

Adolfo Alvial



Adolfo Alvial Consultancies Chile

Adolfo Alvial is a former technical director for Marine Harvest Chile and founder of Adolfo Alvial Consultancies, which provides services in technical development for aquaculture, environmental management and ecotourism.

Alvial was formerly general manager of the Technological Institute of Salmon, the technology arm of SalmonChile. Alvial led a blue-ribbon team that analyzed Chile's recovery from infectious salmon anemia.



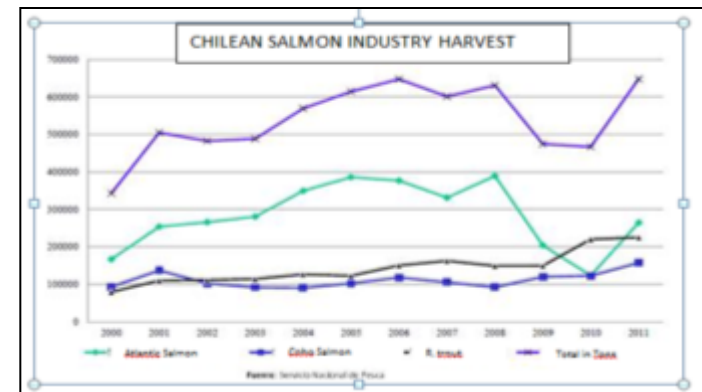
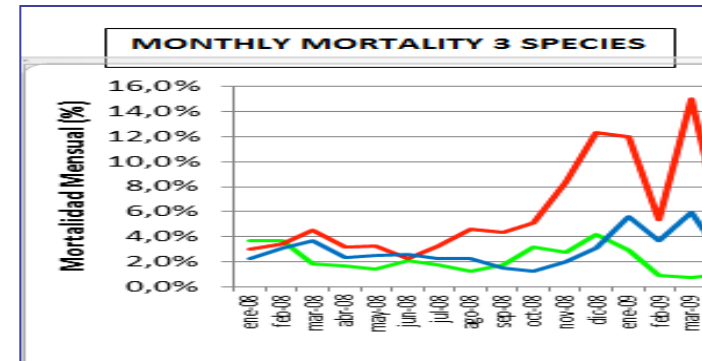


Follow up results from ISA study in Chile

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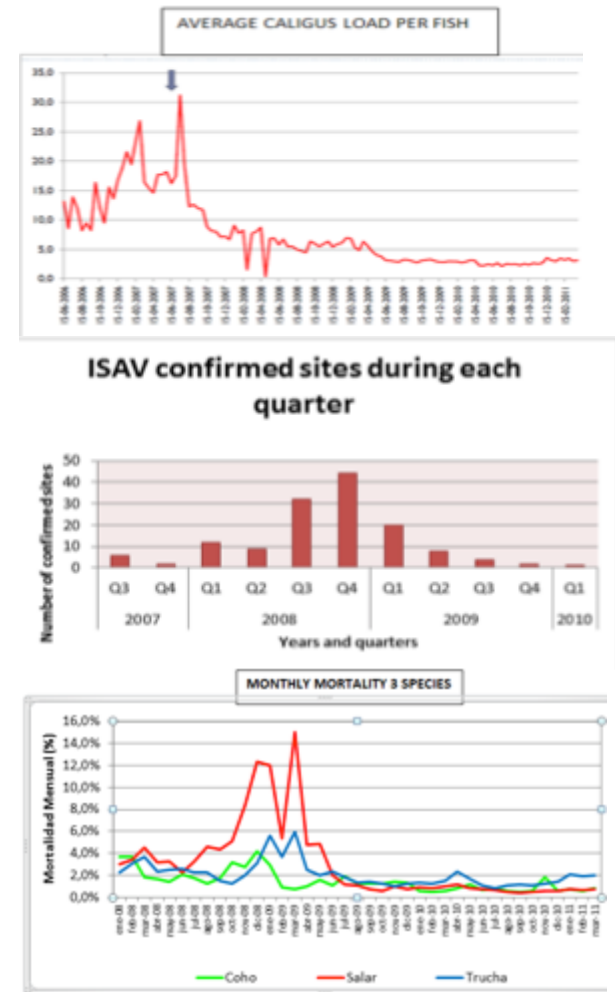
ISA CRISIS IMPACTS

- Mortality increased.
- Production and exports dropped.
- Chilean companies temporarily lost market share
- The industry lost technicians and workers.
- Unemployment and economic activity were affected in Southern Chile.



CHANGES REVERSED THE TREND

- Caligus and ISA were controlled.
- Fish mortality reached the lowest historic values.
- Production and exports recovered in 2012 after 2 years of declination.
- The U.S. market was recovered and new markets were developed.
- Labor supply grew again.
- Southern regions again leading employment rate (unemployment rates around 4%).



CRUCIAL INDUSTRY CHANGES

FIELDS	CHANGES	RECENT CHANGES
REGULATION	Licensing/Zone management/ Biosecurity along value chain.	Sanitary macrozones & marine corridors / Density regulation planned/SRS vigilance and control program to be enacted (in addition to Caligus and ISA programs).
ENFORCEMENT	More resources for inspection, analysis and monitoring.	Improved environmental and sanitary programs.



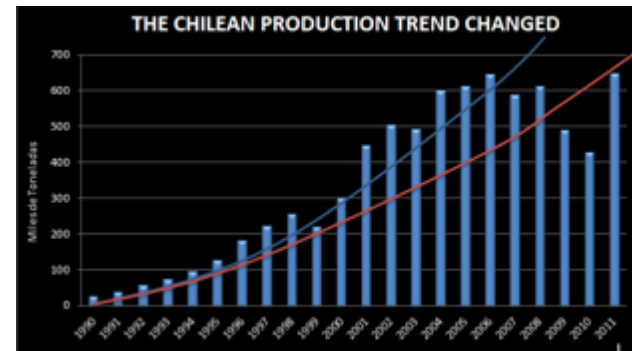
CRUCIAL INDUSTRY CHANGES

FIELDS	CHANGES	RECENT CHANGES
GOOD PRACTICES	SalmonChile voluntary measures	BAP, GlobalGap and ASC certifications.
PRODUCTION MODEL	Eggs & smolt quality assurance/ all in all out/ Fallow periods/ fish movement restrictions/ Strict logistic control.	Voluntary agreements to manage neighborhoods..



PROSPECTS

- Growth will continue but at lower rates
- Acquisitions and mergers of companies
- New market consolidations
- All producers certified
- Zonal management based on indicators of carrying capacity
- Human capital building



Thank You!

