

ANNUAL REPORT



2022

EXECUTIVE SUMMARY

In 2019, the Chilean salmon farming industry and the Monterey Bay Aquarium Seafood Watch Program® launched the Chilean Salmon Antibiotic Reduction Program (CSARP), with the goal of reducing antibiotic use in that country's industry by 50% by 2025. This report provides a summary of CSARP activities, industry statistics, research, and data on antibiotic use for the 3 years from 2020 to 2022.

This report provides sector-wide transparency of the salmon farming industry, with a focus on the results and an analysis of the industry's use of antibiotics during the period. The analysis includes region-specific results and non-attributable, company-level data that provide particular insights into operational and regional decision-making. This information informs a discussion about the key factors that influenced the results.

Key Findings

- The COVID-19 global pandemic significantly disrupted demand from destination markets because of social and supply chain restrictions in 2020. But, the market recovered with historically high production volumes and prices in 2021–22. Chile remains one of the world's most important sources for farmed salmon, particularly for the export markets of the United States, Japan, and Brazil.
- Antibiotic use in the Chilean salmon farming industry increased during 2020–21 but decreased in 2022. The increase was driven by unusual environmental conditions, including more frequent harmful algal blooms and low oxygen levels that necessitated additional treatments. More favorable environmental conditions resumed in 2022, and the industry reduced antibiotic use by 7.5%.
- Since the start of CSARP, the partnership has reduced antibiotic use by 12% overall.
- This industry faces continued uncertainty from global climate change, and environmental conditions are likely to continue to be important to company-level decision-making on the use of antibiotics. But, the report also found significant variation in antibiotic reductions by region and company. These findings indicate that some companies are taking more aggressive action to reduce antibiotics than others, and certain regions and companies are more likely to use high levels of antibiotics—thus impeding progress toward reducing overall use.
- Overall, the data from 2017 to 2020 indicate that the industry is capable of significantly reducing the use of antibiotics. Achieving the goal of a 50% reduction hinges on further reductions, individual company accountability, and investments in new and innovative solutions.

Reducing the use of antibiotics is a complex challenge that requires industry action and collaboration with government, academia, and nongovernmental organizations. It is crucial to find solutions to this challenge to ensure the viability of the industry, livelihoods, and communities while safeguarding environmental health.

