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Marine Scotland Science

Scottish Fish Farm Production Survey 2015



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// FOREWORD

The annual production survey of fish farms in Scotland for 2015 was carried out by Marine Scotland Science (MSS). This survey collates annual production data from Scottish fin fish farm sites operated by authorised aquaculture production businesses. The production tonnage obtained is for the wet weight (i.e. weight of live fish) at harvest.

Responses to questionnaires from Scottish fish farming companies covering the period 1st January to 31st December 2015 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 rainbow trout, Atlantic salmon and other farmed species sectors. 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.

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L A Munro
I S Wallace

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// EXECUTIVE SUMMARY

The tables below summarise the results from the 2015 fish farms annual production survey.

Rainbow Trout (*Oncorhynchus mykiss*)

		2014	2015
Total production	(tonnes)	5,882	8,588
Production for the table	(tonnes)	5,328	8,033
Production for restocking	(tonnes)	554	555
Number of staff employed		113	126
Mean productivity	(tonnes/person)	52.1	68.2
Number of ova laid down to hatch	(millions)	11.0	12.1
Number of ova imported	(millions)	10.4	11.2

In 2015, the production of rainbow trout increased by 2,706 tonnes. Employment increased by 13 staff and mean productivity increased to 68.2 tonnes per person. The number of ova laid down to hatch increased by 1.1 million and the number of ova imported increased by 0.9 million.

Atlantic salmon (*Salmo salar*)

Smolts

		2014	2015
Number of ova produced	(millions)	33.5	11.6
Number of ova laid down to hatch	(millions)	70.8	68.2
Number of ova exported	(millions)	0	0.1
Number of ova imported	(millions)	58.9	59.7
Number of smolts produced	(millions)	45.0	44.6
Number of smolts put to sea	(millions)	48.1	45.5
Number of staff employed		309	294
Mean productivity (000s smolts/person)		145.6	151.6

The production of ova decreased by 21.9 million in 2015 and the number of ova laid down to hatch decreased by 2.6 million. A very small amount of ova were exported in 2015 (0.1 million) and the number of ova imported increased by 0.8 million from the 2014 figure. The number of smolts produced decreased by 0.4 million. In 2015 the number of staff decreased by 15 and mean productivity increased by 6 tonnes per person.

Production fish

		2014	2015
Total production	(tonnes)	179,022	171,722
Production of 0-year fish	(tonnes)	720	626
Production of grilse	(tonnes)	46,686	53,930
Production of pre-salmon	(tonnes)	55,311	60,182
Production of salmon	(tonnes)	76,305	56,984
Mean fish weight 0-year	(kg)	2.5	2.8
Mean fish weight grilse	(kg)	5.2	4.8
Mean fish weight pre-salmon	(kg)	4.9	4.7
Mean fish weight salmon	(kg)	5.6	5.2
Number of staff employed		1,325	1,363
Mean productivity	tonnes/person	135.1	126.0

Production tonnage decreased by 7,300 tonnes with an increase in the mean weight of 0-year fish but a decrease in the mean harvest weights of grilse, pre-salmon and salmon. Staff numbers increased by 38 and mean productivity decreased to 126.0 tonnes per person.

Smolt survival (percentage harvested)

Survival (%)	Years 0+1	Year 2	Total
2012 input year class	52.0	33.4	85.4
2013 input year class	49.6	26.7	76.3

The smolt survival rate for the 2013 input year class decreased to 76.3%.

Other Species

Including Arctic charr (*Salvelinus alpinus*); brown/sea trout (*Salmo trutta*); halibut (*Hippoglossus hippoglossus*); lumpsucker (*Cyclopterus lumpus*) and several species of wrasse (Labridae)

		2014	2015
Total production	(tonnes)	119 ^a	107 ^b
Number of staff employed	(full-time)	29	35
	(part-time)	20	15
Number of ova laid down to hatch	(millions)	17.8	14.8
Number of ova imported	(millions)	1.1	0.6

Some figures are excluded from this report as providing them would reveal production information from individual companies.

a Excluding cod production.

b Excluding Arctic charr production.

In 2015, the production of other species decreased by 12 tonnes from the 2014 total. Overall, employment increased by one person in 2015. There was a decrease in the number of ova laid down to hatch.

Number of Confirmed Escape Incidents from Fish Farms Notified to the Scottish Government

Species	Number of reported incidents which could have led to an escape of farmed fish	Number of reported incidents which did lead to an escape of farmed fish	Number of fish escaped
Rainbow trout	0	1	2,091
Atlantic salmon (freshwater stages)	1	0	0
Atlantic salmon (seawater stages)	1	5	16,005

// 1. RAINBOW TROUT (*ONCORHYNCHUS MYKISS*)

Production survey information was collected from all 24 companies actively involved in rainbow trout production, farming 45 active sites. This figure represents the entire industry operating in Scotland.

Production

Table 1a: Annual production (tonnes) of rainbow trout during 2001-2015 and projected production in 2016

Year	Tonnes	Year	Tonnes
2001	5,466	2009	6,766
2002	6,659	2010	5,139
2003	7,085	2011	4,619
2004	6,352	2012	5,670
2005	6,989	2013	5,611
2006	7,492	2014	5,882
2007	7,414	2015	8,588
2008	7,670	2016	7,415*

* Industry estimate based on stocks currently being on-grown.

Production increased in 2015 by 2,706 tonnes, an increase of 46%, to 8,588 tonnes. This was the highest ever level of rainbow trout production recorded in Scotland.

Table 1b: Production (tonnes) for the table trade during 2005-2015 according to weight category

Year	<450 g <1 lb	450-900 g 1-2 lbs	>900 g >2 lbs	Total Tonnes
2005	2,856	1,203	2,111	6,170
2006	2,182	1,810	2,636	6,628
2007	2,499	1,663	2,407	6,569
2008	2,375	1,950	2,487	6,812
2009	2,232	1,143	2,620	5,995
2010	2,125	727	1,606	4,458
2011	1,421	1,004	1,433	3,858
2012	1,195	1,655	2,209	5,059
2013	1,908	825	2,268	5,001
2014	2,334	290	2,704	5,328
2015	2,299	258	5,476	8,033

Production for the table in 2015 was 8,033 tonnes, an increase of 2,705 tonnes (51%) on the 2014 total, and accounted for 94% of the total rainbow trout production, an increase on the proportion to that produced in 2014. Also an increase in the number of fish in the large size range and a decrease in the number of fish in the small and medium size ranges were highlighted.

Table 1c: Production (tonnes) for the restocking trade during 2005-2015 according to weight category

Year	<450 g <1 lb	450-900 g 1-2 lbs	>900 g >2 lbs	Total Tonnes
2005	21	390	408	819
2006	36	357	471	864
2007	24	413	408	845
2008	27	351	480	858
2009	32	294	444	770
2010	19	201	461	681
2011	8	419	334	761
2012	22	266	323	611
2013	24	221	365	610
2014	28	256	270	554
2015	15	158	382	555

In 2015, production for the restocking of angling waters increased to 555 tonnes representing an increase of one tonne (0.2%) on the 2014 total. This accounted for 6% of total rainbow trout production in 2015. These figures represent the tonnage of fish supplied to angling waters for restocking purposes; they do not account for the catch taken by anglers. The production of large sized fish showed an increase, while there was a decrease for small and medium sized fish.

Production by Site

Table 2: Numbers of sites grouped by tonnage produced during 2005-2015

Year	Number of sites per production tonnage				Total number of sites
	<1-25	26-100	101-200	>200	
2005	18	12	6	11	47
2006	16	15	6	13	50
2007	14	15	3	16	48
2008	8	15	7	14	44
2009	10	11	7	11	39
2010	7	13	9	7	36
2011	9	10	6	8	33
2012	10	10	6	8	34
2013	6	11	5	8	30
2014	6	11	5	9	31
2015	4	10	5	11	30

Production was reported from 30 of the 45 active sites. The number of producers in the size brackets <1-25 tonnes, 26-100 tonnes decreased while those producers in the 101-200 tonnes bracket remained the same and those in the >200 tonnes size bracket increased. 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 methods of production in 2015 and comparison with production in 2014

Production method	Production grouping (tonnes) in 2015					Total tonnage and (%) by method		Number of sites	
	<10	10-25	26-50	51-100	>100	2014	2015	2014	2015
FW cages	1	0	0	0	5	2,611 (44.4%)	2,433 (28.3%)	5	6
FW ponds and raceways	0	0	8	1	5	1,291 (21.9%)	1,405 (16.4%)	17	14
FW tanks and hatcheries	3	0	0	1	0	71 (1.2%)	72 (0.8%)	4	4
SW cages	0	0	0	0	6	1,909 (32.5%)	4,678 (54.5%)	5	6
SW tanks	0	0	0	0	0	0	0	0	0
Total	4	0	8	2	16	5,882	8,588	31	30

Freshwater production accounted for 3,910 tonnes (45.5%) and seawater production for the remaining 4,678 tonnes (54.5%). Production from seawater cages increased whilst there was a decrease in production from freshwater cages.

Company and Site Data

Table 4: Number of companies and sites in production during 2002-2015

Year	No. of companies	No. of sites
2002	39	57
2003	37	56
2004	38	62
2005	42	70
2006	36	66
2007	38	70
2008	31	66
2009	27	56
2010	25	51
2011	23	48
2012	25	48
2013	24	46
2014	24	46
2015	24	45

In 2015 the number of companies authorised by the Scottish Government and actively engaged in rainbow trout production was 24. The number of sites registered and in production was 45.

Staffing and Productivity

Table 5: Number of staff employed and productivity per person during 2002-2015

Year	Full-time	Part-time	Total	Productivity (tonnes/person)
2002	114	46	160	41.6
2003	107	41	148	47.9
2004	115	37	152	41.8
2005	108	35	143	48.9
2006	112	35	147	51.0
2007	111	32	143	51.8
2008	107	34	141	54.4
2009	111	27	138	49.0
2010	98	31	129	39.8
2011	95	23	118	39.1
2012	79	28	107	53.0
2013	89	21	110	51.0
2014	93	20	113	52.1
2015	110	16	126	68.2

The overall number of staff employed in 2015 increased by 13 to 126. The number of full-time staff increased by 17 while the number of part-time staff decreased by four.

Productivity, measured as tonnes produced per person, increased by 31% in 2015 with no distinction between full and part-time employees being made for this calculation.

Production by Area

Table 6: Production and staffing by area in 2015

Area	No. of sites	Table production (tonnes)	Restocking production (tonnes)	Mean tonnes per site	Staffing			Productivity (tonnes/person)
					F/T	P/T	Total	
North	6	2	26	4.7	7	2	9	3.1
East	12	962	255	101.4	38	5	43	28.3
West	13	6,115	40	473.5	46	3	49	125.6
South	14	954	234	84.9	19	6	25	47.5
All	45	8,033	555	190.8	110	16	126	68.2

Productivity was greatest in the West at 473.5 tonnes per site and 125.6 tonnes per person.

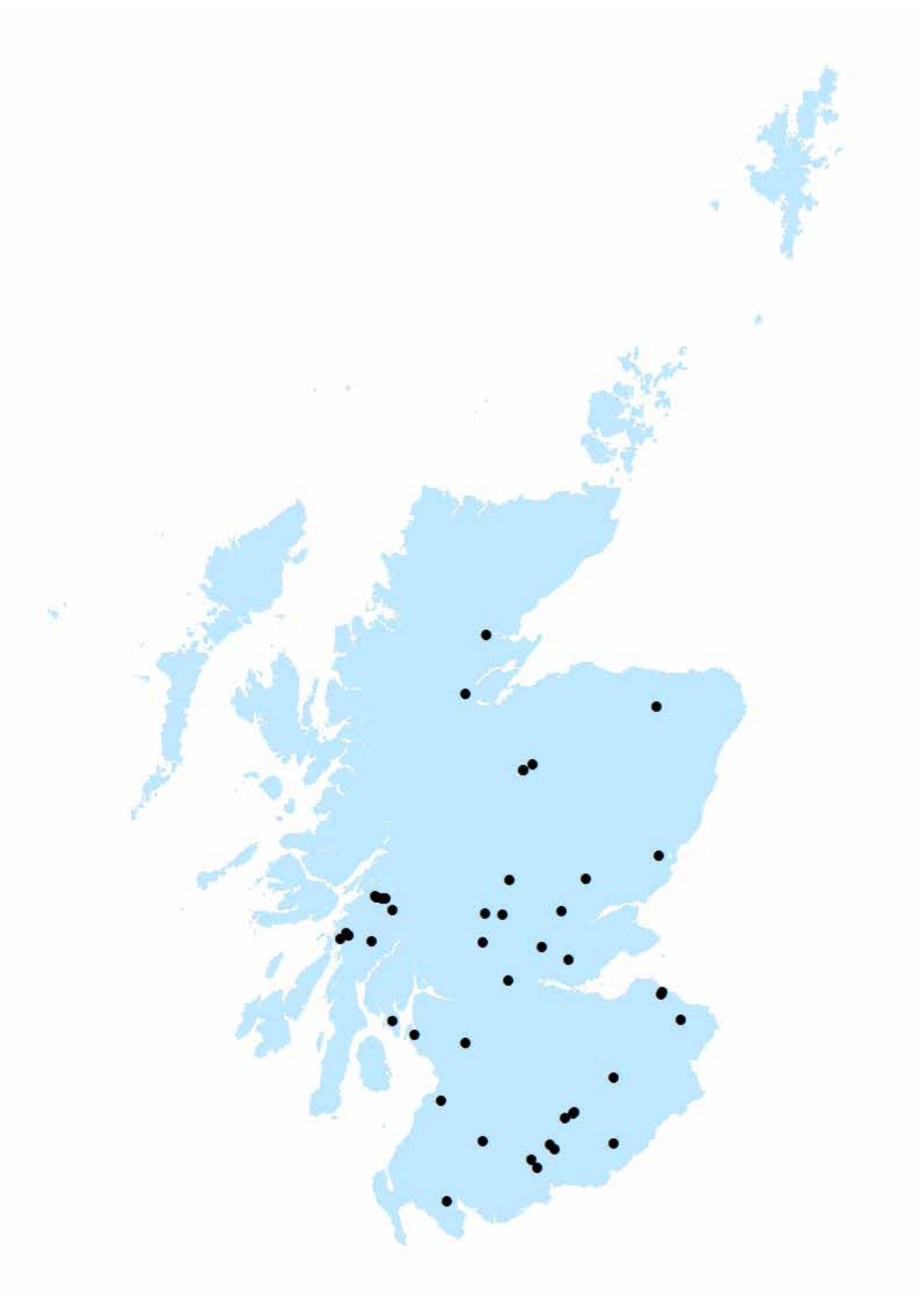


FIGURE 1: THE DISTRIBUTION OF ACTIVE RAINBOW TROUT SITES IN 2015

Type of Ova Laid Down

Table 7: Number (000s) and proportions (%) of eyed ova types laid down to hatch during 2004-2015

Year	All female diploid no.(%)	Triploid no. (%)	Mixed sex diploid no. (%)	Total ova
2004	29,272 (90)	3,146 (10)	138 (<1)	32,556
2005	16,773 (83)	1,729 (8)	1,745 (9)	20,247
2006	22,378 (84)	2,804 (10)	1,626 (6)	26,808
2007	23,630 (83)	2,531 (9)	2,140 (8)	28,301
2008	22,978 (88)	2,526 (9)	725 (3)	26,229
2009	15,469 (87)	2,341 (13)	35 (<1)	17,845
2010	13,352 (89)	1,052 (7)	675 (4)	15,079
2011	12,673 (84)	2,254 (15)	215 (1)	15,142
2012	10,967 (85)	2,005 (15)	7 (<1)	12,979
2013	7,857 (80)	1,955 (20)	77 (<1)	9,889
2014	8,321 (75)	2,710 (25)	9 (<1)	11,040
2015	10,245 (85)	1,800 (15)	76 (<1)	12,121

Source of Ova Laid Down

Table 8: Number (000s) and sources of eyed ova laid down to hatch in 2004-2015

Year	Ova produced in Great Britain (GB)			Imported ova			Total
	Own stock	Other stock	Total	Northern hemisphere	Southern hemisphere	Total	
2004	330	320	650	31,906	0	31,906	32,556
2005	281	105	386	16,977	2,884	19,861	20,247
2006	541	2,169	2,710	22,588	1,510	24,098	26,808
2007	936	230	1,166	26,650	485	27,135	28,301
2008	582	487	1,069	25,160	0	25,160	26,229
2009	603	220	823	17,022	0	17,022	17,845
2010	415	50	465	14,614	0	14,614	15,079
2011	215	189	404	14,738	0	14,738	15,142
2012	14	230	244	12,735	0	12,735	12,979
2013	77	537	614	9,275	0	9,275	9,889
2014	9	655	664	10,376	0	10,376	11,040
2015	6	888	894	11,227	0	11,227	12,121

In 2015, the total number of eyed ova laid down to hatch increased by just under 1.1 million (9.8%) on the 2014 figure. The proportion of ova from GB broodstock increased to 7.4% of the total and the rainbow trout industry remained reliant on imported ova. Data on the importation of ova into Scotland are also available from the health certificates 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 from Official Import Health Certificates

Table 9a: Number (000s) and sources of ova imported into Scotland from outwith GB during 2008-2015

Source	2008	2009	2010	2011	2012	2013	2014	2015
Denmark	5,530	4,070	1,715	5,250	1,950	1,315	2,500	2,330
Isle of Man	775	290	1,400	520	300	800	1,000	175
N. Ireland	16,130	10,090	9,247	7,320	8,332	5,125	4,780	6,535
Norway	1,500	750	200	130	300	175	710	670
USA	1,490	2,240	2,340	1,580	1,800	2,350	1,700	1,675
Totals	25,425	17,440	14,902	14,800	12,682	9,765	10,690	11,385

Table 9b: Seasonal variation in numbers (000s) and sources of ova imported into Scotland from outwith GB during 2015

Month	Denmark	Isle of Man	N. Ireland	Norway	USA
January	60	0	1,150	220	0
February	0	0	0	0	0
March	100	0	750	350	0
April	0	175	665	100	0
May	970	0	0	0	0
June	0	0	0	0	1,325
July	0	0	320	0	175
August	75	0	1,370	0	0
September	200	0	1,230	0	175
October	0	0	1,050	0	0
November	0	0	0	0	0
December	925	0	0	0	0
Totals	2,330	175	6,535	670	1,675

Table 9c: Number (000s) and sources of fish imported into Scotland from outwith GB during 2008-2015

Source	2008	2009	2010	2011	2012	2013	2014	2015
N. Ireland	33	0	<1	72	155	537	674	746
Republic of Ireland	0	0	2	0	0	0	0	0

Suppliers within the European Union (EU) accounted for 79.4% of ova imported into Scotland during 2015 with the USA and Norway accounting for 14.7% and 5.9% respectively. To maintain their ability to regulate production throughout the year and produce a constant supply of fish for their markets, producers have to rely upon supplies of out of season ova. In recent years there has been an increasing trend for producers to import part grown rainbow trout into Scotland from outwith GB.

Trade in Fry and Fingerlings

Table 10: Number (000s) of fry and fingerlings traded during 2004-2015

Year	Fry and fingerlings bought			Total number bought	Total number sold
	All female diploid no. (%)	Triploid no. (%)	Mixed sex diploid no. (%)		
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
2006	19,731 (89)	1,675 (7)	790 (4)	22,196	20,460
2007	14,830 (89)	1,140 (7)	675 (4)	16,645	23,631
2008	24,298 (95)	1,082 (4)	118 (0.5)	25,498	31,036
2009	21,113 (94)	1,358 (6)	0	22,471	20,597
2010	15,539 (95)	585 (4)	141 (1)	16,265	14,686
2011	16,288 (88.5)	1,970 (10.7)	138 (0.8)	18,396	16,612
2012	12,543 (91)	1,226 (9)	0	13,769	12,088
2013	6,734 (84)	1,239 (16)	0	7,973	6,749
2014	5,911 (81)	1,423 (19)	0	7,334	6,719
2015	6,104 (87)	598 (9)	290 (4)	6,992	6,971

The established trade between hatcheries and on-growing farms continued in 2015. Some companies specialised in the production of fry and fingerlings. The total number of fry and fingerlings sold increased by 3.8% while the number bought decreased by 4.7%. The disparity between supply and demand is due to trade with England and Wales.

Use of Vaccines

Table 11: Number of sites rearing fish vaccinated against enteric redmouth disease (ERM) and number of fish vaccinated (millions) during 2004-2015

Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
No. of sites	42	37	31	28	28	31	27	26	24	19	21	17
No. of fish	30.6	30.0	36.4	41.4	29.1	27.5	20.0	20.3	20.4	9.9	10.0	8.3

Vaccines continued to be used as a preventative treatment against enteric redmouth disease (ERM), a potentially serious bacterial infection, caused by *Yersinia ruckeri*. Vaccination is generally carried out as a bath treatment at the fingerling stage, although some vaccines are administered by intra-peritoneal injection. A total of 8.3 million fish were vaccinated on 17 sites.

Organic Production

Of the 45 sites recorded as being active in rainbow trout production in 2015, none were certified as organic.

Escapes

There was one incident involving the loss of 2,091 fish from a rainbow trout site in 2015.

// 2. ATLANTIC SALMON (*SALMO SALAR*) – OVA AND SMOLTS

Production survey information was collected from all 25 companies actively involved in the freshwater production of Atlantic salmon, farming 87 active sites. This figure represents the entire freshwater industry operating in Scotland.

Company and Site Data

Table 12: Number of companies and sites in production during 2006-2015

Year	No. of companies	No. of sites
2006	39	135
2007	37	135
2008	38	130
2009	30	105
2010	31	104
2011	28	98
2012	28	100
2013	27	102
2014	26	96
2015	25	87

In 2015 the number of companies authorised by the Scottish Government for freshwater production of Atlantic salmon decreased by one to 25. A total of 87 sites were actively engaged in commercial production, a decrease of nine sites from the 2014 figure.

Production and Staffing

Table 13: Number (000s) of smolts produced, staff employed and smolt productivity during 2005-2015

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
Number (000s) of smolts produced	36,326	40,827	38,125	36,450	36,868	36,872	43,626	44,324	40,457	45,004	44,571	
Staffing	Full-time	200	209	217	209	216	233	225	235	237	244	239
	Part-time	74	62	62	54	54	56	68	93	48	65	55
	Total	274	271	279	263	270	289	293	328	285	309	294
Productivity, 000s of smolts per person	132.6	150.6	136.6	138.6	136.5	127.6	148.9	135.1	142.0	145.6	151.6	

Smolt production in 2015 decreased by 1% compared to 2014. The number of staff employed in 2015 decreased by 15 and productivity increased by 4.1% to a figure of 151.6 smolts produced per person. Data for staffing and productivity in 2013 are shown, however, there are uncertainties with these data due to consolidation within the industry.

Smolts by Age Group

Table 14: Number of smolts (000s) produced by type during 2003-2015

Year	S½	S1	S1½	S2	Total
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
2006	16,953	23,172	698	4	40,827
2007	15,431	22,694	0	0	38,125
2008	12,431	24,019	0	0	36,450
2009	13,837	23,031	0	0	36,868
2010	14,116	22,756	0	0	36,872
2011	17,233	26,393	0	0	43,626
2012	18,795	25,239	290	0	44,324
2013	19,024	21,279	154	0	40,457
2014	22,367	22,473	164	0	45,004
2015	23,850	20,711	10	0	44,571

In 2015, there was an increase (6.6%) in the number of S½ smolts produced but a decrease (7.8%) in the number of S1 smolts produced. A small amount of S1½ smolts were produced while there was no production of S2 smolts.

Production Systems

Table 15: Number and capacity of production systems during 2011-2015

System	No. of sites with system					Total capacity, 000s cubic metres				
	2011	2012	2013	2014	2015	2011	2012	2013	2014	2015
Cages	44	43	44	41	38	325	349	372	351	355
Tanks and Raceways	54	57	58	55	49	49	51	64	65	47
Total	98	100	102	96	87	374	400	436	416	402

The principal types of facility used for the production of smolts in freshwater are cages or tanks and raceways. In 2015, the number of farms using cages decreased by three and the number of farms using tanks and raceways decreased by six. In terms of volume, cage capacity increased by 4,000 m³ and tank and raceway capacity decreased by 18,000 m³. This resulted in a net decrease in volume of 14,000 m³ available for the production of smolts in Scotland during 2015.

Table 16: Number (000s) of smolts produced and stocking densities by production system during 2011-2015

Year	Number of smolts produced (000s)					Stocking densities (smolts/m ³)				
	2011	2012	2013	2014	2015	2011	2012	2013	2014	2015
Cages	23,135	26,882	20,910	22,816	18,135	71	77	56	65	51
All others	20,491	17,442	19,547	22,188	26,436	418	342	305	341	562
Total	43,626	44,324	40,457	45,004	44,571	-	-	-	-	-

The average stocking densities of cages decreased from 65 to 51 fish per m³ in 2015 compared to 2014 while densities in tanks and raceways increased from 341 to 562 fish per m³.

Ova Production

Table 17: Number (000s) of salmon ova produced during 2008-2015

Year	2008	2009	2010	2011	2012	2013	2014	2015
No. of ova	135,230	91,964	91,655	78,208	57,489	56,904	33,450	11,605

In 2015, 11.6 million ova were stripped, a decrease of 65% from the number of ova produced in 2014.

Table 18: Source, number (000s) and previous year's estimate of ova laid down to hatch during 2004-2016

Year	In-house broodstock	Out-sourced GB broodstock	GB wild broodstock	Foreign ova	Total	Previous year's estimate
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	19,063	17,768	63	27,157	64,051	58,385
2007	18,837	14,366	78	42,022	75,303	68,032
2008	19,831	14,261	171	26,409	60,672	75,302
2009	17,148	20,158	65	30,200	67,571	64,693
2010	13,744	26,220	0	29,657	69,621	61,011
2011	15,664	14,630	0	34,322	64,616	54,526
2012	18,556	9,981	0	34,700	63,237	55,723
2013	16,996	8,263	0	41,315	66,573	49,249
2014	14,418	2,725	10	53,684	70,837	48,149
2015	6,479	223	10	61,463	68,175	65,284
2016						59,604

The number of ova laid down to hatch was 68.2 million, a decrease of 2.7 million (3.8%) on the 2014 figure. The majority of the ova (90.2%) were derived from foreign sources, this being an increase of 7.8 million (14.5%) on the 2014 figure. Supplies derived from GB broodstock decreased by 10.4 million, a 60.9% decrease on the 2014 figure. Ten thousand ova from GB wild broodstock were laid down in 2015, however, 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 2006-2017

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Actual smolts put to sea	41.1	37.8	36.6	38.5	38.5	42.7	41.1	40.9	48.1	45.5		
Smolts produced	40.8	38.1	36.4	36.9	36.9	43.6	44.3	40.5	45.0	44.6		
Estimated production	33.2	41.2	34.9	32.6	28.7	35.9	31.3	28.1	39.9	43.4	36.6	48.5
Ratio of ova laid down to smolts produced	1.6	2.0	1.7	1.8	1.9	1.5	1.4	1.6	1.6	1.5		

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. Farmers estimate putting 36.6 million smolts to sea in 2016. The ratio of ova laid down to hatch to smolts produced in 2015 was less than the ratio in 2014.

Scale of Production

Table 20: Smolt-producing sites grouped by numbers (000s) of smolts produced during 2002-2015

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		
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
2006	1	4	2	9	19	21	18	10	84	40,827
2007	2	2	4	7	21	21	14	11	82	38,125
2008	2	1	5	8	21	20	15	9	81	36,450
2009	0	0	3	7	14	18	10	12	64	36,868
2010	1	0	4	4	16	15	10	14	64	36,872
2011	1	0	4	5	11	14	9	17	61	43,626
2012	0	0	1	3	19	14	11	13	61	44,324
2013	1	0	1	7	14	14	7	14	58	40,457
2014	0	0	2	1	11	9	14	13	50	45,004
2015	1	1	2	4	9	11	16	11	55	44,571

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

The number of sites producing smolts in 2015 was 55. The number of sites producing less than 101,000 smolts has increased by five and there has also been an increase of two in the number of sites producing between 101,000 and one million smolts. The number of sites producing in excess of one million smolts per year decreased by two.

Production of Ova and Smolt by Production Area

Table 21: Staffing in 2015, ova laid down to hatch in 2014-2015, smolt production in 2014-2015 and estimated production in 2016-2017 by region

Region	Number of staff employed in 2015		Ova laid down to hatch (000s)		Smolt production (000s)		Estimated smolt production (000s)	
	F/T	P/T	2014	2015	2014	2015	2016	2017
North West	130	28	35,737	36,668	29,059	24,788	16,750	26,520
Orkney	1	1	105	55	142	142	140	140
Shetland	26	6	7,172	7,473	1,272	3,372	3,950	5,080
West	49	18	16,712	17,433	8,655	9,625	10,740	11,100
Western Isles	24	2	4,535	5,596	4,265	4,823	4,138	4,820
East and South	9	0	6,576	950	1,611	1,821	899	800
All Scotland	239	55	70,837	68,175	45,004	44,571	36,617	48,460

In 2015, the North West and the West were the main areas where ova were laid down to hatch. The North West, the West and the Western Isles were the main smolt producing areas. The greatest number of staff were employed in the North West region.

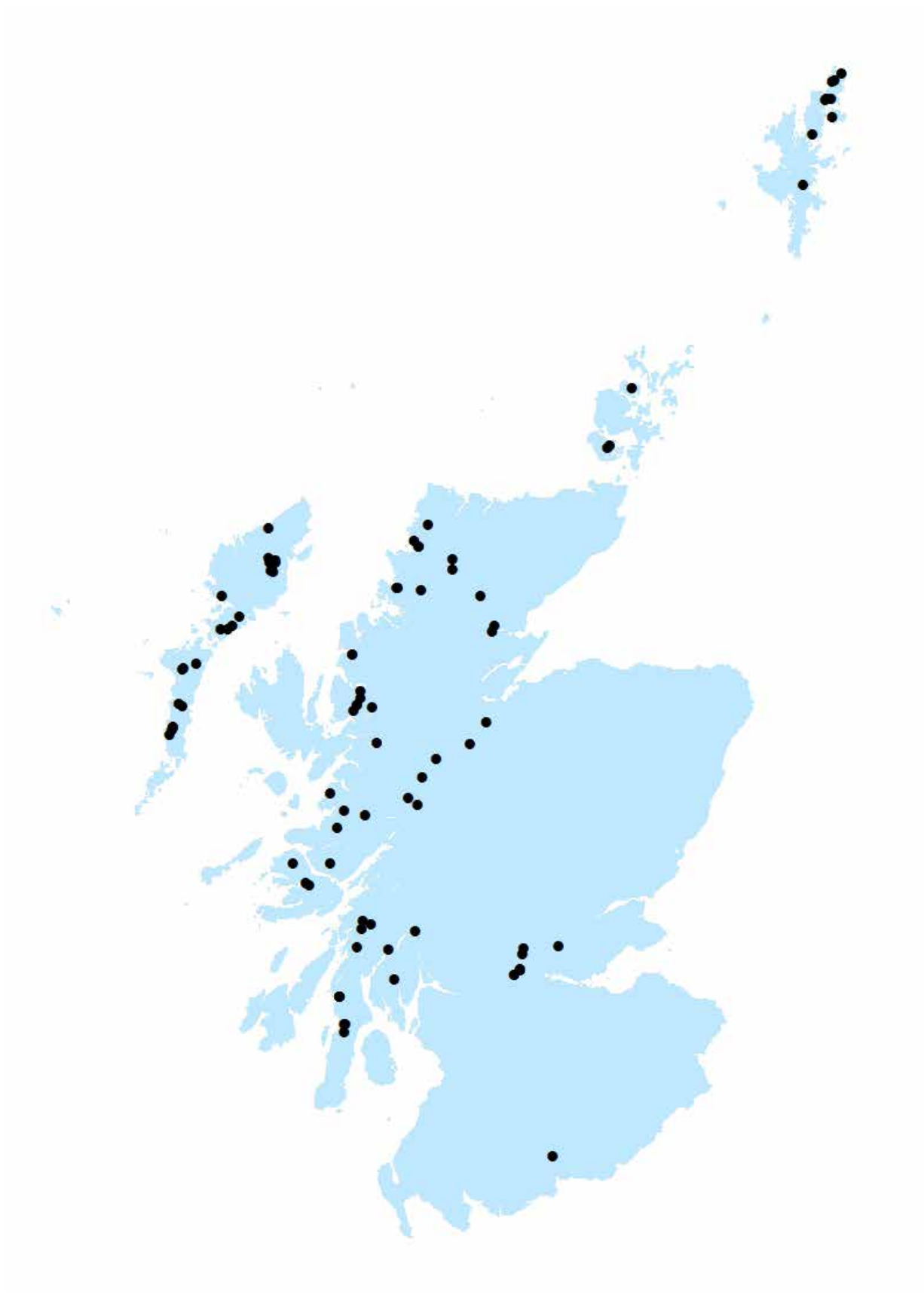


FIGURE 2: THE DISTRIBUTION OF ACTIVE ATLANTIC SALMON SMOLT SITES IN 2015

International Trade in Ova

Since the introduction of the EU single market on 1st 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). Trade is based on the same rules as are established within the EU regarding compartments and zones declared free from listed diseases.

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. Marine Scotland Science advises potential exporters to ascertain with the importing country any specific health testing requirements that may be a condition of import.

Imports and Exports

Table 22a: Source and number (000s) of ova, parr and smolts imported during 2003-2015 derived from health certificates

Import Year	Ova						Parr and Smolts	
	EU Member States	EFTA		Third Countries		Total	EU Member States	EFTA-Norway
		Iceland	Norway	Australia	USA			
2003	7,820	9,518	2,900	550	400	21,188	2,570	0
2004	4,450	3,475	6,750	1,860	450	16,985	824	0
2005	2,610	570	13,210	0	450	16,840	150	0
2006	11,575	300	15,940	2,400	0	30,215	375	0
2007	10,511	0	33,555	0	0	44,066	420	0
2008	5,600	0	22,703	0	0	28,303	519	0
2009	5,460	0	29,938	0	0	35,398	328	0
2010	2,150	0	26,533	0	0	28,683	452	0
2011	3,400	0	35,851	0	0	39,251	800	0
2012	10,134	0	23,849	0	0	33,983	0	0
2013	10,700	2,719	35,044	0	0	48,463	55	0
2014	5,218	3,813	49,831	0	0	58,862	1,602	1,748
2015	4,815	8,978	45,926	0	0	59,719	2,118	365

The numbers of ova imported increased by 1.5%. The number of parr and smolts imported decreased from that observed in 2014, with 2.1 million parr and smolts imported from EU member states and almost 0.4 million from Norway.

Table 22b: Destination and number (000s) of salmon ova, parr and smolts exported during 2004-2015 derived from health certificates

Export year	Farmed origin ova				Total	Parr and Smolts
	Chile	EU	Norway	Others		
2004	2,215	3,699	0	0	5,914	1,488
2005	8,560	3,130	0	1,566	13,256	1,362
2006	26,930	4,312	0	0	31,242	998
2007	32,150	164	0	0	32,314	2,169
2008	62,185	130	0	15	62,330	551
2009	7,181	317	0	0	7,498	89
2010	0	189	600	0	789	130
2011	0	0	0	820	820	183
2012	0	0	0	0	0	55
2013	0	650	0	0	650	404
2014	0	0	0	0	0	259
2015	0	93	0	2	95	8

In 2015, 95,000 ova were exported. Parr and smolt exports decreased by 97% on the 2014 figure.

Vaccines

Table 23: Number of sites using vaccines and number (millions) of fish vaccinated during 2007-2015

Year	2007	2008	2009	2010	2011	2012	2013	2014	2015
No. of sites	73	80	68	70	67	63	63	56	55
No. of fish (millions) vaccinated	41.0	36.7	39.6	42.6	49.2	48.1	47.5	44.7	48.0

Vaccines were used to provide protection against furunculosis, infectious pancreatic necrosis (IPN), ERM, vibriosis and salmonid alphavirus (SAV). The majority of fish were vaccinated against furunculosis and IPN, with smaller numbers of fish being vaccinated against ERM, vibriosis and SAV. A total of 48 million fish were vaccinated across 55 sites.

Escapes

There was one incident reported where the company confirmed there was no loss of fish in 2015.

// 3. ATLANTIC SALMON – PRODUCTION

Production

Production survey information was collected from all 16 companies actively involved in Atlantic salmon production, farming 254 active sites. This figure represents the entire industry operating in Scotland.

Table 24: Annual production of salmon (tonnes) during 1995-2015 and projected production in 2016

Year	Tonnes	Percentage difference	Year	Tonnes	Percentage difference
1995	70,060	9	2006	131,847	2
1996	83,121	19	2007	129,930	-1.4
1997	99,197	19	2008	128,606	-1
1998	110,897	12	2009	144,247	12
1999	126,686	14	2010	154,164	6.9
2000	128,959	2	2011	158,018	2.5
2001	138,519	7	2012	162,223	2.7
2002	144,589	4	2013	163,234	0.6
2003	169,736	17	2014	179,022	9.7
2004	158,099	-7	2015	171,722	-4.1
2005	129,588	-18	2016	177,857*	

*industry estimate of projected tonnage based on stocks currently being on-grown.

The total production of Atlantic salmon during 2015 was 171,722 tonnes, a decrease of 7,300 tonnes (4.1%) on the 2014 total. Production remained high as the 2015 total is the second highest level of production recorded in Scotland.

Table 25: Number (000s), production (tonnes) of salmon harvested and mean fish weight (kg) per year class during 2005-2015

	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)	2005	2005	0	0	-
	2006	2006	115	211	1.8
	2007	2007	23	40	1.7
	2008	2008	116	216	1.9
	2009	2009	81	178	2.2
	2010	2010	128	268	2.1
	2011	2011	109	307	2.8
	2012	2012	127	301	2.4
	2013	2013	0	0	-
	2014	2014	286	720	2.5
	2015	2015	223	626	2.8
Harvest in year 1	2004	2005	15,075	67,738	4.5
	2005	2006	14,036	64,099	4.6
	2006	2007	13,787	60,890	4.4
	2007	2008	13,011	54,759	4.2
	2008	2009	16,338	77,621	4.7
	2009	2010	18,266	85,826	4.7
	2010	2011	18,694	91,105	4.9
	2011	2012	21,502	97,744	4.5
	2012	2013	21,264	106,161	5.0
	2013	2014	20,316	101,997	5.0
	2014	2015	24,038	114,112	4.7
Harvest in year 2	2003	2005	13,920	61,850	4.4
	2004	2006	14,237	67,537	4.7
	2005	2007	14,999	69,000	4.6
	2006	2008	15,881	73,631	4.6
	2007	2009	14,132	66,448	4.7
	2008	2010	13,666	68,070	5.0
	2009	2011	13,772	66,606	4.8
	2010	2012	13,053	64,178	4.9
	2011	2013	11,283	57,073	5.1
	2012	2014	13,712	76,305	5.6
	2013	2015	10,910	56,984	5.2

Table 26: Number (000s) and production (tonnes) of grilse and pre-salmon harvested during 2005-2015

Year	Grilse (January-August)			Pre-salmon (September-December)		
	Number	Tonnes	Average weight (kg)	Number	Tonnes	Average weight (kg)
2005	5,662	22,972	4.1	9,413	44,766	4.7
2006	4,357	18,162	4.2	9,679	45,937	4.7
2007	3,823	15,811	4.1	9,964	45,079	4.5
2008	3,716	15,296	4.1	9,295	39,463	4.2
2009	5,631	23,857	4.2	10,707	53,764	5.0
2010	6,877	29,733	4.3	11,389	56,093	4.9
2011	7,604	35,146	4.6	11,090	55,959	5.0
2012	11,337	53,216	4.7	10,165	44,528	4.4
2013	9,618	47,496	4.9	11,646	58,665	5.0
2014	9,048	46,686	5.2	11,268	55,311	4.9
2015	11,243	53,930	4.8	12,795	60,182	4.7

Table 27: Percentage (by weight) of annual production by growth stage harvested during 2007-2015

Year	2007	2008	2009	2010	2011	2012	2013	2014	2015
Growth stage	-	-	-	-	-	-	-	-	-
Input year fish	<1	<1	<1	<1	<1	<1	0	<1	<1
Grilse	12	12	16	19	22	33	29	26	31
Pre-salmon	34	31	37	36	35	27	36	31	35
Year 2 salmon	53	57	46	44	42	39	35	42	33

Survival and Production in Smolt Year Classes

Table 28: Survival and production in smolt year classes during 1998-2015

Year of smolt input	Harvest year 0					Harvest year 1					Harvest year 2					Yield per smolt (kg)
	Smolt input (000s)	Number (000s)	Weight (tonnes)	Mean weight (kg)	% harvest	Number (000s)	Weight (tonnes)	Mean weight (kg)	% harvest	Number (000s)	Weight (tonnes)	Mean weight (kg)	% harvest	Total % of year class harvested	Year class weight (tonnes)	
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	39,041	168	319	1.9	0.4	15,075	67,738	4.5	38.6	14,237	67,537	4.7	36.5	75.5	135,594	3.47
2005	37,168	0	-	-	0	14,036	64,099	4.6	37.8	14,999	69,000	4.6	40.3	78.1	133,099	3.58
2006	41,091	115	211	1.8	0.3	13,787	60,890	4.4	33.5	15,881	73,631	4.6	38.6	72.5	134,732	3.28
2007	37,853	23	40	1.7	0.06	13,011	54,759	4.2	34.4	14,133	66,448	4.7	37.3	71.8	121,247	3.20
2008	36,662	116	216	1.9	0.3	16,338	77,621	4.7	44.6	13,666	68,070	5.0	37.3	82.2	145,907	3.98
2009	38,548	81	178	2.2	0.2	18,266	85,826	4.7	47.4	13,772	66,606	4.8	35.7	83.3	152,610	3.96
2010	38,490	128	268	2.1	0.3	18,694	91,105	4.9	48.6	13,053	64,178	4.9	33.9	82.8	155,551	4.04
2011	42,733	109	307	2.8	0.3	21,502	97,744	4.5	50.3	11,283	57,073	5.1	26.4	77.0	155,124	3.63
2012	41,094	127	301	2.4	0.3	21,264	106,161	5.0	51.7	13,712	76,305	5.6	33.4	85.4	182,767	4.45
2013	40,936	0	-	-	0	20,316	101,997	5.0	49.6	10,910	56,984	5.2	26.7	76.3	158,981	3.88
2014	48,045	286	720	2.5	0.6	24,038	114,112	4.7	50.0							
2015	45,465	223	626	2.8	0.5											

In 2013, the last year for which survival can be calculated, the survival rate from smolt input to harvest decreased to 76.3%. Of the 2014 year class, 50.6% of the input has been harvested, 0.4% higher than the average harvest of fish one year after input in the 2013 year class. In 2015, the harvest of fish from the 2015 input was 0.5%, this was an decrease compared with the proportion of fish harvested from the same year class in 2014.

Smolts to Sea

Table 29: Number (000s) and origin of smolts put to sea during 2003-2015

Year	Smolts put to sea (000s)				Total (000s)	Scottish Origin %	English Origin		Other Origin	
	S½	S1	S1½	S2			(000s)	%	(000s)	%
2003	14,534	28,283	986	0	43,803	93	2,590	6	325	>1
2004	14,044	23,776	1,221	0	39,041	97	634	2	541	>1
2005	13,051	22,501	1,616	0	37,168	96	1,594	4	0	0
2006	15,578	23,733	1,779	0	41,090	96	1,257	3	272	>1
2007	14,665	23,188	0	0	37,853	94	1,747	5	420	1
2008	11,101	25,561	0	0	36,662	96	1,418	4	0	0
2009	14,967	23,581	0	0	38,548	95	1,700	4	105	<1
2010	14,069	24,421	0	0	38,490	95	1,541	4	120	<1
2011	17,721	25,012	0	0	42,733	96	1,765	4	0	0
2012	17,334	23,480	280	0	41,094	96	1,510	4	0	0
2013	19,262	21,534	140	0	40,936	97	1,169	3	0	0
2014	23,759	24,144	142	0	48,045	94	893	2	2,072	4
2015	22,886	22,569	10	0	45,465	96	938	2	1,082	2

The total number of smolts put to sea in 2015 was 45.5 million. This smolt input comprised S1s (49.6%), S½s (50.3%) and a small number of S1½s (>0.1%). Four percent of the smolts stocked to Scottish salmon farms were sourced from outwith Scotland, 2% of which came from sources outwith Great Britain. This was a decrease of 2% compared with the proportion observed in 2014.

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 2004-2015

Region	Smolts put to sea (000s)		Harvest in year 0			Harvest in year 1			Harvest in year 2			Total Harvest	
	Year	No	Year	No	%	Year	No	%	Year	No	%	No	%
North West	2004	9,642	2004	168	1.7	2005	4,516	46.8	2006	2,978	30.9	7,662	79.4
	2005	10,888	2005	0	0	2006	5,796	53.2	2007	2,914	26.8	8,710	80.0
	2006	10,403	2006	115	1.1	2007	4,300	41.3	2008	3,612	34.7	8,027	77.1
	2007	9,563	2007	23	0.2	2008	5,394	56.4	2009	1,850	19.3	7,267	75.9
	2008	9,099	2008	116	1.3	2009	4,897	53.8	2010	2,687	29.5	7,700	84.6
	2009	9,986	2009	42	0.4	2010	7,045	70.5	2011	2,003	20.1	9,090	91.0
	2010	9,924	2010	117	1.2	2011	6,324	63.7	2012	2,802	28.2	9,243	93.1
	2011	12,605	2011	53	0.4	2012	7,937	63.0	2013	1,744	13.8	9,734	77.2
	2012	11,588	2012	127	1.1	2013	7,179	62.0	2014	2,623	22.6	9,929	85.7
	2013	10,975	2013	0	0	2014	6,549	59.7	2015	1,695	15.4	8,244	75.1
	2014	17,543	2014	191	1.1	2015	9,649	55.0					
	2015	8,646	2015	223	2.6								
Orkney	2004	1,842	2004	0	0	2005	480	26.0	2006	416	22.6	896	48.6
	2005	2,192	2005	0	0	2006	598	27.3	2007	602	27.4	1,200	54.7
	2006	1,622	2006	0	0	2007	433	26.7	2008	586	36.1	1,019	62.8
	2007	1,408	2007	0	0	2008	594	42.2	2009	741	52.6	1,335	94.8
	2008	1,912	2008	0	0	2009	507	26.5	2010	1,120	58.6	1,627	85.1
	2009	1,154	2009	0	0	2010	741	64.2	2011	95	8.2	836	72.4
	2010	2,557	2010	0	0	2011	1,126	44.0	2012	936	36.6	2,062	80.6
	2011	2,718	2011	0	0	2012	1,203	44.3	2013	765	28.1	1,968	72.4
	2012	2,727	2012	0	0	2013	1,422	52.1	2014	1,167	42.8	2,589	94.9
	2013	2,104	2013	0	0	2014	1,023	48.6	2015	512	24.3	1,535	72.9
	2014	2,761	2014	0	0	2015	1,412	51.1					
	2015	3,266	2015	0	0								
Shetland	2004	12,372	2004	0	0	2005	4,220	34.1	2006	4,040	32.7	8,260	66.8
	2005	10,824	2005	0	0	2006	4,162	38.4	2007	4,175	38.6	8,337	77.0
	2006	13,180	2006	0	0	2007	4,578	34.7	2008	4,959	37.6	9,537	72.3
	2007	14,947	2007	0	0	2008	4,610	30.8	2009	4,930	33.0	9,540	63.8
	2008	13,929	2008	0	0	2009	4,992	35.8	2010	4,659	33.4	9,651	69.2
	2009	10,031	2009	29	0.3	2010	4,201	41.9	2011	3,234	32.2	7,464	74.4
	2010	11,573	2010	0	0	2011	4,134	35.7	2012	4,292	37.1	8,426	72.8
	2011	11,206	2011	49	0.4	2012	4,911	43.8	2013	2,709	24.2	7,669	68.4
	2012	11,389	2012	0	0	2013	4,995	43.9	2014	4,022	35.3	9,017	79.2
	2013	9,956	2013	0	0	2014	4,289	43.1	2015	3,034	30.5	7,323	73.6
	2014	11,309	2014	0	0	2015	5,042	44.6					
	2015	9,040	2015	0	0								
South West	2004	6,786	2004	0	0	2005	3,281	48.4	2006	2,722	40.1	6,003	88.5
	2005	6,589	2005	0	0	2006	2,054	31.2	2007	4,175	63.3	6,229	94.5
	2006	7,032	2006	0	0	2007	2,677	38.1	2008	3,065	43.6	5,742	81.7
	2007	6,135	2007	0	0	2008	980	16.0	2009	3,289	53.6	4,269	69.6
	2008	6,507	2008	0	0	2009	4,153	63.8	2010	2,969	45.6	7,122	109.4*
	2009	8,200	2009	10	0.1	2010	2,700	32.9	2011	4,697	57.3	7,407	90.3
	2010	6,565	2010	12	0.2	2011	3,000	45.7	2012	2,648	40.3	5,660	86.2
	2011	7,493	2011	0	0	2012	2,673	35.7	2013	3,706	49.4	6,379	85.1
	2012	7,363	2012	0	0	2013	2,841	38.6	2014	3,863	52.5	6,704	91.1
	2013	7,801	2013	0	0	2014	3,202	41.0	2015	3,564	45.7	6,766	86.7
	2014	6,981	2014	95	1.4	2015	3,771	54.0					
	2015	11,156	2015	0	0								
Western Isles	2004	8,399	2004	0	0	2005	2,578	30.7	2006	4,081	48.6	6,659	79.3
	2005	6,675	2005	0	0	2006	1,426	21.4	2007	3,133	46.9	4,559	68.3
	2006	8,853	2006	0	0	2007	1,799	20.3	2008	3,659	41.3	5,458	61.6
	2007	5,800	2007	0	0	2008	1,433	24.7	2009	3,320	57.2	4,753	81.9
	2008	5,214	2008	0	0	2009	1,789	34.3	2010	2,231	42.8	4,020	77.1
	2009	9,177	2009	0	0	2010	3,579	39.0	2011	3,743	40.8	7,322	79.8
	2010	7,870	2010	0	0	2011	4,110	52.2	2012	2,375	30.2	6,485	82.4
	2011	8,711	2011	7	0.1	2012	4,778	54.9	2013	2,358	27.1	7,143	82.0
	2012	8,027	2012	0	0	2013	4,827	60.1	2014	2,037	25.4	6,864	85.5
	2013	10,100	2013	0	0	2014	5,254	52.0	2015	2,105	20.8	7,359	72.8
	2014	9,451	2014	0	0	2015	4,164	44.1					
	2015	13,357	2015	0	0								

* The survival of the 2008 smolt input in the South West is over 100% due to the practice of putting smolts to sea in one region and subsequently moving them to another sea water site in another region for harvest.

Staffing

Table 31: Number of staff employed in the production of salmon during 2005-2015

Year		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Staff	F/T	851	790	798	849	874	944	923	944	1,081	1,191	1,256
	P/T	128	81	118	100	89	120	90	115	99	134	107
Total staff		979	871	916	949	963	1,064	1,013	1,059	1,180	1,325	1,363
Productivity (tonnes/person)		132.4	151.4	141.8	135.5	149.8	144.9	156.0	153.2	138.3	135.1	126.0

In 2015, the total number of staff employed in salmon production was 1,363, an increase of 38 compared with 2014. The staffing figures collected refer specifically to the production of Atlantic salmon and do not include figures for staff involved with processing or marketing activities. Productivity decreased from 135.1 to 126.0 tonnes produced per person.

Production Methods

Table 32: Production methods, capacity, tonnage and average stocking densities (kg/m³) during 2013-2015

Method	Number of sites			Total capacity (000s cubic metres)			Production (tonnes)		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Seawater tanks	4	3	4	6.0	6.1	6.2	34	0	179
Seawater cages	253	257	250	19,064	19,481	20,338	163,200	179,022	171,543
For cage sites: ratio of production (kg) to cage capacity (m ³)							8.6	9.2	8.4

In 2015, the majority of fish were produced in seawater cages. There were 179 tonnes of production from seawater tank sites in 2015. This reflects the high installation and running costs incurred in operating seawater tank systems. Most seawater tank capacity has been re-deployed for the production of other species of marine fin fish or salmon broodstock.

Sea cage capacity increased by 857 m³ during 2015 and the number of sea cage sites in production decreased by seven. Production efficiency in sea cages, measured as the ratio of fish weight in kilograms produced per cubic metre, decreased to 8.4 kg/m³. In cage sites, the ratio of production (expressed in kilograms) to cage capacity (expressed in cubic metres) was 8.6, 9.2 and 8.4 in 2013, 2014 and 2015 respectively.

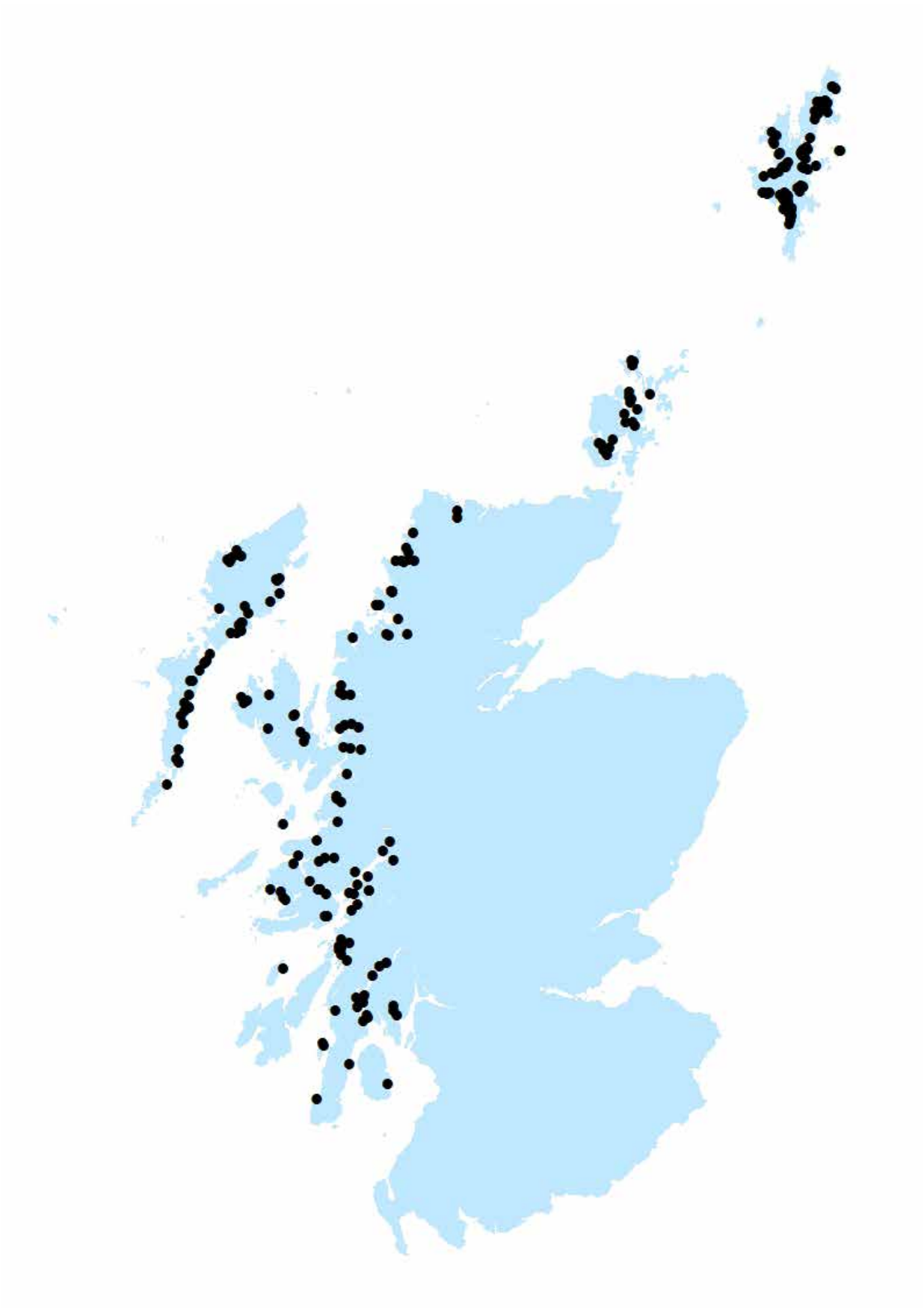


FIGURE 3: THE DISTRIBUTION OF ACTIVE ATLANTIC SALMON PRODUCTION SITES IN 2015

Scale of Production by Site

Table 33: Number of sites shown in relation to their production grouping and percentage share of production 2005-2015

Production grouping (tonnes)	0	1-50	51-100	101-200	201-500	501-1,000	>1,000	Total	
								Sites*	Tonnes
2005	112	8	13	16	41	37	51	278	129,588
2006	95	10	10	16	29	30	62	252	131,847
2007	89	9	8	19	33	34	55	247	129,930
2008	118	7	9	15	22	29	57	257	128,606
2009	104	12	12	10	33	25	58	254	144,247
2010	109	5	6	10	33	22	64	249	154,164
2011	106	9	7	9	28	29	66	254	158,018
2012	115	3	5	9	25	33	67	257	162,223
2013	112	9	3	12	18	36	67	257	163,234
2014	117	8	1	9	26	29	70	260	179,022
2015	115	2	1	9	26	26	75	254	171,722
2005	0	0.2	0.7	1.9	10.8	20.5	65.9	-	-
2006	0	0.2	0.6	1.8	7.9	15.9	73.6	-	-
2007	0	0.2	0.4	2.3	8.3	19.0	69.8	-	-
2008	0	0.1	0.5	1.6	5.8	15.9	76	-	-
2009	0	0.2	0.6	1.0	7.7	13.0	77.5	-	-
2010	0	0.1	0.3	0.9	7.3	10.8	80.6	-	-
2011	0	0.2	0.3	0.8	6.4	13.4	78.9	-	-
2012	0	<0.1	0.2	0.9	5.0	15.0	78.8	-	-
2013	0	0.1	0.1	1.1	4.0	16.7	78.0	-	-
2014	0	0.1	<0.1	0.8	5.0	12.0	82.0	-	-
2015	0	<0.1	<0.1	0.9	5.0	11.6	82.4	-	-

*Includes farms stocked but having no production.

In 2015, the number of sites with no production decreased by two whilst the number producing 1 to 500 tonnes decreased by six. The number of sites producing over 500 tonnes increased by two, continuing the trend towards production in larger sites with an increase of five in the number of sites producing over 1000 tonnes.

Company Productivity

Table 34: Number of companies grouped by production (tonnes), manpower and productivity (tonnes per person) during 2014-2015

Total Tonnage		0-100	101-200	201-400	401-700	701-1,000	1,001-2,000	>2,000	Total
No. of companies	2014	8	0	1	1	1	1	6	18
	2015	6	2	1	0	0	1	6	16
No. of tonnes	2014	50	0	221	530	730	1,153	176,338	179,022
	2015	0	369	203	0	0	1,504	169,646	171,722
Manpower (total)	2014	18	0	3	31	5	6	1,262	1,325
	2015	1	20	4	0	0	34	1,304	1,363
Productivity (tonnes/person)	2014	3	0	74	17	146	192	140	135
	2015	0	19	51	0	0	44	130	126

The greatest productivity of 130 tonnes per person was achieved in the companies producing over 2000 tonnes. The least productivity of 19 tonnes per person was from the companies producing between 101-200 tonnes. In comparison with 2014, the average company productivity decreased from 135 to 126 tonnes per person. Overall, production was dominated by six companies in 2015 which between them accounted for 99% of Scotland's farmed Atlantic salmon production.

Manpower and Production by Production Area

Table 35: Manpower and production (tonnes) by area 2006-2015 and projected production in 2016

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	2006	203	23	40,219	178	211	1.8	8,742	4.2	16,995	4.6	14,271	4.8
	2007	277	44	33,541	104	40	1.7	6,674	4.1	13,212	4.9	13,615	4.7
	2008	280	34	40,718	130	216	1.9	7,817	4.2	15,997	4.5	16,688	4.6
	2009	256	32	35,295	122	75	1.8	9,777	4.7	15,860	5.6	9,583	5.2
	2010	294	44	47,353	140	239	2.0	15,895	4.4	17,837	5.1	13,382	5.0
	2011	303	38	41,656	122	174	3.2	13,152	4.3	16,879	5.1	11,451	5.7
	2012	300	40	50,987	150	301	2.4	31,121	4.7	5,842	4.7	13,723	4.9
	2013	350	48	43,320	109	0	-	17,937	4.9	16,417	4.7	8,966	5.1
	2014	348	46	50,873	129	511	2.7	26,440	5.3	8,731	5.5	15,191	5.8
	2015	382	66	54,741	122	626	2.8	18,046	4.8	26,897	4.6	9,172	5.4
	2016			43,342*									
Orkney	2006	72	3	3,724	50	0	-	509	3.1	1,689	3.9	1,526	3.7
	2007	41	7	4,432	92	0	-	196	3.9	1,657	4.3	2,579	4.3
	2008	60	5	5,716	88	0	-	811	4.2	1,747	4.3	3,158	5.4
	2009	47	2	6,220	127	0	-	754	4.6	1,793	5.2	3,673	4.9
	2010	58	2	9,388	156	0	-	1,221	4.1	2,279	5.1	5,888	5.3
	2011	69	0	6,369	92	0	-	3,508	5.1	2,355	5.4	506	5.3
	2012	65	6	11,694	165	0	-	3,532	5.3	2,720	5.1	5,442	5.8
	2013	86	3	11,479	129	0	-	3,191	5.1	4,491	5.7	3,797	5.0
	2014	90	6	13,029	136	0	-	980	5.5	5,045	6.0	7,004	6.0
	2015	93	1	11,074	118	0	-	1,386	5.0	6,129	5.4	3,559	6.9
	2016			12,450*									
Shetland	2006	190	18	39,278	189	0	-	3,765	4.3	16,134	4.9	19,379	4.8
	2007	182	25	40,795	197	0	-	2,663	4.5	17,838	4.5	20,294	4.9
	2008	202	26	41,374	182	0	-	4,091	4.1	14,287	4.0	22,996	4.6
	2009	188	22	43,785	208	65	2.3	4,873	3.3	16,183	4.6	22,664	4.6
	2010	178	23	45,439	226	0	-	3,624	4.9	17,179	5.0	24,636	5.3
	2011	189	22	35,493	168	118	2.4	4,611	4.7	16,071	5.1	14,693	4.5
	2012	188	16	43,010	211	0	-	6,083	4.3	15,784	4.5	21,143	4.9
	2013	210	14	36,694	164	0	-	5,822	4.5	18,121	4.9	12,751	4.7
	2014	224	24	46,369	187	0	-	6,196	5.7	17,604	5.5	22,569	5.6
	2015	228	19	42,786	173	0	-	11,134	5.4	14,939	5.0	16,713	5.5
	2016			41,229*									
South West	2006	181	22	25,460	125	0	-	2,467	4.4	7,920	5.3	15,073	5.5
	2007	162	36	31,353	158	0	-	4,309	4.1	7,069	4.3	19,975	4.8
	2008	173	21	19,229	99	0	-	1,212	4.0	3,108	4.6	14,909	4.9
	2009	199	23	35,726	161	38	3.5	4,615	4.6	15,988	5.1	15,085	4.6
	2010	231	39	27,751	103	29	2.5	6,032	4.2	7,118	5.7	14,572	4.9
	2011	212	17	37,157	162	0	-	3,618	4.8	10,899	4.8	22,640	4.8
	2012	221	24	26,850	110	0	-	9,315	5.4	4,508	4.8	13,027	4.9
	2013	251	19	34,924	129	0	-	5,847	4.8	9,111	5.6	19,966	5.4
	2014	279	29	34,976	114	209	2.2	4,278	5.1	10,476	4.4	20,013	5.2
	2015	302	12	35,911	114	0	-	10,356	4.7	6,686	4.3	18,869	5.3
	2016			36,987*									
Western Isles	2006	144	15	23,166	146	0	-	2,679	4.0	3,199	4.3	17,288	4.2
	2007	136	6	19,809	140	0	-	1,969	3.8	5,303	4.2	12,537	4.0
	2008	134	14	21,569	146	0	-	1,365	3.8	4,324	4.0	15,880	4.3
	2009	184	10	23,221	120	0	-	3,838	4.1	3,940	4.6	15,443	4.6
	2010	183	12	24,233	124	0	-	2,961	3.7	11,680	4.2	9,592	4.3
	2011	150	13	37,343	229	15	2.1	10,257	4.7	9,755	5.0	17,316	4.6
	2012	170	29	29,682	149	0	-	3,165	3.7	15,674	4.0	10,843	4.6
	2013	184	15	36,817	185	0	-	14,699	5.2	10,525	5.2	11,593	4.9
	2014	250	29	33,775	121	0	-	8,792	4.5	13,455	4.1	11,528	5.7
	2015	251	9	27,210	105	0	-	13,008	4.4	5,531	4.5	8,671	4.1
	2016			43,849*									
Scotland Total	2006	790	81	131,847	151	211	1.8	18,162	4.2	45,937	4.7	67,537	4.7
	2007	798	118	129,930	142	40	1.7	15,811	4.1	45,079	4.5	69,000	4.6
	2008	849	100	128,606	135	216	1.9	15,296	4.1	39,463	4.2	73,631	4.6
	2009	874	89	144,247	150	178	2.2	23,857	4.2	53,764	5.0	66,448	4.7
	2010	944	120	154,164	145	268	2.1	29,733	4.3	56,093	4.9	68,070	5.0
	2011	923	90	158,018	156	307	2.8	35,146	4.6	55,959	5.0	66,606	4.8
	2012	944	115	162,223	153	301	2.4	53,216	4.7	44,528	4.4	64,178	4.9
	2013	1,081	99	163,234	138	0	-	47,496	4.9	58,665	5.0	57,073	5.1
	2014	1,191	134	179,022	135	720	2.5	46,686	5.2	55,311	4.9	76,305	5.6
	2015	1,256	107	171,722	126	626	2.8	53,930	4.8	60,182	4.7	56,984	5.2
	2016			177,857*									

*Estimated production for 2016.

Company and Site Data

Table 36: Number of companies and sites engaged in the production of Atlantic salmon during 2005-2015

Year	Number of companies			Number of sites		
	Producing	Non-producing	Total	Producing	Non-producing	Total
2005	40	10	50	166	112	278
2006	32	12	44	157	95	252
2007	28	10	38	158	89	247
2008	26	9	35	139	118	257
2009	25	6	31	150	104	254
2010	20	10	30	140	109	249
2011	21	6	27	148	106	254
2012	16	6	22	142	115	257
2013	15	6	21	145	112	257
2014	11	7	18	143	117	260
2015	10	6	16	139	115	254

The number of companies authorised and actively producing Atlantic salmon in 2015 was 10, a decrease of one from 2014. Six companies remained active and authorised, although not producing salmon for harvest in 2015. This continued the trend of Atlantic salmon production becoming concentrated within fewer companies. These 16 companies had 254 registered active sites, although not all these sites produced fish for harvest in 2015.

Fallowing

Table 37: Number of seawater cage sites employing a fallow period during 2006-2015

Year	Fallow Period (weeks)						Total
	0	<4	4-8	9-26	27-51	52	
2006	67	10	44	74	37	20	252
2007	67	16	41	61	38	24	247
2008	53	16	28	92	40	28	257
2009	51	3	30	86	46	37	253
2010	53	8	26	83	41	36	247
2011	60	10	31	85	27	39	252
2012	58	4	31	97	28	37	255
2013	51	4	31	92	35	43	253
2014	48	4	36	89	29	51	257
2015	45	6	41	84	27	47	250

Of the 250 seawater cage sites recorded as being active in 2015, 47 sites were fallow for the entire year whilst 158 sites were fallow for a variable period. There were 45 sites that did not fallow in 2015. The normal production cycle in seawater 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.

Broodstock Sites

Table 38: Number of sites holding Atlantic salmon broodstock during 2005-2015

Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Broodstock sites	15	15	17	20	20	11	10	11	7	8	8	4

In 2015, the number of freshwater and seawater sites holding broodstock decreased to four. The number of sites holding broodstock in any one year can be variable, as can be seen from the previous years' figures, which indicate no obvious trend. A total of 1,875 fish were stripped, yielding 11.6 million ova, giving an average yield of 6,187 ova per fish.

Organic Production

Table 39: Organic production of Atlantic salmon during 2010-2015

Year	Number of active cage sites	Number of cage sites certified as organic	Production (tonnes)
2010	247	14	6,122
2011	252	10	3,104
2012	255	7	4,597
2013	253	8	5,207
2014	257	8	3,588
2015	250	5	2,382

Of the 250 active Atlantic salmon seawater cage sites in 2015, five were certified as organic, producing 2,382 tonnes.

Escapes

There were five incidents involving the loss of 16,005 fish from seawater Atlantic salmon sites in 2015. There was one additional incident reported where the company confirmed there was no loss of fish.

// 4. OTHER SPECIES

The Scottish aquaculture industry has continued to farm other species of fish during 2015. The production of brown trout (*Salmo trutta*) showed a small decrease, with the majority of the production being for the angling restocking market. Production of halibut (*Hippoglossus hippoglossus*) also decreased while there was a very small amount of Arctic charr (*Salvelinus alpinus*) produced. There was no cod (*Gadus morhua*) production during 2015. Lumpsucker (*Cyclopterus lumpus*) and several species of wrasse (Labridae) were also produced in 2015. The production of lumpsucker and wrasse are targeted at the marine Atlantic salmon industry where they are used as a biological control for parasites.

Company, Site and Production Data

Table 40: Number of companies and sites producing other species in 2015, annual production of other species (tonnes) during 2012-2015 and estimated production in 2016

Species	No. of companies	No. of sites	2012 Production tonnage	2013 Production tonnage	2014 Production tonnage	2015 Production tonnage	2016 Production tonnage*
Arctic charr	1	1	0.2	0	0	†	∞
Brown trout/ Sea trout	14	18	42	44	48	42	58
Cod	0	0	0	†	†	0	0
Halibut	2	3	73	56	66	56	90
Lumpsucker	4	4	0	0	5	6	15
Wrasse spp.	3	4	†	0.1	0.1	3	7

* Industry estimates based on stocks currently being on-grown.

† Production occurred but this cannot be shown without revealing the figure for an individual company.

∞ The estimated production for 2016 cannot be shown without revealing the figure for an individual company.

Staffing

Table 41: Number of staff employed in farming other species during 2006-2015

Year	Full-time	Part-time	Total
2006	92	17	109
2007	75	29	104
2008	80	44	124
2009	23	22	45
2010	19	24	43
2011	24	19	43
2012	25	21	46
2013	29	21	50
2014	29	20	49
2015	35	15	50

In 2015, the overall number of staff employed in the production of other species increased by one.

Production of Cleaner fish

Table 42: Number of cleaner fish produced during 2015

Species	Number of fish produced (000s)
Lumpsucker	235
Wrasse spp.	75

In recent years lumpsucker and wrasse spp. have been produced for use as a biological control for parasites in the marine Atlantic salmon industry. Data on the number of fish produced has only been collected since 2015. As data for future years is collected it will show trends in cleaner fish production.

Ova Laid Down to Hatch

Table 43: Source of ova from other species laid down to hatch during 2015

Species	Source of ova laid down to hatch (000s)		
	Own broodstock	Other GB broodstock	Foreign ova
Brown trout/sea trout	450	0	0
Halibut	4,000	0	0
Lumpsucker	0	1,746	600
Wrasse spp.	8,000	0	0

Trade in Small Fish

Table 44: Trade in small fish of other species in 2015

Species	Bought (000s)	Sold (000s)
Halibut	40	66
Brown trout/sea trout	168	163
Lumpsucker	994	494
Wrasse spp.	0	25

There was also a small amount of production of: brook charr (*Salvelinus fontinalis*); carp (*Cyprinus carpio*); sheepshead minnow (*Cyprinodon variegatus variegatus*); tiger trout (*Salmo trutta x Salvelinus fontinalis*) and turbot (*Scophthalmus maximus*). However, due to the small number of companies in production, it is not possible to summarise these data without revealing the production of individual companies.

Organic Production

Of the 30 sites recorded as producing other species in 2015, no organic production was reported.

Escapes

There were no reported escapes from sites rearing other species during 2015.

// 5. SCOTTISH MARINE REGIONS

The Marine (Scotland) Act 2010 introduces integrated management of Scotland's seas. The creation of a National Marine Plan sets the wider context for planning within Scotland including what should be considered when creating regional marine plans. Eleven Scottish Marine Regions have been created under the Act (see Appendix 3 map) which cover sea areas extending out to 12 nautical miles.

To support the development of Regional Marine Plans by Regional Marine Planning Partnerships, tonnages and financial values of annual finfish production have been calculated for the regions defined under the Act. These regional data are presented in Appendix 3. In order to maintain commercial confidentiality salmon production figures for the Argyll & Clyde and North Coast & West Highlands have been merged. Other finfish species including brown/sea trout, rainbow trout, cod, halibut and cleaner fish were produced, however these figures can not be attributed to Scottish Marine Regions due to commercial confidentiality.

// 6. SUMMARY

Rainbow trout

The production of rainbow trout increased by 46% in 2015 to 8,588 tonnes and was directed at the table (94%) and restocking (6%) markets. This was the highest ever level of rainbow trout production recorded in Scotland and was mostly due to increased marine production (4,678 tonnes compared to 1,909 tonnes in 2014). The total numbers of staff employed by the sector increased by 13 to 126. There was an overall increase in the productivity of the industry to 68.2 tonnes per person.

In 2015, the number of eyed ova laid down to hatch (12.1 million) increased by 1.1 million and was mainly all-female diploid stock (85%). The proportion of ova from GB broodstock increased to 7.4%. There was a decrease in trade with Denmark (20.5% of total ova imported), the Isle of Man (1.5% of total ova imported) and Norway (5.9% of total ova imported). Northern Ireland was the largest source of imported ova with 57.4% of the total, this was an increase proportionally from 2014. There were no imports of ova from the Southern hemisphere during 2015. There is a continued high dependence of the Scottish trout industry on imported ova however, imports of part-grown fish have also increased.

Atlantic salmon

In 2015, the total production of Atlantic salmon decreased by 7,300 tonnes to 171,722 tonnes, a 4.1% decrease on the 2014 production total. This follows a 9.7% increase in 2014 and is the second highest production ever recorded in Scotland. The survey shows increases in the production of grilse and pre-salmon but a decrease in the production of salmon. The number of staff directly employed on the farms increased by 38. Overall, there was a decrease in the productivity of tonnes produced per person from 135.1 to 126.0. The estimated harvest forecast for 2016 is 177,857 tonnes. The trend towards concentrating production in larger sites was maintained with 82.4% of production being concentrated in the sites producing over 1,000 tonnes per annum.

During 2015 there was a decrease in the number of ova produced to 11.6 million. The number of ova laid down to hatch decreased by 3.8% to 68.2 million. This highlights the trend towards using foreign ova sources with 90.2% of the ova laid down to hatch being imported and only 9.8% derived from Great British sources. Smolt production decreased slightly to 44.6 million, with the majority being produced as S½ smolts (53.5%), S1 smolts (46.5%) and the remainder as S1½ smolts (0.02%). The number of staff directly employed on freshwater sites decreased by 15 and productivity increased to 151,600 fish per person. Projections suggest that fewer smolts will be produced in 2016, followed by an increase in 2017.

Other Species

There was a decrease in the production of brown/sea trout from 48 tonnes in 2014 to 42 tonnes in 2015. Halibut production decreased by 10 tonnes and there was no reported production of Cod. Lump sucker and wrasse were produced for use as biological controls for parasites in the marine Atlantic salmon farming industry. In 2015, the total number of staff employed in the production of other species increased by one to 50.

ANNUAL PRODUCTION SURVEY 2015

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
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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. Accreditation Schemes

Please include membership to trade associations, quality schemes or organic certification schemes.

Q3. 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

Ova from abroad- Northern Hemisphere includes those from Northern Ireland and Isle of Man.

Q8-9. 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**

Q12. Fish Holding Capacity

Please enter the total cubic metre capacity for each type of production unit

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2016 to allow the Annual Survey Report for 2015 to be produced.

**ANNUAL RETURN OF INFORMATION FROM SCOTTISH FISH FARMS
FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 2015
ATLANTIC SALMON - SMOLT DATA**
Please complete and return by 31 January 2016 to L A Munro, Marine Scotland Science
375 Victoria Road, Aberdeen, AB11 9DB

Business No:

1	How many staff were employed in smolt production (company total)	Full time male	<table border="1"><tr><td></td><td></td><td></td></tr></table>				Part time male	<table border="1"><tr><td></td><td></td><td></td></tr></table>			
Full time female	<table border="1"><tr><td></td><td></td><td></td></tr></table>				Part time female	<table border="1"><tr><td></td><td></td><td></td></tr></table>					

2 Please detail any accreditation schemes this company is a member of; _____

3 How many ova were produced in the winter of 2014-2015 (company total)

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4	How many eyed ova were laid down for hatching in winter of 2014-2015	Site No	Site No	Site No																														
		Site Name	Site Name	Site Name																														
		<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
a From own farmed broodstock	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											
b From other GB farmed broodstock	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											
c From GB wild broodstock	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											
d From foreign sources	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											

5 How many eyed ova do you expect to hatch this winter (2015-2016)

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6	How many fry or parr were	a Transferred into the site	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
b Transferred out of the site	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												

7	How many smolts were produced as	a S ¹ / ₂ s (ie from 2015 hatch)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
b S1s (ie from 2014 hatch)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
c S ¹ / ₂ s or S2s (ie from 2014 or 2013 hatch)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												

8	How many smolts were sold as	a S1s (incl S ¹ / ₂ s)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
b S2s (incl S ¹ / ₂ s)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												

9	How many smolts do you expect to produce for sea winter on-growing in 2016 as	a S1s (incl S ¹ / ₂ s)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
b S2s (incl S ¹ / ₂ s)	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												

10 How many smolts do you plan to produce in 2017

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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)

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13	How many fish did you vaccinate	a against furunculosis	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
		b against ERM	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
c against IPN	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
d against <i>Vibrio</i> spp.	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												
e against SAV	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>											<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>												

ANNUAL PRODUCTION SURVEY 2015

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. Accreditation Schemes

Please include membership to trade associations, quality schemes or organic certification schemes.

Q3. 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

Q7. How many smolts produced as S1/2 or S1 etc

The definitions used for the survey are:

- S¹/₂ <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
- S1¹/₂ 19-24 months old, ie put to sea in July-December in year post hatch
- S2 >24 months old when put to sea

- Q8. } For S1s - combine numbers of S¹/₂s with S1s and
- Q9. } For S2s - combine numbers of S1¹/₂s with S2s

Q10. 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 2015 (maximum = 52)

It will be appreciated if the questionnaires are returned promptly and not later than 31 January 2016 to allow the Annual Survey Report for 2015 to be produced.

**ANNUAL RETURN OF INFORMATION FROM SCOTTISH FISH FARMS
FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 2015
ATLANTIC SALMON - PRODUCTION DATA**
Please complete and return by 31 January 2016 to L A Munro, Marine Scotland Science
375 Victoria Road, Aberdeen, AB11 9DB

«Address1»

Business No:

1 How many staff were employed in salmon production (company total), excluding post-harvest processing staff	Full time male Full time female	<table border="1" style="width: 100%; height: 20px; margin-bottom: 5px;"></table> <table border="1" style="width: 100%; height: 20px;"></table>	Part time male Part time female	<table border="1" style="width: 100%; height: 20px; margin-bottom: 5px;"></table> <table border="1" style="width: 100%; height: 20px;"></table>
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2 Please detail any accreditation schemes this company is a member of; _____

	Site No Site Name	Site No Site Name	Site No Site Name
--	----------------------	----------------------	----------------------

3 How many smolts were put into the site in 2015 as:

a S¹/₂s (ie from 2015 hatch)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
b S1s (ie from 2014 hatch)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
c S1¹/₂s or S2s (ie from 2014 or 2013 hatch)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

4 How many of above came from England

5 Total smolt input proposed in 2016

6 HARVEST of 2015 SMOLT INPUT in 2015

a Number of tonnes (wet weight at harvest)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
b Number of fish	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

7 HARVEST of 2014 SMOLT INPUT from 1 JANUARY to 31 AUGUST

a Number of tonnes (wet weight at harvest)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
b Number of fish	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

8 HARVEST of 2014 SMOLT INPUT from 1 SEPTEMBER to 31 DECEMBER

a Number of tonnes (wet weight at harvest)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
b Number of fish	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

9 HARVEST of 2013 SMOLT INPUT

a Number of tonnes (wet weight at harvest)	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>
b Number of fish	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

10 From the total production what amount in TONNES was certified as organic

11 How many tonnes of fish do you expect to harvest in 2016

12 BROODSTOCK PRODUCTION

a Were brood fish produced in 2015	YES/NO	YES/NO	YES/NO
b How many fish were stripped	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

13 What is the current fish holding capacity of each site in cubic metres

14 Duration of FALLOW PERIOD in WEEKS (cage sites; MAX = 52)

ANNUAL PRODUCTION SURVEY 2015

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
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 or if NONE then enter as

					0
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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. Accreditation Schemes

Please include membership to trade associations, quality schemes or organic certification schemes.

Q3. How many smolts put to sea

The definitions used for the survey are:

- S¹/₂** <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
S¹/₂ 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

Q12. Broodstock production

Please circle YES if broodfish were produced on the site

Q13. 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)

Q14. Fallow period

For cage sites only; please enter any number of weeks a site was fallow in 2015; 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 2016 to allow the Annual Survey Report for 2015 to be produced.

ANNUAL PRODUCTION SURVEY 2015

GUIDANCE NOTES FOR QUESTIONNAIRE

OTHER SPECIES

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**, or is no longer used to culture the species concerned, please score through the relevant site or species code.
3. When completing the boxes please start from the right, if NONE then enter a **zero** in right hand box eg

					0
--	--	--	--	--	---

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.

Q2. Accreditation Schemes

Please include membership to trade associations, quality schemes or organic certification schemes.

Q5 - 7. 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 2016 to allow the Annual Survey Report for 2015 to be produced.

// APPENDIX 2

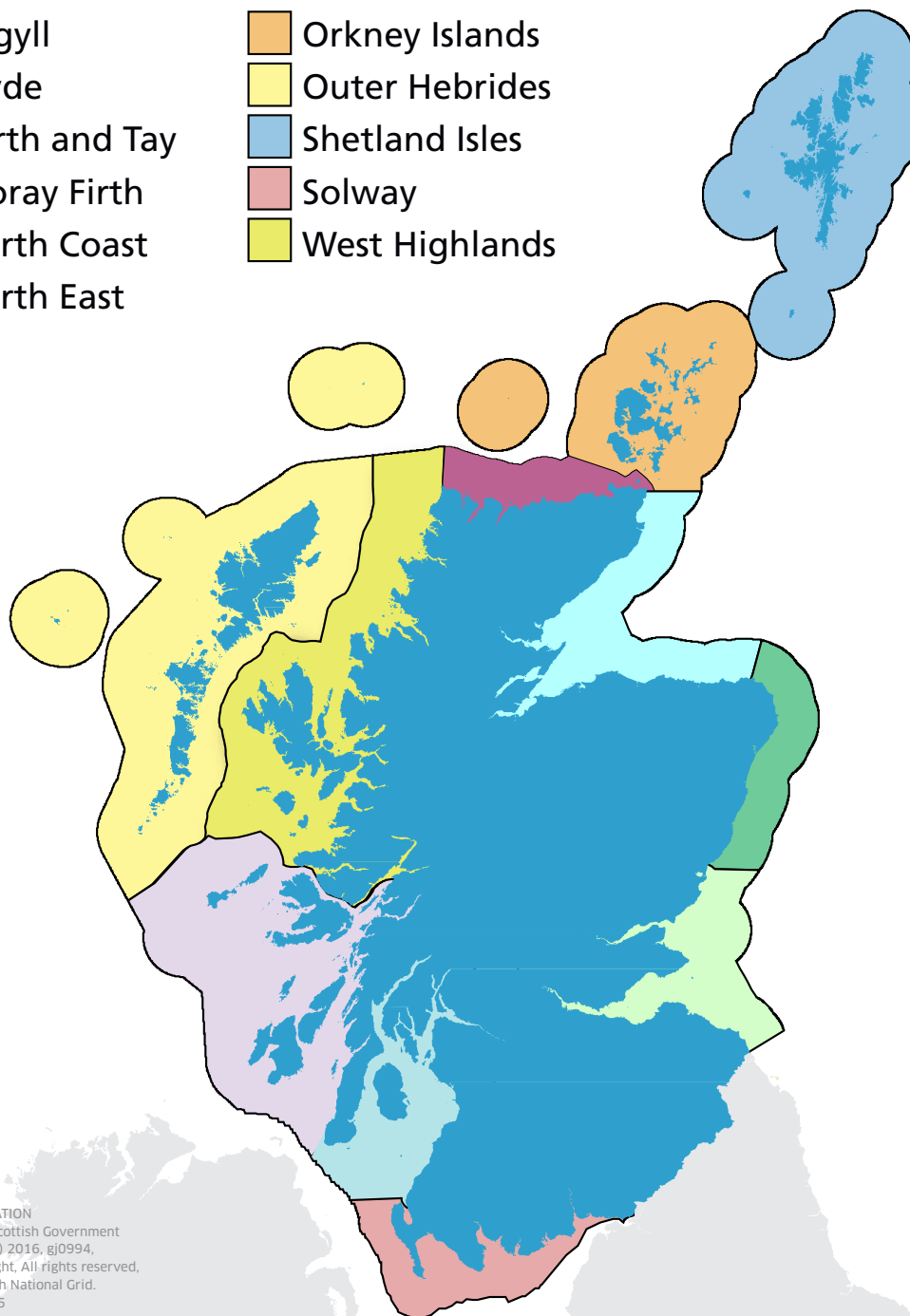
Glossary and Abbreviations

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 National Control Measures	Disease control measures in accordance with The Aquatic Animal Health National Control (Scotland) Regulations 2009.
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.
ERM	Enteric redmouth disease.
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.
Fry	The life stage of a young salmon from independence of the yolk sac as the primary source of nutrition to dispersal from the redd.
Gamete	Reproductive cells.
Grilse	Salmon harvested between 1 st January and 31 st August after one winter at sea.
Intra-peritoneal	Within the body cavity.
IPN	Infectious pancreatic necrosis.
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.
MSS	Marine Scotland Science.
Parr	Young salmon at stage from dispersal from redd to migration as a smolt.

Photoperiod	Alteration of the daylight regime.
Pre-salmon	Salmon harvested between 1 st September and 31 st December after one winter at sea.
Raceway	Concrete or brick channels used for farming fish.
SAV	Salmonid alphavirus.
S½	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.
S1½	Salmon or sea trout smolting at approximately 18 months from hatch.
S2	Salmon or sea trout smolting at approximately two years from hatch.
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.

// APPENDIX 3

Scottish Marine Regions



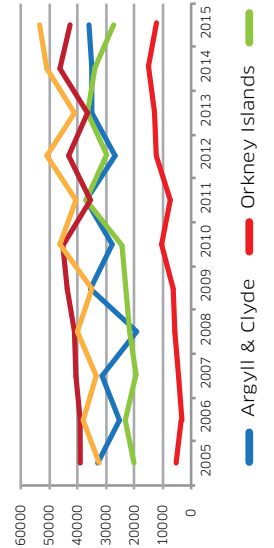
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Scale 1:4,250,765

Salmon Production by Scottish Marine Region (Tonnage and Value)

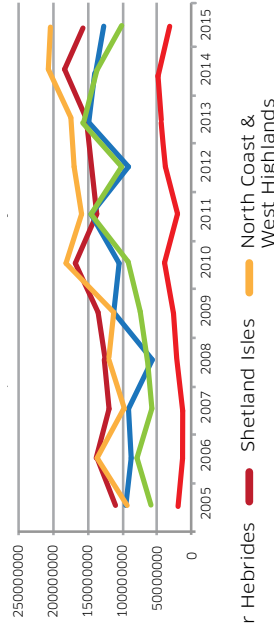
Region	2005		2006		2007		2008		2009		2010		2011		2012		2013		2014		2015	
	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £	Tonnage	Value £
Argyll & Clyde	33,056	95,465,728	25,460	88,855,400	31,353	91,331,289	19,229	57,071,672	35,726	113,859,718	27,751	104,982,638	37,157	146,323,872	26,850	92,578,800	34,924	148,042,836	34,976	140,673,472	35,911	133,229,810
Orkney Islands	5,183	14,968,504	3,724	12,996,760	4,432	12,910,416	5,716	16,965,088	6,220	19,823,140	9,388	35,514,804	6,369	25,081,122	11,694	40,320,912	11,479	48,659,481	13,029	52,402,638	11,074	41,084,540
Outer Hebrides	19,964	57,656,032	23,166	80,849,619	19,809	57,703,617	21,569	64,016,792	23,221	74,005,327	24,233	91,673,439	37,343	147,056,734	29,682	102,344,915	36,817	156,067,263	33,775	135,843,050	27,210	100,949,100
Shetland Isles	38,946	112,476,715	39,278	137,079,916	40,795	118,835,835	41,374	122,798,032	43,785	139,542,795	45,439	171,895,737	35,493	139,771,434	43,010	148,298,480	36,694	155,545,866	46,369	186,496,118	42,786	158,736,060
North Coast & West Highlands	32,439	93,683,191	40,219	140,364,310	33,541	97,704,933	40,718	120,851,024	35,295	112,485,165	47,353	179,136,399	41,656	164,041,328	50,987	175,803,176	43,320	183,633,480	50,873	204,611,206	54,741	203,089,110
All Scotland	129,588	374,250,170	131,847	460,146,006	129,930	378,486,090	128,606	381,702,608	144,247	459,716,145	154,164	583,203,017	158,018	622,274,490	162,223	559,346,283	163,234	691,948,926	179,022	720,026,484	171,722	637,088,620

Footnote - Figures for Argyll & Clyde and the North Coast & West Highlands have been merged due to commercial confidentiality. Other finfish species including brown/sea trout, rainbow trout, cod, halibut and cleaner fish were produced but can not be attributed to Scottish Marine Regions due to commercial confidentiality. Average prices (real) have been adjusted for inflation based on 2015 price estimates.

Salmon Tonnes



Value £ real price (inflation adjusted on 2015 Price estimates)





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Edinburgh
EH1 3DG

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