

NORWEGIAN
SEAFOOD
COUNCIL

挪威海产在中国的发展情况汇报

Norwegian seafood in China

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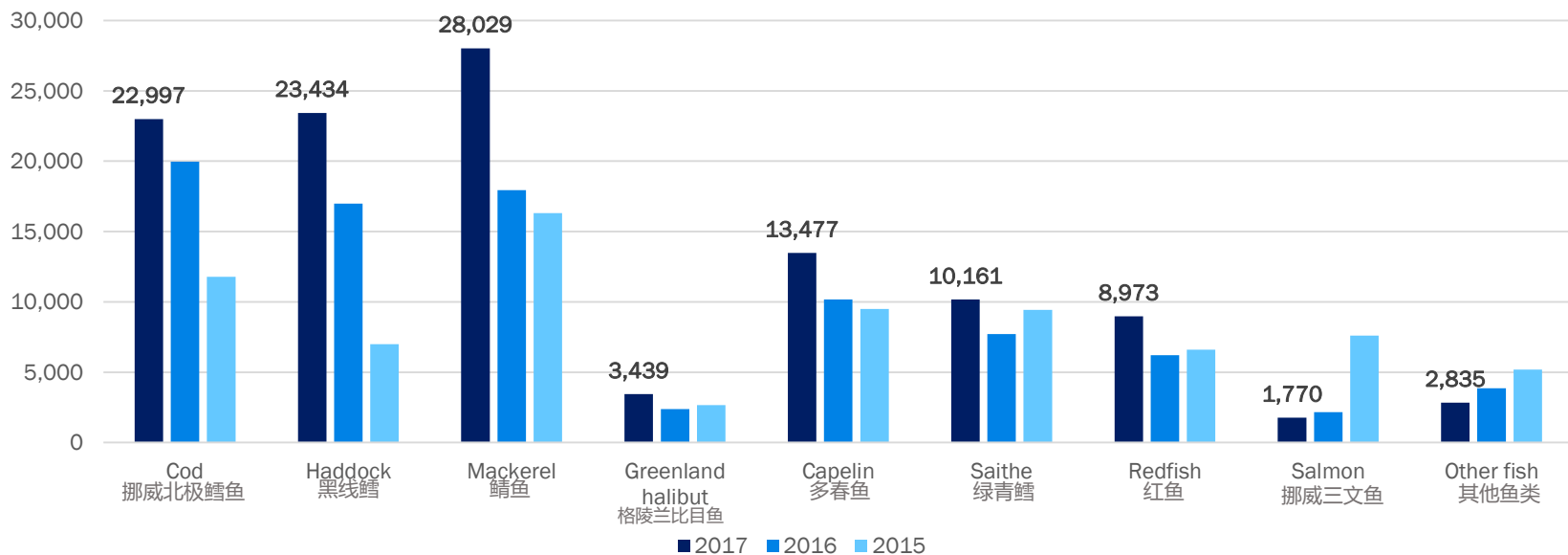
挪威今年出口了115000吨海产，比2016年增长32%，比2015年增长51%

Norway has exported 115.000 tons seafood this year.

A growth of 32 % compared to 2016 and 51 % more than 2015.

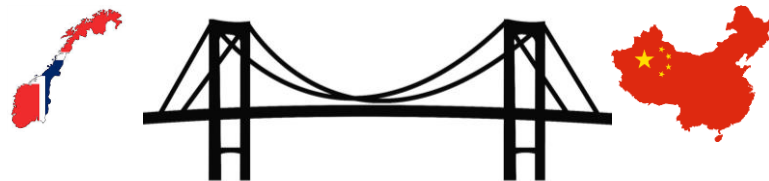
挪威海产出口到中国的各品类总量（1月到9月）

Export of Norwegian seafood to China (January-September)



Market access Norwegian seafood 挪威海产的市场准入情况

- ◆ Resumed bilateral relationship since December 2016.
 - ◆ Positive dialogue between authorities
 - ◆ Signed MOU on food trade in April 2017
 - ◆ Signed Protocol on salmon in May 2017
 - ◆ Free trade negotiation resumed in August 2017
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- ◆ 2016年12月起中挪双边关系恢复正常化
 - ◆ 双方高层管理机构有效互动
 - ◆ 2017年4月签署食品贸易备忘录
 - ◆ 2017年5月签署三文鱼进口协议
 - ◆ 2017年8月自由贸易协议谈判重启



Still some challenges, work in progress 仍待解决的问题与工作进展

Salmon

- ◆ Implementation of the salmon protocol
- ◆ Uncertainty about veterinarian tests, and following quarantine time

Seafood in general

- ◆ Recognition of producers to be approved for export to China is still pending
- ◆ 30 new species are pending approval
- ◆ Approval of fish meal and fish oil

三文鱼

- ◆ 三文鱼进口协议的实施
- ◆ 对检测项目和隔离检疫时间规定的
不确定性

挪威海产总体情况

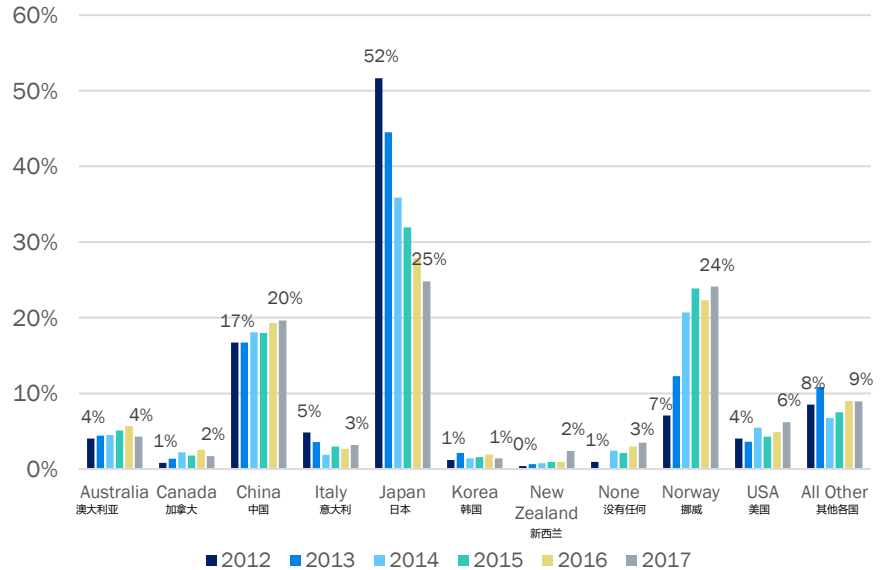
- ◆ 挪威水产品生产企业在华注册名单
认证工作仍在待定中。
- ◆ 30种新海产品类等待批准中。
- ◆ 鱼饲料和鱼油产品等待批准中。

Norway has grown its perception as seafood nation among Chinese consumers 挪威已经成为中国消费者心目中的海产大国

- ◆ China increases its own perception as a seafood nation
- ◆ Perception of Japan as seafood nation is delining
- ◆ Norway taking a strong position.

- ◆ 中国本地海产的认知也在增长，中国被认为是海产大国。
- ◆ “日本是海产大国”的认知在降低。
- ◆ “挪威是海产大国”的认知非常明确。

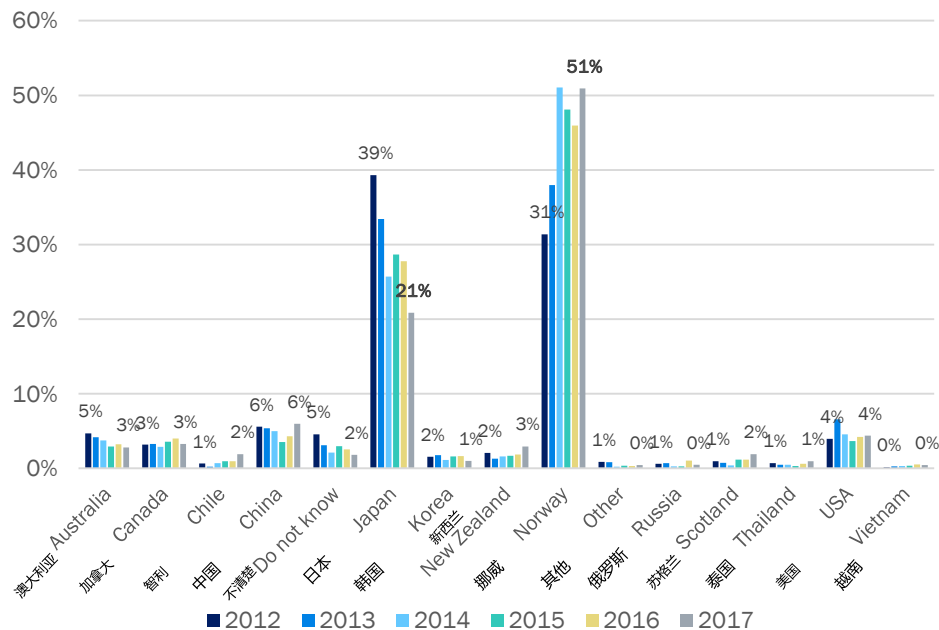
Association of seafood nation (1st mentioned)
海产大国的认知联系（受访时第一个被提及的国家）



Source: NSC' Seafood Consumer Insight 2012-2017 数据来源：挪威海产局消费者调查2012-2017

Chinese consumers have a strong preference for Norwegian salmon 中国消费者对挪威三文鱼有明确的偏爱

Which is your preferred country of origin when you buy salmon
哪个国家是你在购买三文鱼的时候会偏爱的产地？



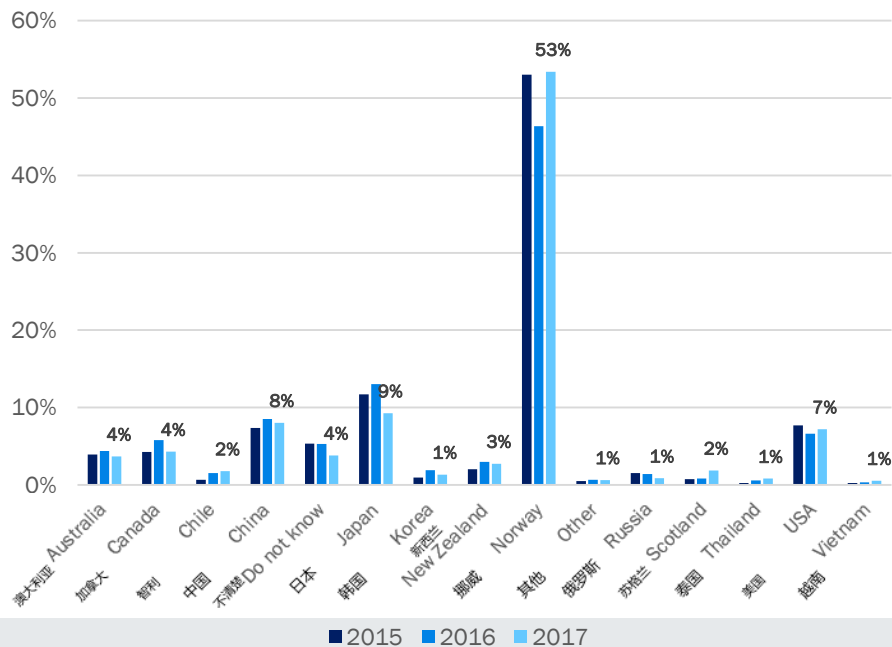
Source: NSC Seafood Consumer Insight 2012-2017 数据来源：挪威海产局消费者调查2012-2017



Strong preference also for Norwegian cod 对挪威北极鳕鱼的偏爱也非常明确



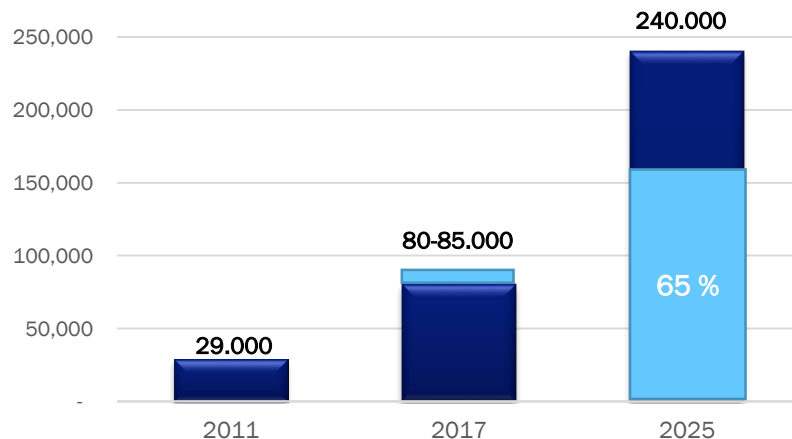
Which is your preferred country of origin when you buy XueYu ("cod")
哪个国家产的鳕鱼是你更喜欢的？



Salmon market is expected strong growth over the next years 三文鱼未来几年的市场预期有迅猛增长

- ◆ Salmon consumption has grown around 300 % since 2011.
- ◆ Expect salmon consumption to reach 240.000 tons in 2025.
- ◆ Target market share for Norway is to 65%
- ◆ 三文鱼总消费量自2011年起已经增长约300%
- ◆ 预期到2025年三文鱼年总消费量会达到24万吨
- ◆ 挪威的目标是达到约65%

三文鱼在中国的年消费量
Annual salmon consumption in China

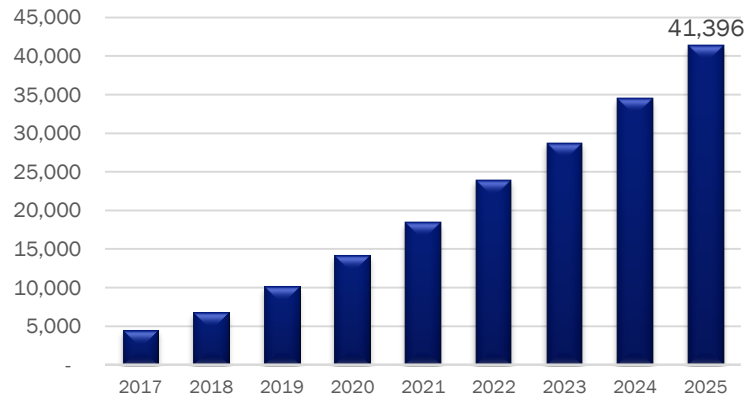


The expected consumption of Norwegian Arctic Cod in China

挪威北极鳕鱼在中国的预期消费量

- ◆ Target for Chinese consumption is more than 40,000 tons by 2025
- ◆ The upside is even larger
- ◆ Meets Chinese consumers needs
- ◆ 目标在2025年，中国消费量超过4万吨
- ◆ 形势非常乐观
- ◆ 满足中国消费者的需求

Norwegian Arctic Cod Consumption in China (in tons)
挪威北极鳕鱼在中国的年消费量 (单位：吨)



更多挪威海产种类在中国的市场机遇

Market opportunity for more Norwegian seafood species

新市场调研

- ◆ 红鱼
- ◆ 格陵兰比目鱼
- ◆ 绿青鳕
- ◆ 鲱鱼
- ◆ 鲭鱼
- ◆ 多春鱼
- ◆ 帝王蟹
- ◆ 雪蟹
- ◆ 褐蟹
- ◆ 蓝贻贝
- ◆ 冷水虾
- ◆ 扇贝
- ◆ 鳕鱼干

New market research

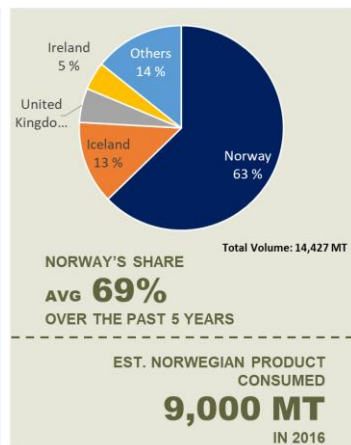
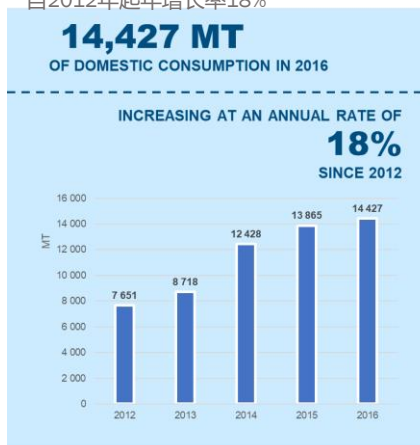
- Redfish
- Greenland Halibut
- Saithe
- Herring
- Mackerel
- Capelin
- King Crab
- Snow Crab
- Brown Crab
- Blue Mussels
- Cold-Water Prawns
- Scallops
- Stockfish



鲭鱼: 高消费量且挪威已经占据优势

Mackerel: high consumption and Norway already has leading position

2016年国内该品类总消费14427吨
自2012年起年增长率18%



在过去的5年内挪威占份额约69%
预计2016年挪威鲭鱼在华消费9000吨

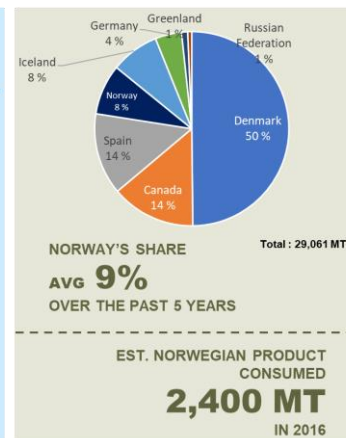


比目鱼: 市场总消费量很高, 挪威应怎样争取更高市场份额?

Hallibut: high domestic consumption, how can Norway increase market share?



2016年国内该品类总消费29061吨
自2012年起年增长率16%



在过去的5年内挪威占份额约9%
预计2016年挪威产比目鱼在华消费2400吨

SEAFOOD
FROM NORWAY

The Norwegian flag is positioned vertically between the words 'FROM' and 'NORWAY'. It consists of three horizontal stripes: a red top stripe, a white middle stripe, and a blue bottom stripe.