

Tierra del Fuego  
Province:  
“Where aquaculture  
creates  
sustainable value”

“Origin, biosecurity, and certainty for  
internationally scalable projects”





# LAW NO. 1601 AND ITS IMPLEMENTING DECREE

Marine and inland aquaculture: from a fragmented framework to a controlled system

- ▶ **Preliminary Planning**  
The Strategic Environmental Assessment establishes a prior and mandatory framework to define suitable areas, regulate water use, and reduce regulatory uncertainty.
- ▶ **Institutional coordination**  
Fisheries, Environment, and Water authorities operate under clearly defined mandates, with mandatory coordination, no overlapping functions, and a designated aquaculture authority.
- ▶ **Implementation certainty**  
A single-entry framework for projects, comprehensive assessment, time-bound approvals, and annual monitoring to ensure continuity within a clear and predictable regulatory framework.

Reduced discretion. Stronger coordination. Greater predictability.

**A structured aquaculture governance system grounded in ex-ante rules, interinstitutional coordination, and legal certainty to enable sustainable development.**



## TECHNICAL AND INSTITUTIONAL FRAMEWORK

The aquaculture system in Tierra del Fuego Province was developed through technical work, provincial coordination, and the support of the Consejo Federal de Inversiones (CFI).

- ▶ **Sectoral assessment**  
Assessment of aquaculture potential and its production, environmental, social, and economic scope.
- ▶ **Continuity of technical work**  
Participation of specialists with experience in Aquaculture Production and Administration, contributing sector expertise and implementation capacity through CFI technical assistance agreements.
- ▶ **Strategic framework**  
This process made possible Law No. 1601 and the Development Program, in alignment with National Law No. 27.231 and international standards.

**This is not an improvised starting point, but a sound foundation for investment. The Province, the CFI and a specialized technical team constitute a strong institutional platform to structure aquaculture development.**

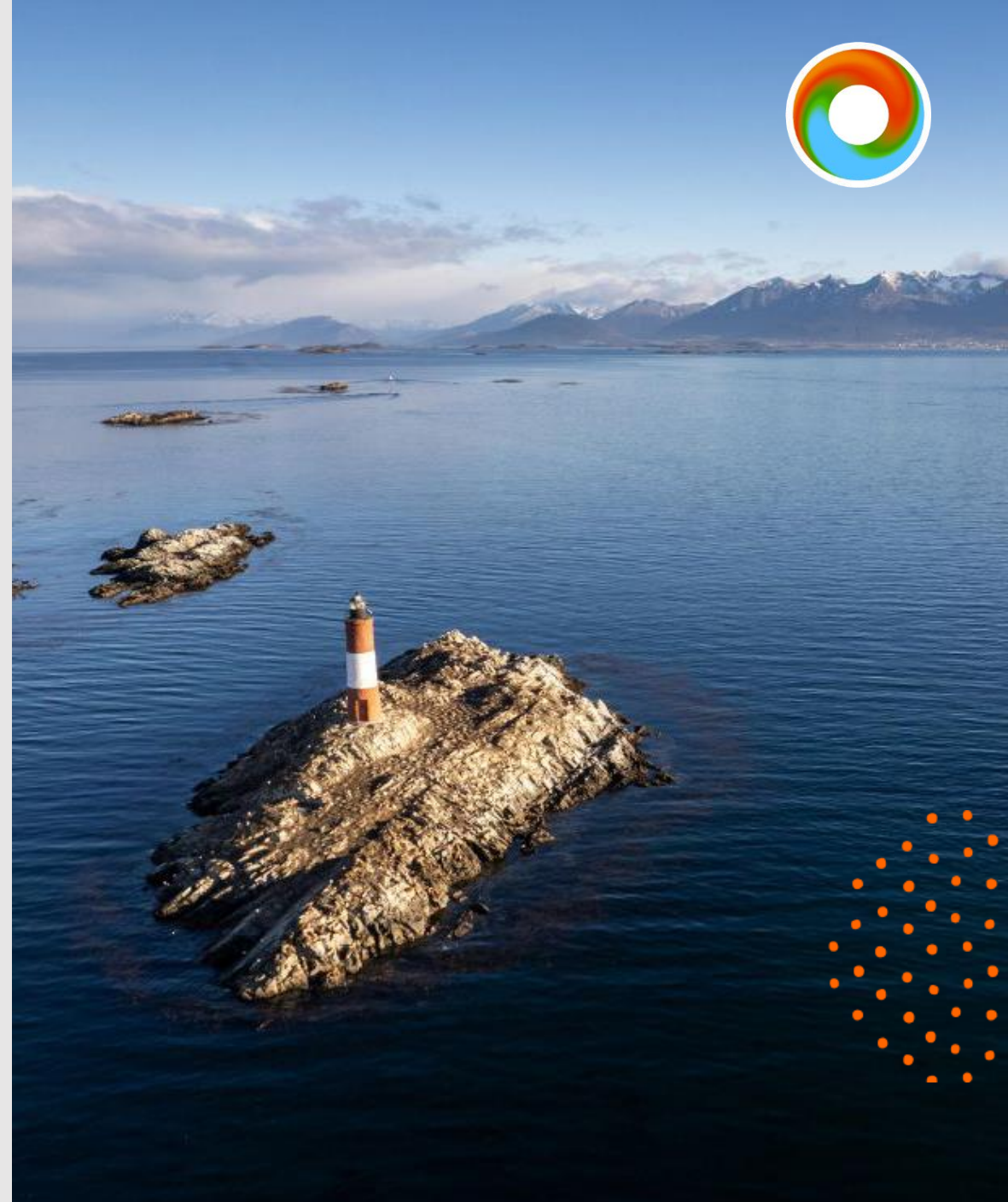
# INVESTMENT THESIS

**Tierra del Fuego does not compete on volume, but on value, biosecurity, and origin.**

This positioning aligns with strategic capital, industrial partners, and high-standard markets.

- Tierra del Fuego origin with immediate differentiation capacity.
- Inland waters, biological control, and a marine-coastal platform combining productive scale, logistics, and proprietary branding.
- A provincial framework that structures development, ensures traceability, and enables predictable growth.

**The value proposition is not volume without identity, but the transformation of origin into value through biosecurity certainty and value-added production.**



# INLAND AND MARINE WATERS



The competitive advantage of Tierra del Fuego lies in the integration of biological control, territorial assets, and commercial projection.

Inland waters underpin genetic development and biological control, while the marine –coastal front delivers scale, logistics, and exportable identity.

## INLAND WATERS

Biological foundation

- Broodstock reservoir, genetic and technological validation.
- Water management based on flow, quality, and scale.
- Operational platform for biosecurity, traceability, and local capacity development.

## MARINE AND COASTAL FRONT

Commercial scale

- Coastal logistics and processing capabilities to strengthen the provincial cluster.
- A southern identity tailored to premium markets.
- Diversification aligned with territorial planning in Tierra del Fuego.



# GENETICS AND DISTINCTIVE BRANDING

In salmonids, value capture extends beyond production, beginning with genetics, traceability, and brand development.

The Plan enables local genetic development, safeguards populations, and ensures genetic and biosecurity traceability.

1

## Local genetics

Broodstock, applied research, and proprietary biological resources.

2

## Biosecurity traceability

Biosecurity, official control, and commercial confidence from the outset.

3

## Origin branding

“Tierra del Fuego / End of the World” as a distinctive positioning for premium markets.

TIERRA DEL FUEGO  
SEAL

**From ova to  
value  
creation**

Value lies in genetics, biosecurity and origin.

Tierra del Fuego integrates knowledge, genetics, and branding.





# BIOSECURITY

**Biosecurity is not a cost; it is a competitive advantage.**

In an industry where disease outbreaks can undermine value and reputation, Tierra del Fuego presents itself as a reliable and traceable origin, supported by integrated public oversight.

## Biosecurity

Protocols integrated from the project design phase.

## Validation

Health and food safety officer.

## Traceability

Tracking of processes, batches, and critical decisions.

## Quality

Technical and commercial assurance of the product.

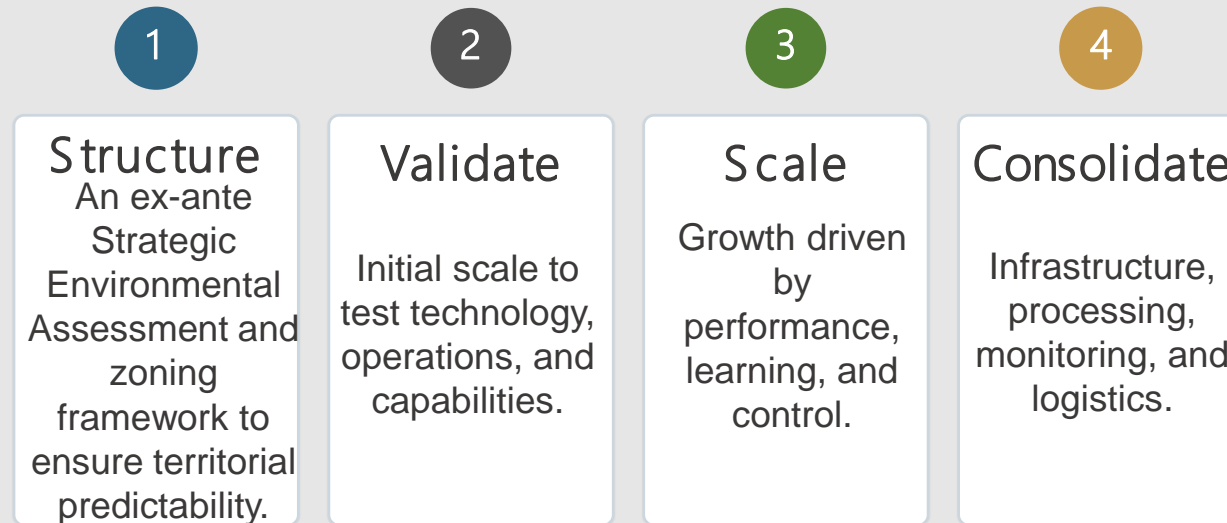
In high-standard aquaculture, biosecurity reduces risk, protects the environment, safeguards reputation, and sustains markets.



# DEVELOPMENT PLAN

The provincial plan reduces friction and enhances execution.

First structure, then validate, and finally scale. For the investor, this means lower implementation risk.



The roadmap reduces improvisation and enhances execution visibility.



# IMPACT AT THE PROVINCIAL LEVEL

A solid investment, as it generates value beyond production.

The value proposition goes beyond profitability, focusing on development with identity, local capacity building, and an exportable brand.

## Employment and talent

More technicians, operators, and capabilities linked to marine and inland waters.

## Local value creation

Processing, conditioning, monitoring, and innovation within Tierra del Fuego.

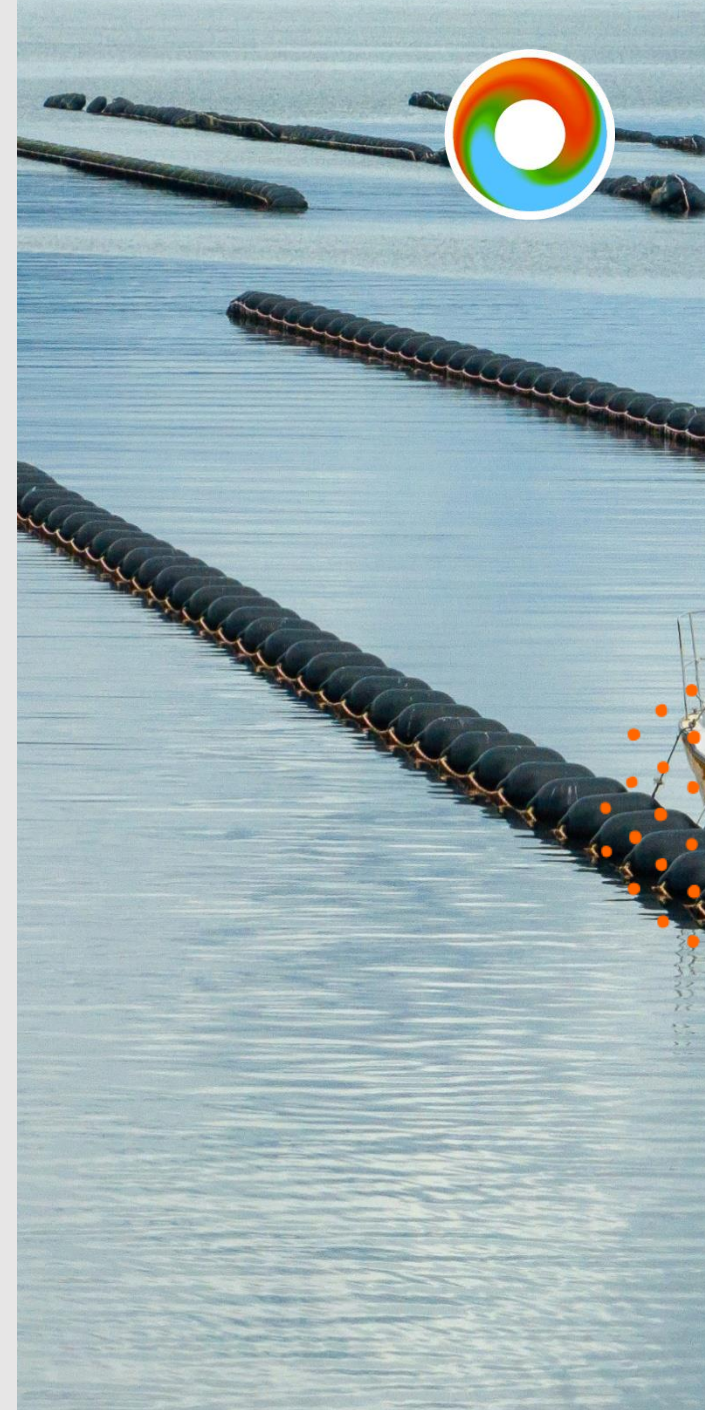
## Strategic capacity

Genetics, knowledge, and control anchored in Tierra del Fuego.

## A distinctive southern brand

An exportable positioning that integrates quality, biosecurity, and territorial identity.

The right investment is the one that leaves installed capacity in Tierra del Fuego.





## THE INVITATION TO CAPITAL

Investing now means securing an early position before the category reaches maturity.

### **Strategic capital**

For genetic development, infrastructure, pilot projects, and initial scale-up.

### **Operating partners**

To strengthen technological capabilities, biosecurity systems, and industrial capacity.

### **Market access**

To open markets and position a reliable southern brand.

Tierra del Fuego has the potential to become a southern platform for high-value aquaculture, built on genetics, biosecurity, and the Tierra del Fuego seal.

# KEY INVESTMENT ADVANTAGES



A well-structured project can leverage significant tax and customs benefits, within the applicable legal framework and with a long-term horizon under Law No. 19.640.

## POTENTIAL BENEFITS

<b>National level: 100%</b>	Up to 100% relief from domestic national taxes, subject to the applicable legal framework and statutory exceptions.
<b>Imports: 100% / 50%</b>	Imports into the Special Customs Area from abroad or from a Free Trade Zone: 100% exemption from taxes, statistical and destination verification fees, and special contributions; and 100% or 50% exemption from import duties, as applicable.
<b>Mainland → Tierra del Fuego: 100%</b>	Goods transferred from the mainland to the Special Customs Area benefit from free circulation and 100% exemption from duties, taxes, special contributions, and statistical and destination verification fees.
<b>Exports from the Special Customs Area: 100%</b>	Exports from the Special Customs Area (SCA) are exempt from foreign exchange requirements and economic restrictions, and benefit from 100% exemption from export duties, taxes, special contributions, and statistical service fees.

## CONDITIONS FOR VALUE CAPTURE

- **Regulatory framework** Maximizing the benefits requires legal and tax structuring and, where applicable, approval from national and/or provincial authorities, depending on the activity.
- **Origin** Rules of origin and minimum processing requirements must be met, where applicable.
- **Compliance** Access to benefits is governed by the applicable legal framework based on the project submitted.
- **Access to financial instruments** Access to assistance funds and financing (FOGADEF, CFI, FAMP); eligibility and available financial instruments should be assessed for each project.

**Tierra del Fuego offers a highly competitive tax and customs framework.**

# PREDICTABILITY AND SCALE-UP



Tierra del Fuego offers investors a predictable framework, with three differentiated scales based on project size and an integrated view of the venture.

## TIMELINE BY PROJECT SCALE

- 1 First scale** Up to 5 years, with an extension for an equal period.
- 2 Second scale** Up to 10 years, with an extension for an equal period.
- 3 Third scale** Up to 15 years, with an extension for an equal period.

At the third scale, the potential time horizon may extend up to 30 years, subject to compliance, periodic evaluation, and renewal.

## COMPREHENSIVE VIEW OF THE VENTURE

**The project is not viewed solely as a water parcel, but as a fully integrated production system, from inland waters to the coastal interface.**

- Marine and inland waters.
- Water surfaces and farming areas.
- Coastal zones, shoreline areas, and the land–sea interface.
- Associated land areas and logistics infrastructure.
- Ongoing analysis of production, water resource, environmental, and biosecurity aspects.

**Areas required to support operations, processing, distribution, and scaling.**

**For investors, this means predictability, structured scaling, and a comprehensive view of the venture, from the resource to the infrastructure.**

**Approval is not limited to a water surface; it authorizes a fully integrated production project, from resource to the infrastructure required for operations, processing, and scaling.**



## KEY STRATEGIC BENEFITS OF INVESTING IN TIERRA DEL FUEGO

Tierra del Fuego brings together 130 nautical miles of marine coastline and approximately 620 km<sup>2</sup> of lakes, lagoons, and rivers—an exceptional natural base for the development of high-value marine and inland aquaculture.

The provincial proposal combines strict protection in sensitive areas such as the Beagle Channel with sustainable development in suitable zones, transforming environmental quality into investment, employment, value addition, and international projection.

Law No. 1601 and its implementing decree translate this potential into a structured system with ex-ante planning, institutional coordination, administrative certainty, and robust biosecurity foundations for sustainable projects.

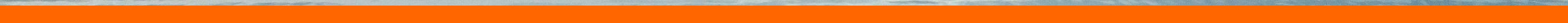
Key Benefits: origin and international positioning, high-quality water resources, biosecurity and traceability, clear rules for investment, responsible scale-up, local capabilities and complementary competitive advantages.

**In Tierra del Fuego, aquaculture creates value by integrating origin, biosecurity, control, and investment predictability.**






Thank you!





# somos Gobierno de Tierra del Fuego

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