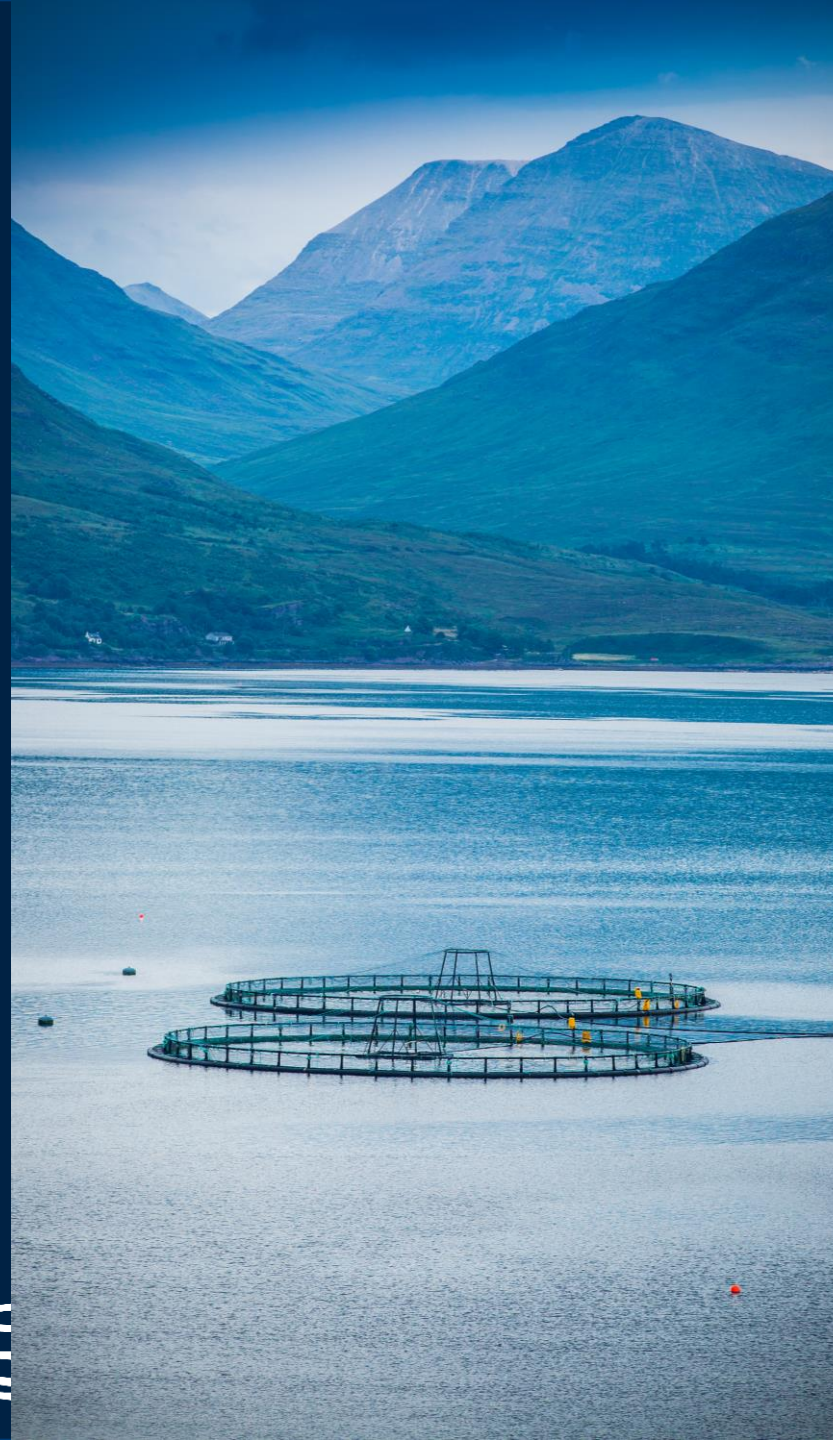


Scottish salmon and the Label Rouge: a success story spanning more than 30 years

Marie-Anne Omnes - Seafood Scotland

In collaboration with Scottish Quality Salmon



SEAFOOD FROM SCOTLAND

Independent, non-commercial and funded by the Marine Directorate of The Scottish Government, only organisation representing every part of the Scottish seafood industry – from sea to plate – since 1999.

A key focus is raising awareness of the quality and provenance of our seafood among buyers, chefs and food influencers around the world.

Collaborating with partners such as Salmon Scotland and Scottish Quality Salmon.



SEAFOOD FROM SCOTLAND

SCOTTISH SALMON AQUACULTURE

Scotland's natural environment, with its pristine cold waters and suitable coastal conditions, made it an ideal location for salmon farming.

First marine fish farm established at Loch Ailort in Inverness-shire in 1965

1970s-1980s -from 14 tonnes in 1971 to 600 tonnes in 1980.





SCOTTISH SALMON AQUACULTURE TODAY

- **Export value:** £844 million in 2024, the highest ever recorded - from over 100,000 tonnes exported to 48 countries.
- **Jobs:** Supports over 12,500 jobs, with more than 2,500 directly employed by farming companies.
- **Supply chain:** Supports over 3,600 supply chain businesses across Scotland.
- **Farms:** over 200 salmon farms dotted around the Scottish coast.

In 2024, Scottish salmon production was an estimated **185,207 tonnes live weight**, which was higher than 2023 and 2022 but lower than the record set in 2021.

Scottish salmon is the **largest food product exported** from Scotland and the UK.

France remains the biggest market for Scottish salmon, accounting for more than half of all exports, with sales of £462 million in 2024.





EUROPEAN SALMON MARKET

The European salmon market is driven by high consumption, particularly in countries like France, Germany, and Poland, which rely heavily on imports.

Salmon is a very popular fish in Germany, with per capita consumption reaching 2.4 kg in 2023, **making it the most consumed fish species.**

The European salmon market was valued at €17.5 billion in 2024 and is projected to **reach €26 billion by 2033.**

2.2 ANALYSIS BY MAIN SPECIES

TABLE 9
SELF-SUFFICIENCY RATES
OF TOP-15 MOST
CONSUMED PRODUCTS IN
THE EU (2022)

Source: EUMOFA, based on
EUROSTAT (online data codes:
[fish_ca_main](#), [fish_aq2a](#)
and [DS-045409](#)) and FAO data.
Details on the sources used can
be found in the Methodological
background.

Products ⁴² and share of total apparent consumption	Per capita consumption (kg, live weight equivalent)	Self-sufficiency rate
Tuna (13%)	2,96	29%
Salmon (11%)	2,51	1%
Shrimps (7%)	1,68	11%
Alaska pollock (7%)	1,67	0%
Cod (7%)	1,63	5%
Mussel (5%)	1,21	78%



A WORD ON BREXIT...

Increased red tape and costs triggered by the UK's departure from the EU in January 2020 has seen exports of Salmon to the trade bloc drop 16% to 44,000 tonnes in 2023. While export values to the EU were only down 3% to £356m, this was only because strong global demand had driven up prices.

Brexit has cost the Scottish salmon industry up to £100 million annually in lost sales due to increased red tape, administrative costs, and delays at borders (Salmon Scotland).

France is the biggest market for Scottish salmon, with 500 lorryloads of fish from the Highlands and islands entering Europe each week. However, some imports are meant for other markets, including Germany.

Pre-BREXIT, Germany was the 2nd market for Scottish salmon. In 2025, it is impossible to get specific figures.

A new deal was announced in May 2025 with potential positive outcomes for salmon exports to Germany and Europe in general.



SEAFOOD FROM SCOTLAND

LABEL ROUGE – 65 YEARS IN THE MAKING



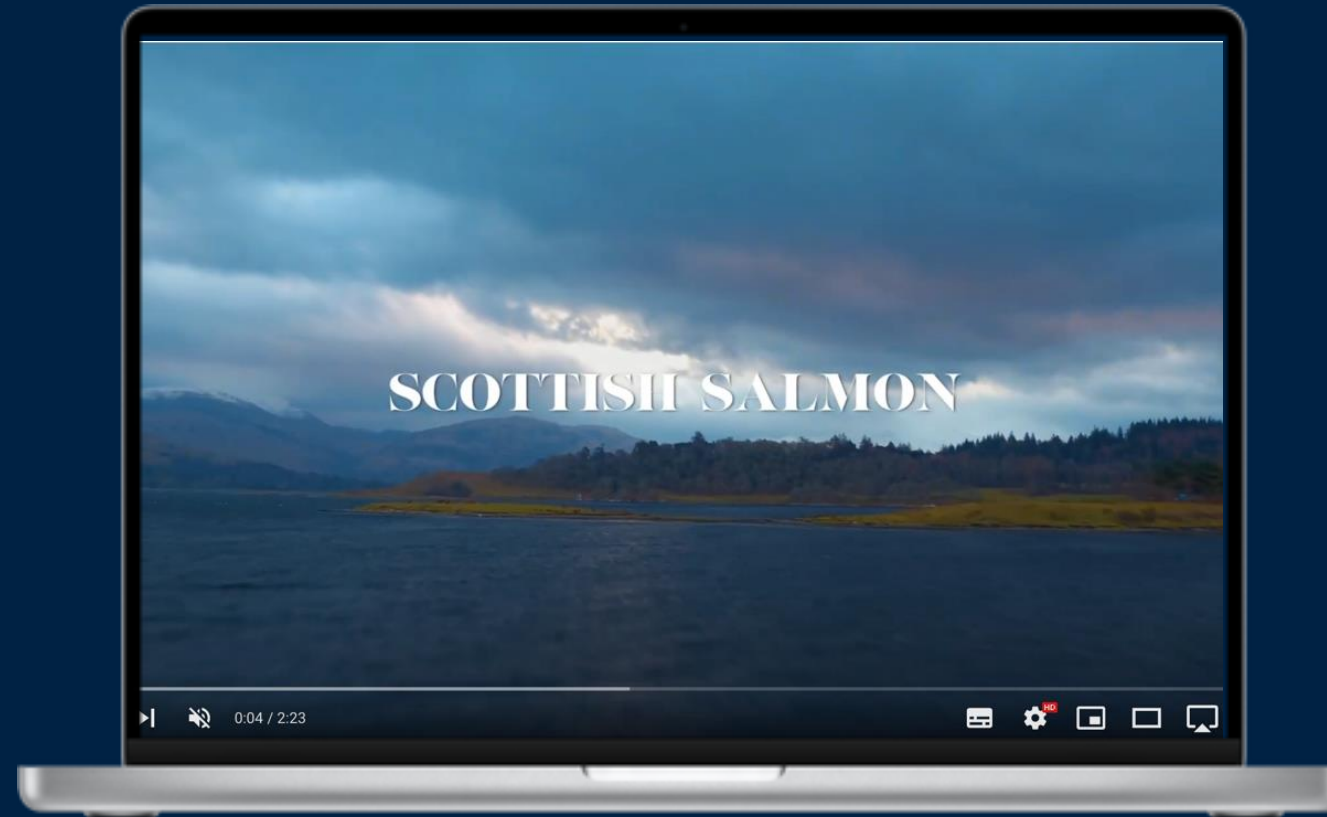
The history of the Label Rouge dates back to the 1960 Agricultural Orientation Law, which created the agricultural label at the instigation of the French minister at the time. This initiative arose from the desire of a group of poultry farmers who, faced with the increasing industrialisation of agriculture, sought to promote traditional farming methods by offering consumers a guarantee of quality.

Approval is officially announced through a joint decree from the Minister for Agriculture and Fisheries and the Minister for Consumer Affairs, on the recommendations of the National Institute for Origin and Quality (INAO), the French public body responsible for quality and origin marks relating to food products.

In 1992, Scottish salmon became the first fish and the first non-French product to obtain the Label Rouge certification, the official endorsement by the French authorities of the superior quality of a food or farm-raised product, particularly with regard to taste.

Originally produced as a niche product for the premium French market and served in many of France's top restaurants, it is now sought-after in other European countries, including Germany.

LABEL ROUGE



Let's embark on the Label Rouge Journey...



SCOTTISH LABEL ROUGE SALMON



Five Scottish aquaculture companies farm Label Rouge Scottish Salmon in accordance with strict specifications.

In the Highlands and Islands, the water from streams and rivers flowing down from the mountains provides the ideal conditions for young fish to grow in freshwater.

The dynamic environment encourages the salmon to swim constantly, respecting the fish's natural growth rate.

- **8,000 tonnes of Label Rouge Scottish salmon**
- **< 5% of Scottish production**
- **0.003% of global production!**



INTRODUCING LABEL ROUGE SCOTTISH SALMON



The Label Rouge, official recognition of superior taste and quality in products



A recognised and protected 'Scotland' origin



Quality and flavour guaranteed by rigorous farming conditions in the pure waters of Scotland





WHY CHOOSE LABEL ROUGE

- **Slow growth**: Label Rouge Scottish salmon are raised for 8 to 16 months in freshwater, then for at least 12 months at sea.
- **Low density**: 2% fish and 98% water.
- **Balanced diet** rich in marine products and guaranteed GMO-free (<0.9%) and free from processed animal proteins.
- **Control of the fat content** in the flesh so that the fish is not too fatty – guaranteed omega-3 content.
- **Traceability from egg to plate** and sell-by date (12 days after slaughter) to guarantee the product's ultra-freshness.



GUARANTEED SUPERIOR TASTE QUALITY



To guarantee the taste quality, sensory and hedonic tests are regularly carried out by a panel of consumers and a panel of experts.

Criteria assessed: appearance, texture, cooking properties, firmness, taste, etc.

Label Rouge salmon has:

- A more intense flavour
- A “melt-in-your-mouth” texture
- A typical salmon smell
- Firmer filets
- A better cooking performance



SEAFOOD FROM SCOTLAND

GROWING APPETITE FOR LABEL ROUGE SALMON

- Trust in the product
- Growing category
- Sustainability
- Versatility
- Cross-generational demand
- Ambassadors





Any questions?

Vielen dank!

Schottischer Lachs Label Rouge
Seafood Scotland

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