

# Salmon Scotland:

Growing Salmon. Growing Scotland.

2024 Manifesto





# Salmon Scotland Manifesto

We urge parties to support the continued success of the Scottish salmon sector, the UK's largest food export, and want to work with government to deliver sustainable economic growth, generate jobs in remote communities and in the UK-wide supply chain, and provide the best animal welfare in the world.

## A global success story - grown in Scotland

Scottish salmon is an extraordinary global success story that we can all be immensely proud of, supporting thousands of jobs and contributing hundreds of millions of pounds to the UK economy. Scottish salmon, grown in the cold waters off the Highlands and islands, is recognised as the best in the world – which is why it is in such high demand at home and abroad.

## The UK's biggest food export

Scottish salmon was the UK's biggest food export in 2022, according to official HMRC figures. Sales of the nutritious fish reached £578 million in the calendar year, with France and the US leading the global demand. Scottish salmon was exported to 54 countries, and sales outperformed all the UK's other main food exports including bakery goods, chocolate, cheese, cereals and lamb. Salmon is also the most popular fish among UK consumers, with sales of all salmon in UK retailers running at around £1.2 billion-a-year

## Supporting 12,500 Scottish jobs

Salmon farming directly employs more than 2,500 people in economically fragile, coastal communities in rural Scotland, with a further 10,000 Scottish jobs dependent on the sector. Figures from Salmon Scotland show a direct economic contribution of £303 million in Gross Value Added (GVA) in 2021, up nearly a fifth on pre-pandemic levels of £254 million in 2019. Through the wider supply chain and employment, the combined GVA total was £766 million.

## Growth potential

By tapping into salmon farming's full potential, we are confident the blue economy can deliver even greater benefits for local communities – and could be worth £1billion to the UK economy in just a few years. This would create additional revenue for government to spend on public services.



We want to see a more enlightened approach to the movement of labour into the UK, which recognises the unique challenges our coastal and rural farming communities face, including a change to key worker definitions and a broader public signal that the UK is open to people coming here to work.

---

The Scottish salmon sector is a bright spot in the economy and our members have the ability to help the country recover from both the long-term effects of Covid and Brexit.

Our sector employs more than 2,500 direct and 10,000 indirect jobs across Scotland: from fish farming, to processing, to fish health and veterinarians, to lab workers and specialists working in the fields of sustainability and innovation, our sector offers more than 100 distinct job roles.

While the vast majority of people working in our sector are British nationals, the sector does have an ongoing need for fresh talent from beyond our shores to fill roles where the skills do not currently exist in the UK, or exist in the right numbers.

The combination of skills shortages and long-term hard-to-fill vacancies is preventing the sector from growing even more robustly.

That's why we've been calling on the UK government to accept the House of Commons' environment, food and rural affairs committee recommendations to work with our sector and other food producers to address labour shortages and to develop a long-term labour strategy.

We want the next UK government to support important supply chain roles such as fish processing, as well as come up with a more flexible approach to immigration, one that is long-term and ensures the UK economy continues to have access to skilled foreign workers.





**We want a serious, pragmatic approach to the UK's relationship with the EU, with a clear focus on the nation's export businesses which depend on a positive, professional relationship with France and the other countries of the EU.**

**We want smooth trade flow and access to new markets. Specifically, the lack of a new eCertification for export health certificates (EHCs), and issues with the current outdated system, is costing salmon farmers millions of pounds every year. Improving the certification programme should be an urgent priority for Defra.**

Scottish salmon is the UK's largest food export, with the majority of fresh Scottish salmon exported to Europe. Like many other sectors our farming companies have faced increased red tape and costs triggered by Brexit in January 2020.

The costs associated with additional red tape and administrative burdens and delays in exporting to the EU are estimated to cost the Scottish salmon sector £3 million-a-year.

And recent figures published by Salmon Scotland reveal that there has been a net 'loss' of sales valued at between £75-£100 million had the sector grown at the same pre-Brexit rate.

Brexit has been mitigated by huge growth in other markets, particularly Asia and the US. Overall international sales in 2023 were worth £581 million, including a 7 per cent increase in the value of exports to the US and 22 per cent to Asia as global demand for our product continues to outstrip supply.

However, with salmon increasingly popular in traditionally smaller European markets such as the Netherlands and Spain, smoother trade flow and new markets would open up the possibility of further economic growth – generating greater investment in the Scottish economy and more high-skilled Scottish jobs.

A UK government pilot of new eCertification for export health certificates (EHCs) was piloted in 2022. Yet despite running well, the new scheme has not been implemented.

New border control posts (BCPs) have recently come into force, bringing in a raft of new import requirements governing salmon feed.

Four years on from Brexit, the next UK government needs to ensure the rules on international trade are fit-for purpose and help the country's biggest food export to continue to grow, and create jobs and wealth for the UK.



### Reduce trade friction with the EU

**We need the UK and EU to create a bespoke and mutually convenient Sanitary and Phytosanitary (SPS) agreement to return efficiencies to supply chains on both sides of the Short Straits to help domestic and European consumers and businesses.**

---

The EU is the largest single market for Scottish salmon globally. The sector invested heavily to make sure that fresh Scottish salmon could be exported as efficiently as possible once the post-Brexit transition period ended and the transition to the EU-UK Trade and Cooperation Agreement (TCA) took effect on 1 January 2021.

Despite these efforts, additional burdens on exporters remain. It is necessary for proposed efficiencies within the exporting system to be realised. This can all be done without any reduction in the overall checks or confidence within the domestic food chain systems.

Salmon Scotland calls on the UK government to prioritise developing an aligned agreement which states that UK and EU SPS standards are equivalent and/or aligned.

An agreement along these lines would generate significant benefits to exporters by reducing the bureaucracy throughout the supply chain.

Additionally, implementing new electronic systems – which have been called for prior to Brexit, specifically for export health certificates – would reduce time pressures and costs while increasing efficiencies.

Providing alignment between the UK and EU – making sure that our standards are understood and accepted, in a manner in which they can be shared, evidenced and traced easily – will benefit every part of the supply chain.





**In many remote parts of Scotland, salmon farms are vital to the future of local businesses and communities. But the lack of access to rural housing is a major barrier for workers. We are calling for reform to ensure that a significant proportion of the seabed licence fees paid by salmon farmers is reinvested directly in rural communities, with a particular focus on creating new housing.**

For over two years, Salmon Scotland has been pressing for more government action to tackle the Highland housing crisis.

Currently, there are more than 60 properties either owned or rented by our farming companies which, between them, provide accommodation for more than 130 employees and their families across the Northern and Western isles and the west coast of Scotland.

In 2022, we also partnered with the Scottish Empty Homes Partnership to make a joint call for vacant properties to be brought back in to use to tackle the rural housing crisis in Shetland.

That crisis has now been declared an “emergency” by the Scottish government. Salmon Scotland wants the Scottish and UK governments to work together to tackle this issue.

One solution we have suggested is for the £10 million paid to the Crown Estate Scotland by salmon farmers to be ringfenced to provide affordable accommodation for key workers living in rural, remote and coastal areas, rather than being allocated to general spending commitments.

Analysis by Salmon Scotland confirms that house prices have risen more sharply in the Highlands and islands than across the whole of Scotland over the past two decades. The cost and lack of affordability is contributing to depopulation in the Highlands and islands.

Salmon Scotland creates vital jobs and wealth for our Highland and islands communities. A focus on rural housing would help attract more people to come and live and work in all jobs in coastal communities, while also retaining local people to help to tackle depopulation.



