2nd December 2025

Mairi Gougeon MSP
Cabinet Secretary for Rural Affairs, Land Reform and Islands
Scottish Government
St Andrew's House, Edinburgh

cc:
Kate Forbes MSP, Deputy First Minister and Cabinet Secretary for Economy and Gaelic
Gillian Martin MSP, Cabinet Secretary for Climate Action and Energy

Dear Cabinet Secretary,

Re: Independent analysis of the true economic impact of salmon farming in Scotland

We are writing to share with you the findings of an important new study, *Assessing the Economic Impact of Salmon Farming in Skye & Lochalsh*, prepared independently by **Dr Andrew Moxey (Pareto Consulting and former Chief Agricultural Economist. Scottish Executive)** and **Professor Angela Tregear (University of Edinburgh Business School)**.

Commissioned jointly by **WildFish Scotland** and the **Sustainable Inshore Fisheries Trust (SIFT)**, the report provides one of the clearest and most rigorous examinations to date of salmon farming's economic footprint in Scotland. Its conclusions raise serious questions about the credibility of long-standing claims made by the industry regarding its contribution to rural development and Scotland's economy

The study finds that headline economic statistics - often repeated uncritically in policy and media discourse - substantially overstate the benefit of salmon farming once factors such as displacement of other industries, foreign ownership, and public subsidy are accounted for. In particular, it highlights that:

- Headline figures of jobs created by the salmon farming industry fail to take into account jobs that the industry undermines in tourism, freshwater fisheries, shellfish aquaculture and sea-fisheries

- The absence of transparent, verified data regarding other marine sectors makes industry claims about economic benefit meaningless and even undermines Scottish Government statistics on the sector's impact.
- Revenues from salmon farming are not retained locally, with Scottish farms' contributions to the corporate profits of the four multinational companies which dominate the sector being largely repatriated overseas;
- Salmon farming companies place a burden on rural locations by 'free riding' on the local ecosystem, for example by dumping untreated effluent into inshore waters whilst not paying any Non Domestic Rates.

This evidence directly challenges the often-repeated narrative that Scottish salmon farming is a "£1 billion industry" underpinning rural prosperity. That figure reflects gross export value - not value added to Scotland's economy, and certainly not to the communities that host the farms.

Continuing to present salmon farming as an unquestioned economic success story carries reputational risks for Scotland itself. A government that prides itself on environmental leadership and evidence-based policy-making cannot afford to appear captured by the very industry it regulates. Indeed the authors of the study acknowledge the fragility of the industry and the economic vulnerability of over-reliance on this sector. It is, in this light, important to note that the sector employs fewer people now than it did in 2015.

If public debate and policy decisions continue to rely on unverified industry data, Scotland risks being seen internationally as overlooking public interests and community well-being in order to support corporate interests.

We believe there is now an urgent need for the Scottish Government to take action on this important issue by committing to:

1. **Greater transparency** - ensuring that independently verified economic data on salmon farming is made publicly available; and
2. **Independent national assessment** - commissioning a full, arm's-length cost-benefit analysis of the sector's net contribution to Scotland's economy, following the "Green Book" standards.

We would welcome the chance to discuss the findings in detail. Such a meeting could help ensure that future decisions on salmon aquaculture policy and public funding are informed by the most robust and transparent economic evidence available and are in the interests of the Scottish economy rather than the interests of multinational

corporations seeking to avoid regulatory hurdles in other countries including those where they are headquartered.

A digital version of the report can be accessed here: https://sift.scot/wp-content/uploads/2019/02/Assessing-the-Economic-Impact-of-Salmon-Farming-Scoping-Study-2025.pdf

Thank you for considering this important work. We hope the Scottish Government will use it as a foundation for an evidence-based conversation about the true value - and the true costs - of salmon farming in Scotland.

Yours sincerely,

Nick Underdown, WildFish,

Charles Millar, SIFT