

SALMON CLUSTER EVOLUTION IN CHILE: TOWARDS COLLABORATIVE INNOVATION

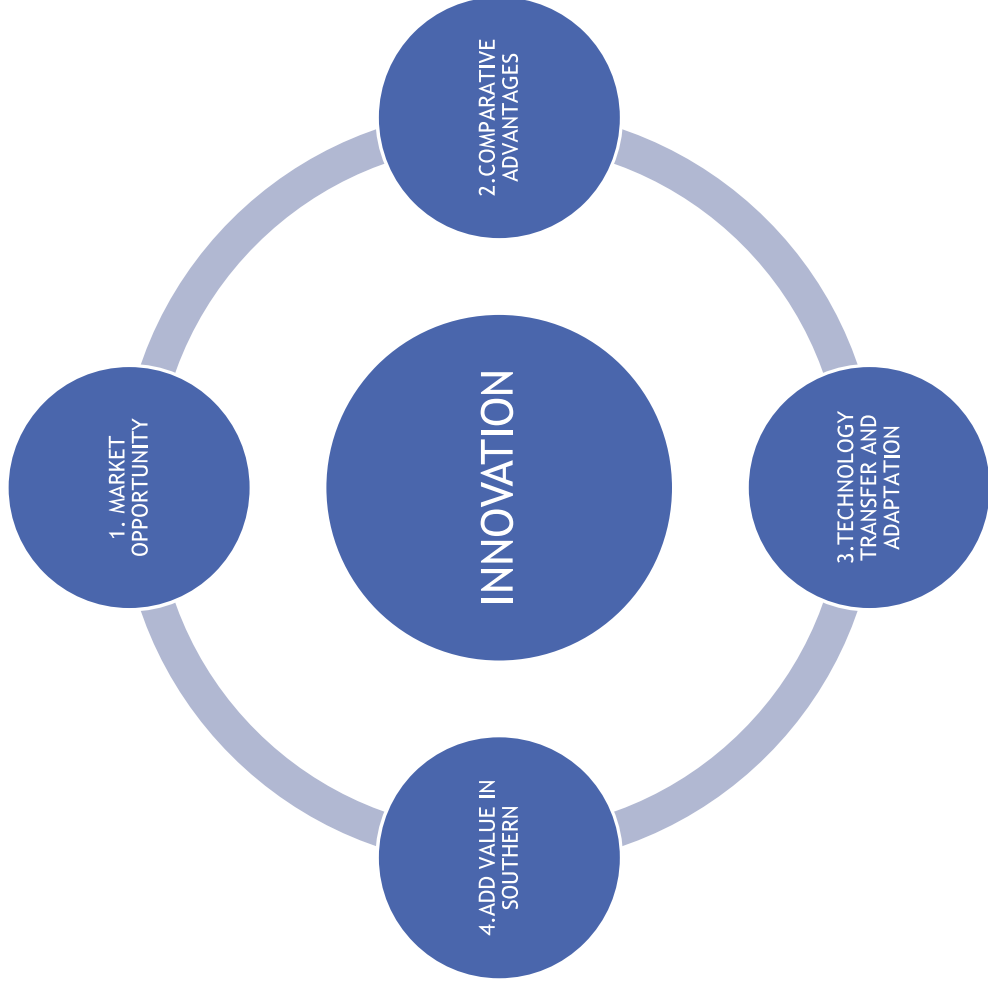
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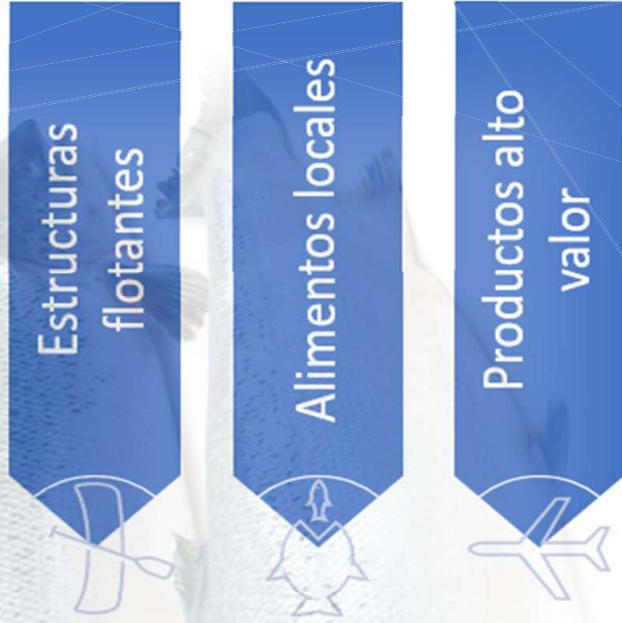
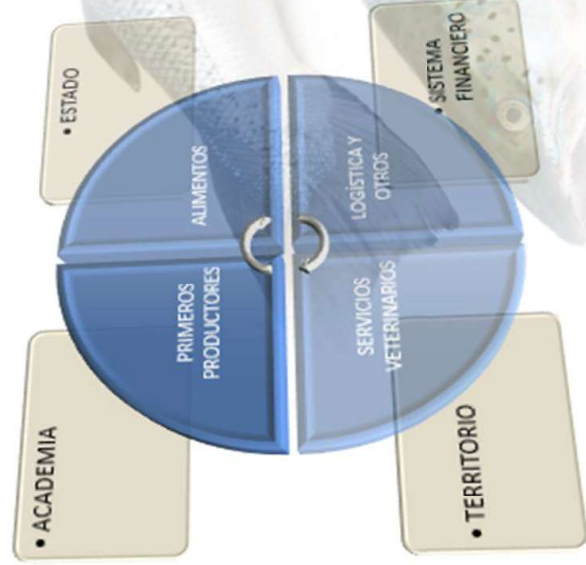
A MACRO INNOVATION

Salmon industry was a large-scale innovation in Chile's south: it took advantage of market opportunities, exploited comparative advantages (environmental and human), and... added value to the southern regions and the country.

WITH A FAST EVOLUTION

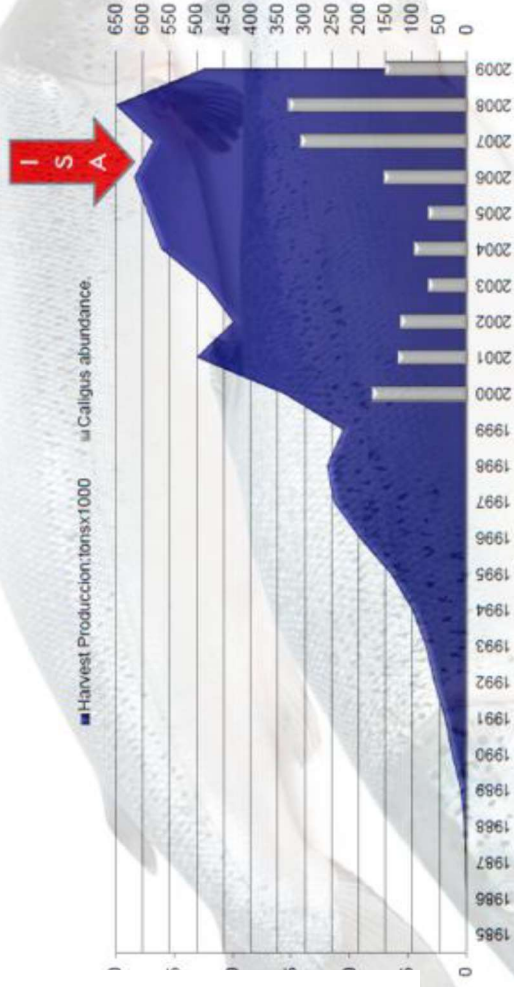


IT MOVES TOWARD A SUCCESSFUL CLUSTER

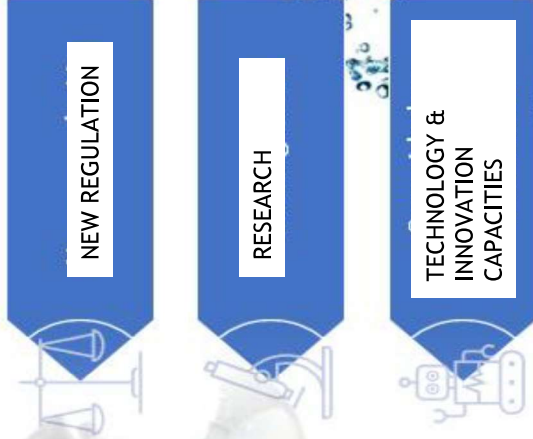


OVERCOMING CHALLENGES

BUT THE INITIAL
MODEL SHOWED
WEAKNESSES

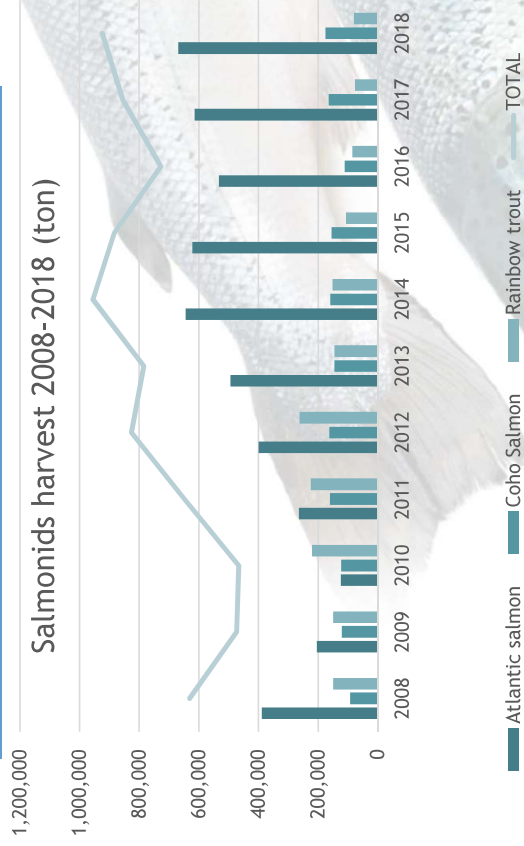


ISA



SALMON IN FIGURES AT THE PRESENT

Harvest 2008 - 2022, ton



EXPORTS:
751,000 TON ,
USD million
6,600
(2022)

2nd product
exported after
copper

90%
Of Chilean
aquaculture

74% of the total
export value in
fisheries +
aquaculture

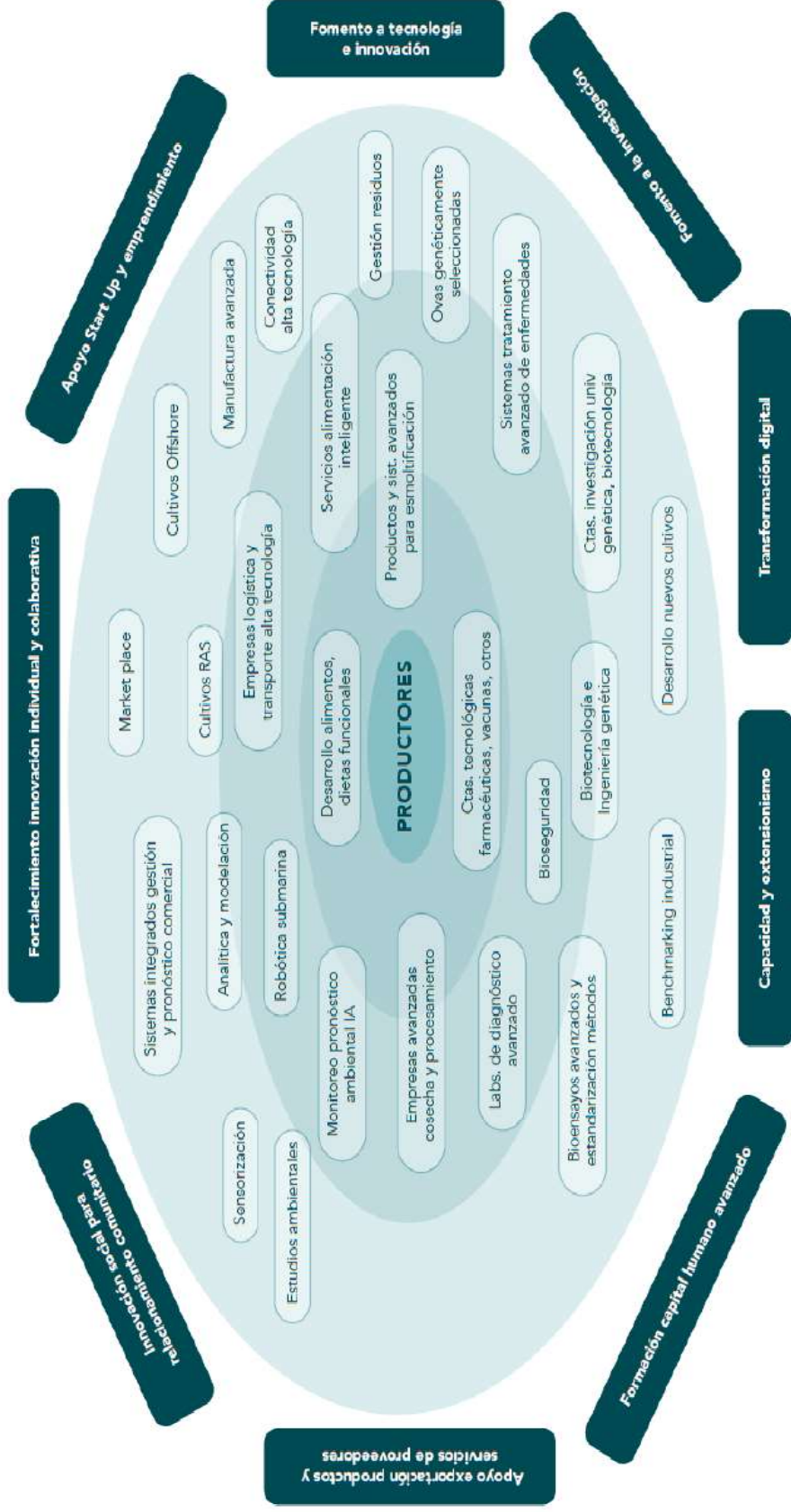
70,000
Direct and
indirect jobs

110 foreign
markets

4,000 supplier
linked
companies

2nd world
producer of A.
salmon and 1st
in trout and
coho **salmon**

A SOPHISTICATED INNOVATION ECOSYSTEM EMERGED



THE MOST IMPORTANT AQUACULTURE R&D&I ECOSYSTEM OF THE SH

The southern hemisphere's largest and most powerful R&D&I ecosystem, with products and services that can be used not only in the country, but also exported to the rest of the world with significant potential.



COMPLEX NEW CHALLENGES DEMAND NEW SOLUTION

GLOBAL CLIMATE CHANGE. Carbon neutrality, green energies, and water footprint reduction SOCIAL SUSTAINABLE DEVELOPMENT. Respect for environment, communities, and culture, gender equality; and human rights CIRCULAR ECONOMY. Reduction, reuse, and recycling of residues MARKETS. Adaptation to new customers and demand

DOMESTIC REGULATION. Integrated and stable TERRITORY. Certainty to operate and to stimulate investment. Trust development with other users ENVIRONMENT. Carrying capacity estimations (water bodies); escapes control, and use of pharmaceutical reduction ADVANCED HUMAN CAPITAL. Emphasis on Professional postgraduate in aquaculture. Interaction academy-industry R&D&I. Private-Public-Academy long term programs

IN FRONT OF SO COMPLEX CHALLENGES, COLLABORATION IS THE ANSWER

ASSOCIATIVENESS Trust between actors.
Social capital building Systematic
interaction with customers Needs
identification and updates Good
environments to innovate Incentives and
instruments to innovate

SOLUTIONS

COLLABORATION

COMPLEXITY

UNDER THIS CONVICTION AND VISION, WE DECIDED TO CREATE THE CLUB

I took the initiative and develop a draft of the Club concept I met with other innovator entrepreneurs in the industry that I knew for years We together gave form to the initial approach Not a “unión” entity...but a CLUB A space of encounter for people and companies involved in aquaculture innovation Therefore, it is neither bureaucratic nor complex. Simple and egalitarian. Strongly based on open minds and approachable people Based on industry suppliers, who have been the engine of innovation in the industry, Chilean or foreign, big or small...at the end...Good people, Good companies Focused on aquaculture from the experience gained in salmon farming

SO, WHAT IS THE CLUB?

- ▶ A space to strengthen individual and collaborative capacities to innovate in the industry of aquaculture, based on trust and cooperation that provides regular services to its associates.

...And under the form of a private, non profit organization

Members include private and academic organizations who can be Members: Associated, Collaborators, or Sponsors



CLUB INNOVACIÓN ACUICOLA
JUNTOS FORJANDO EL FUTURO



INSTITUTIONAL ASPECTS



- ▶ Interested organizations have to apply to be members
- ▶ If they are associated members, they are eligible for the directory board and have the right to vote
- ▶ Collaborator members are invited by the administration, considering that their capacities can contribute to the internal objectives, programs and services
- ▶ Associated members pay an entrance fee and then membership monthly fees
- ▶ The Club is regulated by a Statute and a Ethics Code
- ▶ The organization includes:
- ▶ The Assembly, the Directory board (1 President and 4 Directors), The Administration (1 Executive director, 1 Subdirector, and: legal, Strategic Communication, Audiovisual production, Business and innovation training, and Project management based on Collaborator members. Regular activities are organized under programs included in the Annual Plan associated with the Annual Budget

REGULAR SERVICES



BUSINESS AND INNOVATION TRAINING. Annual Program of Courses and workshops



ACCESS TO CO FUNDING. Information, meetings and Project profiles



ARTICULATION AND NETWORKING. Agreements with pairs and organizations of interest, including authorities. Annual meetings.



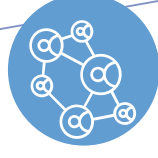
COMMUNICATION AND EXTENSION. Website, RRSS and media management; Website on the industry, publications and courses for community



INDUSTRY CHALLENGES TO INNOVATE. Yearly program on industry challenges



MARKETING AND COMMERCIAL FACILITATION. Participation in international events, InnAqua Conference organization.

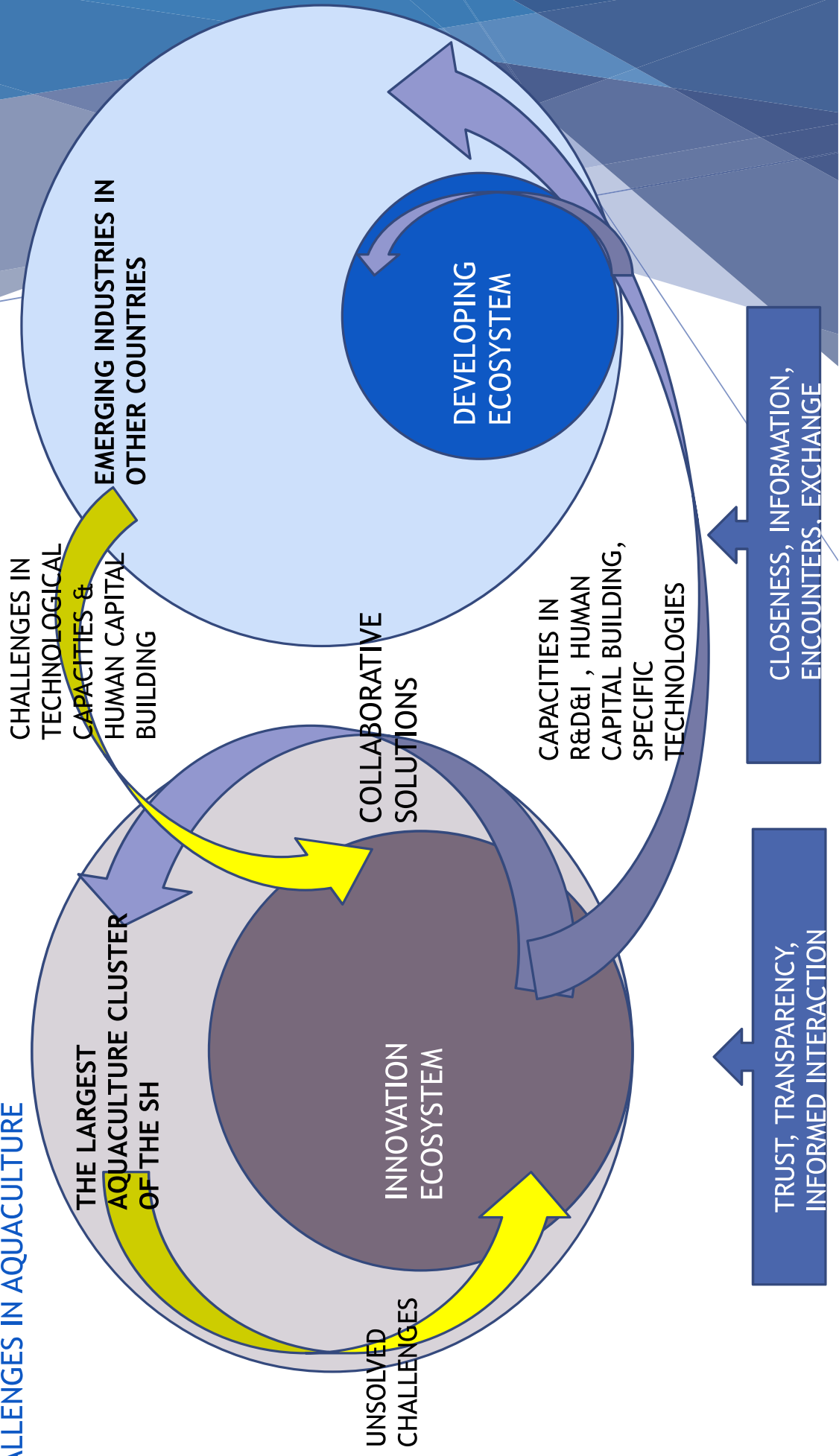


SOCIAL CAPITAL BUILDING. Entertaining informal meetings

ACHIEVEMENTS

- ▶ We have 26 members. Objective is not to surpass 35 in 2 more years
- ▶ We have decided not to include sponsor members
- ▶ We overcame the pandemic after less than 1 year of operation
- ▶ We organized InnAqua under pandemic, online, with more than 1.000 participants and 900 connected as an average
- ▶ Now, we will hold the 2nd version in person. We expect 10 thematic sessions, 25 speakers (12 from other countries), 25 booths, selected posters.
- ▶ We have gained recognition in Chile in the private, public, and academic sectors.
- ▶ We were honored with recognition as contributors to aquaculture innovation in IFC Brazil 2022

**LEADING SUPPORT IN DOMESTIC AND OVERSEAS
CHALLENGES IN AQUACULTURE**



INNAQUA CONFERENCE

CHILE 2023

Aquaculture Innovation Conference

26 al 28 de Septiembre



El encuentro más importante de innovación en acuicultura del hemisferio sur.

Nos reunimos cada dos años para fortalecer la innovación, herramienta fundamental en nuestra tarea de consolidar una acuicultura competitiva y sostenible frente a los desafíos y oportunidades del futuro.

WELCOME!!