NOTE: E1, E2, and E9 are industry players. E3, E4, E6 are researchers, E5 is NGO, and E8 is government.

Thematic structure of interviwees’ accounts

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| Theme | Examples of quotes supporting the theme |
| Market consolidation | “[Salmon Scotland is] a key player in all of this. They're a focal point, and all producing companies are members, large number of supply chain members are members, […] we are a member of that. […] it's a key focal point, that's a key place for us to come together as a sector to face into challenges, but it's also about facing outwards and making sure that we've got unified voices, clear messaging, which might conflict, engagement, political, local, council level, etc. Just so that everyone -- there is a clear and consistent message about the sector being portrayed. And equally Salmon Scotland will face into, rather than one company coming out into media or facing into inquiries on their own and voicing on behalf of the industry. Salmon Scotland can do that.” (E1)  “it’s a very consolidated industry […] there's only really three or four producers I would say in Scotland now. […] So everyone's critical, really from a producer side in such a consolidated industry. […] I think there will continue to be value chain consolidation. So I think more and more farmers will get into the value chain, adding value to the product, supplying direct to retailers, potentially direct to consumers at some point in the future. I think that's a trend that started and is inevitable in a way. (E2)  “[…] there's an issue in terms of UK salmon consumption and supply in that there are only two UK retailers that exclusively stocked Scottish salmon […]. Everybody else has a mixture. […] there are four producers in Scotland that have scale, that's it. No more than four. Used to be 10, used to be 20 and so the producers and the buyers and the retailers because the retailers set a whole host of requirements on producers and those are around volume, price, quality, adherence to a whole range of either in-house retailer standards or externally certified standards, RSPCA Freedom Foods, welfare, stocking densities, use of antibiotics, different forms of husbandry treatments. The retailers certainly had collectively -- have agreed buying policies for their growers on fish feed.” (E9) |
| Technological innovation | “[…] there has been funding mechanisms that has been platforms created via likes of UKRI to support the sector […] more innovation funds, sourced funding bodies, like Innovate UK, or KTN, as it used to be, they put quite significant investments into collaborative projects. And that would then bring together the sector players, the relevant sector players who wanted to support it, as well as R&D bases so Sterling, Aberdeen, Edinburgh, Rosalind, etc, whomever, Cefas, Weymouth, the list goes on and on. Those are sort of mechanisms that help really push forward research and development. […] you get bigger jumps, when you've got collaborative projects […]And it was quite a few significant scale projects, looking at feeds, development of raw materials, you know, sea lice control mechanisms, vaccine development, etc. It was those sort of platforms that really moved things along” (E1)  “the technology has evolved, which has allowed […] bigger scale production. The industry's largely very well financed, and can invest to innovate and grow production technology and methodology and so on. I mean, […] If you contrast salmon farming or producers in Scotland with sheep farming […] there's a lot of them so any kind of evolution of the industry is kind of hampered by the scale of those farmers, their access to capital and innovation. So the industry is very, very innovative. And while we have challenges, no question there, what the industry has been really good at is finding solutions to the challenges that come up. And then and then investing in infrastructure to manage them. […] technology has allowed us to move into higher energy environments and investment. (E2)  “Another factor [in the rise of salmon] would be I'd say dramatic improvements in productivity and efficiency of production through state changes in two things. One, the genetics and the breeding of the animal so it grows faster and the way in which it's farmed takes less time. So that improves your profitability. That's been a very big change in increasing supply. […] So the second thing would be improvements in Disease Control. So we can now vaccinate fish against diseases that they used to die from. […] And it's difficult to vaccinate. You know, fish are different animals to us in terms of immune systems and so on and there's been big improvements in animal health, through medical and scientific technology developments. And then the third thing that would explain the dramatic increase in production is we've gotten better at farming at bigger and bigger scale and the equipment and the know-how and the technology of how you do that”(E9). |
| Regulatory framework | “our sector, salmon, farming, etc. it can't be unregulated, it needs to be regulated. So that's not necessarily an issue. You know, and […] what the consumers expect […] what we source to come from a responsibly managed and regulated sector, industry. If there was no regulation -- Scottish salmon would not have the reputation that it has. So we do need it. So while it hasn't necessarily enabled rapid expansion the sector, it certainly has demonstrated that it's being produced responsibly” (E1)  “our share of global market has declined […] that's because the kind of the regulatory environment within [Norway, Chile] has allowed growth much more efficiently than Scotland has […] the regulations have changed recently […] this year is the first year that Scottish Sea Farms’ had 160 metre diameter pen. Prior to that, it wasn't that long ago, and there will still be 80 metre pens being farmed in Scotland. So big difference in scale” (E2) |
| Environmental impacts | there was a feeling that UK consumers were starting to gravitate away from red meat with a sort of concern about impacts -- their impact of their basket on climate change, so on so forth, and it looked like there was a real opportunity there to try and capture elements of that consumer spend and it looked like it was gravitating towards fish, primarily salmon, as well as plant based products. […] if you're sourcing from responsibly sourced fisheries, ie certified sustainable fisheries, you could argue that is potentially the lowest impact source that we should be using. If you were to flex across to terrestrial proteins or oils, they bring a very significant carbon footprint with them. So if you want to go with a low carbon footprint feed, actually, high marine inclusions is the way to head (E1)  “[because a fishery lost its] MSC approval, we would no longer source fishmeal from those fisheries. So ‘No, it's not been independently certified as sustainable so we're out, we're not sourcing from there, we'll buy elsewhere’. And we will only be using a trimming, so a byproduct of those fish that were used for human consumption”. […] through work with SEPA and Marine Scotland, each farm will look at the expected and modelled impact on the seabed. So we will do the research that says if we have 1500 tonnes of salmon on this site at peak biomass, it will have this impact on the seabed. And that impact would be recoverable over […] so short number of years if that farm was removed, and then every year, that peak biomass and at the end of the crop, you go in, and you sample the seabed around the farm. […]So it's all about the carrying capacity of the environment with a constant feedback loop. […] [what] will influence how much salmon we produce will be what sites we’re producing fish on, are those sites sustainable – environmentally and economically and sustainable, when should we stock them for the best outcome, again economically and welfare, and then what does that then do in terms of our harvest profile.”(E2)  “we have funded projects about waste capture, resource efficiency […] We have conversations with the Sustainable Seafood Coalition […] I think the people that are driving improvements in sustainability or environmental footprint are directly the retailers and the feed companies. […] farming in the sea is intrinsically by a factor of about five, at least five more sustainable than farming on land. […] And so that there are many, many ways in which farmed salmon is a highly sustainable product for those biological reasons (E9) |
| Role of retailers | “the reality is, [consumers] don't like things with heads, eyes, gills, the UK consumers like easily accessible, quick and easy to use protein. And salmon offers that […] Retailers stepping away from having counters. […] And so availability of that traditional sourcing of fish is getting harder and harder for UK consumers. But what they're used to is spending on pack, you know, going up to the counter and there's all these packs presented to you and it's quick and easy grab it, there's a great portion size, everything's dealt with you and salmon lends itself very well to that. So you know that drive is primarily due to boneless portions, fillet portions, in some cases go even further being skinless or descale all the rest of it. […]. I think accessible format is key. (E1)  “Salmon, without question is the biggest single product within the seafood category. […] And in many retailers was in the region of 30 to 40% of the total seafood category. So from a retailer's point of view, having appropriate salmon offering was critical to the whole of that category performance. So it was hugely important. […] salmon for consumers was possibly seen along cloak more akin to other proteins, terrestrial proteins in a way. So if they were going to buy fish, they will choose between cod, haddock, sea bass, prawns potentially, so that was almost a purchase decision among those seafoods whereas salmon would be a case of ‘okay, we're gonna have chicken, beef, lamb, or salmon tonight’. Not absolute situation, but certainly more towards that kind of purchase decision” (E2)  “30 to 40 different products. So it was a vast ingredients in other products. Now M&S is different retailer because of the kind of the breadth of the portfolio of added value products compared to other retailers but that's probably an evolution that's happened over time. And I think then also, you know, you go to the sandwich, the lunch section of the retailer now and you will see much more salmon now than you would have done. So maybe going back 10-15 years, you would have seen a smoked salmon sandwich, but you wouldn't have seen salmon bites or sushi or so on and so on and so on. So I think salmon has made that move into different eating and consumption occasions.” (E2)  “Well, I'm sure the retailers have a big part to play. You know, if they have their but a kind of, “Pick one of your proteins, one of your stir fry mixes one of your carbohydrates and a sauce and a sashy” (27:18). Then you can have noodles or rice, and you can have green vegetables or rainbow vegetables, and you can have a piece of chicken or a piece of salmon. So some of it will be literally physically that the salmon is in a fridge next to the chicken and the chicken and salmon fridge is not next to the beef and pork fridge. […]there's elements about “What’s eye level?”, “What’s on promotion?” […] They might not even tell you anyway, but you know the retailers will have strategies that optimize the profitability of their lines and so they will push or not push depending on, can they get the supply that they want and can they get the profit margin that they want […] smoked salmon or ready meals […] that's a huge part of the market as well because lots of people don't even cook a fillet at home. (E9) |
| Health benefits of salmon | “[there is ] a regular health message out there ‘make sure you omega 3 and make sure you eat an oily fish’ - Salmon delivers on that” (E1)  "When we asked consumers why they have chosen salmon, nine times out of 10, there's two real drivers on purchase decision. The first one is because they like eating salmon. That's it, they really enjoy the bite because they like to eat it. The second one is from a health aspect. So they enjoy it and they know it’s good for their health. […]ultimately, it's a good -- because it's a good product, because it's healthy so it's, I mean, how many foods do we eat, that a) we enjoy, and b) are good for us?” (E2)  “both Norway and Chile have much lower requirements on the fish feed ingredients, which means that the product quality that the Omega 3 in the fish that we eat is significantly less from those sources. Scottish salmon would have more Omega 3 than any of the well Pacific salmon that people think of as healthy […] it's at the pinnacle of nutritional value […] I think one of the drivers of people's consumption of [salmon, prawns] is they are perceived to be healthy, but they don't have a preparation hurdle associated with them.” (E9) |