



# Markedsutvikling for klippfisk i Portugal

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Norges Sjømatråd*

09.01.2020



# Portugal

Small Country: 10, 3 million People

Loves fish: 57 kg per capita

Consume almost: 600.000 tons a year

; Which 70% is imported.

150.000 ton is cod;

One of 4 fish meals is cod!!





## Vareflyt torsk:

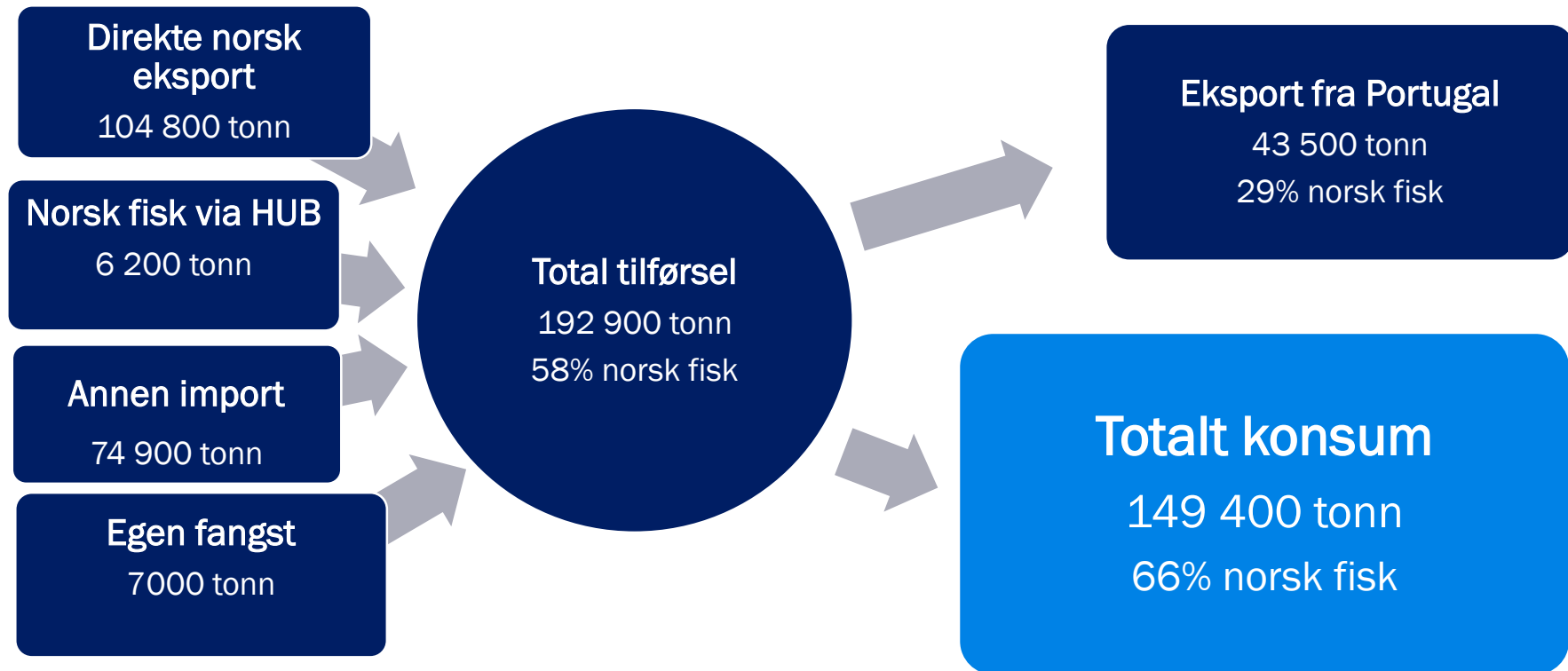
Estimert konsum i 2018:

149 400 tonn

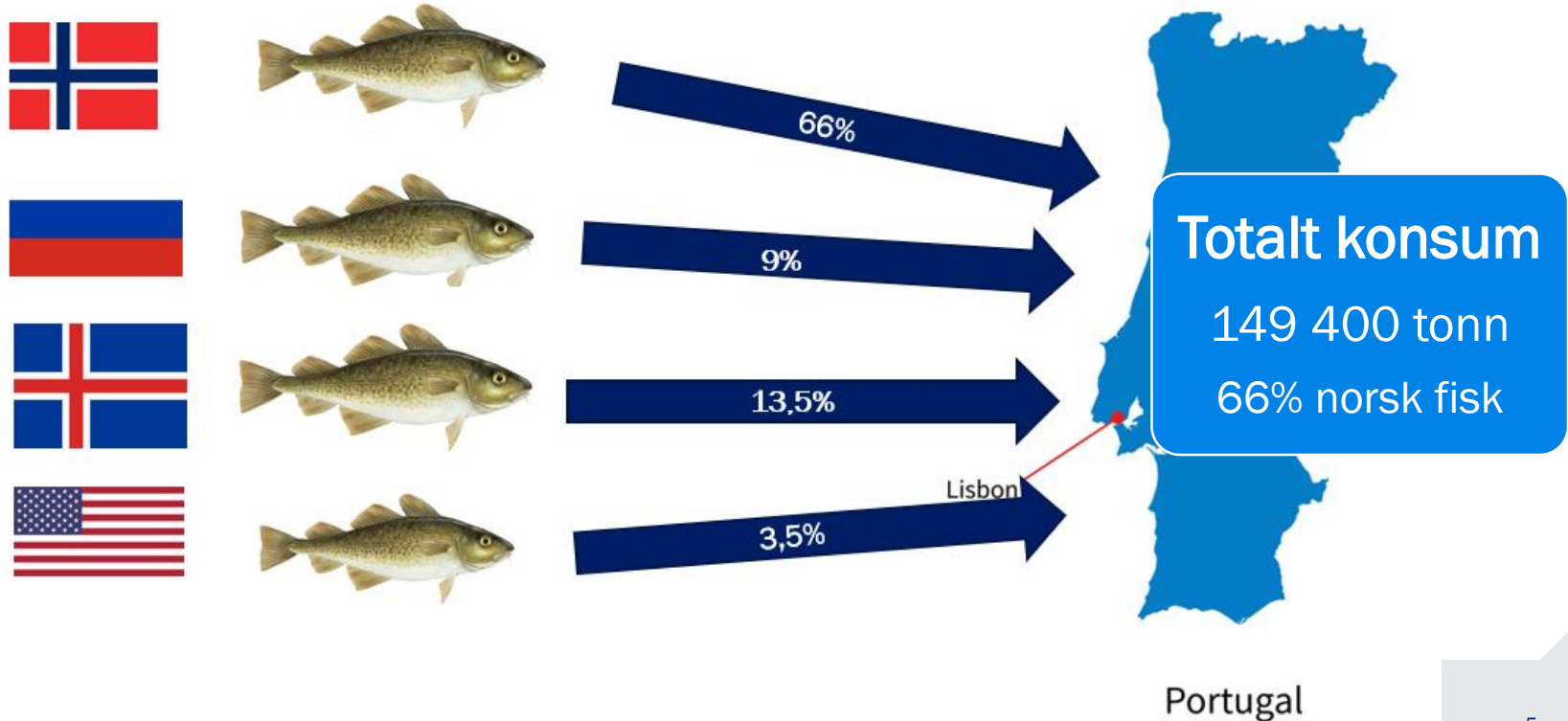
66% norsk opprinnelse



# Total vareflyt av torsk til Portugal(rund vekt)

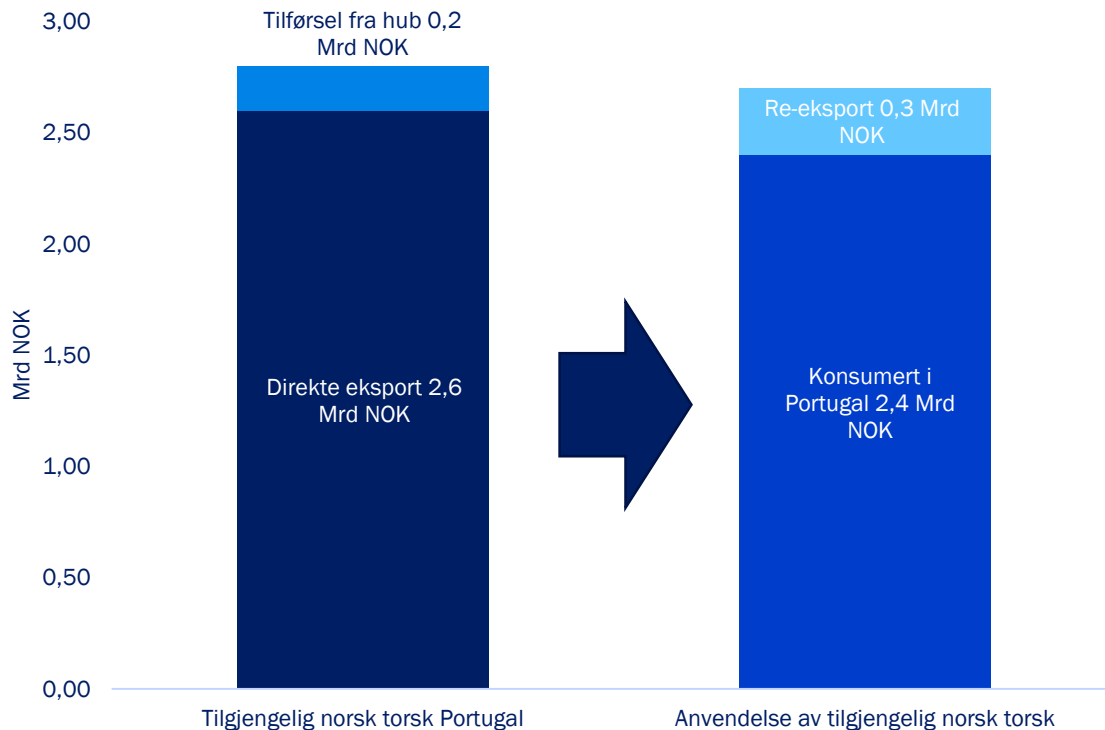


# Where do the cod come from?



# Verdi på norsk torsk i Portugal

- ◆ De om lag 98 200 tonn med norsk torsk som ble konsumert i Portugal i 2018 utgjorde en estimert verdi på 2,4 Mrd NOK, regnet i «eksportverdi ekvivalenter».
- ◆ Dette tilsvarte 26% av totalverdien til norsk torskeeksport (2018).





Betydelig egen klippfisk Industri;

Reeksporterer 43. 500 tonn

Mye som fryst ,utvannet klippfisk.



**BEIRÃO DA SERRA**

# LOMBO DE BACALHAU

**BACALHAU PORTO MORHUA**  
Bacalhau do Atlântico Nordeste (Gadus morhua),  
dessalgado ao ponto de preparo e ultracongelado.

**Riberalves**

**LOMBOS**

1kg

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**BOM PORTO**  
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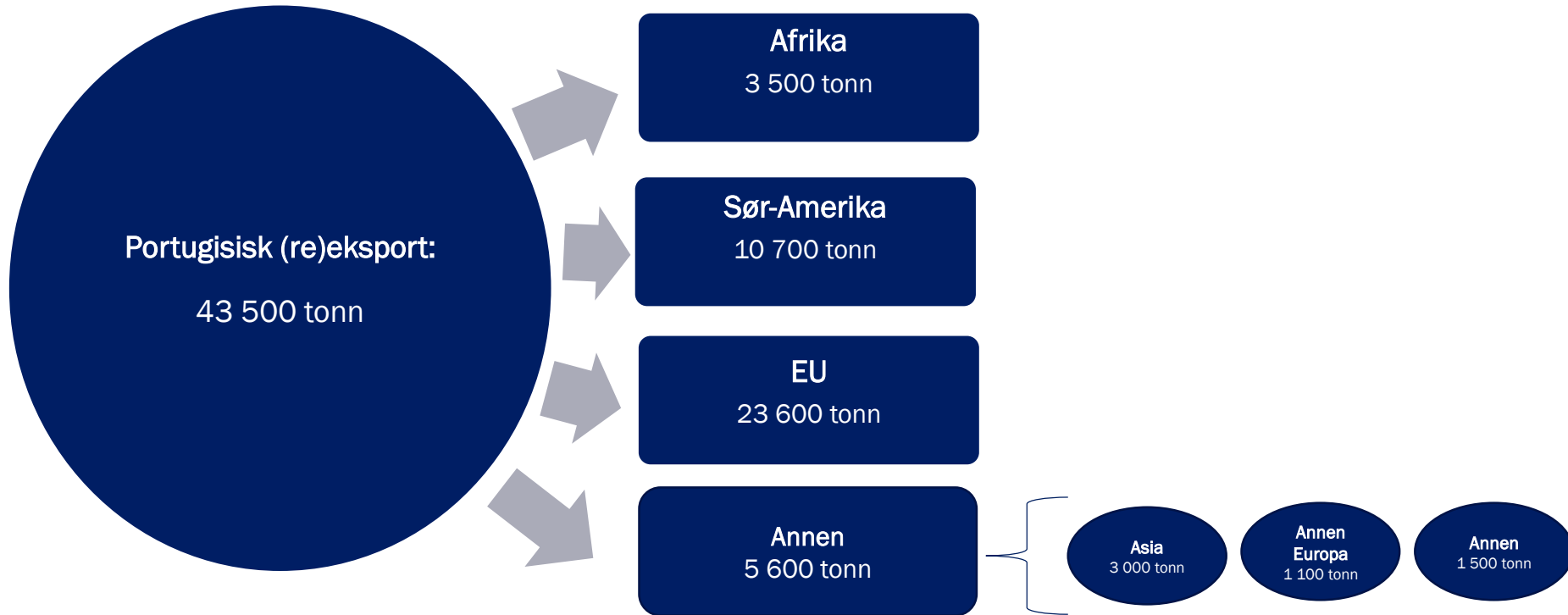
**Amor à Cozinha**  
PRONTO  
A COZINHAR

Saborosa viagem da origem até à sua mesa.  
O 5º Bacalhau é um cavalheiro da Noruega,  
orgulhoso do seu sabor tradicional Português.

Av. Marginal Projetado, 1910 - Galpão 10 e 11  
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# Portugisisk (re)eksport av torsk





# Export of Cod, Jan- November 2019



# Total eksport : 39 755 ton

(pr November 2019)

Klippfisk 24 027 (+19%)

Saltfisk 13 362 (-25%)

Fryst 1940 (+1%)

Fersk 426 (-40%)

.....  
39 755(-3%)

## Norsk eksport av torsk til Portugal

endringer for produkter av torsk, jan-Nov

	Menge Tonn			Verdi 1000 NOK			Pris NOK		
	2018	2019	%	2018	2019	%	2018	2019	%
<b>Fryst</b>									
- Fryst hel	1 694	1 706	1	58 624	64 052	9	34.62	37.54	8
- Fryste biprodukter	266	143	-46	7 295	2 814	-61	27.44	19.69	-28
- Fryst filet	8	91	1064	679	3 504	416	87.32	38.67	-56
<b>Konvensjonell</b>									
- Klippfisk hel	20 225	24 027	19	1 467 736	1 984 308	35	72.57	82.59	14
- Saltet hel, konvensjonell	17 856	13 362	-25	922 340	798 305	-13	51.65	59.74	16
- Saltet filet, konvensjonell									
- Tørrfisk hel	45			2 962			65.18		
<b>Fersk/kjølt</b>									
- Fersk/kjølt hel	695	413	-40	21 954	15 925	-28	31.61	38.51	22
- Ferske/kjølte biprodukter	0			6			55.10		
- Fersk/kjølt filet		13			687			54.48	
<b>Tilberedt/konservert</b>									
- Panert	10			1 072			103.64		
<b>Totalt</b>	<b>40 799</b>	<b>39 755</b>	<b>-3</b>	<b>2 482 668</b>	<b>2 869 595</b>	<b>16</b>	<b>60.85</b>	<b>72.18</b>	<b>19</b>

# 60% av eksporten er klippfisk

Klippfisk	24 027 tn	60,4%
Saltet	13 362 tn	33,6%
Fryst	1 940 tn	4,9 %
Fersk	426 tn	1,1%
<b>Total</b>	<b>39 755 tn</b>	<b>100,0%</b>

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Klippfisk:Pris pr Kg opp 14%,

- likevel eksportøkning på;  
4.000 ton( + 19%)

	2018	2019
Klippfisk	72,57 NOK	82,59 NOK
Saltfisk	51,65 NOK	59,74 NOK



Eksport av saltfisk ned, - 4.400 tonn

Pris opp fra 51,65 NOK til 59,74 NOK(+16%)



Island opp fra 9.249 tn til 9.911 tonn(+662tn) ,dvs + 6,65%.



# Home Consum Clippfish Portugal; 3Q 2019

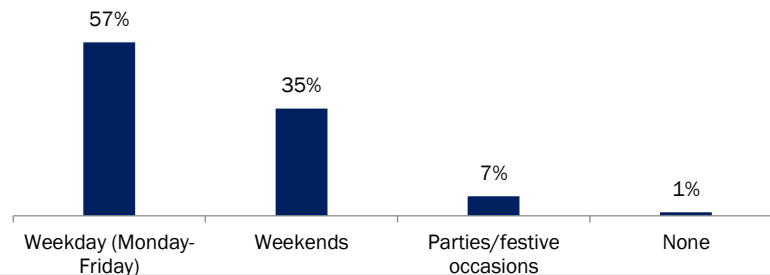
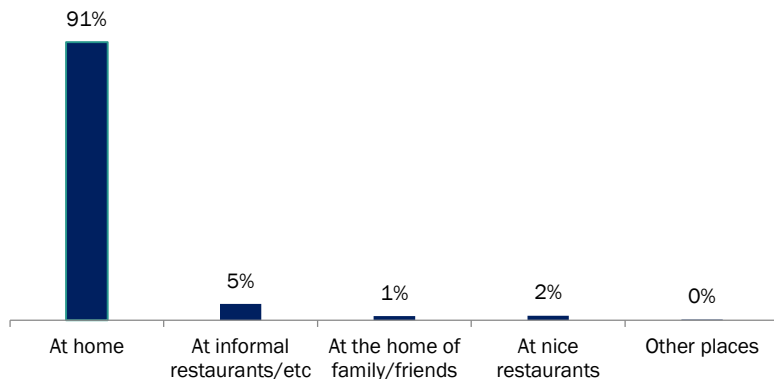


- Spiser portugiserne mer eller mindre klippfisk enn før?

# At Home, Weekdays and weekends

The vast majority eat Bacalhau mainly **at home** and on weekdays and weekends.

Still everyday meal, not as in Brazil, special occasions( Christmas and Easter)





# MORE COD SHOPPERS(+1,9%) ,Bigger Volume(+1,4%)



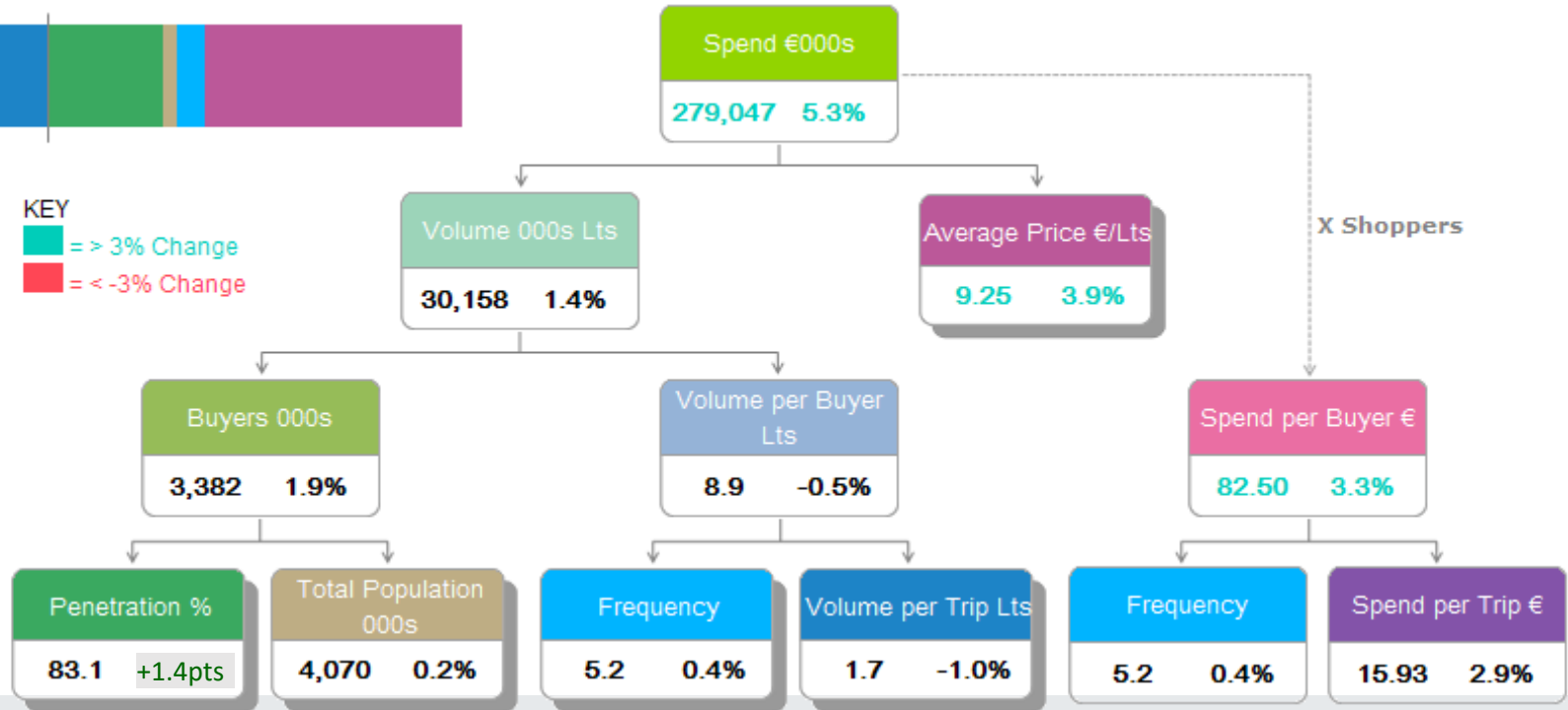
Total Cod Fish | KPI's (Market Indicators) | Ytd Q3 2019 vs Ytd Q3 2018

Attribution of Change in Spend



KEY

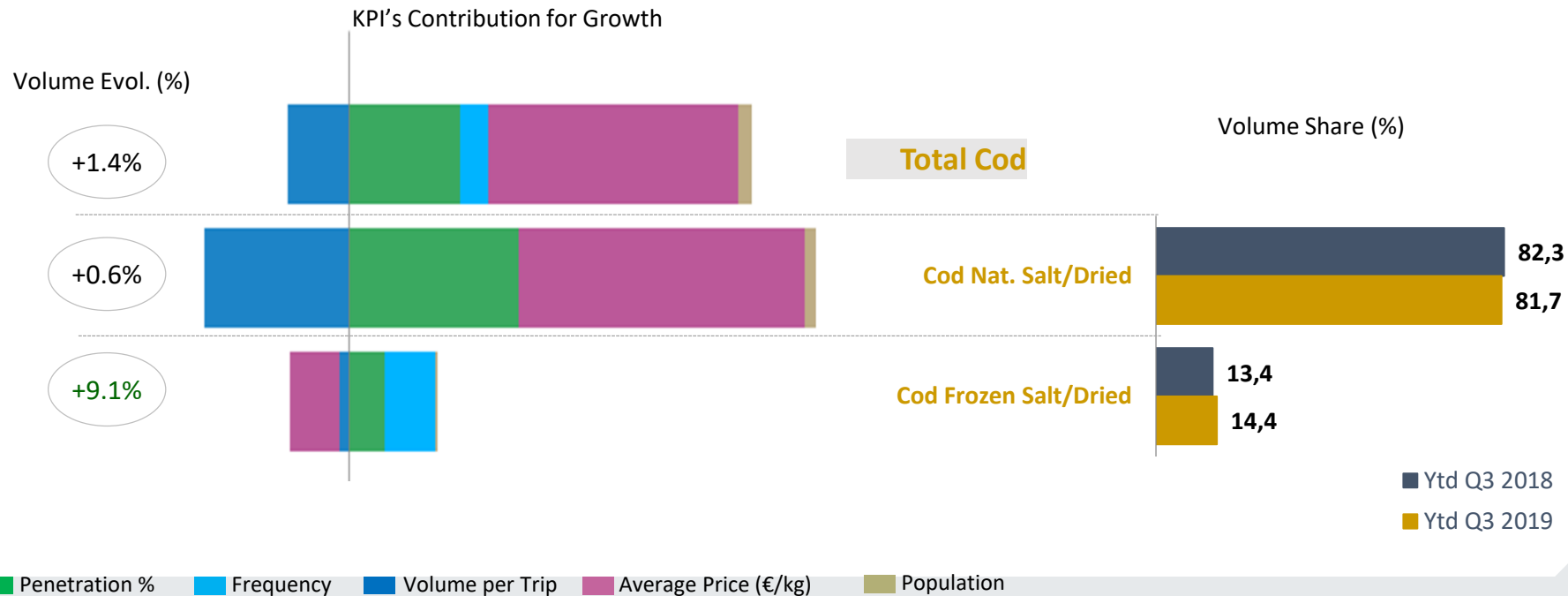
- = > 3% Change
- = < -3% Change



# Traditional Dry and salted still Dominating the market



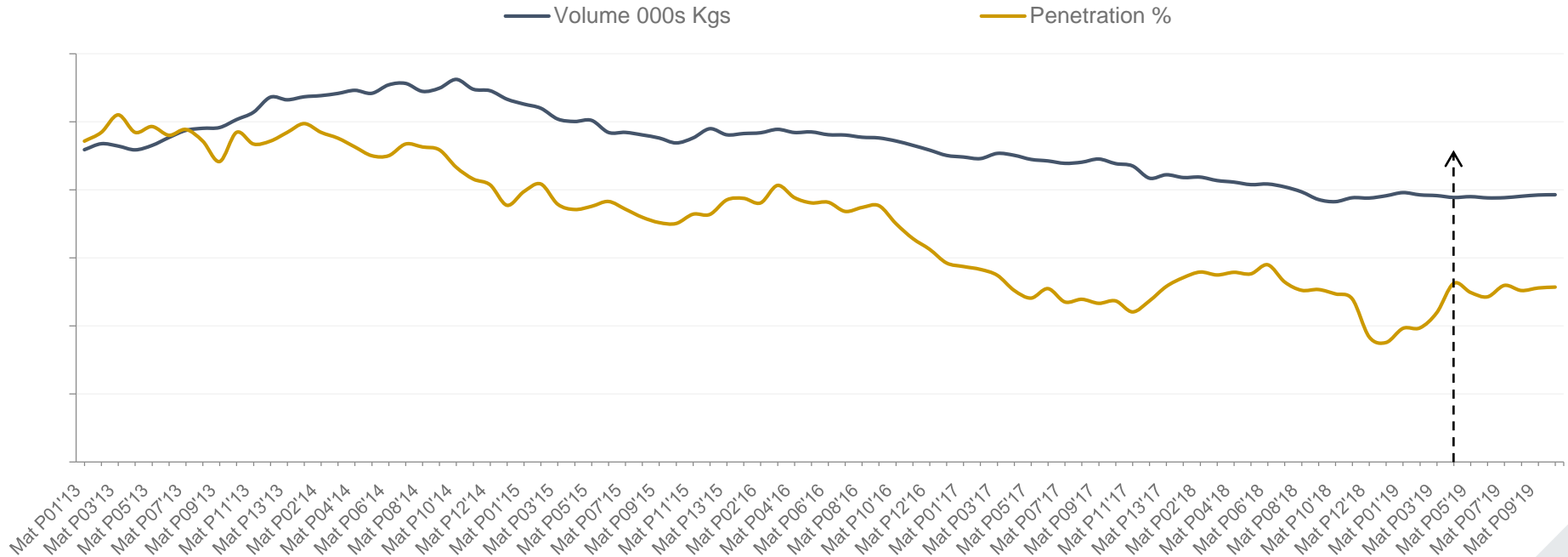
Total Cod Fish | KPI'S Contribution to Segments evolution (%) and Volume Share | Ytd Q3 2019 vs Ytd Q3 2018



# Volume and Penetration stabilize after many years of decrease



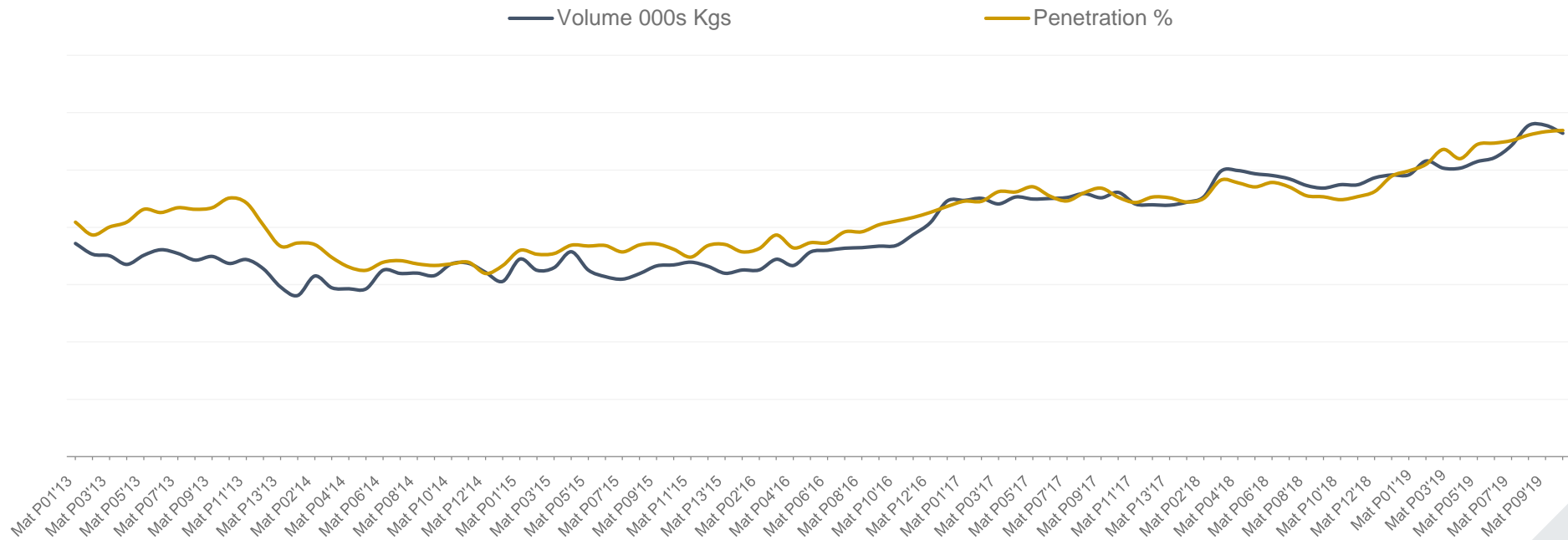
Dried cod fish | Volume and Penetration Evolution | Mat P1 2013 to Mat P10 2019



# While Frozen Still grow Slowly

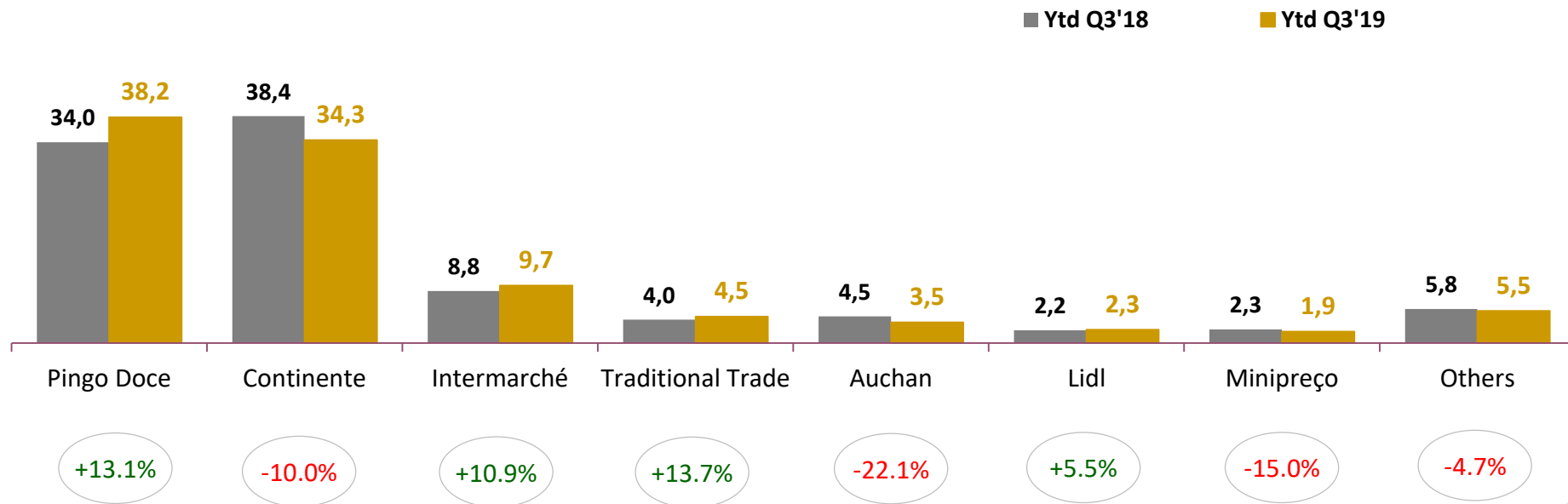


Frozen cod | Volume and Penetration Evolution | Mat P1 2012 to Mat P10 2019



# PINGO DOCE takes pole position from Continente

Dried cod fish | Retailers Volume Share and Evolution | Ytd Q3 2019 vs Ytd Q3 2018



Volume Evol. Vs Ytd Q2'18(%)

# What is the performance of Codfish in Modern Distribution?(Supermarkets)



# Sales Supermarkets Down 12% (November 2019)

## MODERN TRADE SELLS LESS PER FOR MORE MONEY!

Volume decrease by 12%

### Total Food Stores



### Total Dry + Frozen Codfish

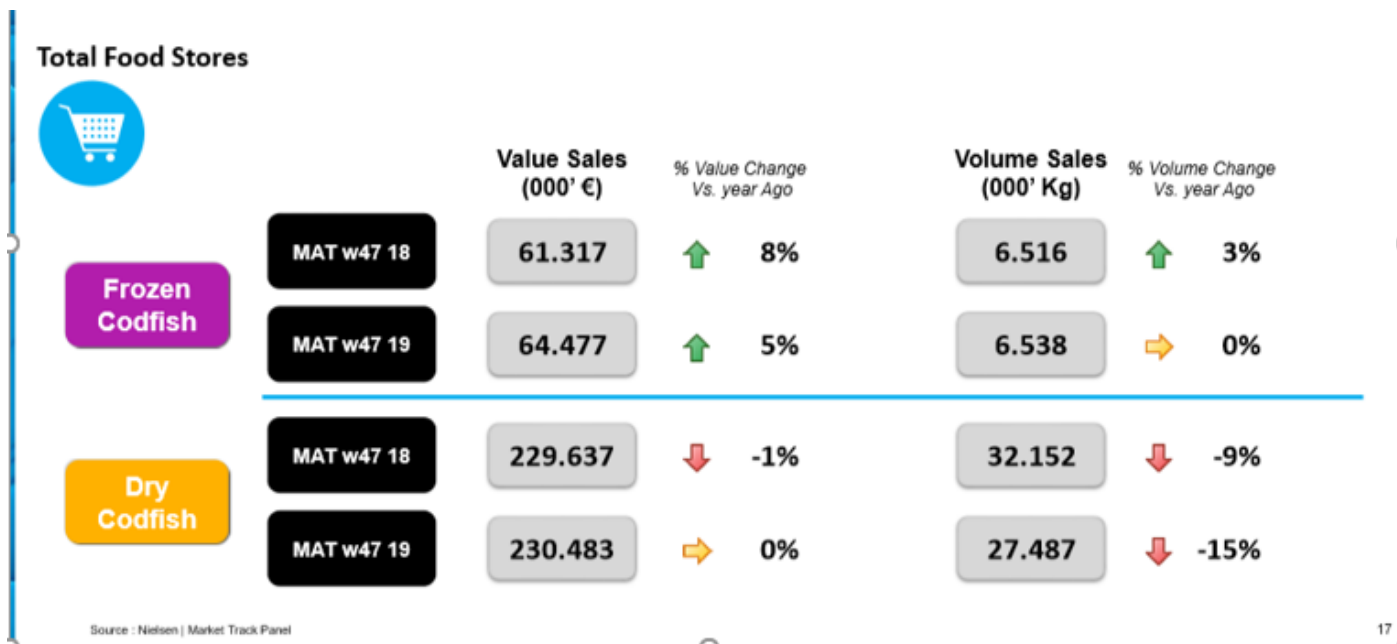
	Value Sales (000' €)	% Value Change Vs. year Ago	Volume Sales (000' Kg)	% Volume Change Vs. Year Ago
<b>MAT w47 17</b>	289.807		41.551	
<b>MAT w47 18</b>	290.954	→ 0%	38.668	↓ -7%
<b>MAT w47 19</b>	294.961	↑ 1%	34.025	↓ -12%

Source : Nielsen | Market Track Panel





# November 2019, Sales Supermarkets, frozen, soaked don't «cannibalize» dry bacalhau.



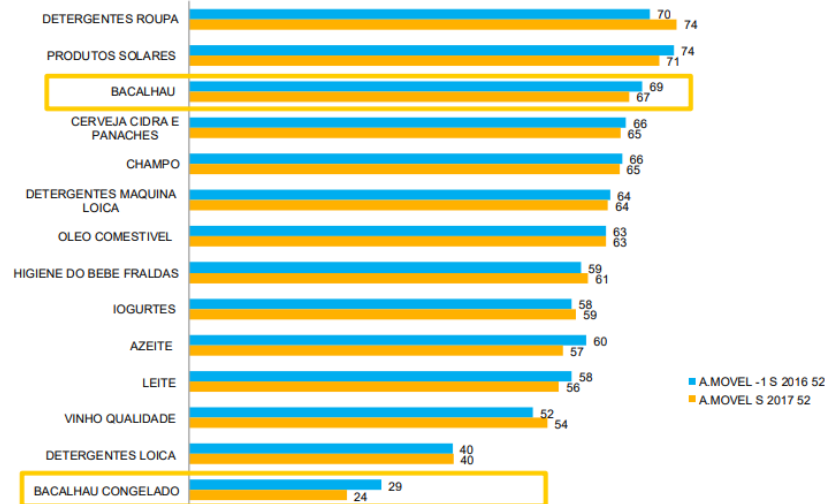
# Klippfisk trekker kunder



## Some categories had a great increase on sales because of promotions

2/3 of Codfish sales are during promotions

% Volume Promotions – Hiper + Supers



\* Fonte: Nielsen | Market Track (TOTAL HIPERS + SUPERS)

# NSC Market Survey 2018:

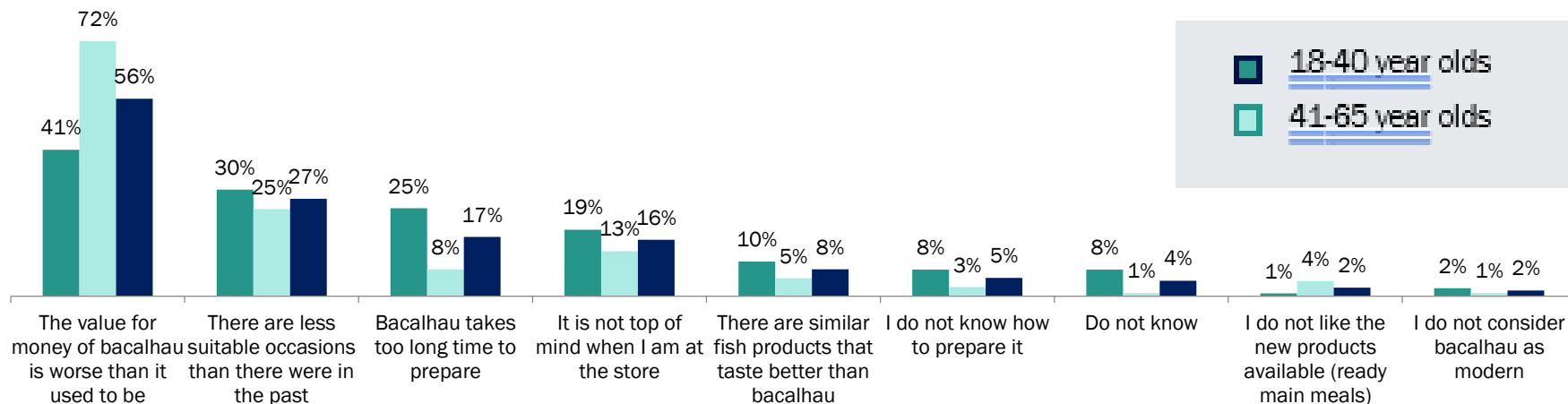
Trend:

Younger people eat  
less Bacalhau than  
older, why?



# Why the Portuguese eat less Bacalhau than before

**Value for money** is the main argument for why they are eating less Bacalhau. This can follow the general increase in prices in the Portuguese market. Value for money is most important argument among the older group of consumers. **Younger consumers** think that it takes **too long to prepare Bacalahau** than older consumers.



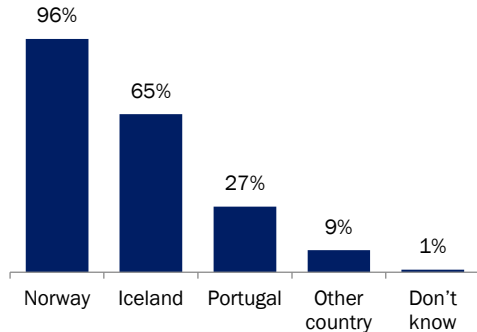


High preference for  
norwegian origin

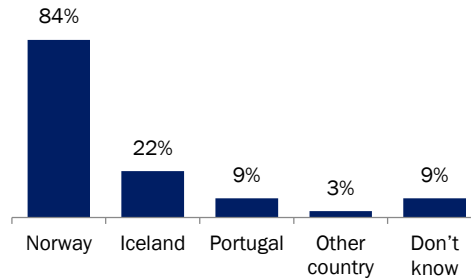


**Norway** has a unique position as a country of origin in Portugal as it is the most **well-known, preferred and chosen** Bacalhau in Portugal.

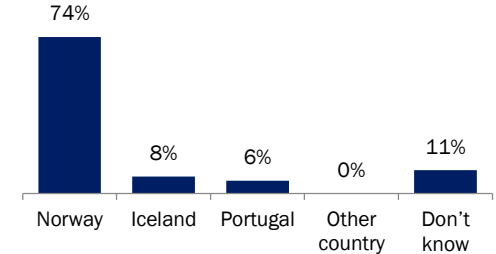
**Produces Bacalhau**



**Where your Bacalhau originates**

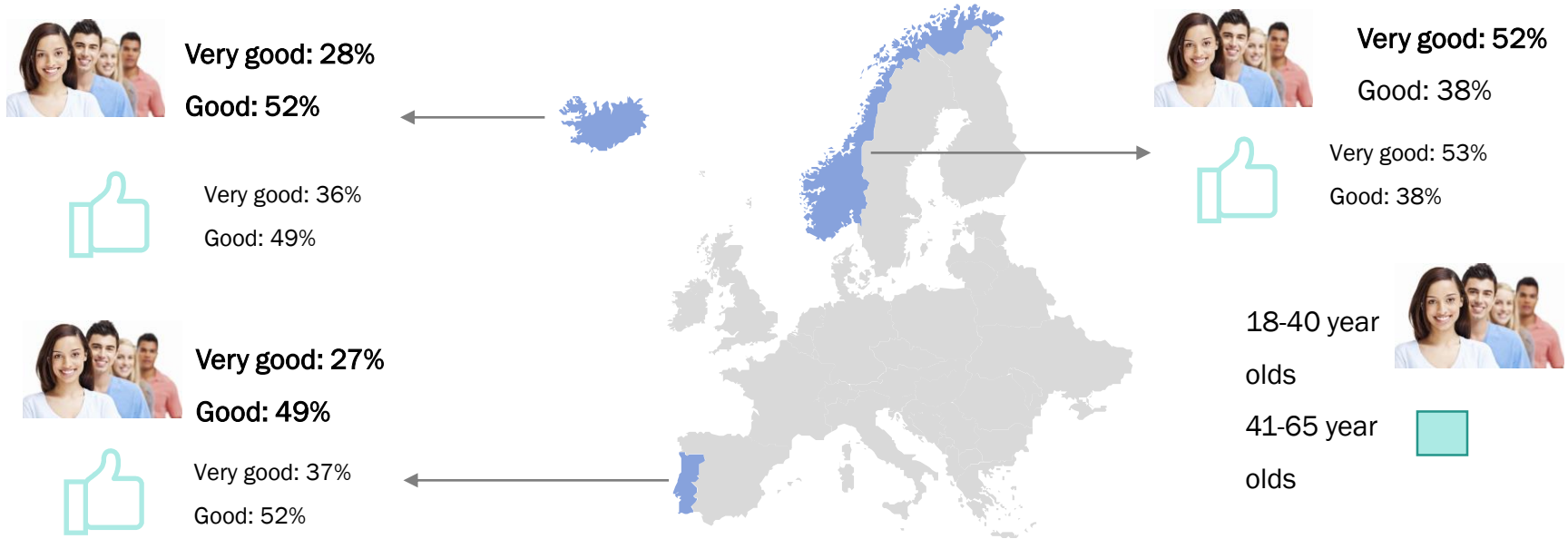


**Preferred Country of origin for Bacalhau**



# Young people prefer Norwegian Bacalhau!

There are **no difference** in the perception of **Bacalhau da Noruega** among the younger and elder consumers, but the elder consumers have more positive perception of the quality of bacalhau with **Islandic** and **Portuguese** Origin than the **younger consumers**





## Summary: Focus Survey Summer 2018

- ◆ Portuguese consumers care **where their Bacalhau comes from**. Even a high share of younger consumers say they care. It is significantly more older consumers than younger who says they care.
- ◆ **Norway has a unique position** as a country of origin in Portugal, with high share of knowledge, preference and usage. There is no age difference here.
- ◆ Bacalhau produced in **Norway** is perceived to have **higher quality** than Bacalhau produced in **Iceland and Portugal**.

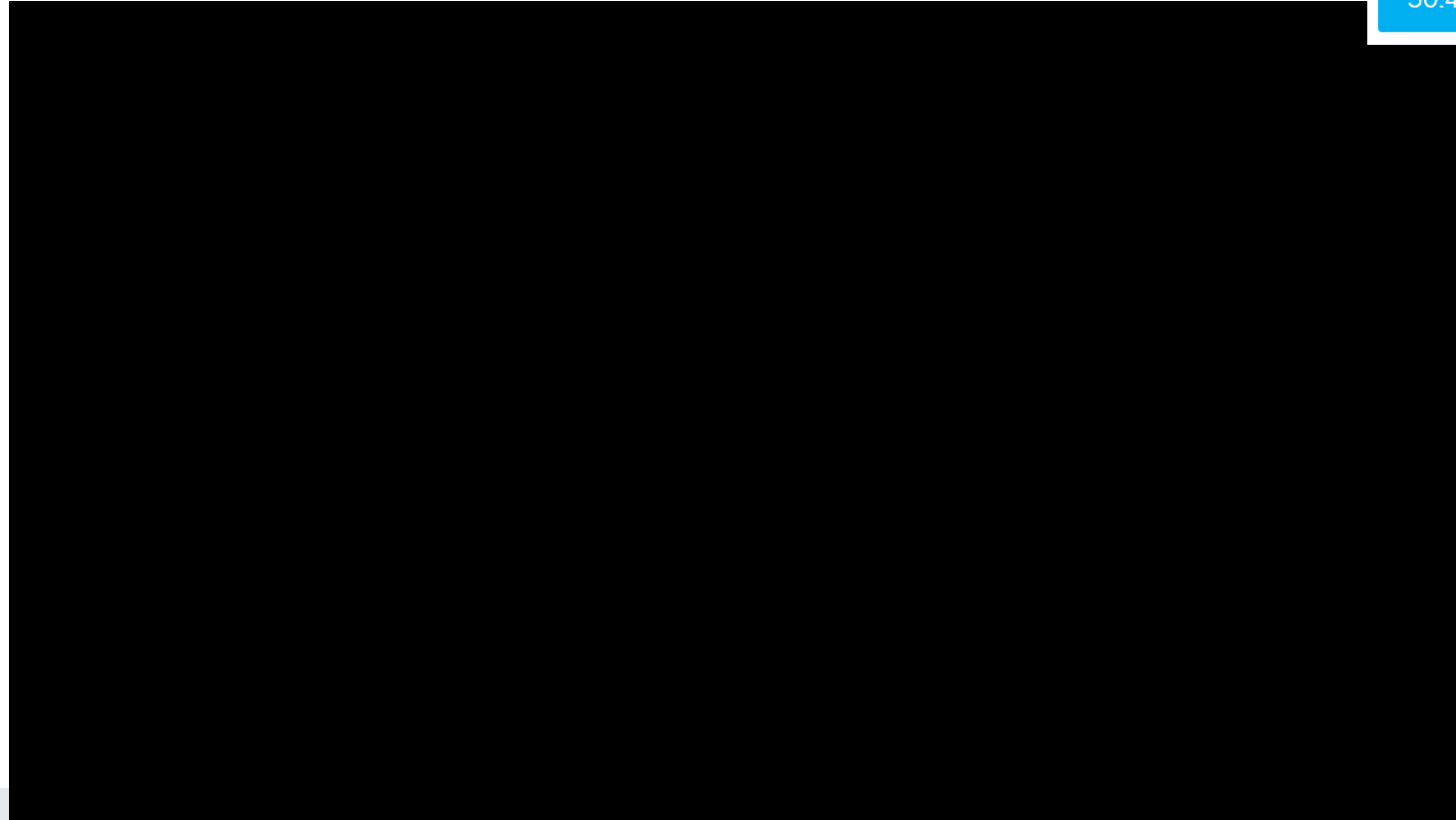


# Cinema Campaign – to target young people

69 MOVIE THEATERS

441 CINEMA ROOMS

50.435 SPOT EXIBITIONS (45"  
spot)



• •



- Remember!

# Klippfiskseminar i Portugal

06.02.2020 14.30

Estoril, Portugal

Welcome to our traditional clipfish seminar in Estoril, Portugal. This is the eight time the seminar is held, and entry is restricted to Norwegian and Portuguese seafood industry.

## Adresse

Hotel Estoril Palácio, 6th of  
February at 14:30

## Dato

06.02.2020

