

Webinar Spania 12 Juni 2019
Bjørn-Erik Stabell

Spain – The seafood giant in Europe



Key facts about Spain

- ◆ Population: 46,56 mill
- ◆ Number of HH: 18,5 mill
- ◆ Number of single HH: 4,7 mill
 - ◆ (25% of HH vs 38% in Norway)
- ◆ Average size HH: 2,49 (vs 2,19 in Norway)
- ◆ Average salary: 23 306 Euro per year
- ◆ Where do people live: Urban population 80,3%.
 - ◆ Growth 0,33% from 2015-2020
 - ◆ (vs Norway 1,45%)
- ◆ Consumption Meat: 93,1 kg per capita
- ◆ Consumption Seafood: 42,4 kg per capita






High seafood consumption per capita makes Spain to the biggest seafood market in Europe



	Fish, Seafood	Meat
Portugal	56,8	90,3
Norway	53,4	65,9
Spain	42,4	93,1
France	24,6	88,7
Sweden	31,0	81,9
United Kingdom	19,0	82,5
Switzerland	17,4	74,7
Germany	14,2	87,9
Poland	12,0	75,6

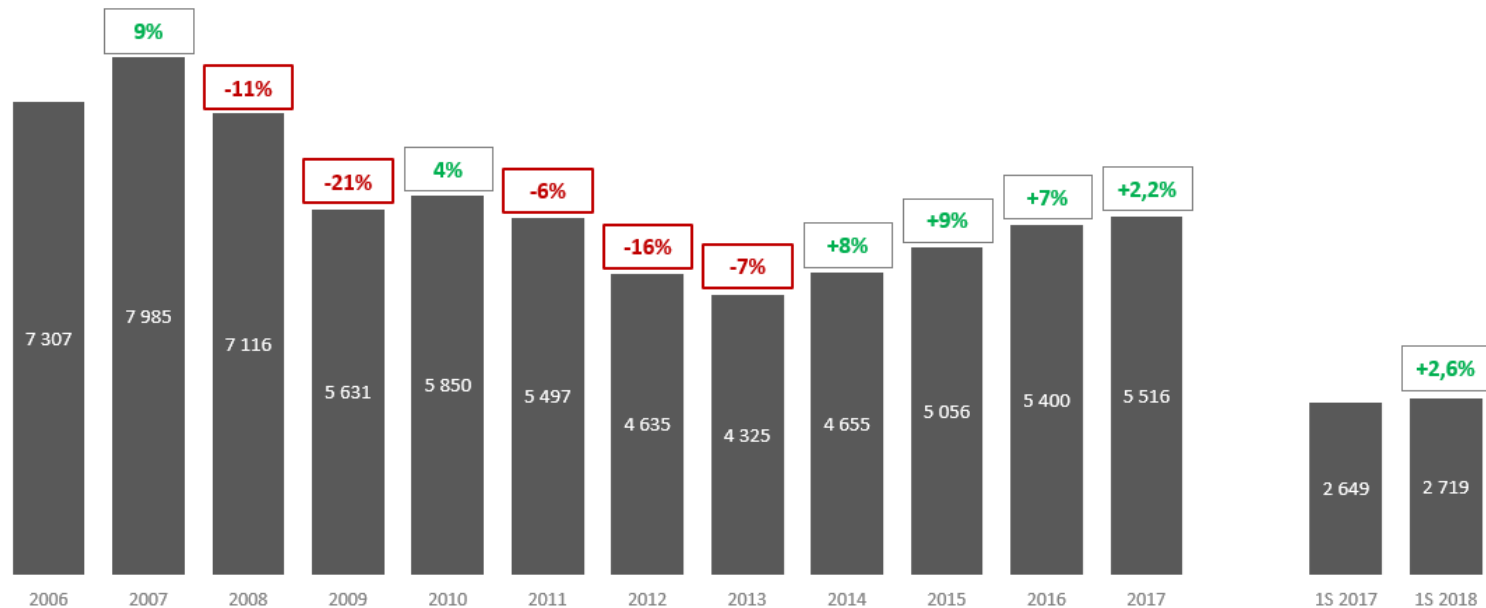
Spain has the highest economic growth in the EuroZone 2015&2018

	2014	2015	2016	2017	2018 Est
	1,4	3,3	3,2	3,0	2,7
	0,9	1,5	1,9	2,6	2,5
	2,2	1,2	1,1	1,9	2,1

Source: www.statista.com

The recovery of the economy = more expensive to advertise

- Media investments in Spain



Investment MM€.

Source: 2006-2017: Infoadex Real Estimated + Internet IAB.
1S 2017-2018: Infoadex Controlled Investment + Internet Forecast Ymedia

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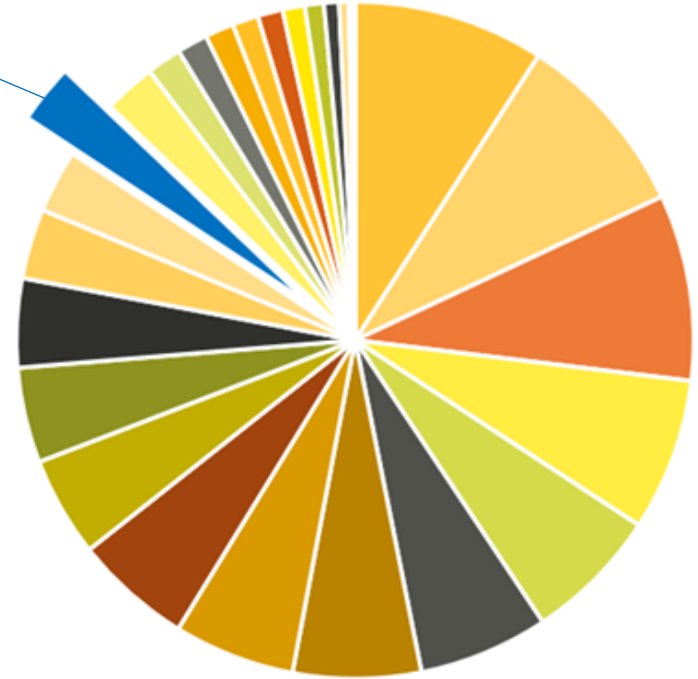
Seafood and Shellfish share of voice in food category in Spain

1,6 %

Seafood as a category is invisible

Brand Awareness and brand loyalty have strong positive association with Purchase intention

From the paper published in International Journal of Business and Social Science : Importance of Brand Awareness and Brand Loyalty in assessing Purchase Intentions of Consumer written by Prof. Dr. Muhammad Ehsan Malik¹, Muhammad Mudasar Ghafoor², Hafiz Kashif Iqbal³, Usman Riaz, Noor ul Hassan, Muhammad Mustafa & Saleh Shahbaz⁴

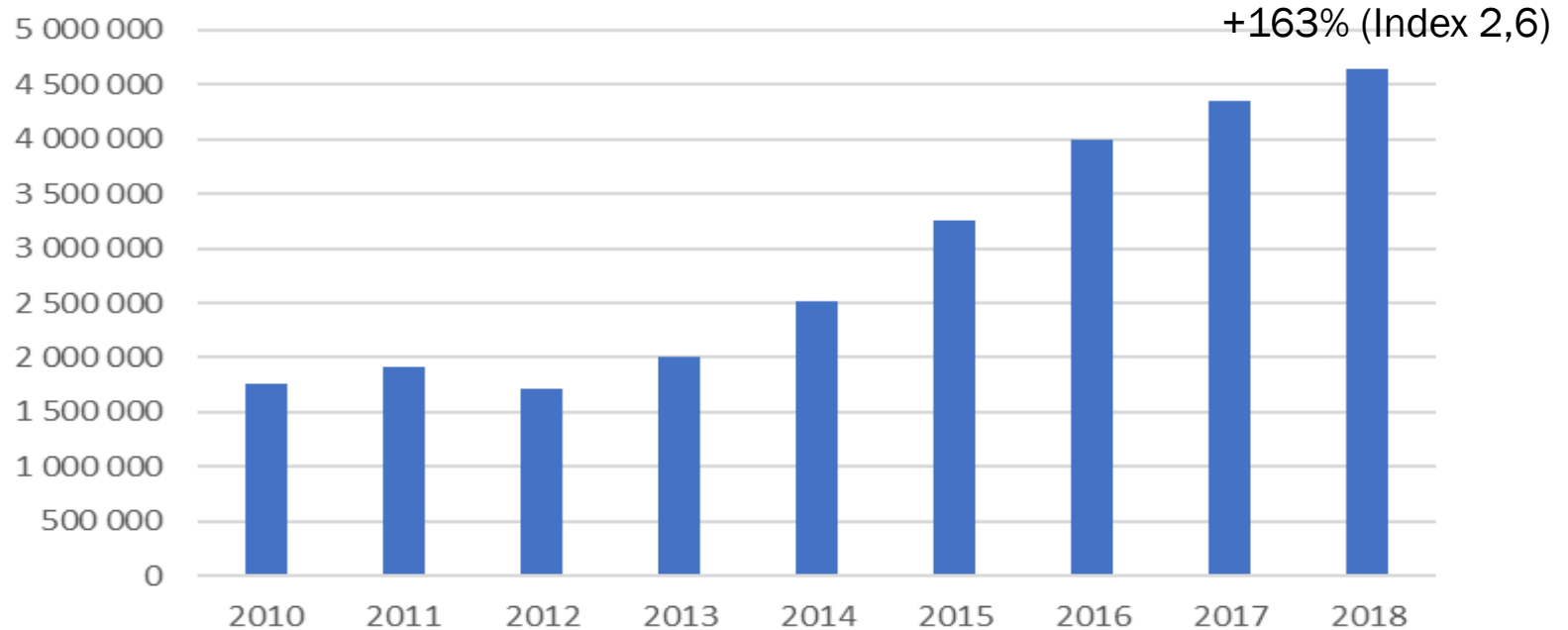


Spain loves Norwegian Salmon –
Norway loves Spain
The growth continues

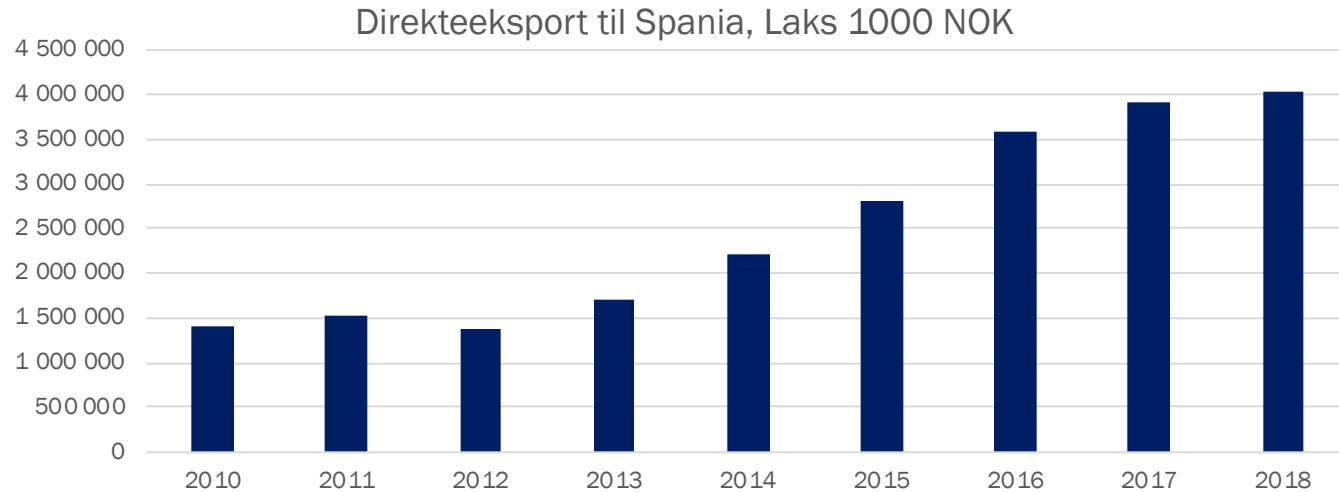


Daily Norway exports to Spain: more than 1,2 mill seafood meals

Development direct export to Spain



Direct export to Spain of Norwegian Salmon (More than 1 million meals per day)



Salmon is now the favourite fish in Spain

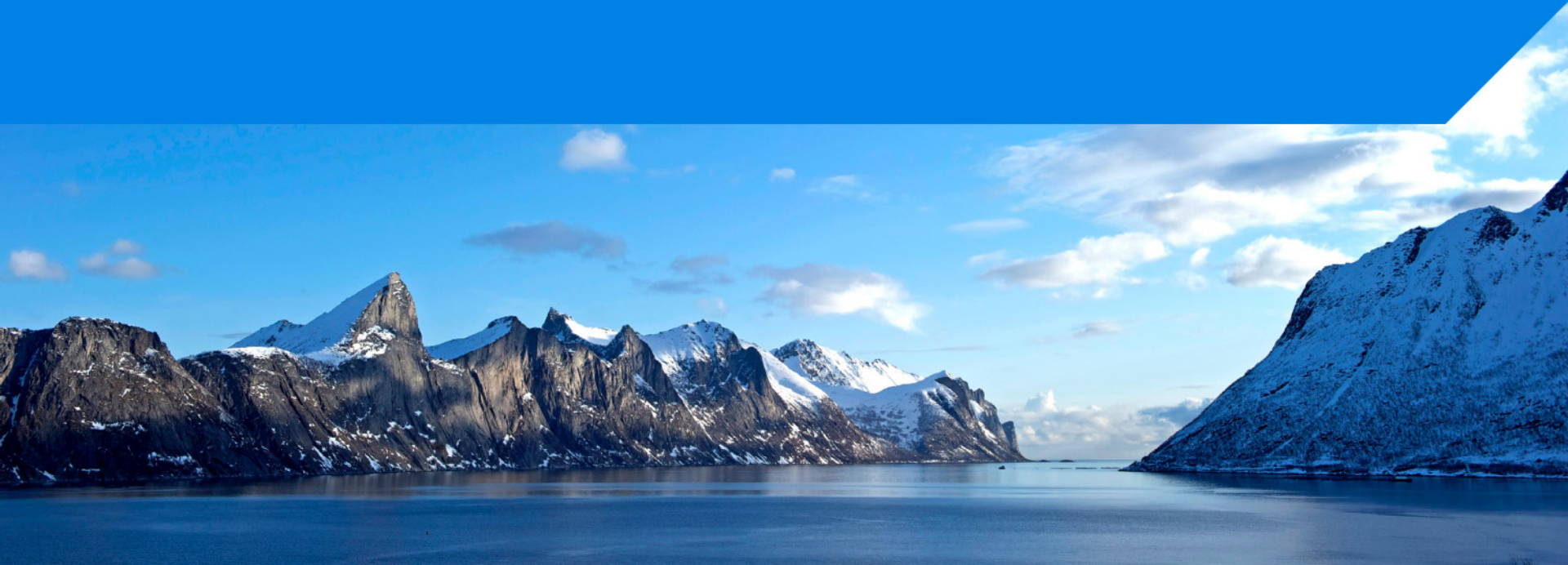
Question: What fish or seafood do you normally prefer for weekday dinner

Specie	2012	Specie	2017
Hake	27%	Hake	25%
Other	8%	Salmon	23%
Prawn/shrimp	8%	Tuna	12%
Sole	8%	Sole	8%
Salmon	7%	Sea Bass	5%
Tuna	7%	Swordfish	5%
Swordfish	6%	Fresh cod	4%
Bacalhau(salt & dry)	5%	Prawn/shrimp	4%
Cod	5%	Do not know	3%
Brown trout	4%	Sardine	2%
Do not know	4%	Other	2%
Sardine	4%	Squid/Cuttlefish/Oct	2%
Sea/salmon trout	2%	Brown trout	2%
Squid/Cuttlefish/Oct	2%	Clam/mussel	1%
Clam/mussel	1%	Fjord trout	1%
Sea Bass	1%	Bacalhau(salt & dry)	1%
		Blue mussel	0%
		Skrei	0%

Development Home consumption



Where is the salmon sold?



The Retailers

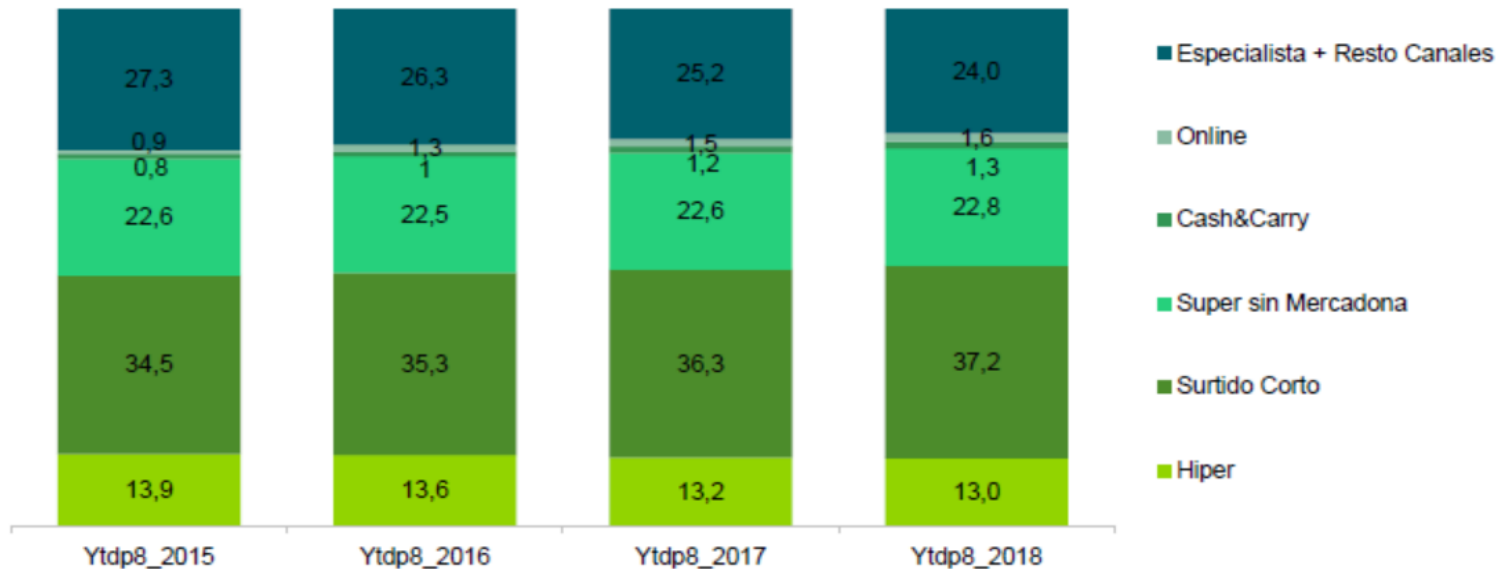
Total FMCG
Acumulado a 12 de Agosto de 2018 (YTD)



Gran Consumo: Alimentación (con frescos perecederos) + Droguería + Perfumería familiar + Baby + Pet Food
Súpers Regionales no incluye Supermercados Eroski ni El Arbol

The retail structure for food in Spain

%Cuota Mercado Valor



Surtido Corto: Tiendas de descuento (Dia, Lidl, Aldi...) + Mercadona

Gran Consumo: Alimentación (con frescos perecederos) + Droguería + Perfumería familiar + Baby + Pet Food

Retail is the main channel – but the fishmongers are still very important for seafood

Canal Especialista*



vs 23,5 % en CUM Agosto 2014 (- 3,6 pp)

*Mercado y tiendas Tradicionales

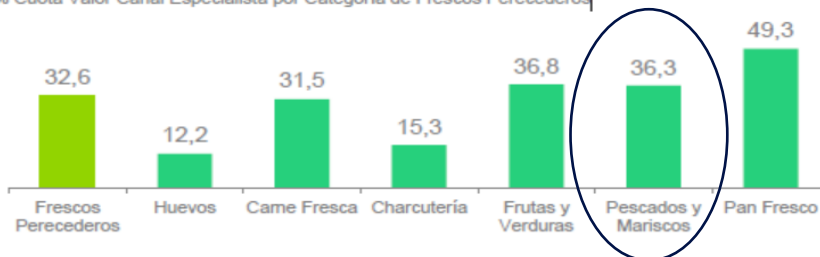


120 MIO
De Cestas Mensuales

% Cuota Valor Canal Especialista



% Cuota Valor Canal Especialista por Categoría de Frescos Perecederos



Datos CUM a 12 de agosto de 2018

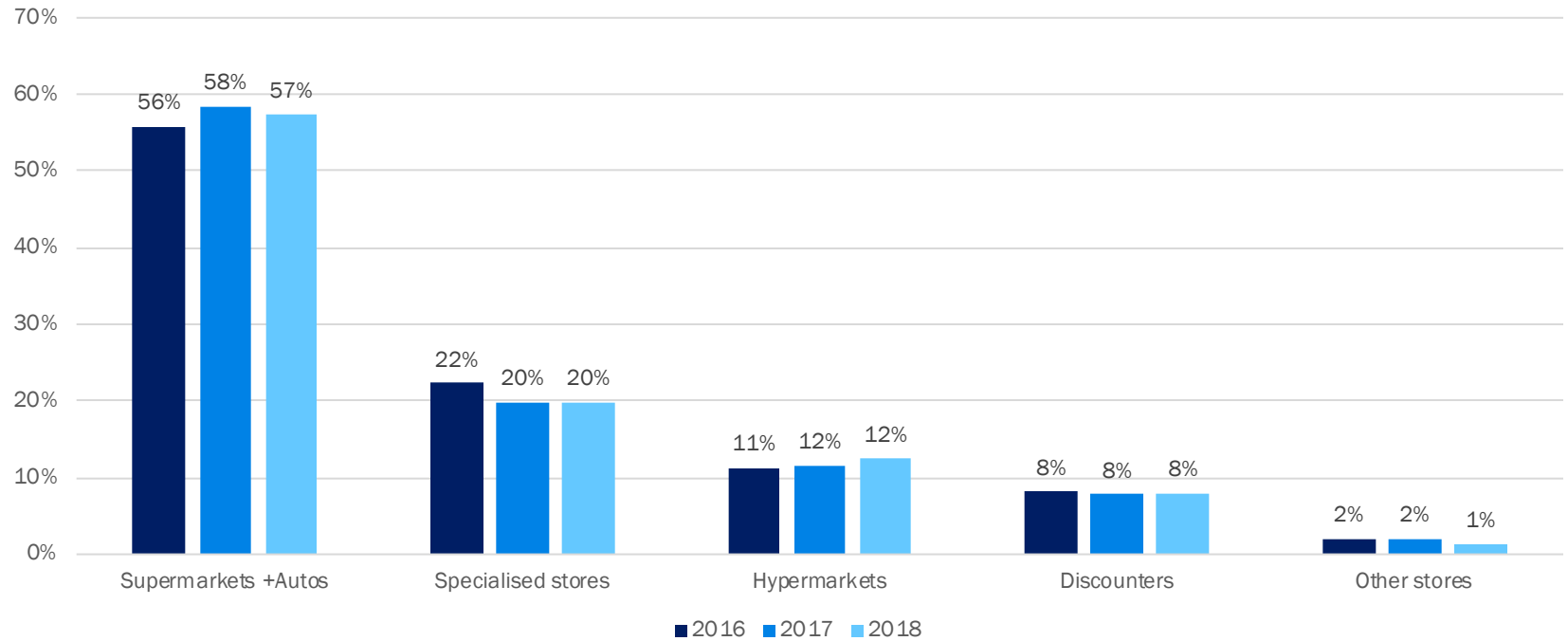
KANTAR **WORLD**PANEL

*Productos Ecológicos de Alimentación Envasada con código EAN

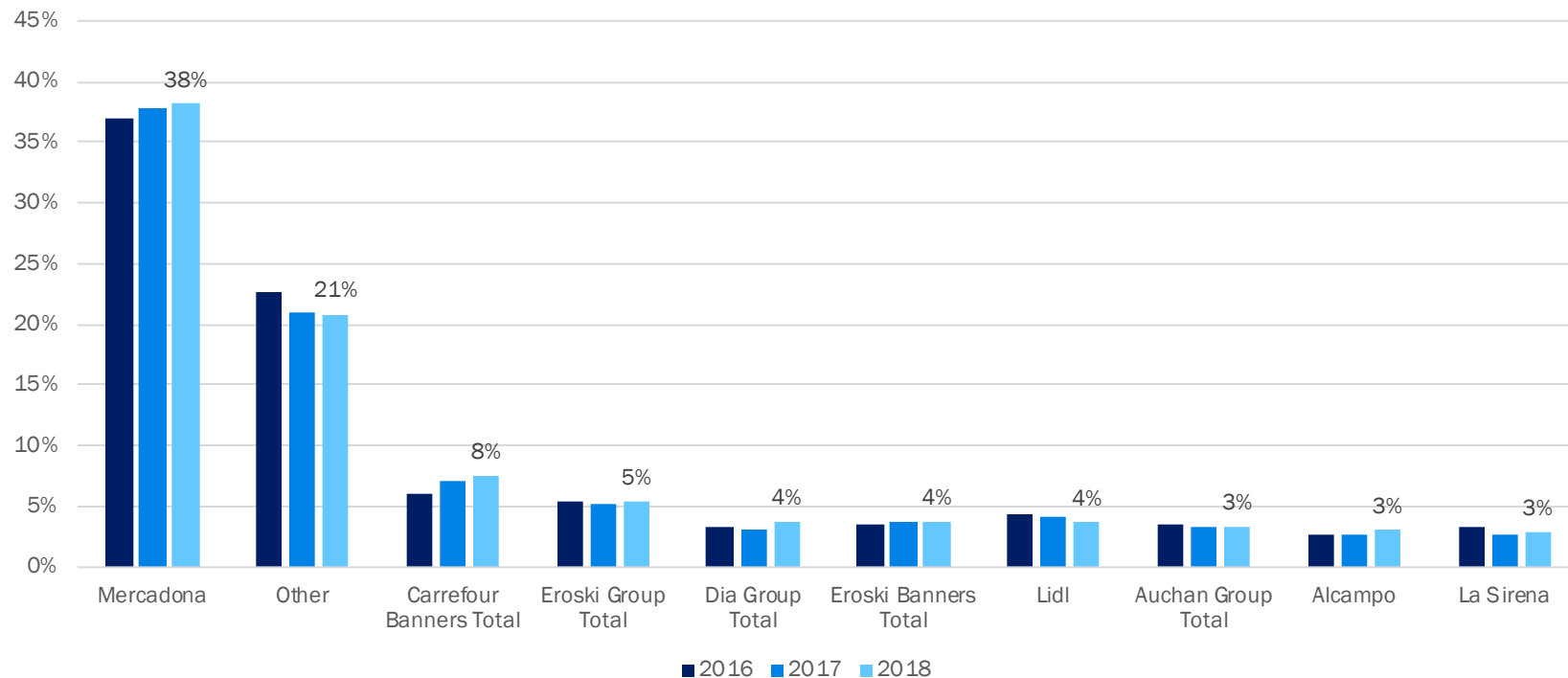
**Productos alimenticios sustitutos Proteína Animal

16

Salmon , market shares per channel



Salmon, market shares retailers

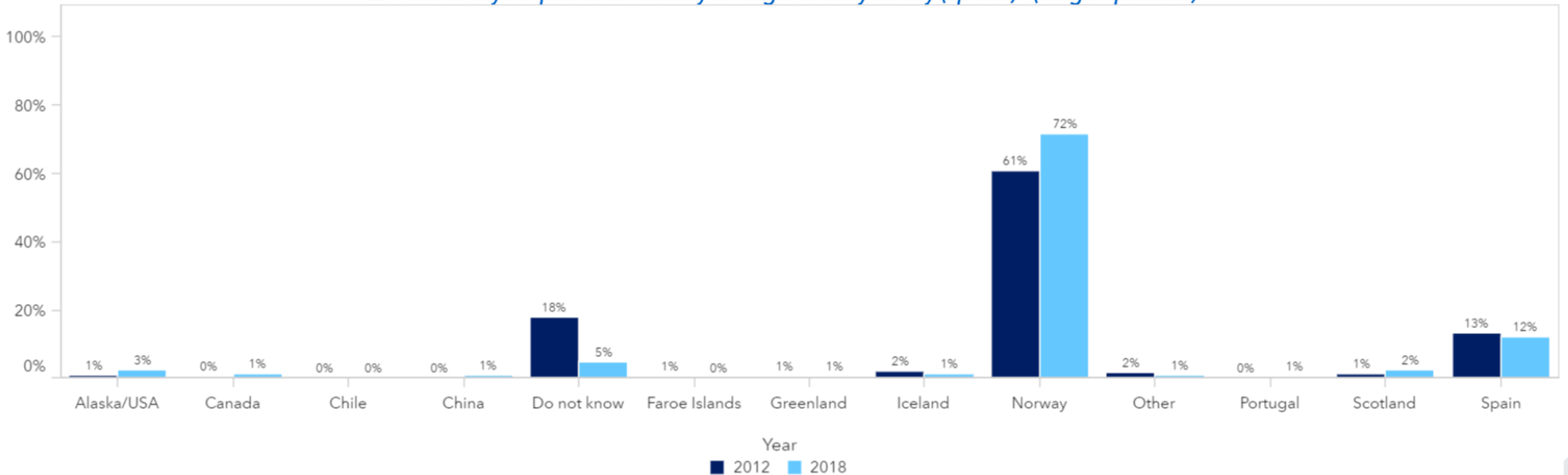


Why is Norwegian a competitive advantage?



In general, spanish consumers prefer seafood from Norway

Q7: Which is your preferred country of origin when you buy (specie)? (Single question)



Norway and Norwegian salmon has a very strong reputation in Spain. This is a competitive advantage for the seafood nation Norway, our exporters and the retailers that utilize this insight. But we need to work continuously with it
Bjørn-Erik Stabell

It takes 20 years to build a Reputation
and 5 minutes to Ruin it.
If you think about that,
you'll do things Differently.

- Warren Buffett -



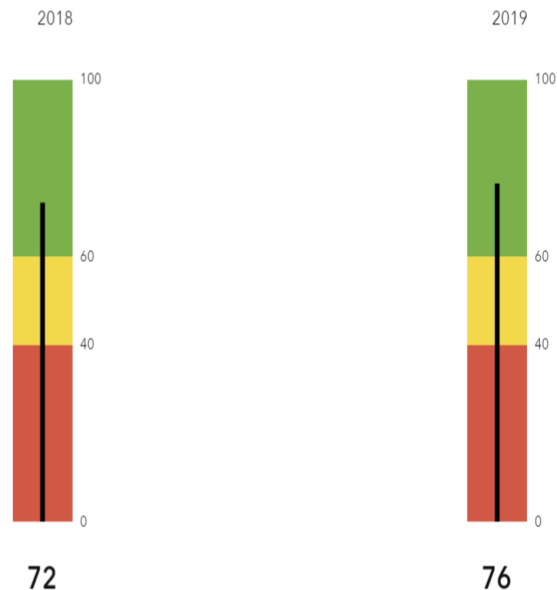
More Quotes @ [Naijawavez.com](https://www.naijawavez.com)

About NSC reputation studies

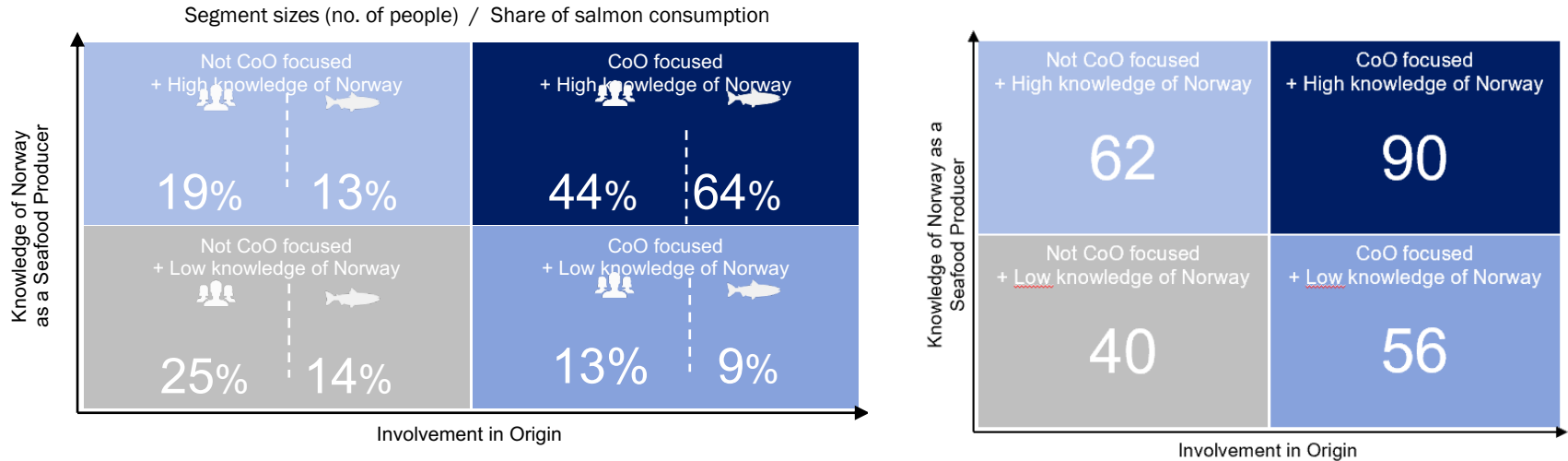
- ◆ This study is based on the NSC reputation concept, which aims to monitor the reputation of Norwegian seafood and be an operative tool in communication and PR. Most often, these quantitative studies are followed up with a qualitative study.
- ◆ The survey is standardized and therefore, results from different studies are comparable. This gives the opportunity for meta learning across countries, and also means that surveys can be sent out quickly when necessary, for instance when there is a media crisis.



In addition has Norwegian Salmon a solid reputation among consumers in Spain



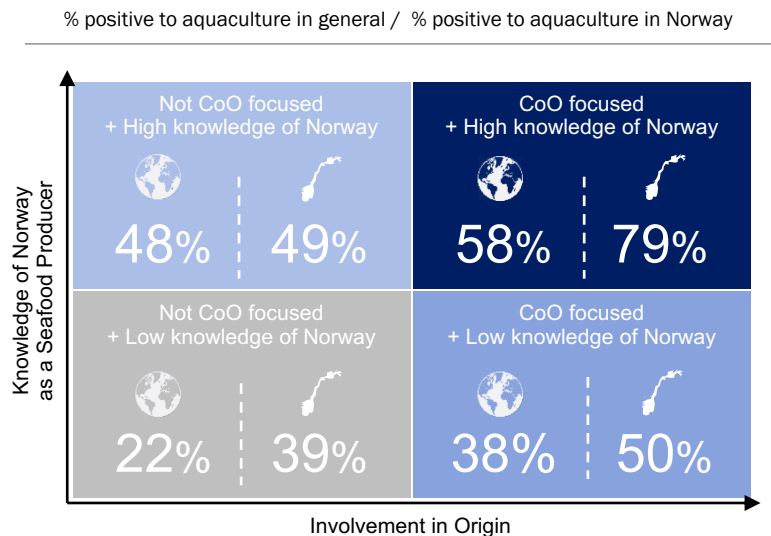
The most important salmon consumers knows a lot about Norway



Because the segments with knowledge about Norway eat salmon more frequently than those with low knowledge, the salmon consumption is divided in a different way than what “number of heads” are. The salmon consumption is disproportionately high in the **CoO focused and higher knowledge of Norway** segment, and low in the segments with lower knowledge of Norway.

And they are also very positive towards Norway

Impression of aquaculture in general and Norwegian aquaculture



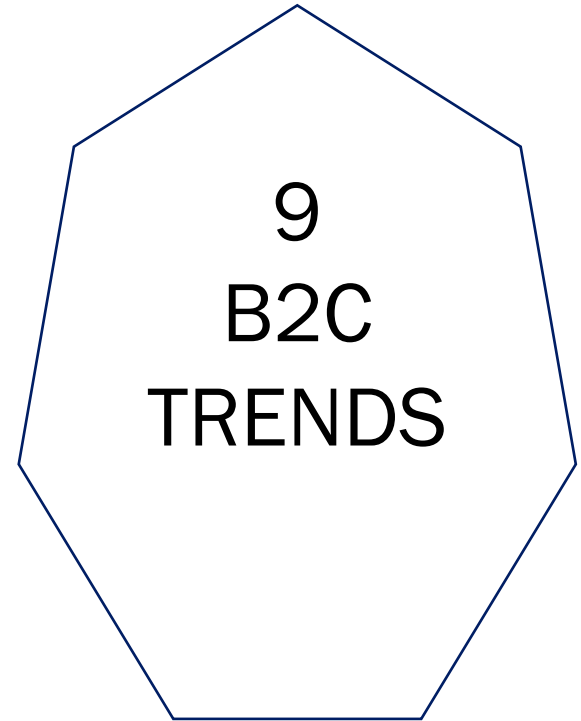
Most have a positive or a neutral impression of aquaculture both in general and in Norway. There is a clear correlation between having CoO focus and higher knowledge of Norway and better impression of aquaculture.

All segments are more positive towards aquaculture in Norway than aquaculture in general.

What are the opportunities for growth in Spain



- # 1 authenticity
- # 2 connection & origin
- # 3 storytelling
- # 4 real food , free food
- # 5 informania
- # 6 convenience & me
- # 7 on the move
- # 8 new sustainability
- # 9 anti

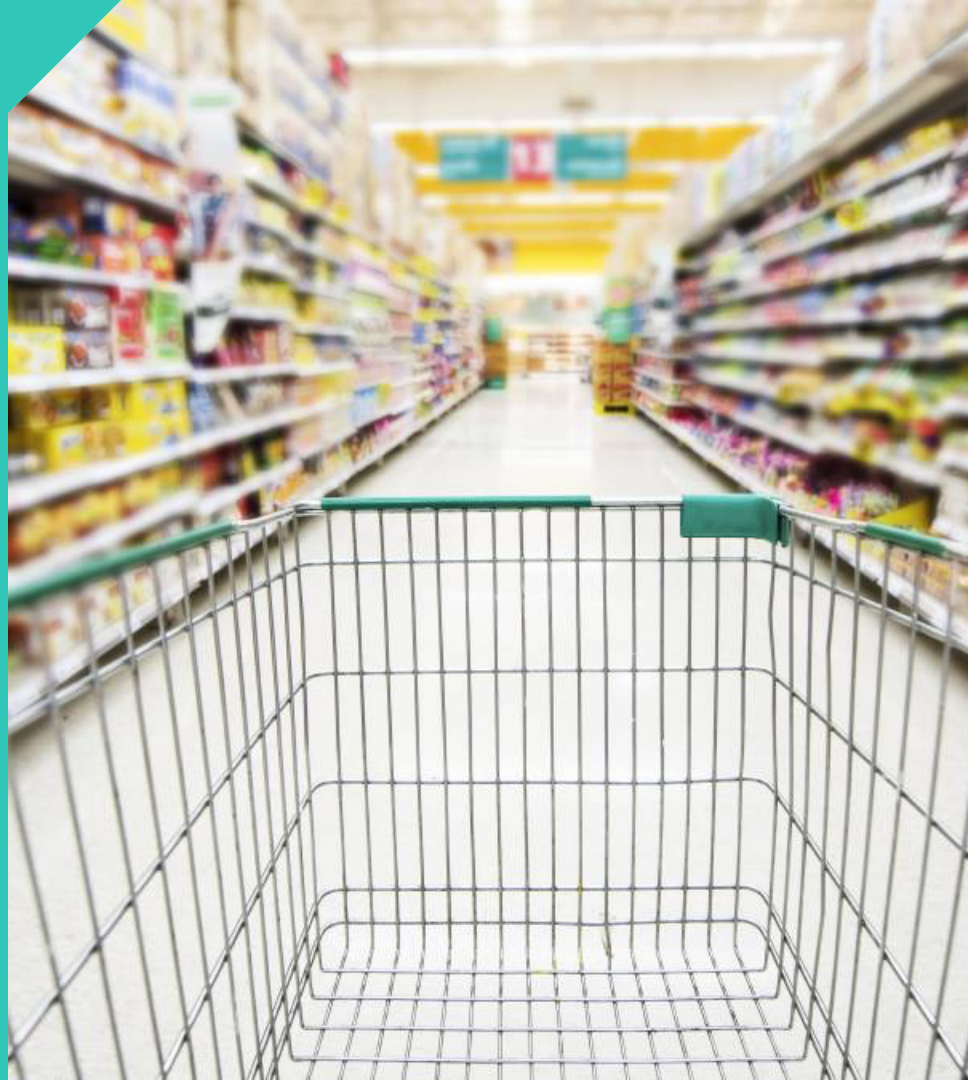


1 AUTHENTICITY





2 CONNECTION





Opplev våre gårder i

ØST

SØRVEST

MIDT

VEST

NORD



Velkommen til TINE gårder

NORGES SJØMATRÅD

3 STORYTELLING





[Balik](#)

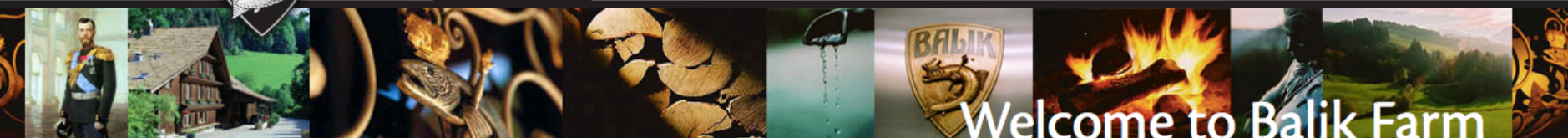
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The Russian Secret Recipe Behind Swiss Balik Salmon

"Balik-Räucherei"

After 1918, following the death of the tsar family, this culinary delight sank into oblivion. But 30 years ago, the secret recipe was rediscovered, and today the world's most noble smoked salmon comes from the Toggenburg. In the Balik smoked salmon manufactory high up in Ebersol, a small village nestled snugly in the midst of an unspoilt hilly landscape, the "King of Fish" is smoked by hand and exported to countries around the world. Numerous royal families in Europe – from Denmark to England and Spain – are regular and loyal clients. Today, Balik is synonymous with the traditional salmon smoking method as practised at the court of the Russian tsars. The manufactory smokes and refines selected salmon cuts according to the secret recipe of the last purveyor of the imperial court. The recipe was entrusted to Hans Gerd Kübel in 1978 by Israel Kaplan, the grandson of the purveyor to the imperial court.

In the 19th century, in Russia's cultural heyday, repasts at the tsar's court were more sumptuous than commonly known in France. St. Petersburg was the cultural centre of Europe long before Paris. Thus, it was the Russian ambassador



6 CONVENIENCE & ME



**THE
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ON SMOKED
HADDOCK**

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BAG** **NO TOUCH
NO SMELL
NO FUSS**



USE BY

Serving suggestion

The future for future growth for salmon in Spain is convenience and products with packaging

Because the Millenials and generation Z will ask for convenience and look for authentic products where they know who is behind it and with a story to tell



NORGES SJØMATRÅD

