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An overview of mussel culture in Chile

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Improvements in production chain could boost output, increase exports

The mussel aquaculture concentrated in northern Chile incorporates over 1,200 growout locations.

Mussel culture in Chile is based on the production of three main species: the chorito or Chilean mussel (*Mytilus chilensis*), the cholga mussel (*Aulacomya ater*) and the giant or choro mussel (*Choromytilus chorus*). Mussel aquaculture has developed locally since the 1960s, with production increasing substantially in the last decade. By 2000, production was around 12,000 metric tons (MT), and by 2009 about 168,000 MT were harvested. Much of the production of Chilean mussels is exported to the European market. The production of cholga and giant mussels is consumed locally.

Because of the geographical conditions and water quality, the activity is concentrated in the Lakes area in Region X. According to data from Sernapesca (Servicio Nacional de Pesca, National Fisheries Services), the areas of Calbuco and Chiloé contribute 99.8 percent of the total landings of farmed mussels. In 2010, processed mussels reached sixth place in the region's exports, contributing a value of \$39 million.

Production processes

This industry currently has four distinct production processes: the production of seed, which currently comes from the capture of wild seed, for production technologies are not yet economically viable; grow-out to market size using suspended systems; transformation of the meat products to frozen and canned products; and marketing to mostly foreign export markets (Fig. 1).

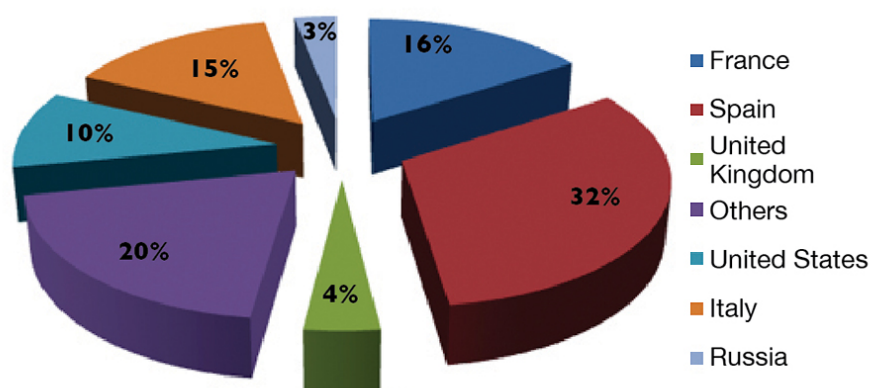


Fig. 1: Export markets for Chilean mussels in 2010. Source: Webcomex – ProChile.

The Integrated Territorial Program for Mussels reported that the industry is a productive conglomerate composed of 63 seed producers, 1,120 grow-out centers, 40 processing plants and approximately 60 exporting agents.

Standardization needed

While Chile's mussel culture industry has entered a very important phase of growth, challenges remain, especially in the seed production and grow-out components. This contrasts sharply with the level of the processing plants and marketing, which have production technologies and expertise to satisfy the requirements of each market.

This results in ineffective coupling and standardization of all the production links, increasing production costs. In turn, the small and medium producers of mussels do not have management systems to respond adequately to the requirements of processing plants. Therefore, their production suffers from low prices, generating narrow profit margins that prevent scaling up and additional quality improvements.

Because of this, the Chilean or chorito mussel has been positioned as a product mainly for bulk unprocessed exports at medium to low prices. The mussels have had to face the foreign market preferences for domestic products and for value-added and certified products like those from New Zealand and Ireland.



While several mussel species are raised primarily for local consumption, efforts are under way to boost the culture of Chilean mussels for additional exports.

National brand

To improve the competitiveness of the industry and reduce the risks associated with fluctuations in current markets, efforts have been focused on diversification into new markets in Latin America and Asia, and establishing a so-called national brand for Chilean mussels that clearly represents the quality of their origin.

At Cultivos Marinos San Agustín Ltda., the company's value proposition is to raise the standards of Chilean farmed mussels through various certifications that would demonstrate environmental stewardship, as well as quality and social responsibility. This differentiation will lead to better prices – estimated at up to 40 percent higher for value-added products – in organic markets that are currently small but growing 20 percent annually, mainly in the United States and European Union.

To accomplish these goals, the company is working on several fronts, including certifying its growout phase processes as organic, and obtaining a major contract with an international company for processing to organic standards. Cultivos Marinos San Agustín Ltda. is currently awaiting a final audit to begin harvesting in the third quarter of 2011. By 2014, it expects to reach 1,000 MT of annual mussel production.

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