

also carrying out research into the possibilities of farming other species, such as turbot and halibut.

The development of the Scottish aquaculture industry has been totally different from that of Norway. In Scotland there are no regulations on the size and ownership of aquaculture facilities. As a result, the Scottish aquaculture industry was essentially pioneered by large corporations which had the financial resources to develop the technology. Subsequently, once initial capitalization costs decreased, many small producers entered the industry with the help of the publicly funded regional development programs of the Highlands and Islands Development Board. As a result, the Scottish industry has grown tremendously in the past four years. For example, the direct employment provided by this industry is currently estimated at around 1,200 jobs. It is expected that within a few years, the Scottish industry will be producing the same numbers of pen-raised Atlantic salmon as the Norwegian industry. Scottish salmon production is currently at a level of 15,000 tonnes. It is expected to reach 45,000 tonnes in 1989 and possibly 63,000 tonnes by 1990. In addition to being faced with a learning curve less steep than that faced by the Norwegians, who pioneered the industry, the marketing prospects of Scottish salmon aquaculture are enhanced by the current difficulties of the Norwegian industry. The United Kingdom, as a member of the EEC, has a freer and more assured access to this market than Norway.

Like the Norwegian salmon aquaculture industry, Scottish aquaculture has a number of problems to contend with. One of these is the lag between infrastructural development, knowledge in fish health and husbandry sciences and the industry's growth. Another is the lack of regulations relating to planning controls, especially over the siting of marine aquaculture operations; for example, there are no regulations specifying minimum distances between farms. This has a potential impact on fish health and the environment which raises concerns among various interest groups as to how the aquaculture industry is developing. The major factor which triggers opposition to aquaculture development is the density of farms. In addition, the unequal application of fish health regulations across the United Kingdom has apparently resulted in the spread of fish diseases from one area to the other.

Another problem in the Scottish industry relates to the marketing difficulties experienced by small producers. This is totally different from the situation in Norway, where aquaculture products are marketed by a central