NORGES SJØMATRÅD

Statusrapport fra USA

Norsk sjømat i Trumps USA – 12. juni 2018

God økonomisk utvikling – handelspolitisk usikkerhet

- Arbeidsledighet 3,9%
- BNP + 2,2% i første kvartal
- Personlig inntekt + 0,3%
- Salg i dagligvare og restaurant +0,3%
- Handelsunderskuddet reduseres

Men...

Handelsunderskuddet er fremdeles betydelig og Trump adminstrasjonen øker presset på handelspartnerne



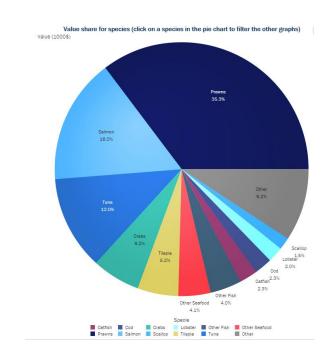
Usikkerhetsfaktorer

- Konsekvenser av handelskonflikter
 - Kina
 - EU
 - Canada
 - Mexico
- Innføring av vedtatte lover og reguleringer
 - Seafood Import Monitoring Program
 - Marine Mammal Protection Act
- Økt politisk fokus på egenproduksjon av sjømat



USA er helt avhengig av import av sjømat

- 80% av konsumert sjømat er importert
- Både amerikansk bearbedingsindustri, distribusjonsleddet, detaljistleddet og restaurantnæringen er avhengig av tilførsel fra andre land
- USA har ikke stor nok egenfangst av de sentrale artene
- Markedet er svært diversifisert på grunn av alle ulike etniske konsumentgrupper

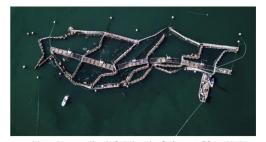


Sjøbasert lakseoppdrett i USA er under press

Washington state har vedtatt å stoppe all oppdrett av atlantisk laks innen 2025 etter en opphetet debatt som følge av en lakserømming

263 000 laks rømte fra Cooke Aquaculture sitt anlegg i Puget Sound like utenfor Seattle i

august 2017.



Atlantic salmon escaped from this Cooke Aquaculture Pacific net pen off Cypress Island in
 1 of 8 August 2017. (Beau Garreau/DAKO. 5TUDIOS)





After a tough floor fight and fancy parliamentary footwork, the state Senate passed a bill phasing out Atlantic salmon net-pen farming in Washington.

Cooke Aquaculture's salmon fish farm at Hope Island. (Steve Ringman/The Seattle Times)



By Lynda V. Mapes

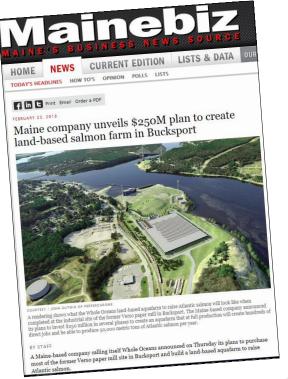
Seattle Times environment reporter

Atlantic salmon net-pen farming will be phased out in Washington by 2025 under legislation passed by the state Senate on Friday after a tough floor fight

Landbasert lakseoppdrett i USA er i vinden







Trender i restaurantsektoren

I følge **National Restaurant Association** er

bærekraft

den viktigste trenden for sjømat i restaurantsektoren



Trendy matkonsepter er...



- Hyper local
- Chef driven
- Natural ingredient
- Reduced food waste
- Veggie centric
- Environmental sustainable
- Local
- Simple
- Farm/estate branded items

TECHNOMIC.

A Winsight Company

Consumers demand to know both what's in their food and what's not in it—many are looking for items free of everything from gluten and added sugars to GMOs and artificial colors. Indeed, transparent sourcing—both in practice and in communication to the consumer—has become a high priority.

"Consumers demand to know both what's in their food and what's not in it"

Technomic's global polling provides some context to this

trend. Around 75% of consumers strongly agree that restaurants should be more forthcoming about where they get ingredients, with this demand most urgent in India and Mexico. About 90% of consumers worldwide say they'd be more likely to purchase restaurant fare described as fresh. Some 75% of consumers are drawn to foods that are natural, authentic, premium and locally sourced. Around 60% of consumers like to see organic, GMO-free, functional and sustainable items. By region, Latin Americans are most insistent on freshness, Asians on authenticity and Europeans have the strongest preference for locally sourced foods, with six in 10 saying restaurants should always purchase local ingredients.



Consumers hunger to know the "story" behind their meal, and they want authentic presentations of traditional regional and ethnic foods. In Kuwait, Naif Chicken

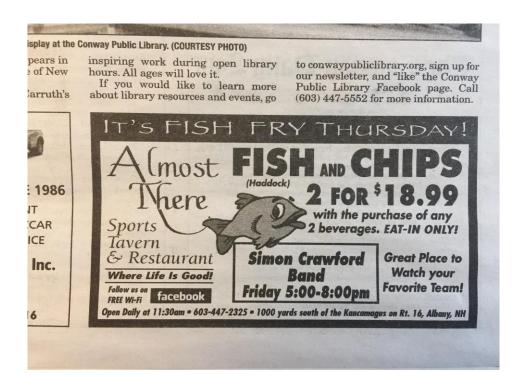
Restaurantsektoren - kontrollfokus

Kostnader
Tilberedelse
Næringsinnhold
Menypris
Leveringssikkerhet





Fish Fry Thursday med hyse i Maine





Salmon is one of the most popular fish species in the world. Every day, 14 million meals with Norwegian salmon are served worldwide. Just a few hours after the salmon are harvested out of the cold, clear waters of Norway, they are ready for export to over 100 countries.

1. How long does it take before salmon are fully grown?

It takes two to three years for the Norwegian salmon to reach a body weight of 4-5kg, which is perfect for human consumption.

At one year old, the salmon are strong enough to migrate from the freshwater to the cold saltwater fjords in the Norwegian sea.

2. How much feed do salmon need before they are fully grown? For each kilogram the salmon gains in weight, 1.2kg of fish feed is required. In its lifetime, a salmon will therefore consume around 6-7kg

Compared with other animals, this amount of feed is very low. In comparison, it takes 3kg of feed to produce 1kg of park and as much as 8kg of feed to produce 1kg of beef.



produce 1kg of park

Bug of feed is required produce Bug of beef.

salmon one of the richest food sources of A normal meal of salmon covers a person's weekly needs of omega-3 fatty acids, following The European Food Safety Authority (EFSA)

important for humans?

arterial diseases in humans. In addition, law levels of omega-3 fatty acids can lead to increased risks

6. How much salmon should we eat? First of all, the question is how much fish should we eat to ensure a balanced diet? The World Health Organization and the Norwegian Health Authority

week, and half of these should be fish which are

3. What kind of feed is fed to Norwegian salmon?

of ingredients. Today, marine resources accounts for 20-30% of the salmon feed, which includes fish oil and fish meal. Vegetable oil, vegetable proteins

The fish oil and fish meal are made from fish offal and wild fish that are not fit for human consumption. The mix of marine and vegetable ingredients is beneficial to both the salmon and

4. How much omega-3 fatty acid do Norwegian salmon contain?

One normal meal of salmon (150g fillet) contains about 1.8g EPA and DHA. This makes Norwegian . Vocuments of

5. Why are omega-3 fatty acids so

Natural omega-3 fatty acids found in salmon are

We should have two to three meals with fish per

rich in important omega-3 fatty acids. Salmon, mackerel and herring are all excellent choices. Not only does salmon provide important omega-3 fatty acids, but it is also a great source for iodine, selenium and other key vitamins.

7. Should everyone eat fish two to three times a week?

Yes, everyone should eat fish two to three times a week irrespective of whether they are young or old. Pregnant women, breastfeeding mothers and children should also follow this recommendation. People suffering from cardiac or arterial diseases are the exception - they are recommended to increase their consumption even further, in order to top up their omega-3 levels.

8. Can we be absolutely sure that Norwegian salmon sold to us are safe and healthy?

Yes, Norwegian salmon raised in the cold, clear waters of Norway are safe and healthy. Norwegian salmon are looked after by vets and the salmon farms are strictly regulated.

Each year, around 14,000 export-ready Norwegian salmon are inspected by the independent National Institute for Nutrition and Seafood (NIFES). None of these inspections have ever found any residues of prohibited medication or illegal foreign substances.

9. There used to be talk of antibiotics in salmon. Are there any traces in Norwegian salmon today? Since the late 80s, the use of antibiotics has

dropped 99% in Norwegian aqueculture. Effective vaccines against the most common salmon diseases, as well as strict hygiene regulations has allowed for this reduction.

Antibiotics is no longer on issue for the Norwegian aquaculture as less than 1% of all Norwegian solmon are treated. In the last 20 years, national and international food authorities have not been able to find traces of antibiotics in Norwegian salmon.

10. A great deal of salmon is farmed in Norway. Isn't that a bit like intensive livestock farming?

No, salmon forming in Norway does not belong in the intensive livestock forming category. Norwegian salmon have plenty of space in the net pens. in fact, regulations require that the salmon only need 2.5% of the total fish pen. Water constitutes the remaining 97.5%, allowing ample room for the

The net pens in which the salmon grow have a circumference of up to 200 metres and a depth of up to 50 metres.



Bekjempe myter om laks og lakseoppdrett



NORGES SJØMATRÅD

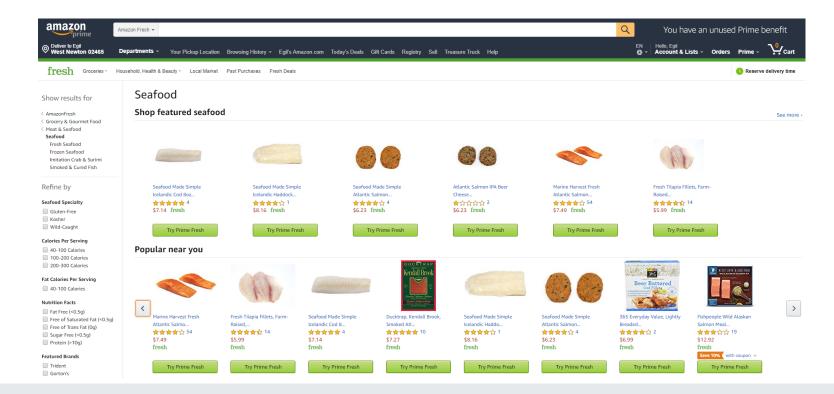
Markedsdrivere for forbruker



«Evolving consumers say they prefer evolving value drivers»

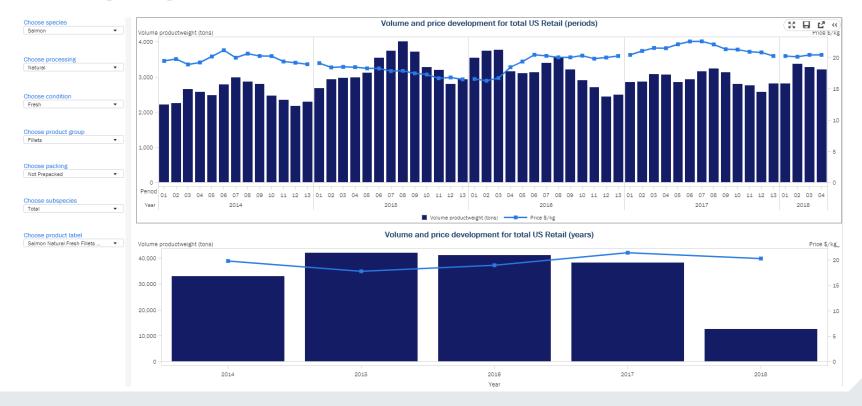
Source: Deloitte Food Value Equation Survey 2015, Deloitte Analysis

Nye salgskanaler: Amazon prime fresh

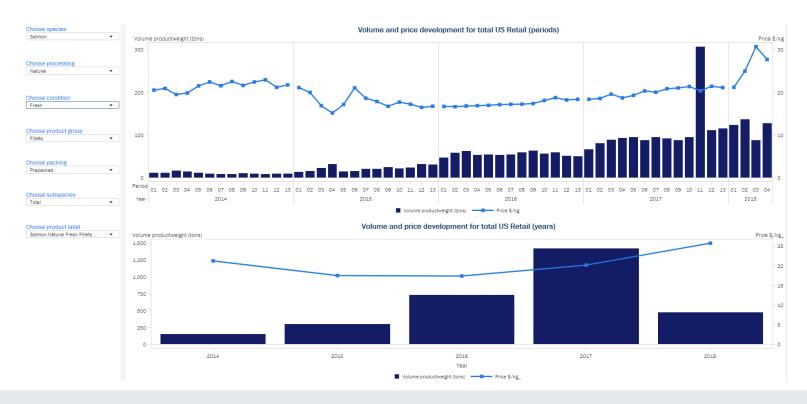


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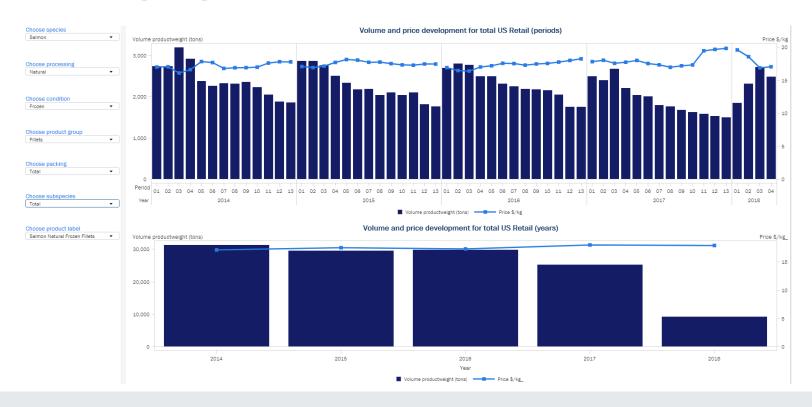
Utvikling salg av fersk laksefilet i detaljhandel



Utvikling detaljsalg av «prepack» laksefilet



Utvikling salg av fryste laksefileter i detaljhandelen



Costco, Boston







Costco fryste porsjoner

3 lbs lakseporsjoner:

\$25,99

på salg: \$19.99

(1,36 kg)

170-227gram



2 lbs torskeporsjoner: \$15,59

(0,91 kg)

142-227 gram



BJ's



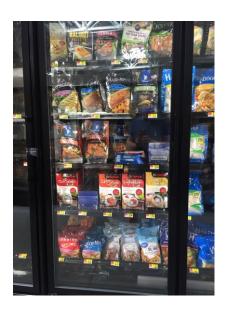
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Walmart, Boston





Walmart, utvalg av fryste produkter









Star market, Boston







Stop'n Shop, Boston





Wegmans, Boston





Fairview market NYC

Hiddenfjord filet \$15,99/lb (salg \$12,99)

Canadisk filet \$13,99/lb

Canadisk kotelett \$ 13,99/lb

Skotsk økolaks \$19,99/lb



Fjordørret: Steelhead trout – Fjord trout







Butikkampanjer



Norwegian Salmon Sushi Bow

For more recipes and tips, visit fromnorway.com

Norwegian Salmon tony tana stores incores

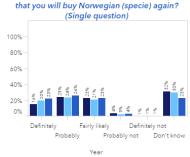
Trim index norsk sjømat



TRIM1: Based on your experience, how would you rate Norwegian (specie)? (Single question) 80% 60% Very good Fair Don't know Year ■ 2016 ■ 2017 ■ 2018

you to recommend Norwegian (specie)? (Single question) 80% Probably Probably not Don't know ■ 2016 ■ 2017 ■ 2018

TRIM2: Based on your experience, how likely are



■ 2016 ■ 2017 ■ 2018



TRIM index norsk laks



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