in margin beside the appropriate box

Hopefully all questions are self explanatory but you may wish to note that:

Q1. How many staff

Please enter the total number of full and part-time staff employed in smolt production, this includes maintenance staff and staff seasonally employed for specific purposes, eg vaccination - please indicate clearly if you have contracted out vaccinating work to avoid duplication in numbers

Please ensure that the same staff are NOT included more than once if your company operates more than one site, especially for companies which operate both smolt and salmon grower sites

Companies are asked to use their discretion as to what they class as full and part-time staff

Q2. Number of ova produced

Enter the total number of ova produced by the company only once, if more than one form is used please enter **zero** or score out on subsequent forms

Q6. How many smolts produced as S2 or S1 etc

The definitions used for the survey are:

$S^1/_2$ <12 months old, ie put to sea in year of hatch
S1 12-18 months old, ie put to sea in January-June in year post hatch
$S1^1/_2$ 19-24 months old, ie put to sea in July-December in year post hatch
S2 >24 months old when put to sea

Q7. } **For S1s** - combine numbers of $S^1/_2$s with S1s and
Q8. } **For S2s** - combine numbers of $S1^1/_2$s with S2s

Q9. Enter here the total number of smolts (any stage) likely to be produced

Q11 Please enter the total cubic metre capacity for all tanks or cages combined

Q12. Fallow period - applies to cage sites only

Please enter any weeks that the site was fallow in 2005 (maximum = 52)

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2006 to allow the Annual Survey Report for 2005 to be produced.

ANNUAL RETURN OF INFORMATION FROM SCOTTISH FISH FARMS FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 2005

ATLANTIC SALMON - PRODUCTION DATA

Please complete and return by 31 JANUARY 2006 to R J Smith, FRS Marine Laboratory PO Box 101, Victoria Road, Aberdeen, AB11 9DB

Reg No FB/

Name of site	Please correct site name here (if necessary)	Please correct main method of production on each site (if necessary), ie sea water cages or tanks

1 How many staff were employed in salmon production (company total), excluding post-harvest processing staff — **Full time** ☐☐☐ **Part time** ☐☐☐

		Site 1	Site 2	Site 3	Site 4
2	**How many smolts were put into the site in 2005 as:**				
a	**S1½s** (ie from 2005 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	**S1s** (ie from 2004 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
c	**S1½s** (ie from 2004 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
d	**S2s** (ie from 2003 hatch)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
3	**How many of the above smolts came from England**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
4	**Total smolt input proposed in 2006**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
5	**HARVEST of 2005 SMOLT INPUT in 2005**				
a	Number of tonnes (wet weight at harvest)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	Number of fish	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
6	**HARVEST of 2004 SMOLT INPUT from 1 JANUARY to 31 AUGUST**				
a	Number of tonnes (wet weight at harvest)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	Number of fish	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
7	**HARVEST of 2004 SMOLT INPUT from 1 SEPTEMBER to 31 DECEMBER**				
a	Number of tonnes (wet weight at harvest)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	Number of fish	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
8	**HARVEST of 2003 SMOLT INPUT**				
a	Number of tonnes (wet weight at harvest)	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
b	Number of fish	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
9	**How many tonnes of fish do you expect to harvest in 2006**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
10a	**Were brood fish produced in 2005**	**YES/NO**	**YES/NO**	**YES/NO**	**YES/NO**
b	**How many fish were stripped**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
11	**What is the current fish holding capacity of each site in cubic metres**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
12	**Duration of FALLOW PERIOD in WEEKS (cage sites; MAX = 52)**	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐	☐☐☐☐☐☐
13	**Does a management agreement in respect of fish health operate with other producers in your area**	**YES/NO**	**YES/NO**	**YES/NO**	**YES/NO**

SEERAD ANNUAL PRODUCTION SURVEY 2005

GUIDANCE NOTES FOR QUESTIONNAIRE

ATLANTIC SALMON

GENERAL NOTES

1. Please check that the pre-printed information on the sheet is correct.
2. If a site is inactive and **not part of a fallowing cycle**, please enter "INACTIVE" after the site name.
3. All harvest tonnages should be supplied for the wet weight of fish at harvest.
4. If a site was used **only to hold broodstock** for stripping please enter "BRD" after the site name.
5. When completing the boxes please start from the right eg for 250 tonnes enter as | | | | 2 | 5 | 0 | or if NONE then enter as | | | | | | 0 |

Hopefully all questions are self explanatory but you should note that:

Q1. How many staff

Please enter the total number of full and part-time workers employed in salmon production; this includes site staff, veterinary and maintenance staff, vaccination teams, administrative and harvesting staff but NOT processing or marketing staff

Please ensure that the same staff are NOT included more than once if the company operates more than one site, especially if your company operates both salmon grower and smolt sites

Q2. How many smolts put to sea

The definitions used for the survey are:

S$^1/_2$ **<12 months old**, ie put to sea in year of hatch
S1 **12-18 months old**, ie put to sea in January-June in the year post hatch
S1$^1/_2$ **19-24 months old**, ie put to sea in July-December in the year post hatch
S2 **>24 months old**, ie when put to sea

Q10. Broodstock production

Please circle **YES** if broodfish were produced on the site

Q11. Fish holding capacity

Please enter the total cubic metre capacity for all tanks and cages combined or, if not known, give the size of tanks or cages (area or circumference plus depth x nos tanks or cages)

Q12. Fallow period

For cage sites only; please enter any number of weeks a site was fallow in 2005; the total number of fallow weeks should not exceed 52

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2006 to allow the Annual Survey Report for 2005 to be produced.

ANNUAL RETURN of INFORMATION from SCOTTISH FISH FARMS
for the PERIOD 1 JANUARY to 31 DECEMBER 2005

OTHER SPECIES - DATA

Please complete and return by 31 JANUARY 2006 to R J Smith, FRS Marine Laboratory, PO Box 101, Victoria Road, Aberdeen, AB11 9DB

Business address: .....

Business number: .....

FB/0 .....

	Name of site	Site no	Species code	Main method of production
1	.....	FS	.....	.....
2	.....	FS	.....	.....
3	.....	FS	.....	.....
4	.....	FS	.....	.....

1. How many staff in total were employed in other species production (company total) Full time ☐ Part time ☐

	Site	Site	Site	Site .....
Species code	.....	.....	.....	.....
2. How many ova were laid down for hatching in 2005				
a) From own broodstock	.....	.....	.....	.....
b) From GB broodstock	.....	.....	.....	.....
c) From foreign sources	.....	.....	.....	.....
3. How many fry/small fish were				
a) Bought	.....	.....	.....	.....
b) Sold	.....	.....	.....	.....
4. What was your total production for the market in TONNES	.....	.....	.....	.....
5. What is your predicted production for the market in 2006 in TONNES	.....	.....	.....	.....

SEERAD ANNUAL PRODUCTION SURVEY 2005

GUIDANCE NOTES FOR QUESTIONNAIRE

OTHER SPECIES

GENERAL NOTES

1. The results of this survey will be made available to the FAO and will be published in the Annual Production Survey of Scottish Fish Farms produced by SEERAD, in summary form only.
2. All information on the form has been hand written, please check that it is correct.
3. If a site is inactive, and not part of a fallowing cycle, or is no longer used to culture the species concerned, please score through the relevant site name or species code.

Species Codes			
ACH	Arctic Charr	BCH	Brook Charr
CAR	Carp	COD	Cod
HAD	Haddock	HAL	Halibut
LSO	Lemon Sole	TIL	Tilapia
TRO	Brown/sea trout	TUR	Turbot

Q1. How many staff

Please include those staff that were involved only in other species production. Please do not include staff that are involved in the production of Atlantic salmon or rainbow trout.

Q4 - 5. Weight of fish sold

Please record the wet weight of fish sold to the nearest **tonne** (not in kgs), for part tonnes please indicate strongly using a decimal point, e.g. **31.5**

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2006 to allow the annual survey report for 2005 to be produced.

APPENDIX 2

Glossary and Abbreviations

Active	Fish farms in a production growing cycle which may contain stock or be fallow.
Alevin	Young fish, at stage from hatching to end of dependence on yolk sacs as primary source of nutrition.
Approved Zone Status	EU recognition of an area clear of listed disease(s).
Broodstock	Adult fish held until maturation for breeding purposes.
Diploid	Fish with the normal two sets of chromosomes.
EEA	European Economic Area.
EFTA	European Free Trade Association.
EU	European Union.
Eyed-ova/eggs	Fish egg(s) at the stage of development when the heavily pigmented eyes of the embryo are sufficiently developed to be clearly visible.
Fallow	Fish farm having no stock, but still part of a growing cycle.
Fingerling	A term commonly applied to young stages of salmonid fish.
FRS	Fisheries Research Services.
Fry	Young salmon at stage from independence of yolk sac as primary source of nutrition to dispersal from the redd.
Gamete	Reproductive cells.
Grilse	Salmon maturing after one winter at sea.
Inactive	Fish farms not in a production cycle and without stock.
Intra-peritoneal	Within the body cavity.
Non-producing	A site which is active, may be stocked with fish, but has produced no fish for harvest during the specified year.
On-growing	Farm producing fish for the table market.
Ova	Eggs.
0-year fish	Fish in their first year of life.
Parr	Young salmon at stage from dispersal from redd to migration as a smolt.
Photoperiod	Alteration of light regime.
Pre-salmon	Non-mature salmon usually after one winter at sea.
Raceway	Concrete or brick channels used for farming fish.

$S1/2$	Salmon or sea trout smolting at approximately six months from hatch (usually by photoperiod and/or temperature manipulation).
S1	Salmon or sea trout smolting at approximately one year from hatch.
$S1\,1/2$	Salmon or sea trout smolting at approximately 18 months from hatch.
S2	Salmon or sea trout smolting at approximately two years from hatch.
SEERAD	Scottish Executive Environment and Rural Affairs Department.
Smolt	Fully silvered juvenile salmon ready to be transferred or to migrate to sea.
Third Country	Country outside the EU.
Triploid	Genetically modified fish that have three sets of chromosomes instead of two.
Year Class	Fish hatched or put to sea in a given year.
ERM	Enteric redmouth.
IHN	Infectious haemopoeitic necrosis.
IPN	Infectious pancreatic necrosis.
ISA	Infectious salmon anaemia.
VHS	Viral haemorrhagic septicaemia.
RTFS	Rainbow trout fry syndrome.