

CHILE PROFILE

Seafood production and exports

In 2014, total Chilean seafood exports were valued at US\$ 6.6 billion, an increase of 17% over the previous year. Japan, the U.S. and Brazil were the main export markets. The value of salmon products exceeded US\$ 4 billion, making farmed salmon the second largest Chilean export in value after copper. Trout and mussels were also significant export products.

Seafood exports to Europe were valued in 2014 at US\$ 1.17 billion, accounting for some 19% of total seafood exports worldwide. Some 55% of all seafood exports to Europe were salmon and trout, followed by mussels (12%) and fish oil (8%).

Seafood exports to the UK

For 2014, Chile exported just over one million kg of seafood products to the UK, valued at UK£ 6,088,796. This was almost all salmon (£ 6,058,316), together with a small amount of tuna (£30,480). In 2011 the UK imported a significant amount of Chilean scallops (£206,665 in value). Smaller amounts of crabs were imported in 2012, and prepared and preserved shrimps and prawn in 2013. In all years, however, salmon has accounted for the vast majority of Chilean exports to the UK.

Employment in seafood

The 2007 National Fisheries and Aquaculture Census indicates that a total of 151,949 persons were employed in fishing and aquaculture, mainly in the artisanal fishing fleet or processing sector. More recent Organisation for Economic Co-operation and Development (OECD) figures are that 142,142 people were employed in Chilean fisheries in 2012, 137,135 on a full-time basis. This includes 91,437 in coastal marine fisheries (2,399 male and 71,038 female), 2,138 (almost all male) in deep sea fisheries, 13,954 in aquaculture, and 34,712 in processing (18,873 male and 15,838 female).

Human trafficking and forced labour: rankings, indicators and reports

Chile is ranked in Tier 1 (the most favourable ranking) in the U.S. Government's 2015 Trafficking in Persons¹ (TIP) report. Though migrants from other Latin American countries are identified as forced labour victims in sectors including mining, agriculture and hospitality, there is no mention of the fishing or seafood industries.

Chile is ranked No. 121 (a fairly favourable ranking) in the Australia-based Walk Free Foundation's 2014 *Modern Slavery Index*² with an estimated 36,900 people (or 0.21% of the total population) in modern slavery.

¹ *United States Trafficking in Persons Report 2015* <http://www.state.gov/j/tip/rls/tiprpt/>

² Global Slavery Index 2014
http://d3mj66ag90b5fy.cloudfront.net/wp-content/uploads/2014/11/Global_Slavery_Index_2014_final_lowres.pdf

There have been some assessments of employment and labour conditions in Chilean aquaculture. A general Food and Agriculture Organisation (FAO) report on employment in aquaculture, published in 2014³, makes considerable reference to Chile. Employment surveys in the salmon industry, undertaken with the support of product associations in 2005 and 2007, covered almost all farms. FAO reports that at that time contract work was growing in Chile, as a means of reducing costs and increasing flexibility, and that barely a quarter of salmon workers had permanent contracts. There was “the danger that firms feel less responsibility to maintain labour standards, which increases the precarious nature of aquaculture work”. Salaries through outsourcing companies were about 30% less than for permanent workers, and the accident rate was higher.

A 2014 media report also observes that seasonal workers are mainly hired by middlemen, third part job brokers and contractors, in the mining, construction and fishing industries⁴.

Ratification of international human rights instruments

United Nations treaties and procedures

Chile has ratified all the core human rights instruments of the UN system. These are, with their date of ratification by Chile:

- International Convention on the Elimination of All Forms of Racial Discrimination (1971)
- International Covenant on Civil and Political Rights (1972)
- International Covenant on Economic, Social and Cultural Rights (1972)
- Convention against Torture and Other Cruel Inhuman or Degrading Treatment or Punishment (1988)
- Convention on the Elimination of All Forms of Discrimination against Women (1989)
- Convention on the Rights of the Child (1990)
- International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (2005)
- Convention on the Protection of All Persons from Enforced Disappearance (2009)

Chile has also ratified optional protocols to the main UN human rights instruments, and accepted individual complaints procedures under them. It has accepted a number of country visits under UN special procedures.

International Labour Organization (ILO) Conventions⁵

Chile has ratified a total of 62 ILO Conventions (of which 51 are in force), including all of its core human rights Conventions.

³ *Improving governance of aquaculture employment: a global assessment*, FAO Fisheries and Aquaculture Technical Paper 575, 2014. <http://www.fao.org/3/a-i3128e.pdf>

⁴ “Seasonal agricultural workers left out of Chilean boom”, Inter Press Service (IPS), 23 May 2014. <http://www.ipsnews.net/2014/05/seasonal-agricultural-workers-left-chilean-boom/>

⁵ The International Labour Organization’s Fundamental Conventions http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_095895.pdf

Fisheries management and policies: recent trends

The Under Secretariat of Fishing and Aquaculture (SUBPESCA) is located in the Ministry of the Economy. Its mission is to regulate and manage fisheries and aquaculture activities through management policies, regulations and measures supported by technical reports.

A new General Law on Fisheries and Aquaculture was adopted in February 2013. Among other things, it provides for regulations to establish quotas primarily on scientific considerations. It has encountered criticism from local fishers, over provisions that grant companies 25-year concessions for fishing farms, and can result in the privatisation of marine resources.

Overall risk assessment

Chile can be considered a country of low to medium risk. Since the return to democratization almost two decades ago, it has had a good human rights record. It has a particularly good record in the ratification of international human rights instruments. Its favourable rankings in both U.S. TIP report and the Global Slavery Index further attest to this. There are concerns, however, that economic growth in recent years has not been evenly distributed. In industries that make extensive use of temporary and contract labour, there is always a risk that employment conditions will be sub-standard. This appears to be the case with the salmon aquaculture industry. As almost all UK imports from Chile in recent years have been from this industry, UK importing companies should exercise due diligence over recruitment and contracting systems, and wage payments, to ensure that labour conditions are consistent with Chilean labour laws. It could also be advisable to support an updated study on employment conditions in salmon aquaculture, as the data used in the above cited FAO study (though it was published in 2014) is now a decade old.

For further information

- **United States Trafficking in Persons Report 2015**
<http://www.state.gov/j/tip/rls/tiprpt/>
The Department places each country in this Report onto one of four tiers, as mandated by the Trafficking Victims Prevention Act (TVPA). This placement is based more on the extent of government action to combat trafficking than on the size of the country's problem. The analyses are based on the extent of governments' efforts to reach compliance with the TVPA's minimum standards. Tier one is the best ranking and Tier 3 the worst.
- **Global Slavery Index 2014**
http://d3mj66ag90b5fy.cloudfront.net/wp-content/uploads/2014/11/Global_Slavery_Index_2014_final_lowres.pdf
- The Global Slavery Index estimates the prevalence of modern slavery country by country, the absolute number by population, how governments are tackling modern slavery, and what factors explain or predict the prevalence of modern slavery. Rankings range from 1 to 167 - with 1 the worst and 167 the best, in terms of the prevalence of the population in modern slavery. This is based on three factors: estimated prevalence of modern slavery by population, levels of child marriage and levels of human trafficking into and out of the country. This gives a 'weighted measure'.

- **The International Labour Organization’s Fundamental Conventions**
http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_095895.pdf
Ratifications of fundamental Conventions and Protocols by country
http://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:10011:0::NO::P10011_DISPLAY_BY,P10011_CONVENTION_TYPE_CODE:1,F

This is an information service provided by Seafish for industry and key stakeholders. To the best of our knowledge this information is factually correct at the date of publication.

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