



Salmon

Welfare Scorecard 2023



COMPASSION
in world farming



Food Business

Foreword

Fish are sentient animals capable of feeling pain, stress and fear, as well as experiencing positive emotions, social bonds, and advanced intelligence. They are sensitive creatures and like many other animals, they explore, socialise, hunt and play. Yet many fish are intensively reared on farms where they are forced to live in conditions that fail to meet their basic welfare needs.

In recent years, there has been an increase in public awareness about animal welfare, sustainability, and healthy food, with many people turning to eating more fish as they decrease their red meat consumption. As the demand for seafood has soared, aquaculture has become the world's fastest-growing food sector, producing \$265 billion worth of goods in 2020. Today, over half the seafood we consume is farmed.

More than 400 million salmon are raised globally each year, with longstanding criticism having been levelled at the industry for failing to find welfare-oriented solutions for addressing stocking densities, mortality rates from sea lice infestations, and the lack of mental stimuli for salmon reared in barren environments.

This new Salmon Welfare Scorecard aims to provide meaningful engagement with the salmon industry, fostering transparency across the supply chain. It will enable producers to report authoritatively on salmon welfare and provide a basis for rewarding better policy and practice; all with the aim of improving the welfare of farmed salmon.

The Scorecard has evaluated the public policies of eight salmon producers which together represent more than 50% of worldwide salmon production. It is based on assessments made from publicly available company information, rated across 13 welfare parameters, including stocking density, humane slaughter, sea lice infestations and mortality. Each parameter is marked independently with the resultant comparison table being based on a 5-colour scale, from red to green.

All the producers included were consulted about the Scorecard's original findings in March 2023 and had the opportunity to adjust their scores by updating any publicly available information prior to publication, as well as being offered private, dedicated meetings with Compassion's Food Business team to discuss how to make welfare improvements.

The Salmon Welfare Scorecard is designed to encourage greater awareness, transparency, and investment in the welfare of farmed salmon. I look forward to seeing increasing progress on fish welfare as a result of engagement with this Scorecard initiative, an approach that we intend to also apply to the farming of other fish species.



Philip Lymbery, Global CEO, Compassion in World Farming International








Parameters	AquaChile	Bakkafrost	Cermaq	Cooke	Grieg Seafood	Leroy	Mowi	SalMar
Enclosure	Orange	Orange	Orange	Red	Yellow	Orange	Light Green	Orange
Feed and Feeding	Yellow	Orange	Yellow	Red	Orange	Orange	Light Green	Orange
Genetics	Green	Red	Green	Orange	Red	Red	Green	Green
Health Planning and Treatments	Yellow	Yellow	Green	Red	Yellow	Light Green	Light Green	Yellow
Humane Slaughter	Red	Light Green	Green	Red	Red	Light Green	Green	Light Green
KWI (Key Welfare Indicators)	Yellow	Orange	Green	Red	Light Green	Orange	Green	Orange
Mortality	Yellow	Yellow	Yellow	Red	Orange	Yellow	Light Green	Orange
Predator Management	Orange	Green	Light Green	Red	Yellow	Red	Light Green	Red
Sea lice	Orange	Yellow	Yellow	Red	Red	Orange	Orange	Orange
Stocking density	Yellow	Orange	Red	Red	Red	Orange	Orange	Orange
Training and Husbandry	Yellow	Orange	Yellow	Red	Yellow	Yellow	Green	Orange
Transport and transfer	Light Green	Orange	Yellow	Red	Red	Red	Yellow	Red
Water Quality	Light Green	Yellow	Green	Red	Light Green	Orange	Yellow	Red

What is assessed?	Explanation of the scoring ¹	Colour code
Policies, reports and company-owned websites that are directly accessible by the public.	<ul style="list-style-type: none"> Each parameter is independent. Each parameter is a representation of a set of standardised sub-topics, questions and answers. Evaluation has been done according to Compassion in World Farming's recommendations and has considered stakeholders' feedback. Answers and references used to choose them have been registered. When a company has a different report or policies for different production locations, the lowest score has been chosen. 	<p>Tier 5: 80-100%</p> <p>Tier 4: 60-80%</p> <p>Tier 3: 40-60%</p> <p>Tier 2: 20-40%</p> <p>Tier 1: 0-20%</p> <p>Percentage of score achieved for each parameter.</p>

¹ Further information on the methodology can be found here.

The Scorecard

The **Salmon Welfare Scorecard** was developed to collect and report on the widely different information communicated by the salmon producers on their welfare policies and practices, analysed and summarised in an accessible and comparable manner, using a 5-colour coded scale.

-  **Red:** Limited reporting. It can also mean that the practice is inadequate for salmon welfare.
-  **Orange:** Writing or reporting is general or vague. Some practices are adequate for salmon welfare.
-  **Amber:** Reporting with not enough detail. A mix of adequate and inadequate practices.
-  **Light green:** Reporting is extensive but omits important details. Mostly good practice.
-  **Green:** Reporting is detailed. General good practice.

The industry overall

The Salmon Welfare Scorecard represents more than 50% of global salmon production which is a sizeable portion of overall production, from where we can extract some learnings that can be applied to the industry as a whole.

The fish industry has yet to fully embrace transparent reporting of their welfare policies and practices, even their positive ones, which would enhance their relationships with crucial stakeholders. Investors and companies are keen for producers to improve transparency in their production standards, as evident from the industry's engagement and positive response to the Scorecard.

As a result, producers are becoming more confident sharing information about their humane salmon slaughter practices, reflecting the industry's shift towards greater transparency. Initially, most producers only disclosed practices around stunning prior to slaughter in vague terms, but after consultation on the Scorecard, half the producers have enhanced their reporting on *humane slaughter*. Other parameters like *Genetics*, where producers did not report whether they use cloning or triploids, or RAS systems, have also improved.

Among the thirteen parameters, *Transport and Transfer* showed commonly poor scores across the board. This reflects that the industry neither offers a clear policy, or reports on, how salmon are transferred, nor the conditions in which they are transported.

The *Stocking density* parameter scored the lowest across all the producers assessed. In contrast to *Transport and Transfer*, producers report more often on stocking density, although the practices and limits they refer to are generally aligned to legislation, and overall, the reporting for this parameter does not achieve the desired level of ownership, clarity, and detail.

Contrary to this, we found that the *Genetics parameter* was reported more accurately with *Health Planning and Treatment* achieving the highest additive score as an industry, although only one producer scored at the highest tier for that parameter. While the reasons for this are unknown, we could argue that social pressure for the protection of the environment has influenced producers' policies. Certifications and legislation have also helped level the playing field for *Health Planning and Treatments*, thanks to their focus on the impact of treatments, such as antibiotics, on human health and the environment. The *Genetics* parameter was not initially well reported, but producers have updated their policies to be more open and clearly reflect their current practices. Similarly, it could be argued that *Genetics* was influenced by negative public pressure and legislation, and decisions around whether genetic engineered salmon, triploid or cloned salmon should be used.



Compassion in World Farming is recognised as the leading international farm animal welfare charity. It was founded in 1967 by Peter Roberts, a British dairy farmer who became concerned about the development of modern, intensive factory farming.

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