

CHAPTER 1

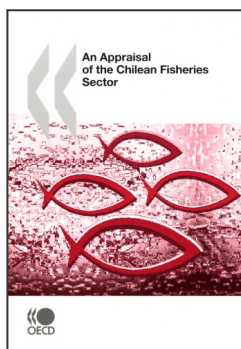
Introduction

Chile has experienced significant changes in its fishing and aquaculture activities over the past fifty years and has become a major world player; In 2006, Chile was ranked fifth in terms of production from capture fisheries behind China, Peru, the US, and Indonesia. It is the seventh largest producer of aquaculture products behind China, India, Vietnam, Thailand, Indonesia and Bangladesh. Chile is also a major player in terms of world trade, being the seventh largest exporter behind China, Norway, Thailand, the US, Denmark and Canada.

Chile has been through an intense, challenging and complex learning process which is reflected in the evolution of its policies and management systems governing the sector. The Chilean State has been one of the main forces behind the evolution of the sector, laying the foundation for a strong and robust sector. The last 50 years has seen a number of significant resource crises and the strong institutional foundations have helped the sector weather these crises and continue to go from strength to strength.

There are, however, a number of issues that still confront the sector. For example, there are ongoing concerns over disease in the salmon aquaculture industry. There are also challenges confronting the management of the small-scale sector that need to be addressed. Issues such as these will test the robustness and adaptability of both the industry itself, as well as the institutional structures governing the sector. In aquaculture, problems related to zoning, spreading of diseases and environmental sustainability, among others, are still being addressed, while in artisanal fisheries, current policies have not as yet successfully dealt with overexploitation or provided work stability to coastal populations.

This report provides an overview of the Chilean fisheries and aquaculture sector as background to the Committee for Fisheries' consideration of the accession of Chile to the OECD. The information in the report will assist the Committee's deliberations concerning the extent to which Chile's policies in the area of fisheries and aquaculture conform to OECD principles and practices. The next chapter in the report provides background on the Chilean fisheries and aquaculture sector, focusing on the production structure, trade patterns, fleet structure and employment. Chapter 3 provides an overview of the institutional framework governing fisheries and aquaculture and describes the key institutions that govern the sector. Chapter 4 reviews the evolution of the fisheries, together with details of the government financial transfers to the sector. The scientific and research support provided for management and enforcement is described in Chapter 5, while Chile's participation in international fisheries and oceans-related agreements is discussed in Chapter 6.



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