2021
April

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Análisis & Asesorías

NEWS Letter

2020 SALMON INDUSTRY BALANCE*:

High Yield (kg/smolt), High Harvest Weights and Increased of Harvest Biomass the Outstanding Indicators of the year 2020

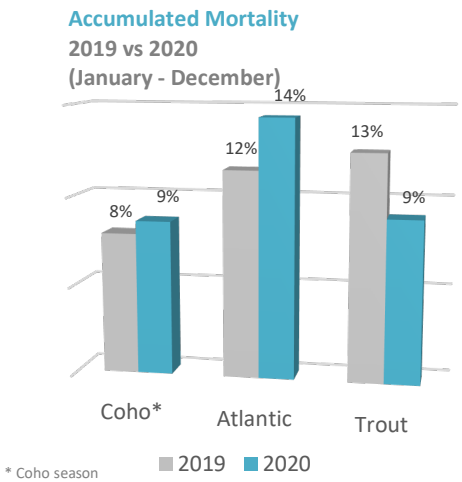
Despite the increase in mortality, good results were maintained in the main productive indicators of the industry in the three species farmed.

Mortality

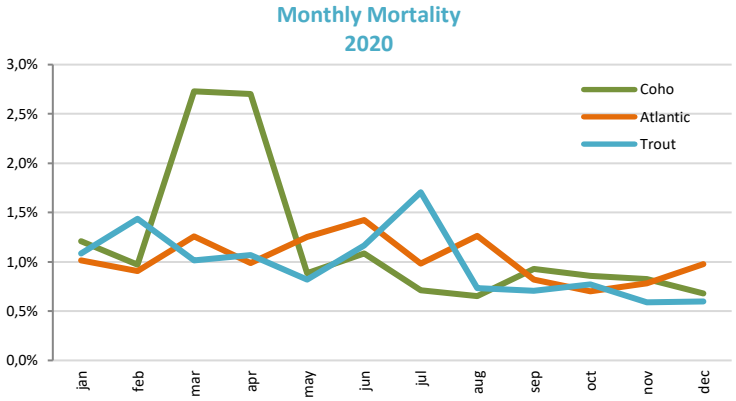
Atlantic Salmon had a 14.4% of accumulated mortality in closed groups in 2020, 25% higher than that registered in previous year, wich closed with 11.5%. In the case of **Rainbow Trout** a lower accumulated mortality was recorded in 2020, reaching 9.1% (vs. 12.6% in 2019) and **Coho Salmon**, accumulated mortality reach 8.6%

The analysis shows that the average monthly mortality in 2020 for **Atlantic Salmon** was 1.03%, **Coho Salmon** was 1.12% and 0.98% for **Rainbow Trout**. This monthly mortality was higher than in 2019 for two species: Coho Salmon (0.87%) and Atlantic Salmon (0.73%). In Rainbow Trout the mortality was higher in the last year (1.04%)

Therefore, 2020 productivity balance shows a total amount of dead fish equivalent to 29.9 million during the growout stage. Per species, 21.9 million correspond to **Atlantic Salmon**, 5.5 million to **Coho Salmon** and 2.4 million to **Rainbow Trout**. 21% of this mortality was caused by infections.



* Coho season



*** The numbers mentioned in this document correspond to those obtained directly from our own Databases (DB). To extrapolate to 100% of the industry, it is necessary to use the estimated DB representativeness, which is 92.3% in average (Coho Salmon: 100%; Atlantic Salmon: 89.4% and Rainbow Trout: 100%). All the information presented includes the 3 farming regions.**

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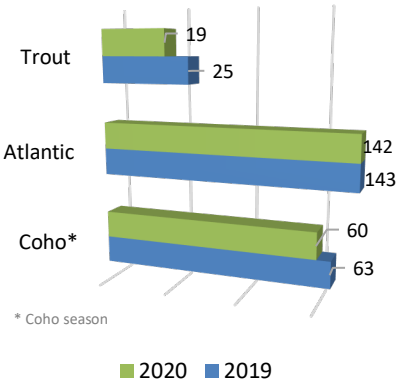
Smolt stocking
Jan - Dec 2019 vs 2020
(million smolt per species)



Smolt Stocking

In 2020, there was an average decrease of 2% in smolt stocking, in relation to the previous year, reaching a total amount of 225.2 million smolt transferred to the sea compared with 228.8 recorded during 2019 for the three species farmed.

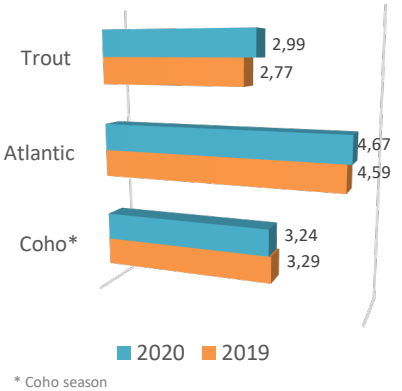
Per species, the numbers show an decrease of 26% in **Rainbow Trout** and increase of 6% in **Coho Salmon** (season). **Atlantic Salmon** almost showed no variations (-0,4%), however, if there were differences in the distribution of smolt release during the year, mainly delays due to the effects of COVID-19, where in the 1st half of the year, the smolt transferred to sea water was 20% lower than in 2019, recovering this difference later in the 2nd semester.

The weight of the fish when transferred to the sea in 2020 was higher in relation to the previous year for the three species: Atlantic Salmon 164 g. (↑1%), Rainbow Trout 236 g. (↑10%) and Coho Salmon 280 g. (↑42%).

Biomass and the Number of Fish

The information shows that, at the end of 2020 (December), there was an decrease of 7% (compared with the previous year) of the number of live fish, with an estimation of a total of 207 million fish (considering the 3 species). By species, **Rainbow Trout** was the specie that shown more variation (37% decrease) in the number of live fish in December 2020 (16 million live fish). **Coho Salmon** recorded a variation of 19% (20.5 million of live fish) mainly associated to delayed smolt transfer in the season. On the other hand, **Atlantic Salmon** also showed a slight decrease of the number of live fish (-5%), reaching 170.5 million live fish at the end of December 2020.

Industry Yield
(kg harvested / smolt)



Regarding living biomass during the growout stage, the analysis reveals an decrease of 16% in relation to December 2019, with a total of 454,408 tons at the end of 2020 for the three species. Per species, **Atlantic Salmon** – that represents 83% of the total living biomass – shows an decrease of 12% up to December 2020, in relation to the same month of the previous year, reaching 377,909 tons. Likewise, the biomass of **Rainbow Trout** and **Coho Salmon** also decreased 44% and 19% respectively.

Productivity

The higher harvest weight and lower mortality recorded during 2020 was reflected in the increase of productivity in **Atlantic Salmon,** which reached **4.67 kg** (closed cycles in 2020) harvested per smolt transferred to the sea, amount that is 2% higher than the amount registered in 2019. In the case of **Rainbow Trout,** an improvement in productivity of 8% was also observed, reaching **2.99 kg** harvested per smolt, whereas for **Coho Salmon,** it decreased 1%, reaching **3.24 kg** harvested per smolt (as a season).

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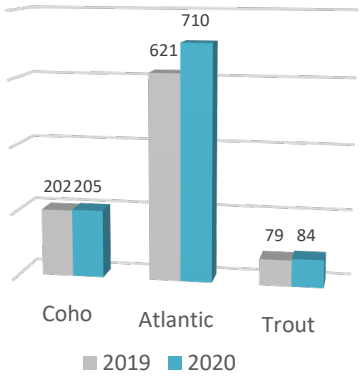
Industry Harvest
Jan - Dec 2019 vs 2020
(thousand tons WFE)



Harvest

The total biomass harvested by the whole industry for the three species in 2020 reached 998 thousand tons (WFE*), amount which is 10% higher than the previous year. Per species, the accumulated harvested volumes (WFE) at the end of the year reached **709,616** tons for **Atlantic Salmon**, **83,839 tons** for **Rainbow Trout** and **204,627** tons for **Coho Salmon**. These numbers represent an increase in harvest for the period of 1,842 tons for Coho Salmon, 87,940 tons for Atlantic Salmon and 4,935 tons for Trout.

In 2020, the average harvest weight for Atlantic Salmon was 5.4 kg, it was 3.7 kg for Coho Salmon and 3.2 kg for Rainbow Trout.

WFE = Whole Fish Equivalent: Unit used to measure the raw material, it corresponds to round bled live weight
% Accumulated Mortality = Total N° of dead fish / initial N° of fish transferred
Biomass Produced = Dead biomass + Harvested biomass + Living biomass at the end of a period
% Dead Biomass = Kg of dead biomass / Kg of biomass produced
°Smolt Stocking: transfer of fish (called smolts at this stage of their life cycle) to sea water farming sites to begin the growout stage

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