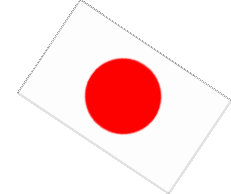


# Et dypdykk i sjømatmarkedene Japan og Sør-Korea - med fokus på kongekrabbe

Melissa Gotliebsen  
Prosjektleder Sør-Korea, NSC

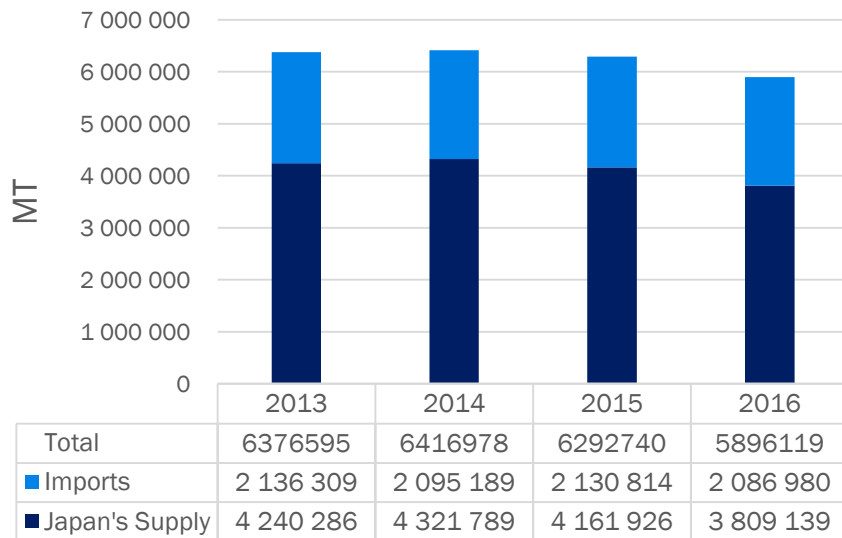
# Sjømatmarkedene Japan og Sør-Korea



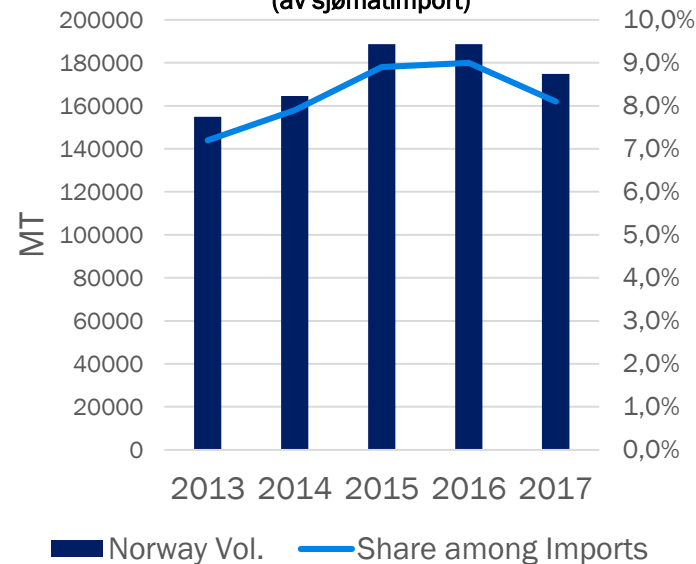


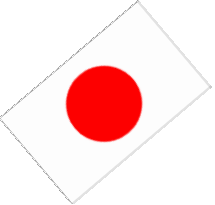
# Totalt sjømatkonsum i Japan synker, men norsk tilførsel øker

Totalt sjømatkonsum i Japan (Japans tilførsel + import)



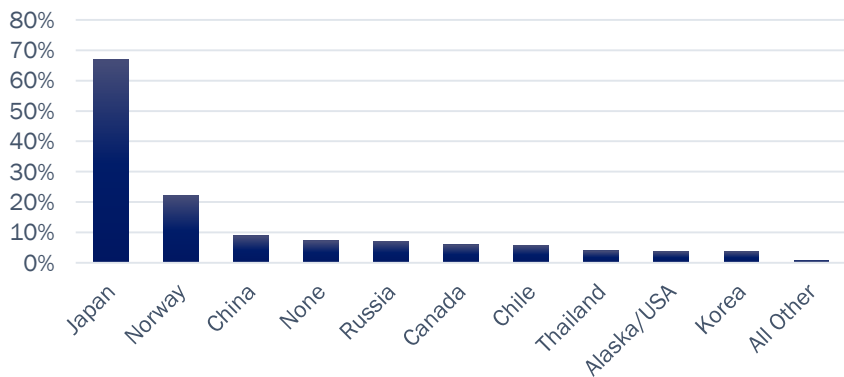
Norges volum og andel (av sjømatimport)



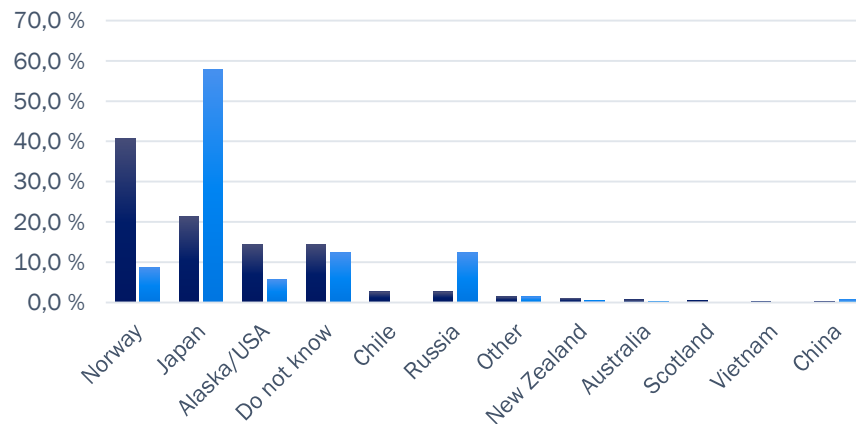


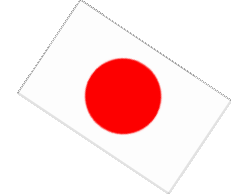
# Sterk posisjon for norsk i det japanske markedet

## Kjennskap til Norge som sjømatprodusent



## Preferanse laks





# Japanske konsumenter har ulik oppfatning av ulike arter

Figure 1.3.1

## WHERE DIFFERENT SPECIES ARE EATEN

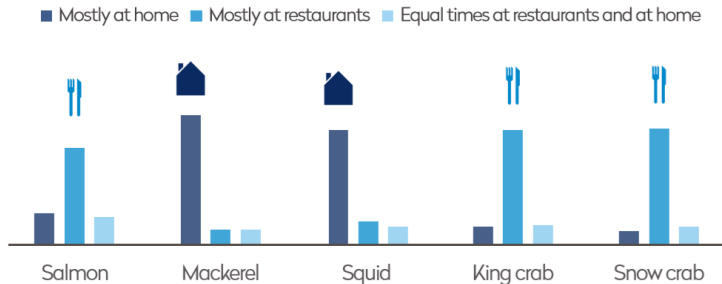
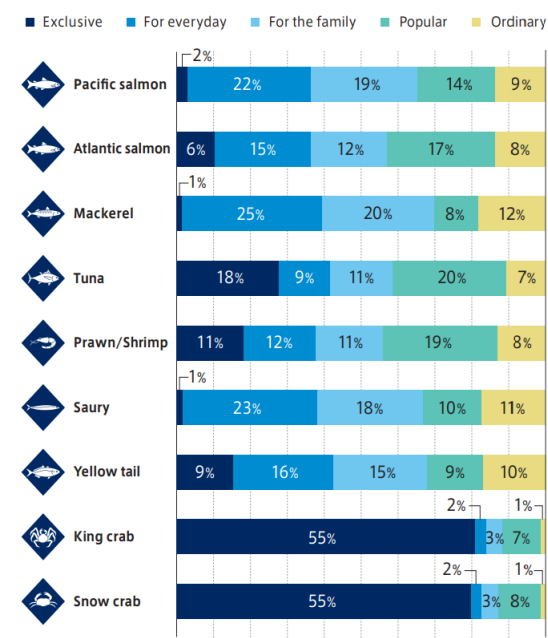


Figure 1.4.3 CONSUMERS HAS DIFFERENT PERCEPTION OF DIFFERENT SPECIES

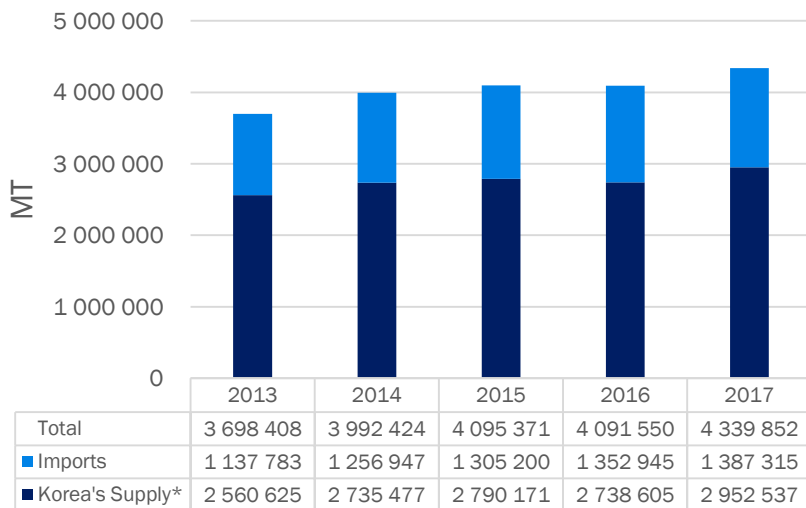


Question: Which words do you think best describe the different species? You can select the same word for several species? (multi)

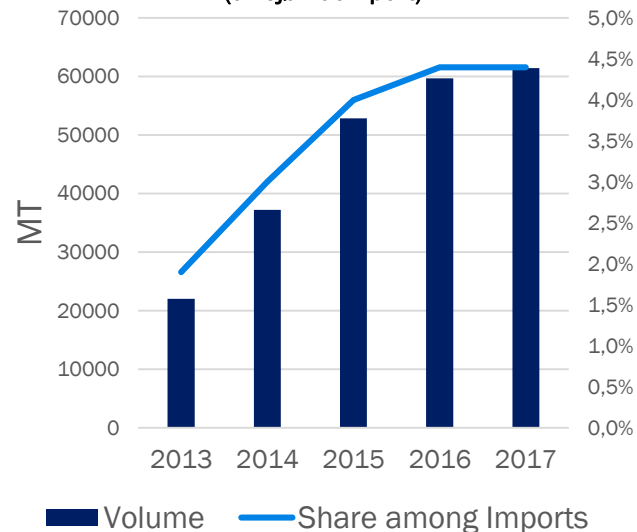
# Total sjømatkonsum i Korea øker



Total sjømatkonsum i Korea (Koreas tilførsel + import)



Norges volum og andel (av sjømatimport)

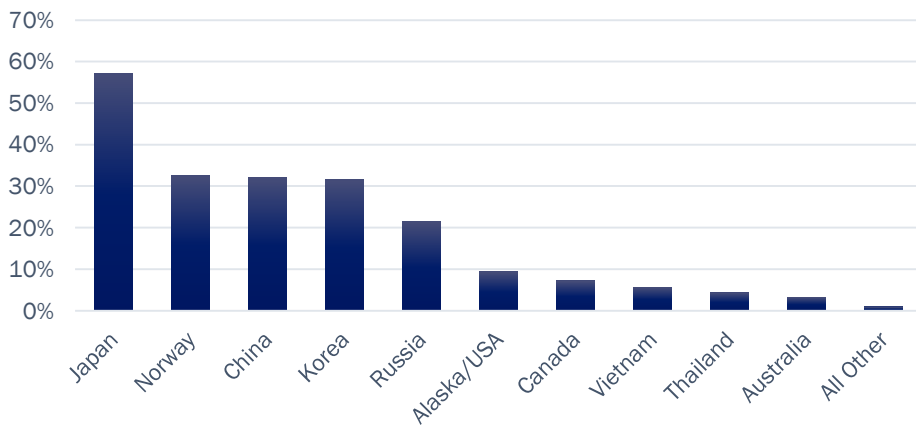




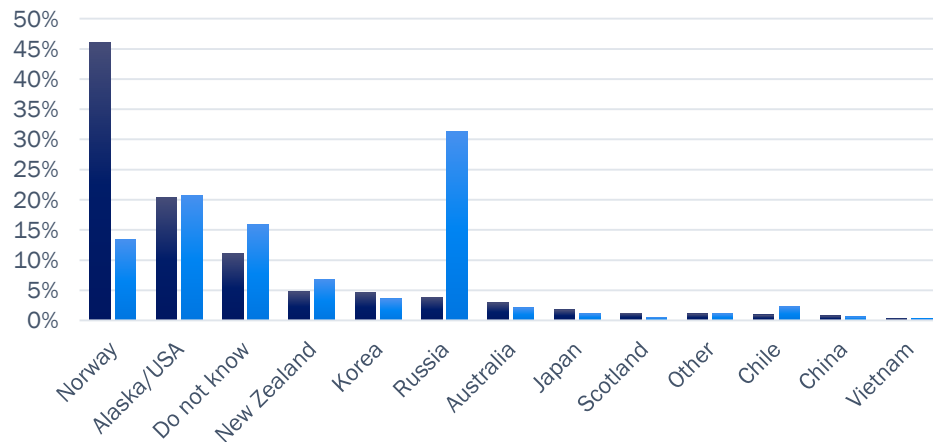
# Sterk posisjon for norsk i det koreanske markedet

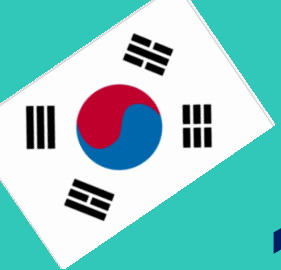


## Kjennskap til Norge som sjømatprodusent



## Preferanse laks





10%  
forventet  
økning i  
sjømatkonsum  
mot 2025\*

\*FAO



Figure 1.11

### ANNUAL SEAFOOD CONSUMPTION

(kg/person)







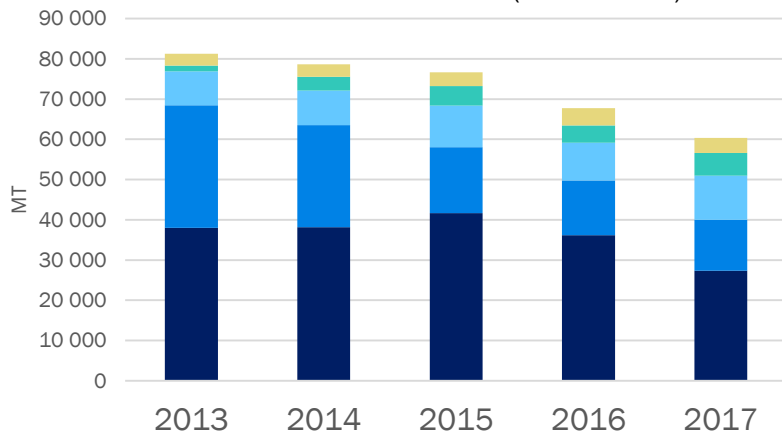
# Markedet for kongekrabbe i Sør-Korea





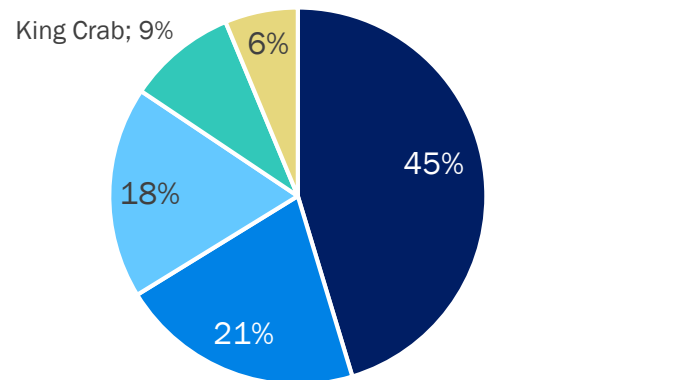
# Total krabbetilførsel i Korea: Økning for kongekrabbe

Total krabbetilførsel (2013-2017)



- Red Snow Crab (domestic)
- Korea Swimming Crab (domestic)
- Snow Crab (domestic + import)
- King Crab (import)
- Other

Krabbemarkedet per art (2017)



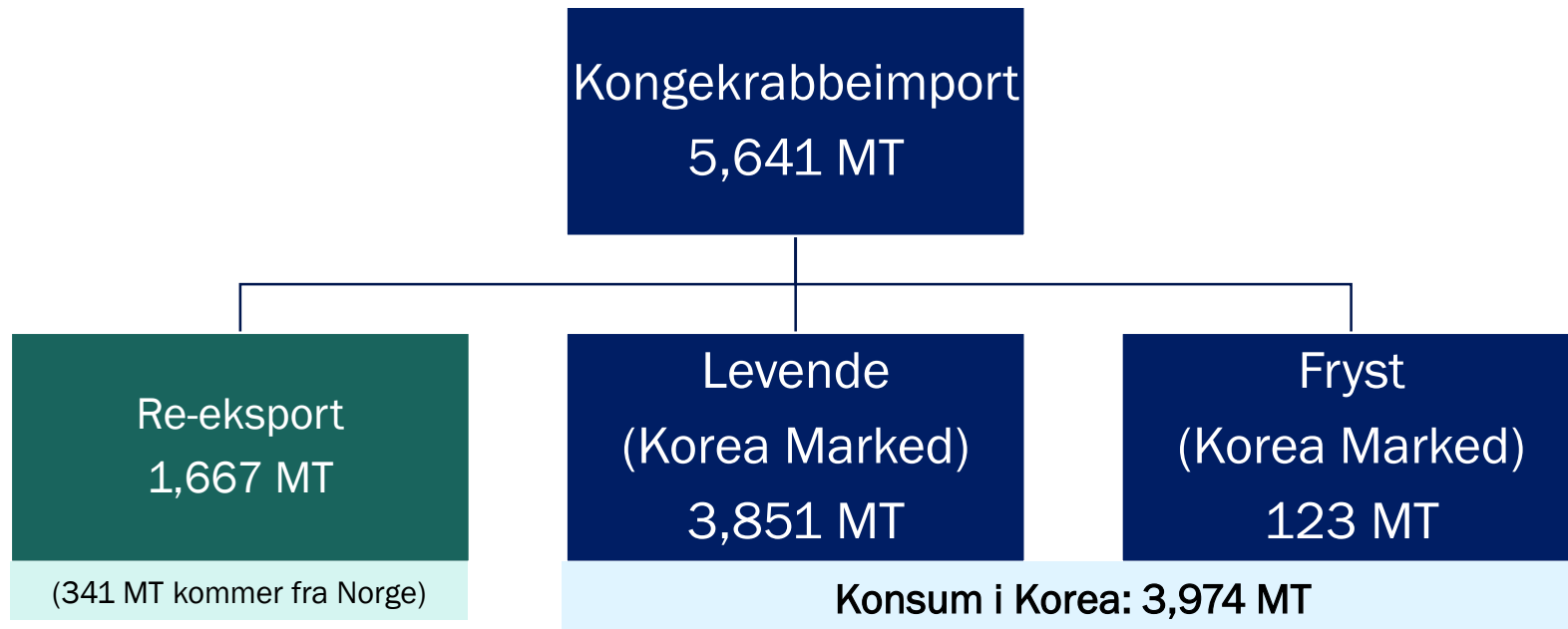
- Red Snow Crab
- Korea Swimming Crab
- Snow Crab
- King Crab
- Other

Volum (2017)\*: 60,365 MT

\* Before export or re-export, Product Weight



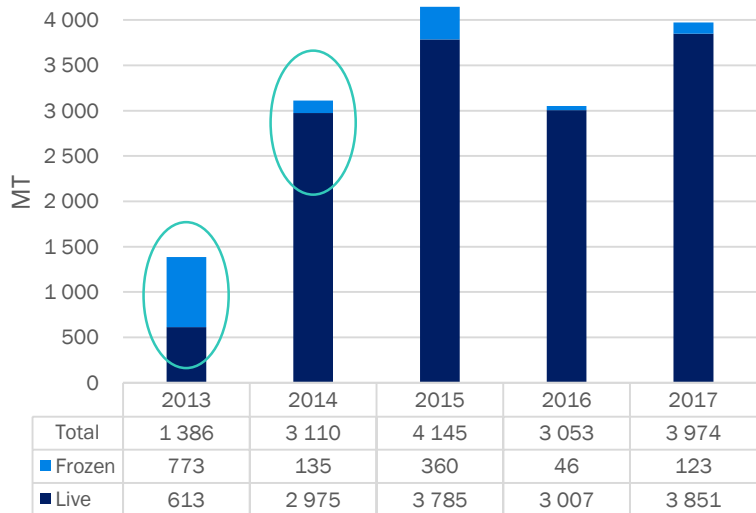
## Distribusjon av kongekrabbe i Korea (2017)





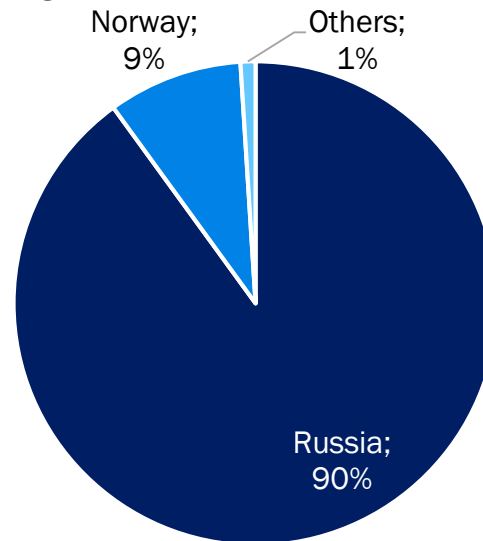
# Konsum: 97% av kongekrabbe til Korea går levende

### Koreas kongekrabbekonsum (2013-2017)



\* Consumption = Imported - re-exported

### Levende kongekrabbe – markedsandel etter land (2017)



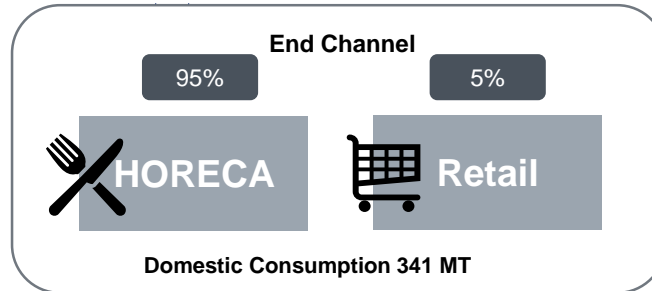
Source: Korea Customs and Trade Development Institute (KCTDI), Ministry of Oceans and Fisheries

# Distribusjon av levende norsk kongekrabbe



## HORECA

- Korean-style Seafood Restaurants
- Crab-specialized Restaurants
- Others



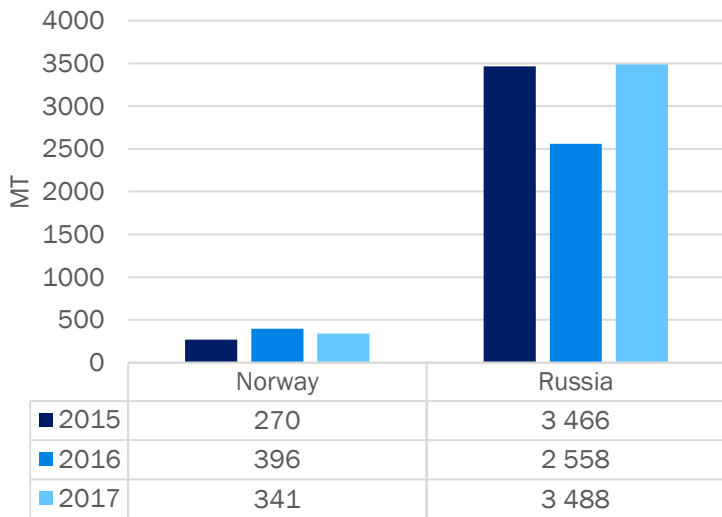
## Retail:

- Hypermarkets
- Supermarkets
- Other



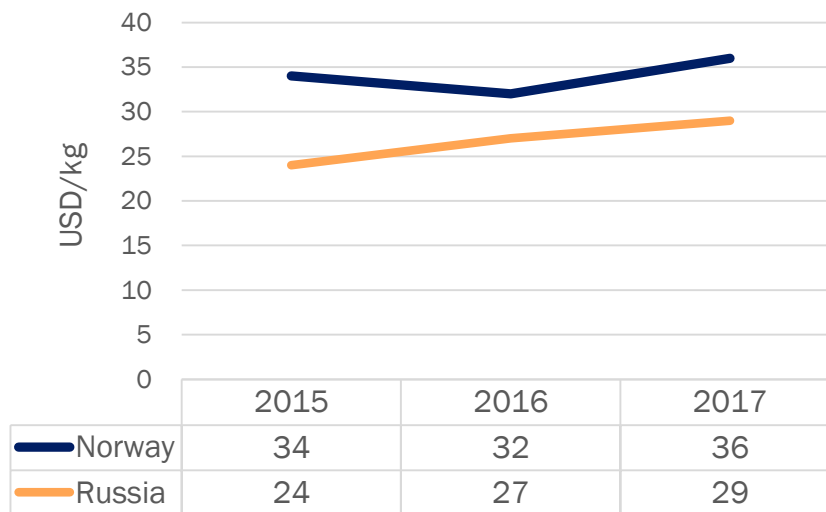
# Norsk kongekrabbe har høyere importpris enn russisk

Levende kongekrabbe - volum\* (2015-2017)



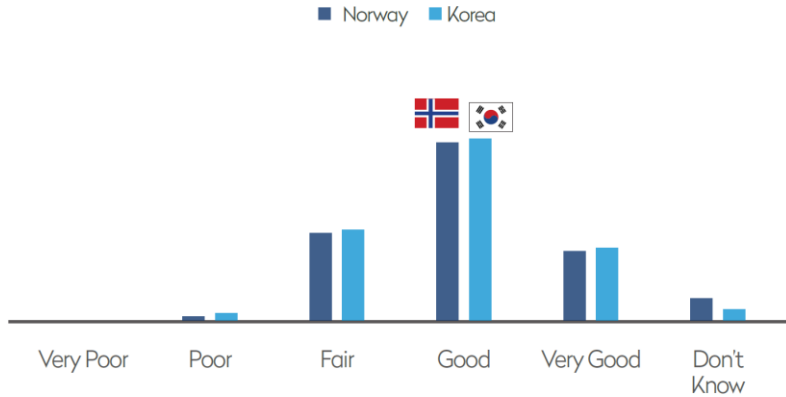
\* Volume for the Korea market

Levende kongekrabbe - priser (2015-2017)

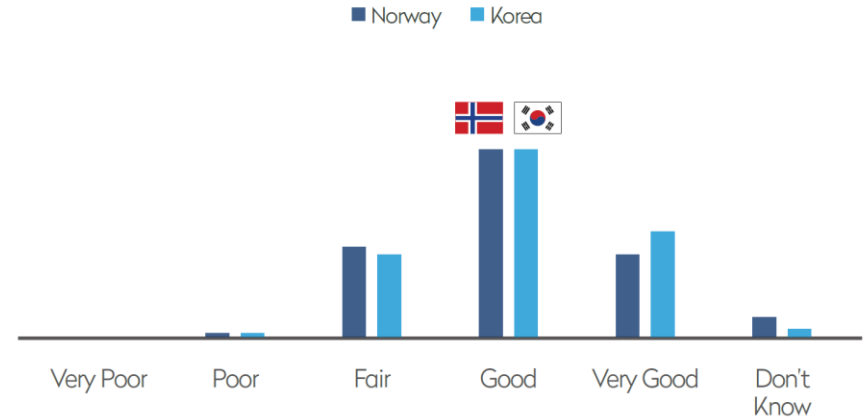


# Sterk norsk posisjon kan benyttes for å posisjonere kongekrabbe

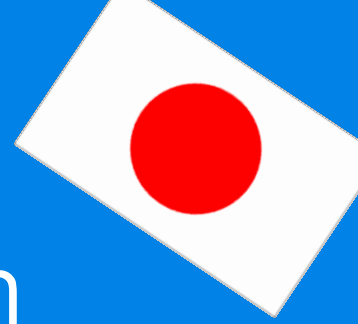
What is Your Perception of Food Safety for Seafood from the Following Countries?



What is Your Perception of the Quality of Seafood from the Following Countries?



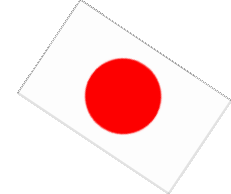




# Markedet for kongekrabbe i Japan

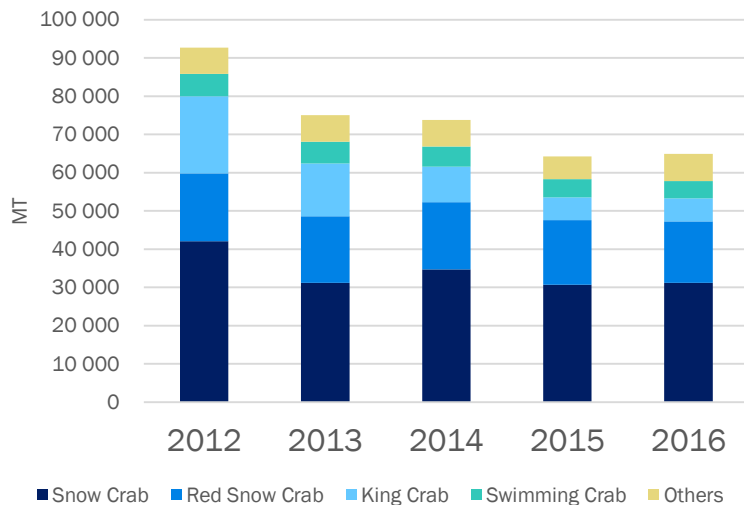




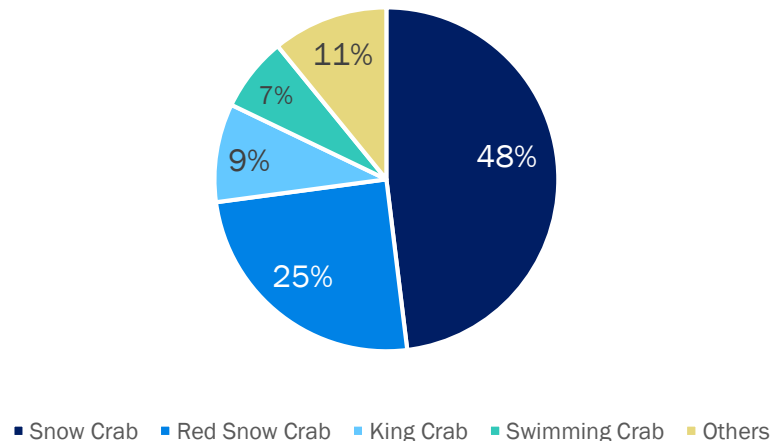


# Total krabbetilførsel til Japan droppet 30% fra 2012-2016

Total krabbetilførsel i Japan (2012-2016)

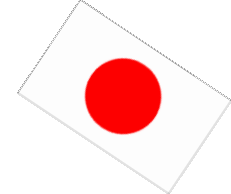


Krabbemarkedet per art (2016)

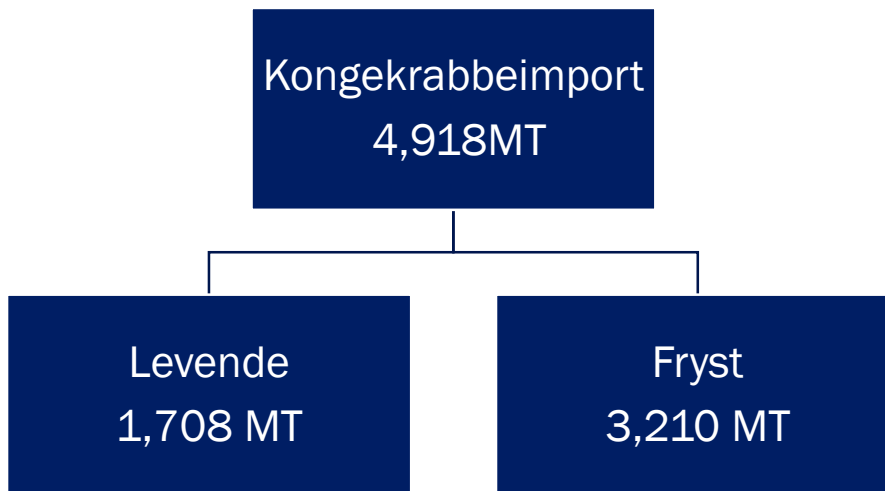


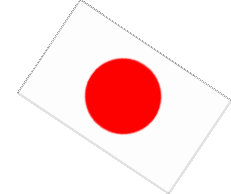
Volume (2016): 64,895 MT

2017 data blir oppdatert i juli 2018



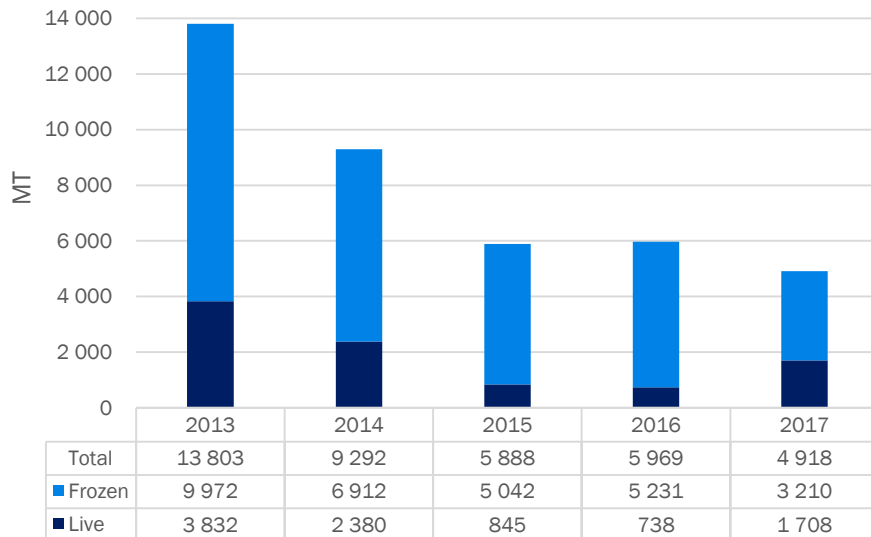
## Distribusjon av kongekrabbe i Japan (2017)



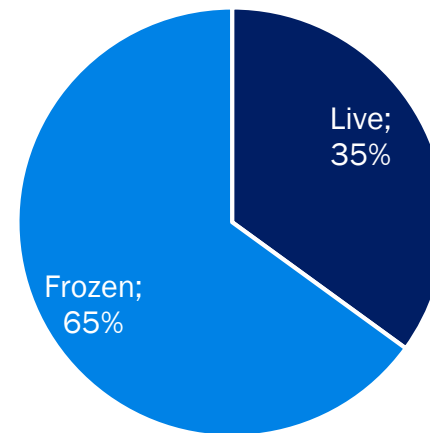


# Kongekrabbekonsum: Nedgang siden 2013

### Japans kongekrabbekonsum (2013-2017)



### Kongekrabbesplitt levende vs fryst (2017)

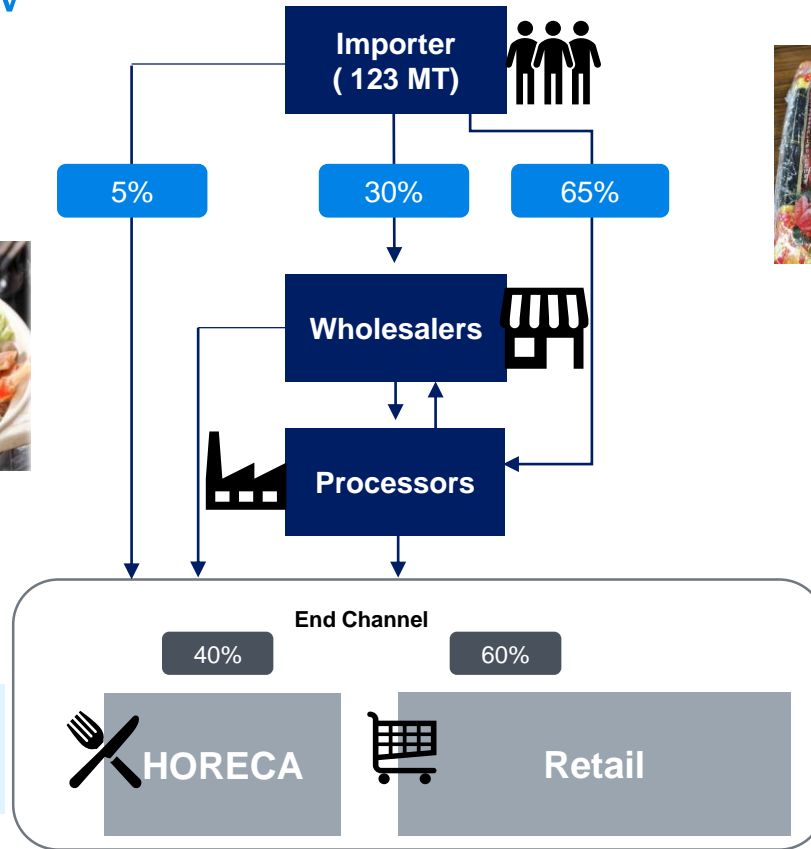


**King Crab Supply (2017): 4,918 MT  
(Product Weight)**

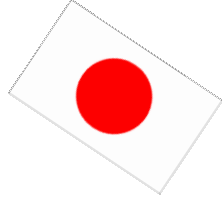
# Distribusjon av fryst norsk kongekrabbe

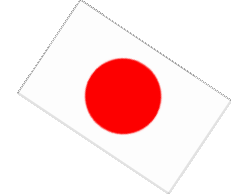


**HORECA**  
- Crab Specialty Restaurants (80%)  
- Others (20%)



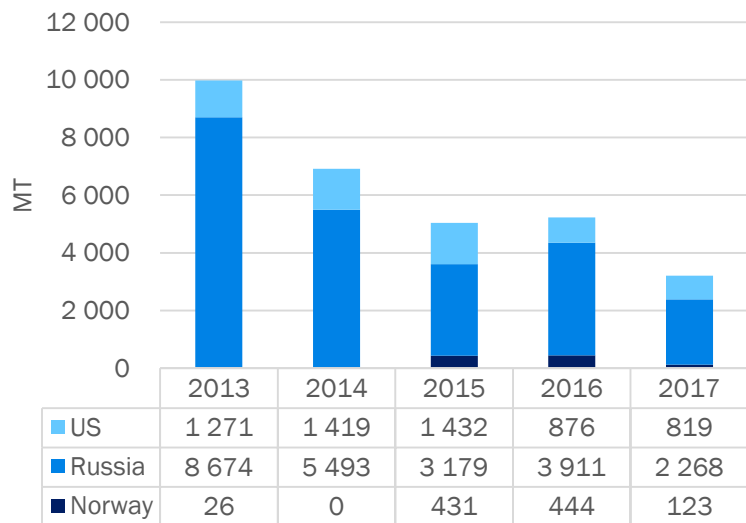
**Retail**  
- Catalogue/Online (50%)  
- Supermarkets (50%)



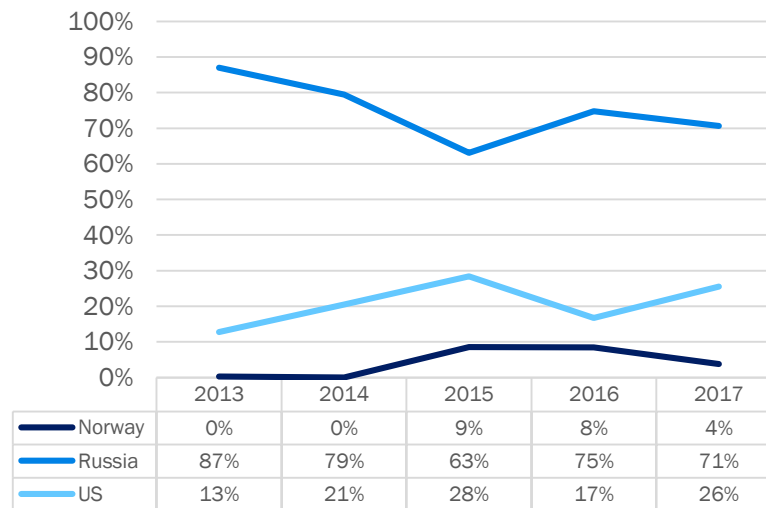


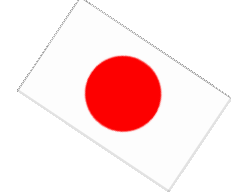
# Frost kongekrabbe: Norsk andel ca 7% (2015-2017)

Frost kongekrabbe i Japan (2013-2017)



Markedsandel fordelt på land (2013-2017)





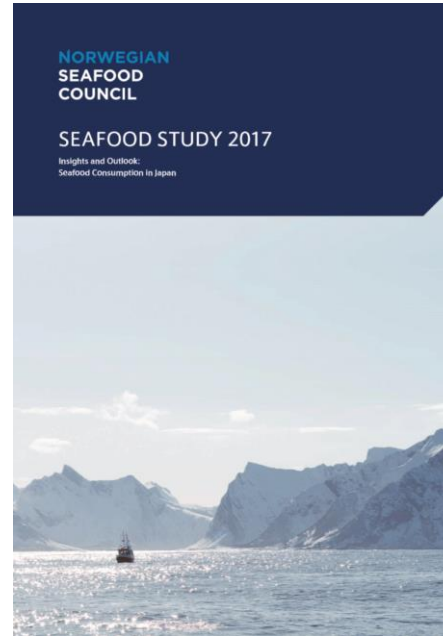
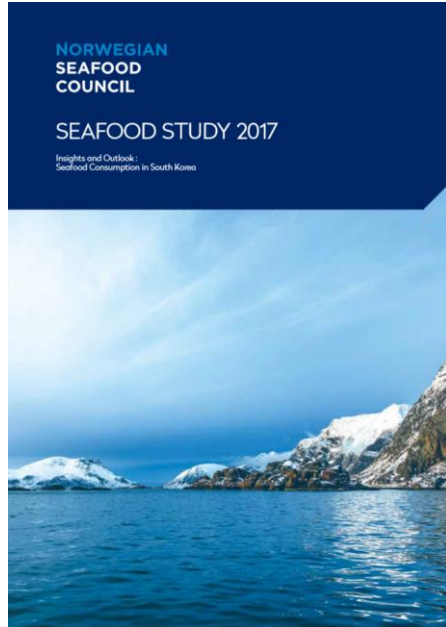
## Kongekrabbe i Japan og Sør-Korea (2017)

Særtrekk ved markedene	Japan	Korea
Kongekrabbekonsum	4,918 MT (Live: 1,708 MT) (Frozen: 3,210 MT)	3,974 MT (Live: 3,851 MT) (Frozen: 123 MT)
Norges volum kongekrabbe	5 MT(Live) 123 MT(Frozen)	341 MT (Live) 5 MT (Frozen)
Norges andel kongekrabbe	0.3% (Live) 4% (Frozen)	9% (Live) 4% (Frozen)
End channels for norsk kongekrabbe	Supermarket: 30% Catalogue/Online: 30% HORECA: 40%	Retail: 5% HORECA: 95%
Årlig konsum	Sesong	Helårskonsum
Produktpreferanse	Fryst kokt til variert bruk	Levende for steaming naturell
Likhetstrekk ved markedene		
Norsk posisjon	Tydelig posisjon for norsk	Tydelig posisjon for norsk

# Markedsaktiviteter skalldyr Japan og Sør-Korea 2018



Vi ønsker å bidra – ta kontakt!





# NORWEGIAN SEAFOOD COUNCIL

## Takk for idag!

Melissa Gotliebsen  
Prosjektleder Sør-Korea, NSC  
[meg@seafood.no](mailto:meg@seafood.no)