

“A look at aquaculture in Chile”



Undersecretariat
for Fisheries
and Aquaculture

Chilean Government

Pablo Berazaluze Maturana
Undersecretary for Fisheries and Aquaculture

Undersecretariat for Fisheries and Aquaculture



- The Undersecretariat for Fisheries and Aquaculture is a public institution that belongs to the Ministry of Economy, Development and Tourism.
- It was created in 1976 through Decree Law 1626/1976.
- Its mission is to regulate and manage fisheries and aquaculture activities through management policies, regulations and measures supported by technical reports based on scientific research and social and economic variables.
- This mission has a participatory and territorial approach aimed at the sustainable development of the national fisheries and aquaculture activity.



Chilean Aquaculture



- Growing food for the world
- Our people has lived near the ocean since the very beginning
- Soon we realized how to extend our ancient knowledge to our pristine waters
- Products are manufactured to the highest quality standards
- Distributed to the most demanding markets in the world
- We produce in rural areas, mainly in the southern part of our country



Chilean Aquaculture



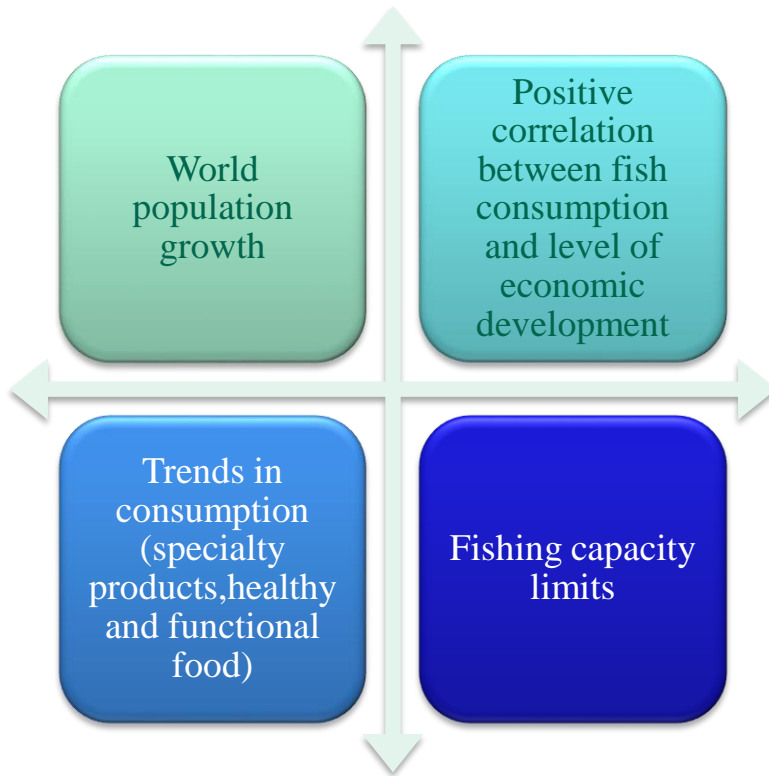
- We comply with high sanitary standards and environmental care
- We have a regulatory and institutional framework established
- We have the collaboration of highly qualified men and women
- Major investment in port infrastructure

Chile: is a GLOBAL LEADER IN AQUACULTURE



Trends and Advantages

GLOBAL TRENDS



CHILEAN ADVANTAGES



Chile: Farmer Country

PRODUCTORES PRINCIPALES	PECES DE ESCAMA		ACUICULTURA CONTINENTAL	ACUICULTURA MARINA/ COSTERA	OTROS ANIMALES ACUÁTICOS	TOTAL DE PECES	PLANTAS ACUÁTICAS	PRODUCCIÓN ACUÍCOLA TOTAL
	ACUICULTURA CONTINENTAL	ACUICULTURA MARINA/ COSTERA						
<i>(Miles de toneladas)</i>								
China	26.029,7	1.189,7	13.418,7	3.993,5	839,5	45.469,0	13.326,3	58.795,3
Indonesia	2.857,6	782,3	44,4	613,9	0,1	4.253,9	10.077,0	14.330,9
India	4.391,1	90,0	14,2	385,7	...	4.881,0	3,0	4.884,0
Viet Nam	2.478,5	208,5	198,9	506,2	4,9	3.397,1	14,3	3.411,4
Filipinas	299,3	373,0	41,1	74,6	...	788,0	1.549,6	2.337,6
Bangladesh	1.733,1	93,7	...	130,2	...	1.956,9	...	1.956,9
República de Corea	17,2	83,4	359,3	4,5	15,9	480,4	1.087,0	1.567,4
Noruega	0,1	1.330,4	2,0	...	...	1.332,5	...	1.332,5
Chile	68,7	899,4	246,4	...	...	1.214,5	12,8	1.227,4
Egipto	1.129,9	...	...	7,2	...	1.137,1	...	1.137,1
Japón	33,8	238,7	376,8	1,6	6,1	657,0	363,4	1.020,4
Myanmar	901,9	1,8	...	42,8	15,6	962,2	2,1	964,3
Tailandia	401,0	19,6	209,6	300,4	4,1	934,8	...	934,8
Brasil	474,3	...	22,1	65,1	0,3	561,8	0,7	562,5
Malasia	106,3	64,3	42,6	61,9	0,6	275,7	245,3	521,0
República Popular Democrática de Corea	3,8	0,1	60,2	...	0,1	64,2	444,3	508,5
Estados Unidos de América	178,3	21,2	160,5	65,9	...	425,9	...	425,9
Ecuador	28,2	0,0	...	340,0	...	368,2	...	368,2

Fuente: FAO 2016

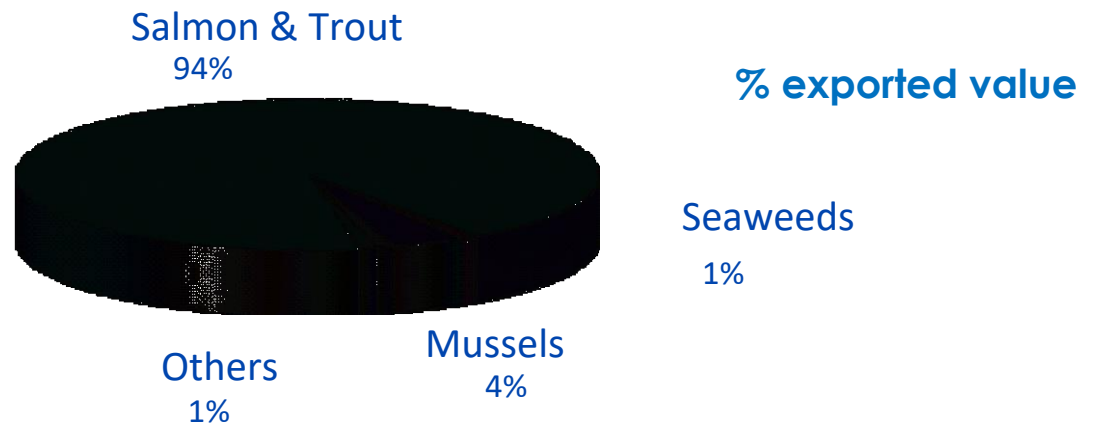
Chilean Aquaculture



- Carried out in different environments (marine, freshwater and estuarine).
- Different types of technology and production levels.
- There are small, middle and industrial-scale producers.
- Based on native (gracilaria, mussels, scallops, oysters) as well as foreign species (salmon, abalone).
- Production is oriented at the generation of value (export).
- High growth and development during the last decade.
- Identified as one of the economic sectors with the highest development potential.
- Highly regulated.
- Promotes other support and service activities.

Development of the Aquaculture

- Aquaculture concessions: 3,300
- 15 species in commercial farming
- Harvest: 971 thousand tons
- Exports: 698 thousand tons
- Revenue: US\$ 4,255 millions

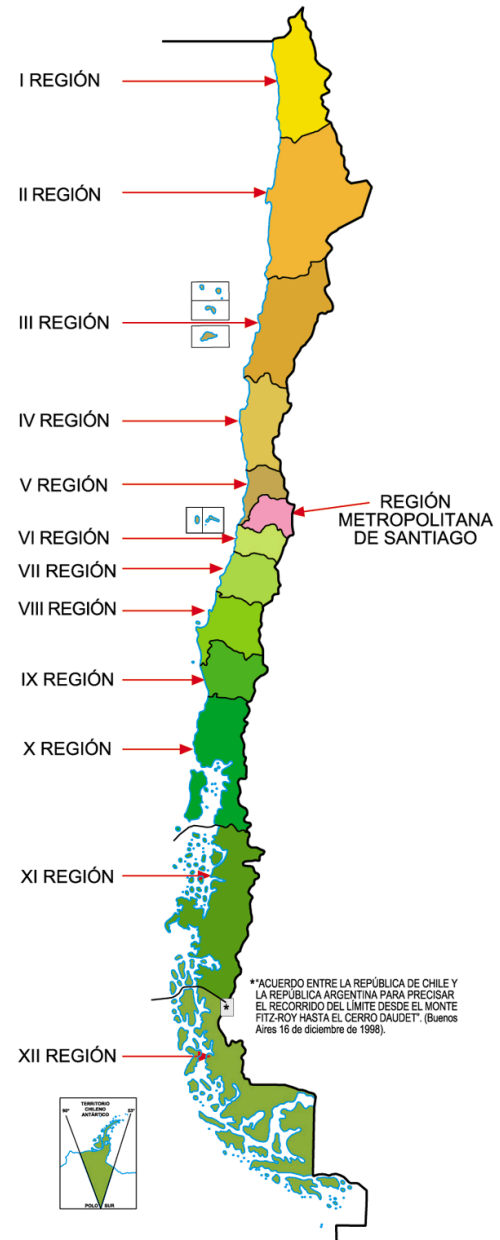
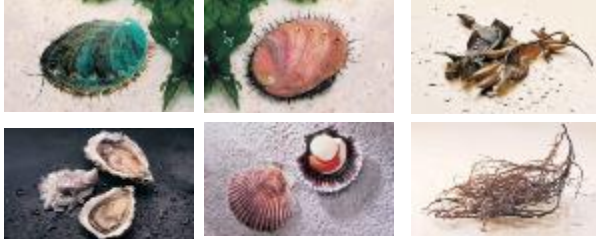


Harvest 2016

SPECIES	TOTAL (ton)
Atlantic Salmon	502,380
Mussel	276,893
Pacific Salmon	101,807
Rainbow trout	71,381
Gracilaria	12,669
Scallop	3,357
Pacific oyster	48
Others	3.357
TOTAL	971,095

Source: National Fisheries and Aquaculture Service, 2017

Aquaculture in Chile



Markets

- Salmons are mainly exported to Japan, USA and Brasil.
- Algae (gracilaria) are exported to the Asian market.
- Mussels and scallops are mainly oriented at the European market.



Exports to Russian Federation



- In 2016, total Chilean exports to Russian Federation reached 61,000 tonnes.
- Aquaculture products reached 58,000 tonnes (95%).
- These exports included salmon, trout and mussels.
- Processing lines included mostly frozen products.



OPPORTUNITIES & CHALLENGES



Our Opportunities



- Implementation and consolidation of Free Trade Agreement.
- Sustained increase of the projected demand.
- Availability of environmental resources to face the projected growth.
- Technological capacity to generate high-quality products.
- Availability of human capital to face research and training needs.
- Institutional basis to face further growth and development phases.

Our Challenges



- Amendment sanitary and environmental regulation.
- Sharing scientific knowledge and knowledge about other culture techniques.
- Maintaining and strengthening innovation processes and competitiveness in all aspects of the aquaculture sector.
- Developing and promoting associativity and co-responsibility of the public and private sectors.
- Strengthening the Public Interest Research.
- Support small-scale aquaculture.
- Improving control processes.

**Thank you for your
attention**



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