

# ØKTE TORSKEKVOTER

## Muligheter og utfordringer

Jan Trollvik

Ålesund 21/10 2012

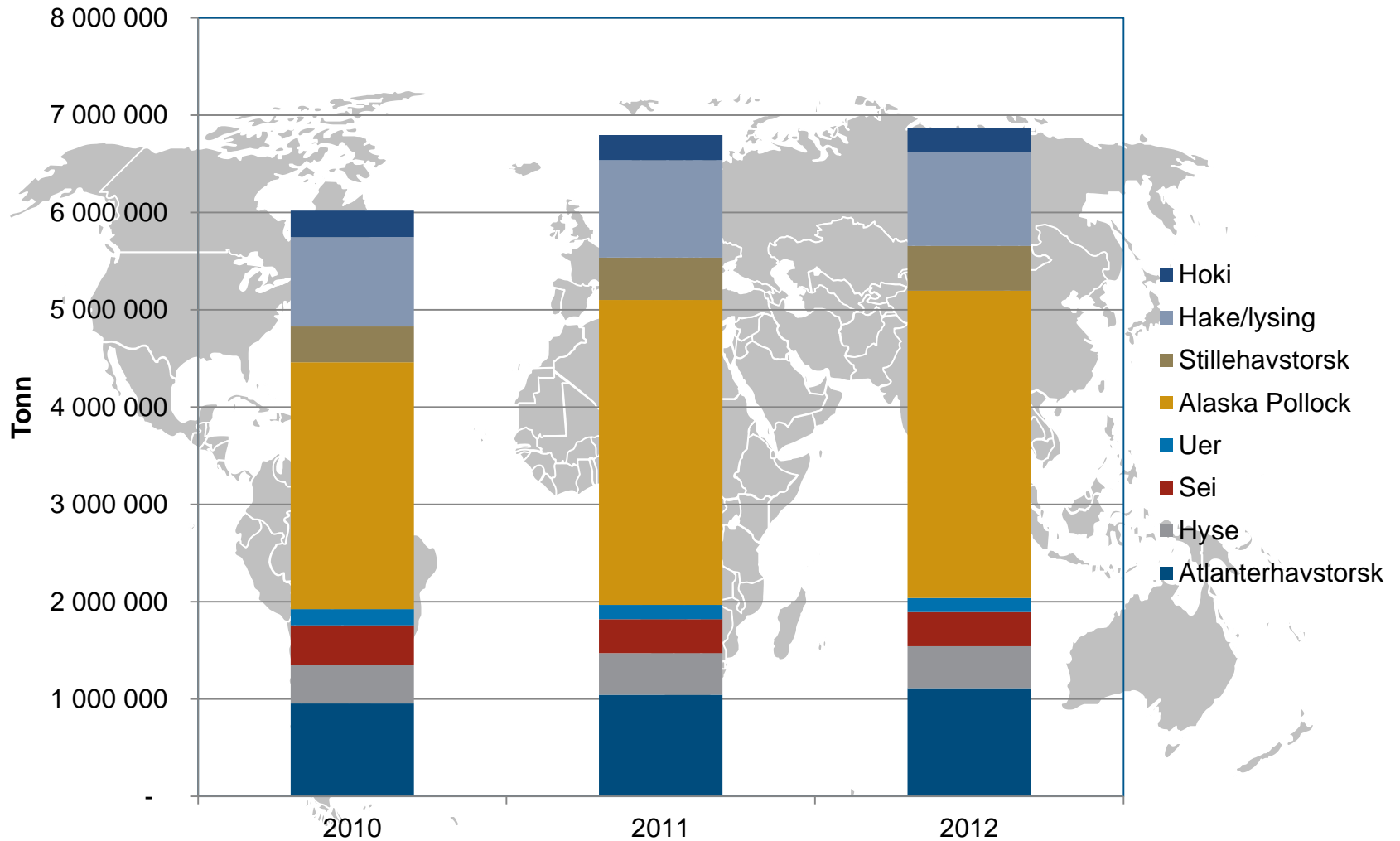


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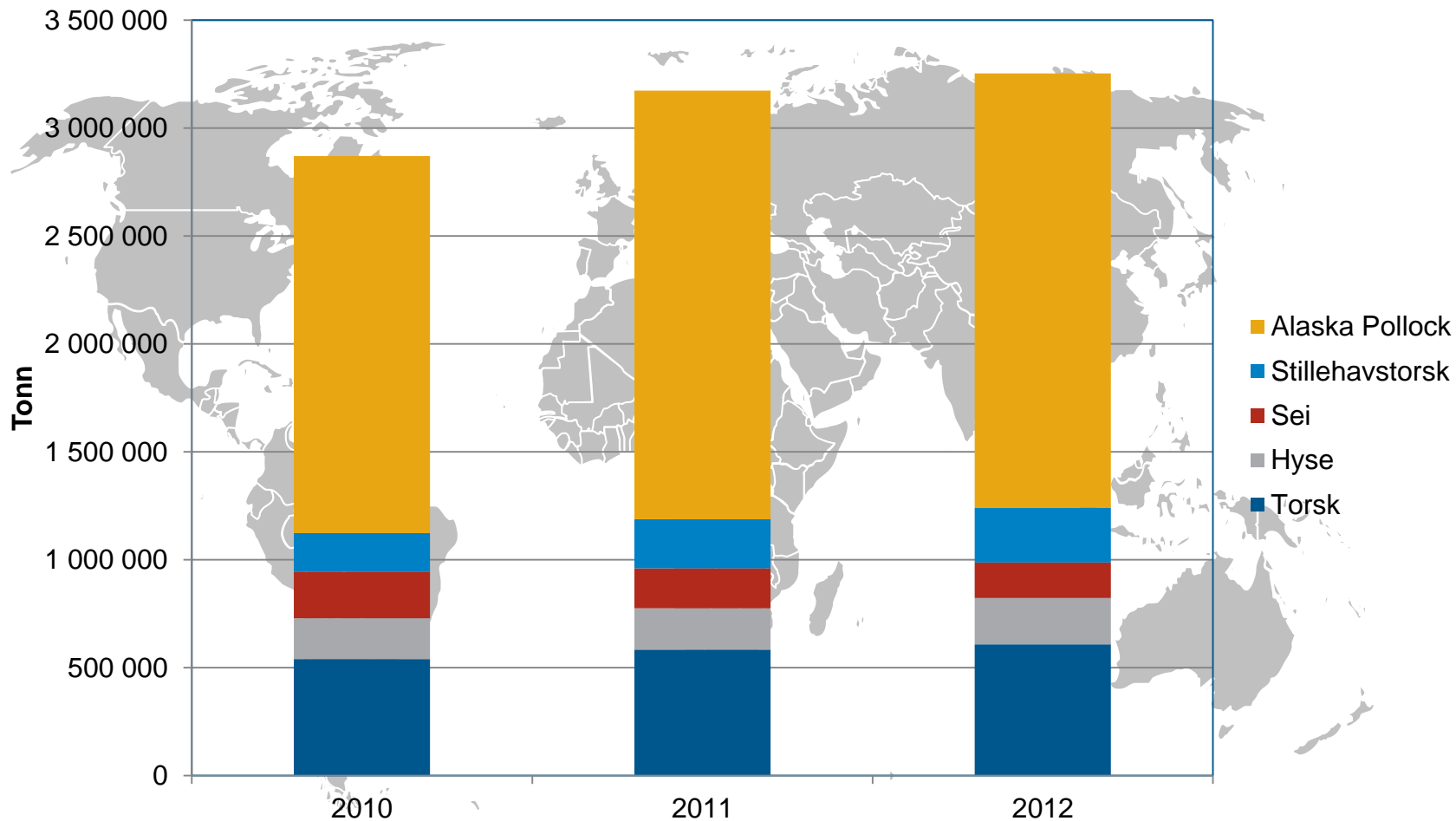
# TILFØRSEL

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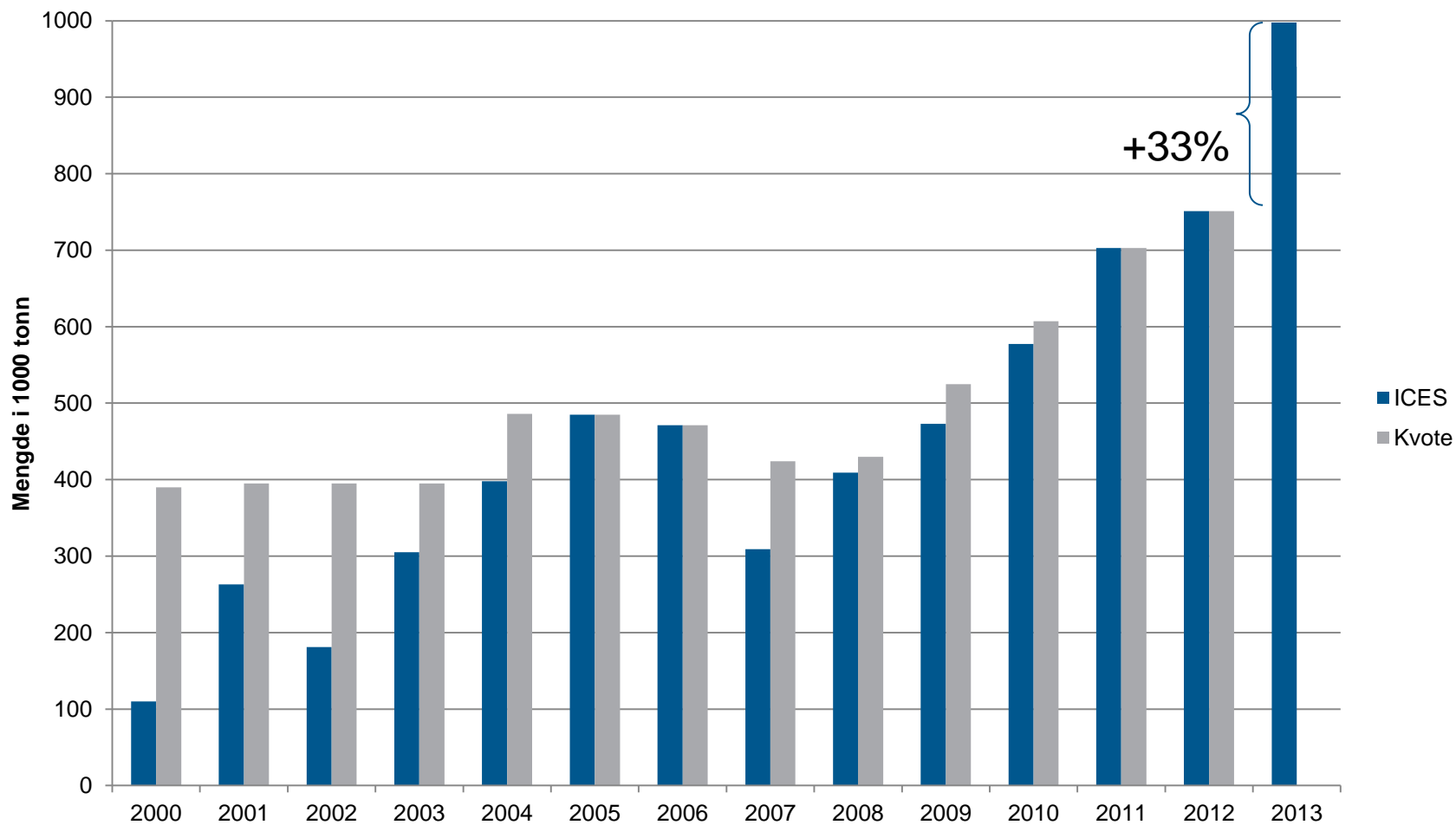
# GLOBAL TILFØRSEL HVITFISK



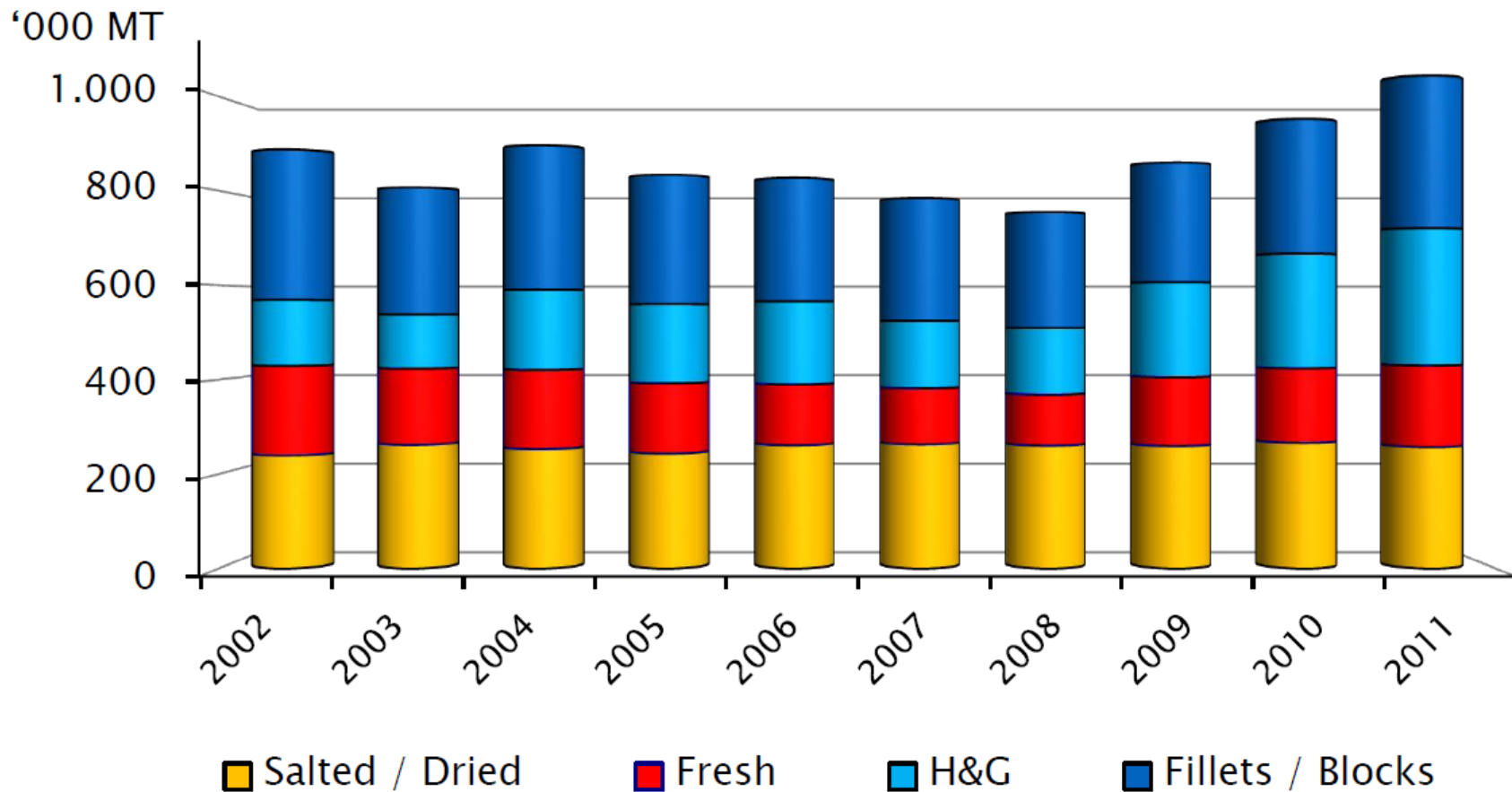
# FANGSTSTATUS 1. HALVÅR



# KVOTE OG ANBEFALT TAC TORSK



# Atlantic Cod Resource Utilization 2002 - 2011



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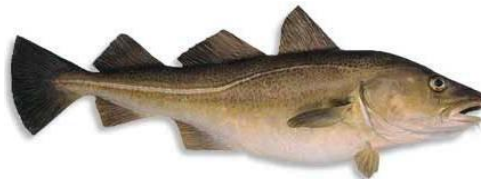
# EKSPORT TORSKEFISK JAN-SEPT 2012

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# EKSPORT JAN-SEPT

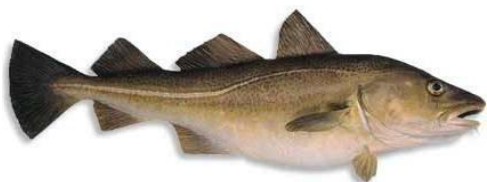
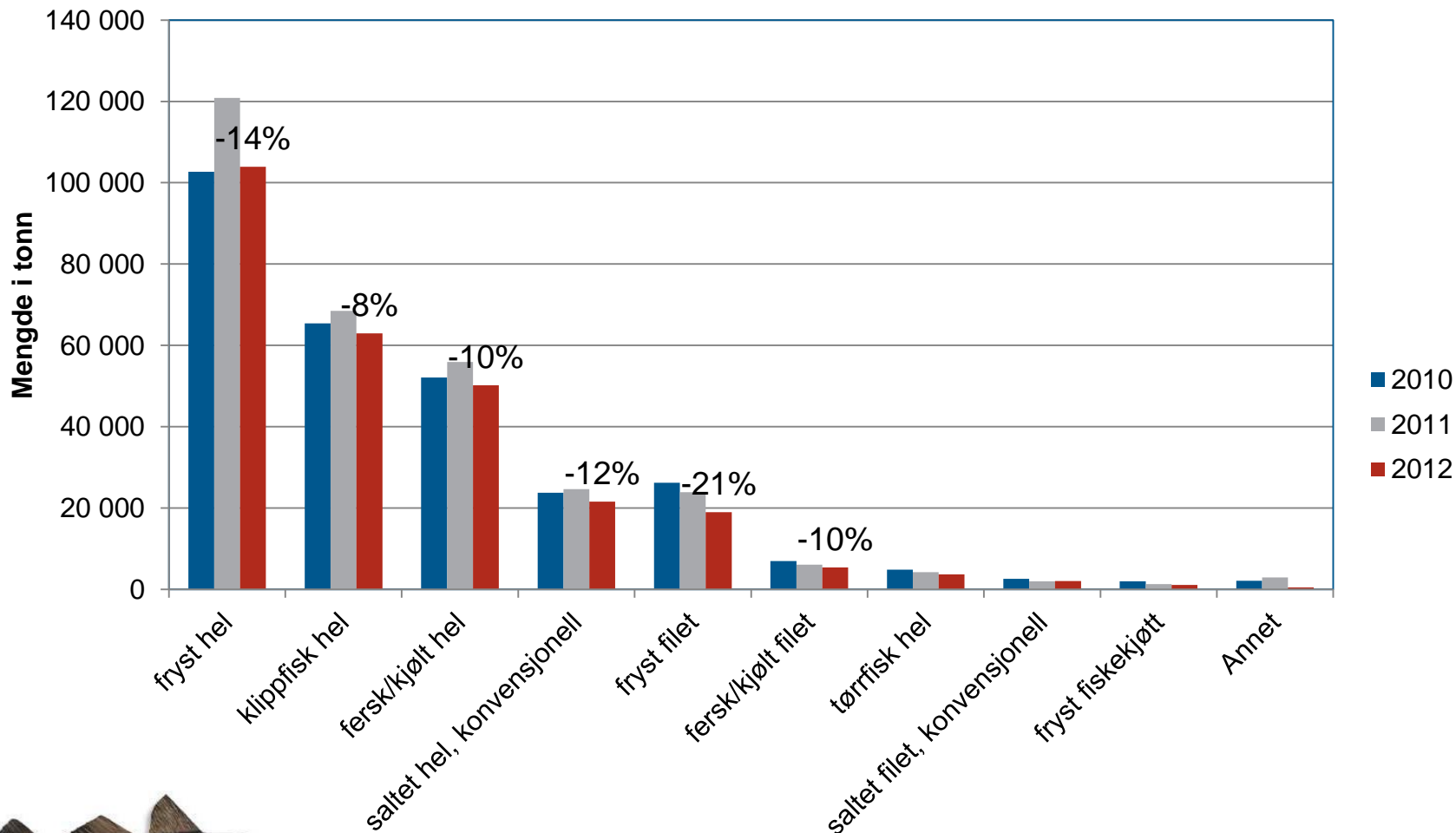
## -13% VOL

|       | Mengde i tonn |         |         | Verdi 1000 NOK |           |           |
|-------|---------------|---------|---------|----------------|-----------|-----------|
|       | 2010          | 2011    | 2012    | 2010           | 2011      | 2012      |
| torsk | 124 859       | 126 519 | 120 953 | 4 093 375      | 4 519 509 | 4 101 040 |
| sei   | 73 697        | 81 822  | 57 588  | 1 493 988      | 1 630 855 | 1 300 664 |
| hyse  | 58 506        | 72 712  | 65 336  | 929 752        | 1 119 130 | 1 024 922 |

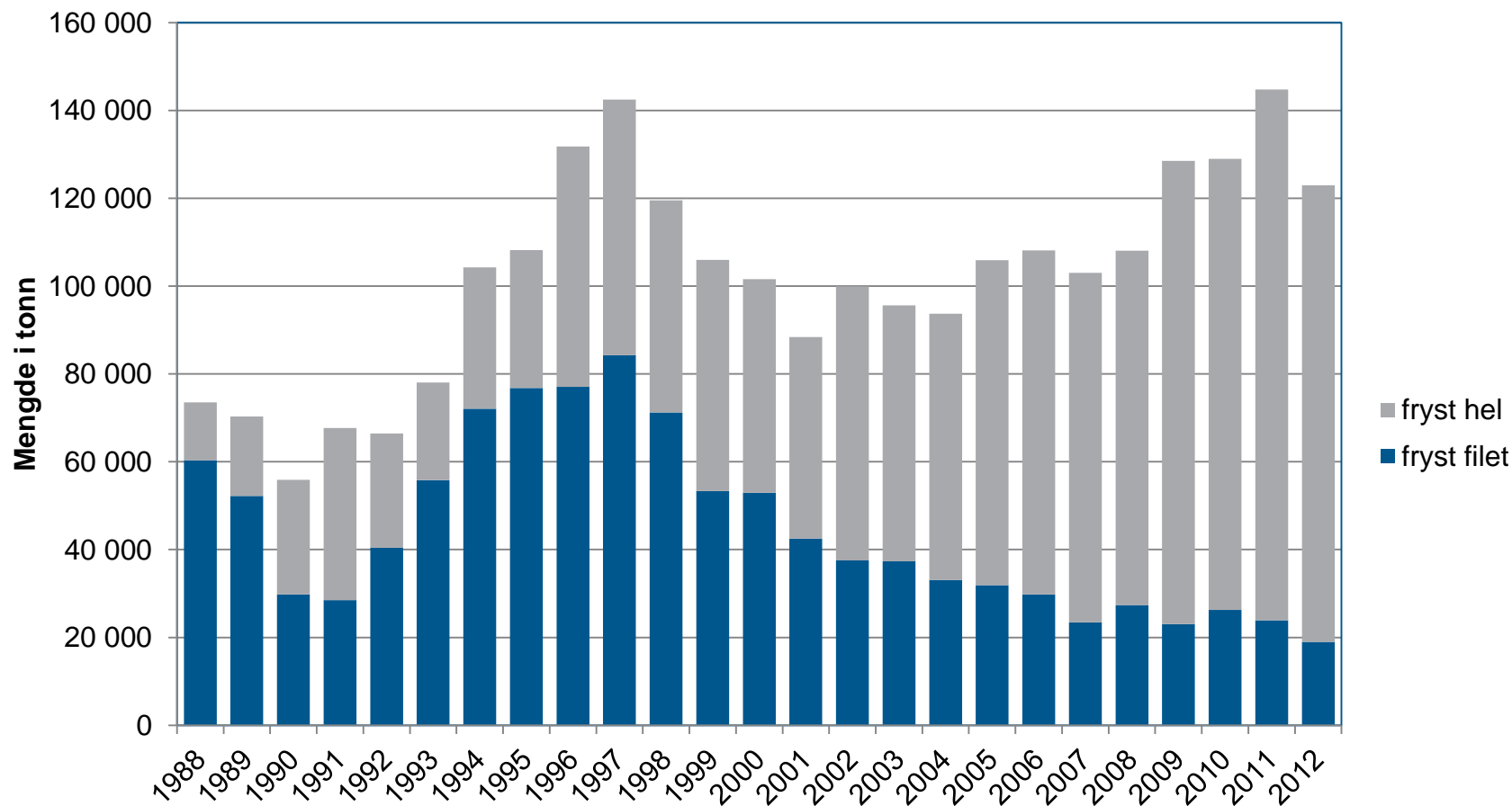




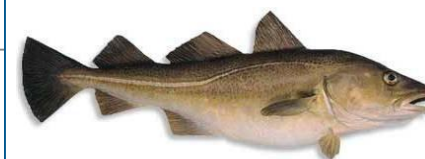
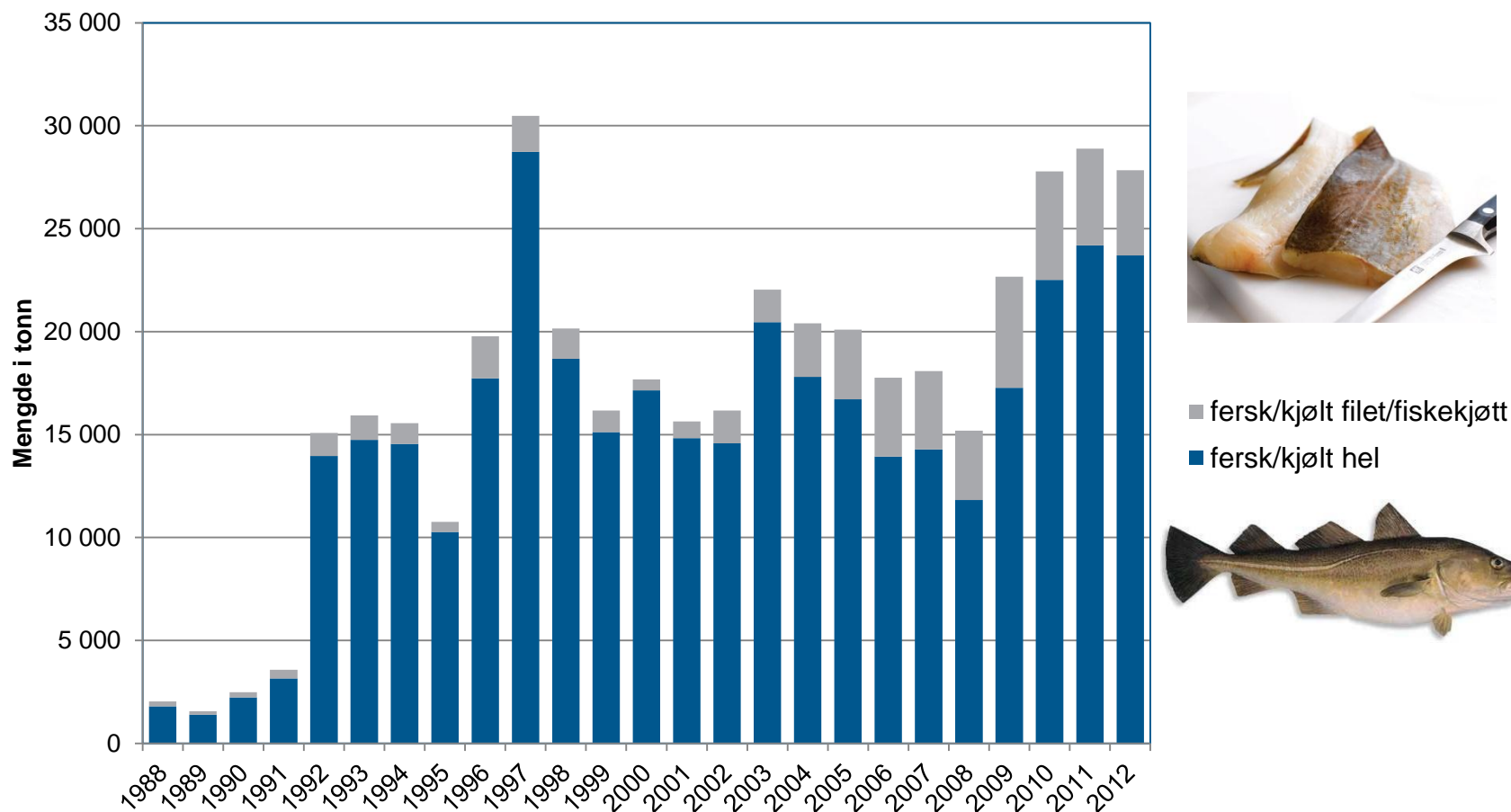
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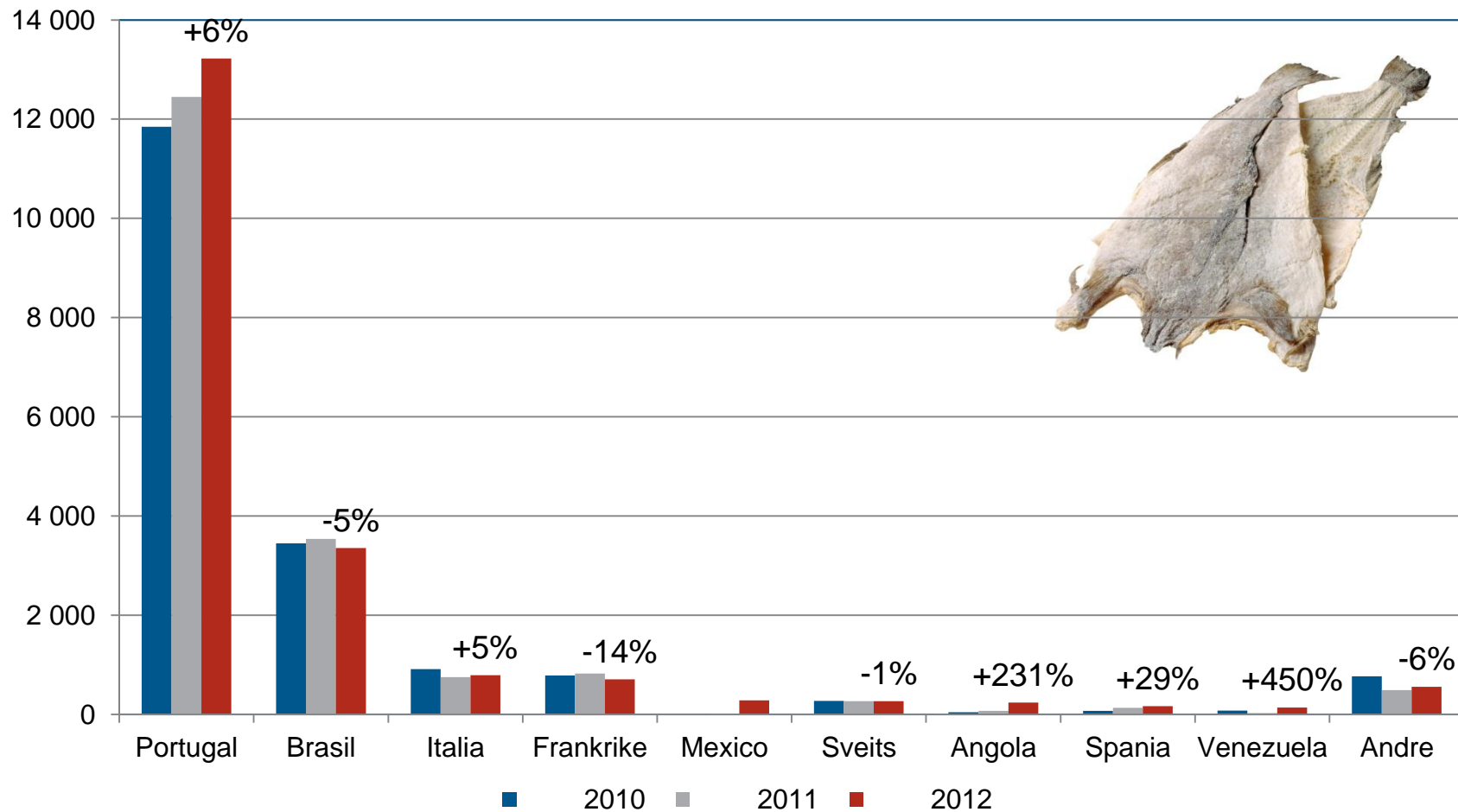
# FORDELING FILET/HEL FRYST JAN-SEPT



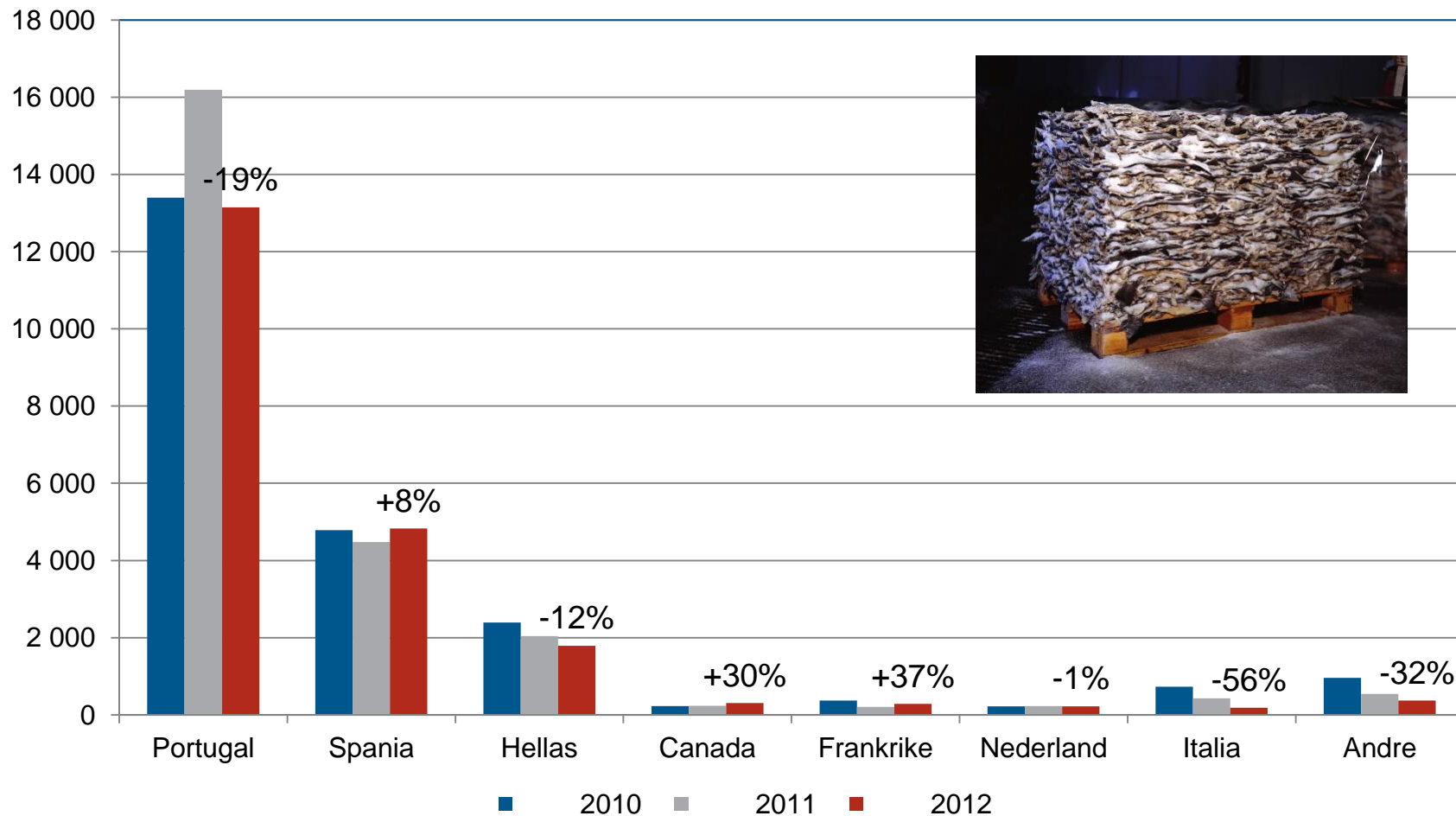
# EKSPORT FERSKTORSK FILET OG HEL JAN-SEPT



# KLIPPFISK ATLANTERHAVSTORSK



# SALTFISK JAN-JULI



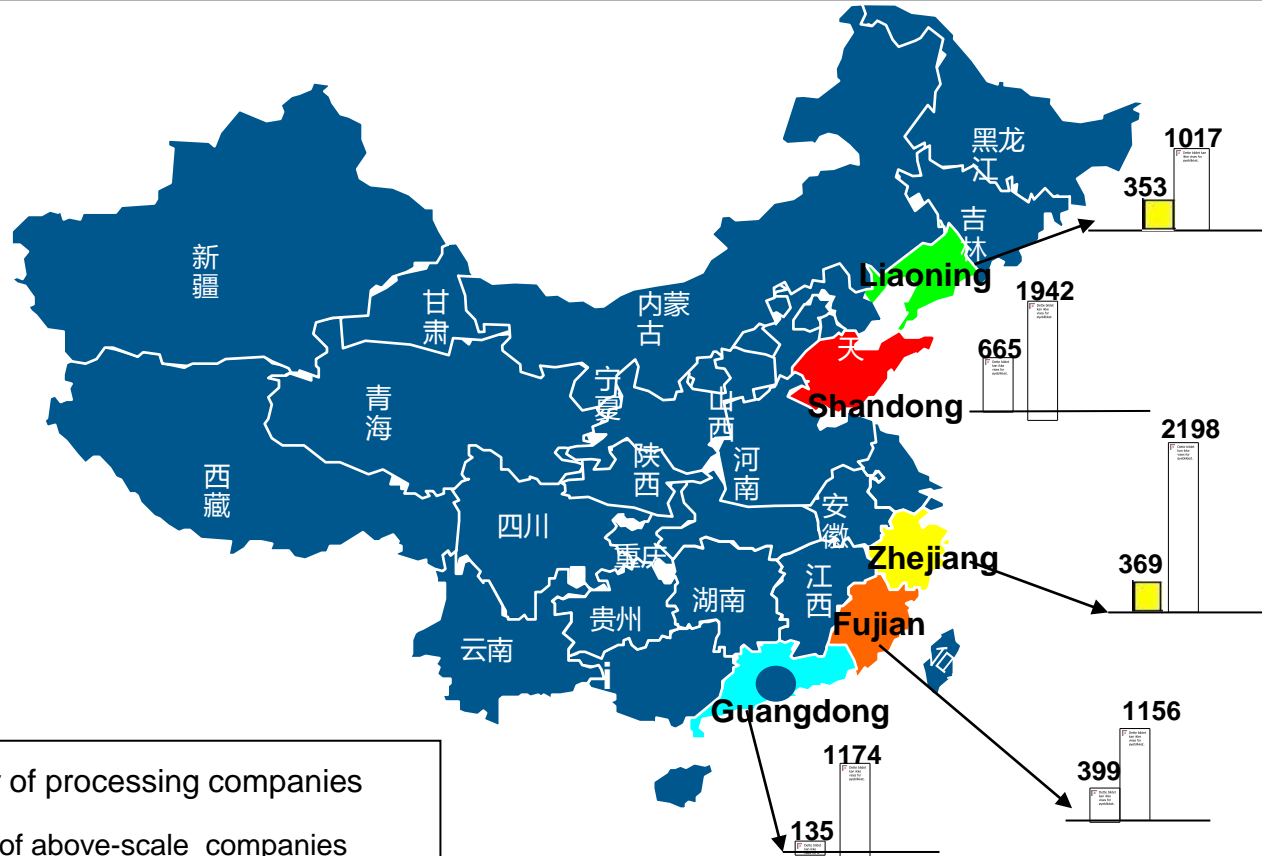
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# HVA SKJER I KINA?

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- **Jinghua Xie**
- Tromsø Business School, University of Tromsø

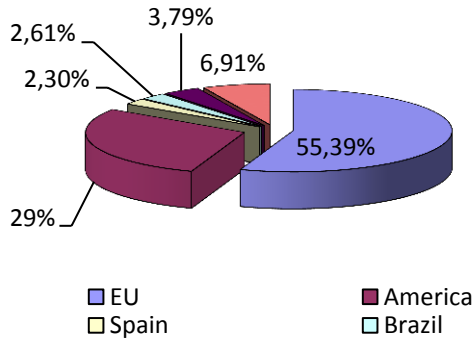
# SJØMATINDUSTRI I KINA



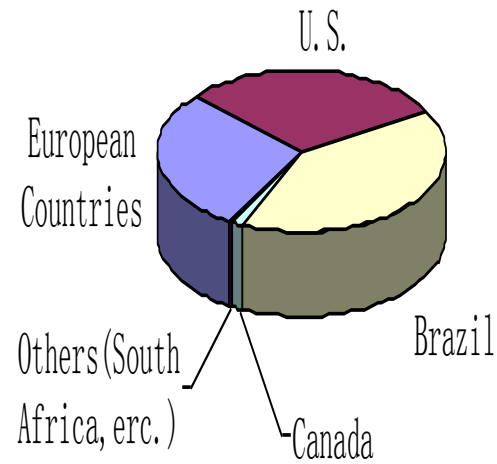
■ Number of processing companies  
■ Number of above-scale companies (annual production capacity more than 5 million tons)



The Main Products Exporting Countries in Shandong Province



Scale Map of Main Ground Fish Exporting Countries of Dalian's Enterprises in 2011

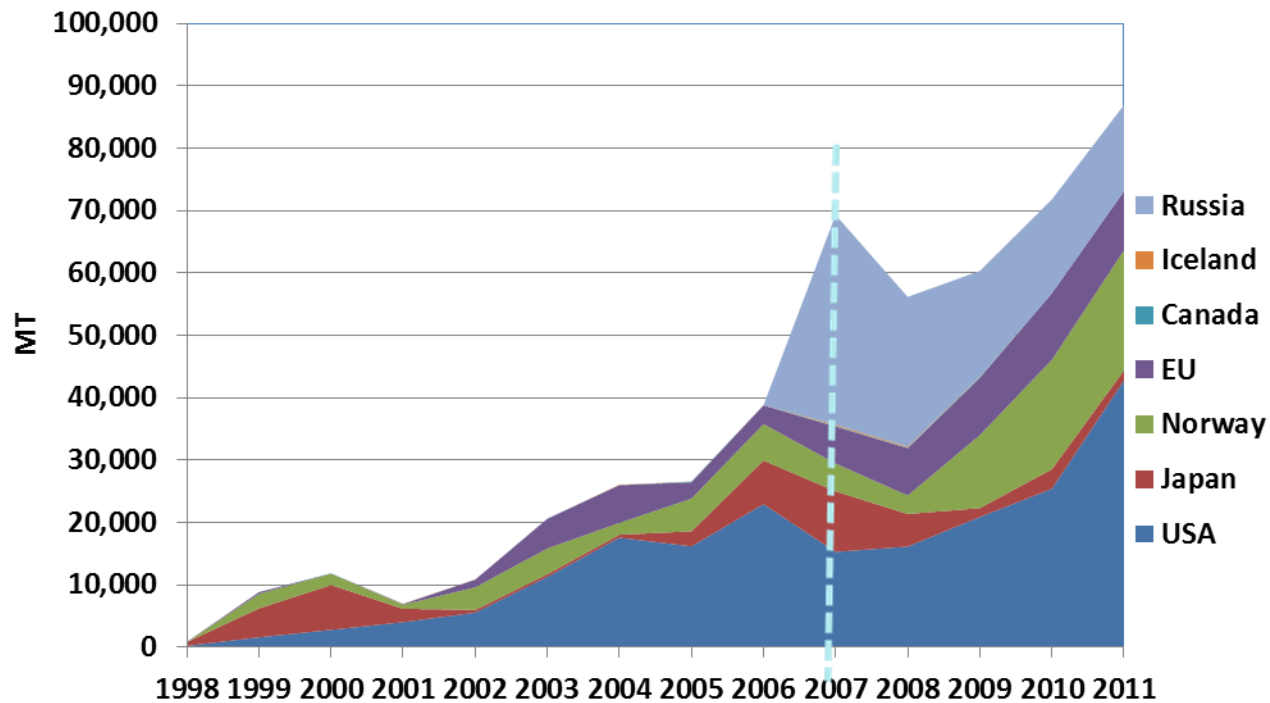


European Countries U.S. Brazil Canada Others (South Africa, etc.)



# EKSPORT TIL KINA

## Cod (torsk)

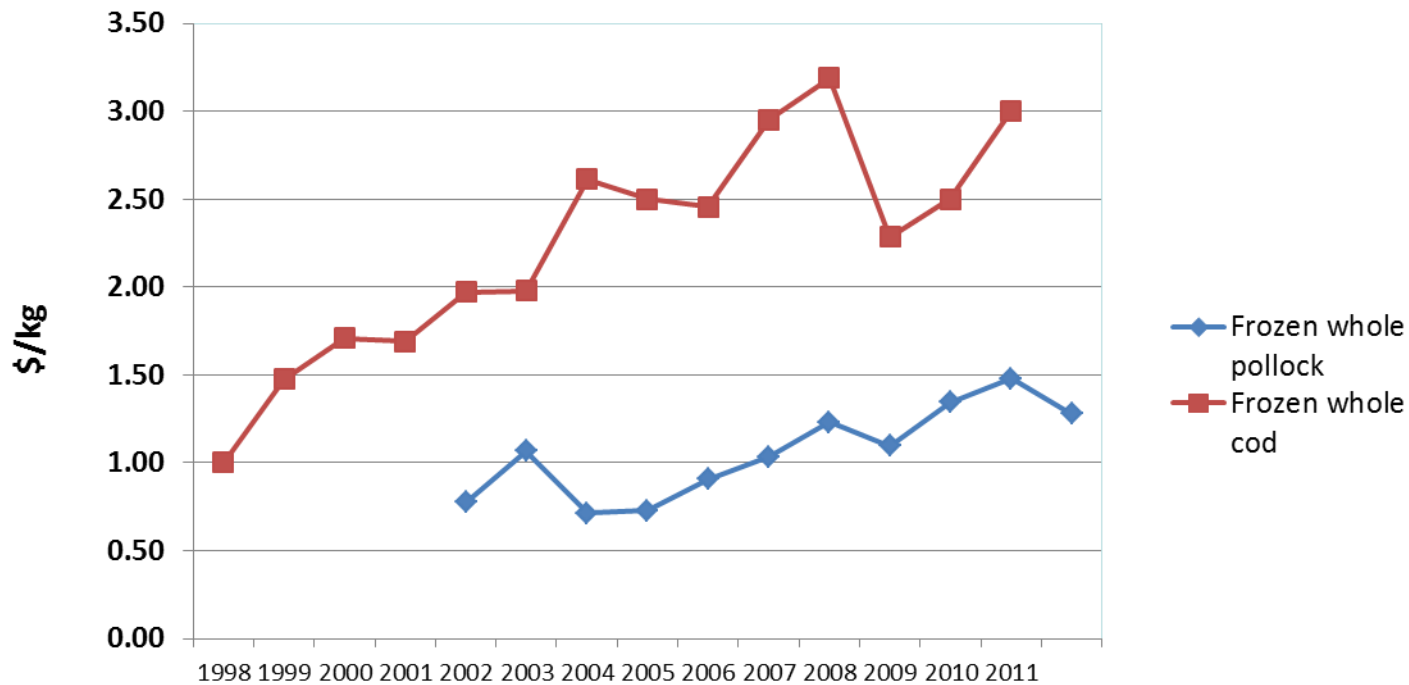


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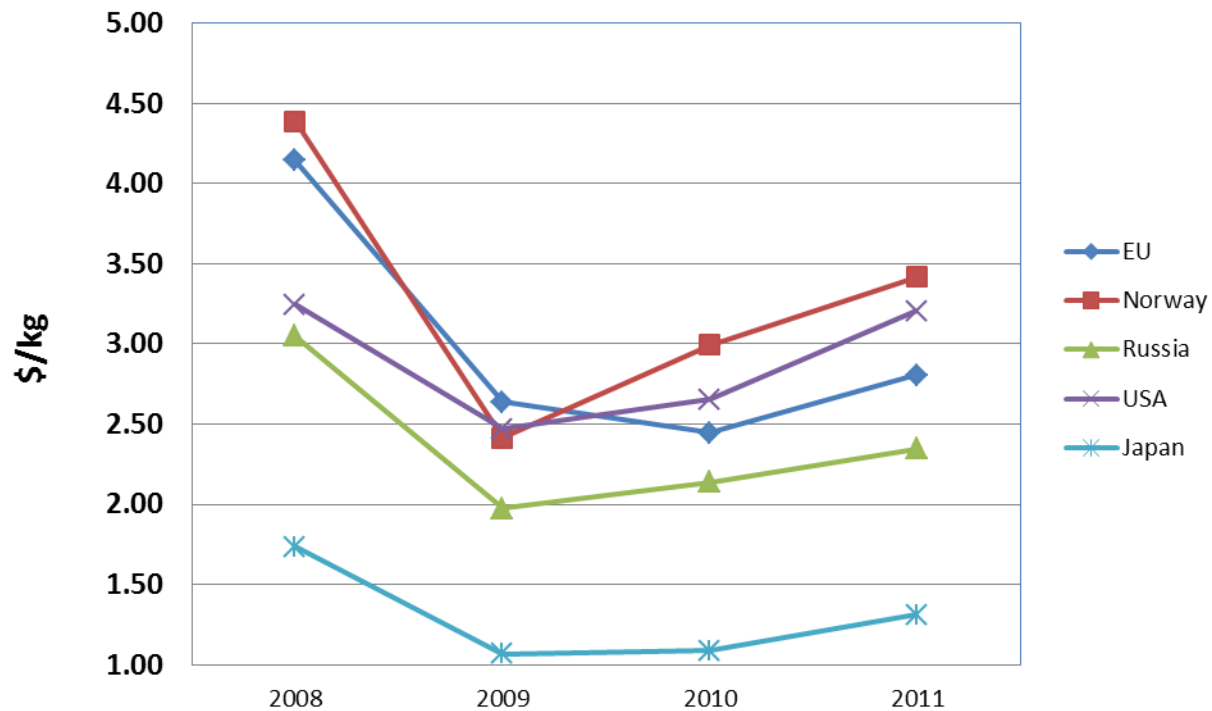
|                         | <b>Import Price<br/>(\$/T)</b> | <b>Export Price<br/>(\$/T)</b> |
|-------------------------|--------------------------------|--------------------------------|
| <b>Pacific<br/>cod</b>  | <b>2350-2800</b>               | <b>4400-5000</b>               |
| <b>Atlantic<br/>cod</b> | <b>2500-2900</b>               | <b>4500-5000</b>               |
| <b>Haddock</b>          | <b>2400-2500</b>               | <b>4000-4500</b>               |
| <b>Pollock</b>          | <b>1300-1400</b>               | <b>2400-2600</b>               |

# IMPORT PRIS TORSK OG AP



# EKSPORT TIL KINA

## Prices of Cod from Main Exporters



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▪ **Yield rate**

**Pollack:** 67%-72%

**Cod:** 75%-80%.

**In general:** 70%

▪ **Cost**

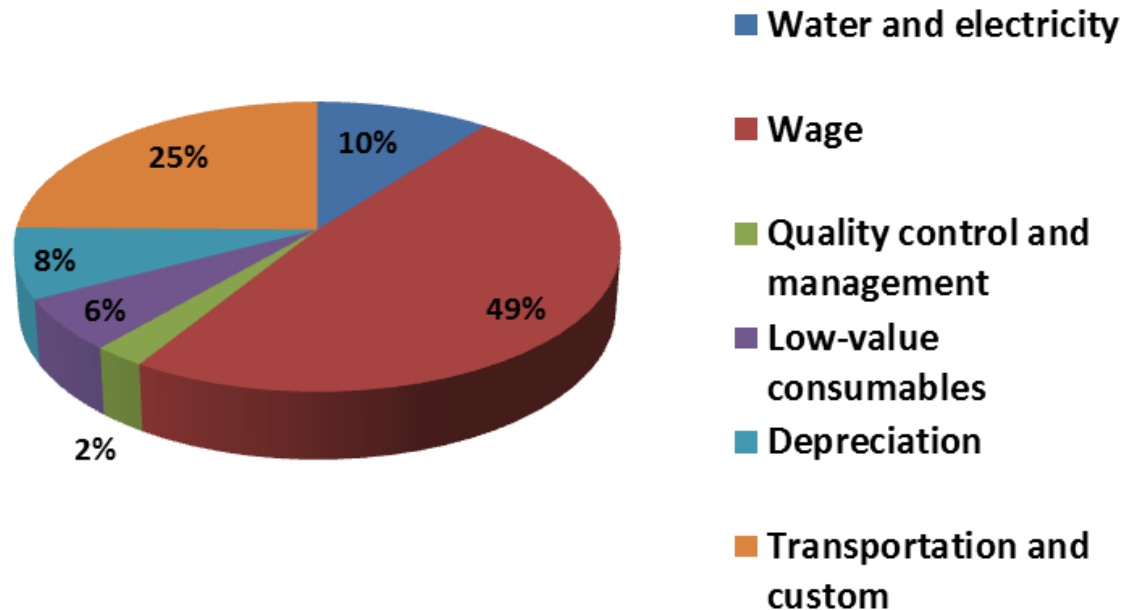
**Total:** \$1010-\$1060/T

**Labor:** 49%

**Water& electricity:** 10%.

▪ **Profit**

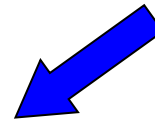
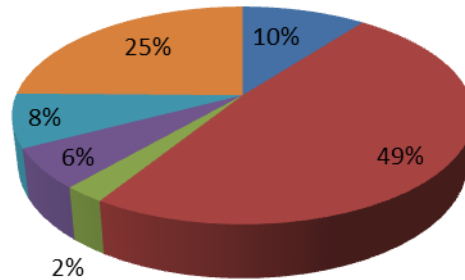
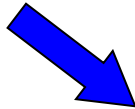
**Maximum:** \$100-200/T



**Import price  
of Atlantic cod  
(\$2500-2900)**



**Cost of raw fish in  
value of frozen  
fillets (\$3333-3867)**



Processing cost: \$1010-\$1060/T

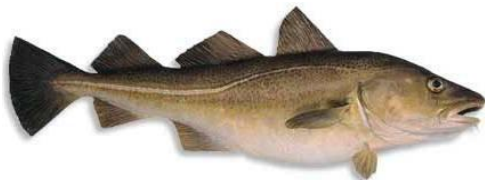


**Expected export price of frozen fillet  
(\$4343-4877)**

# 2012 COD

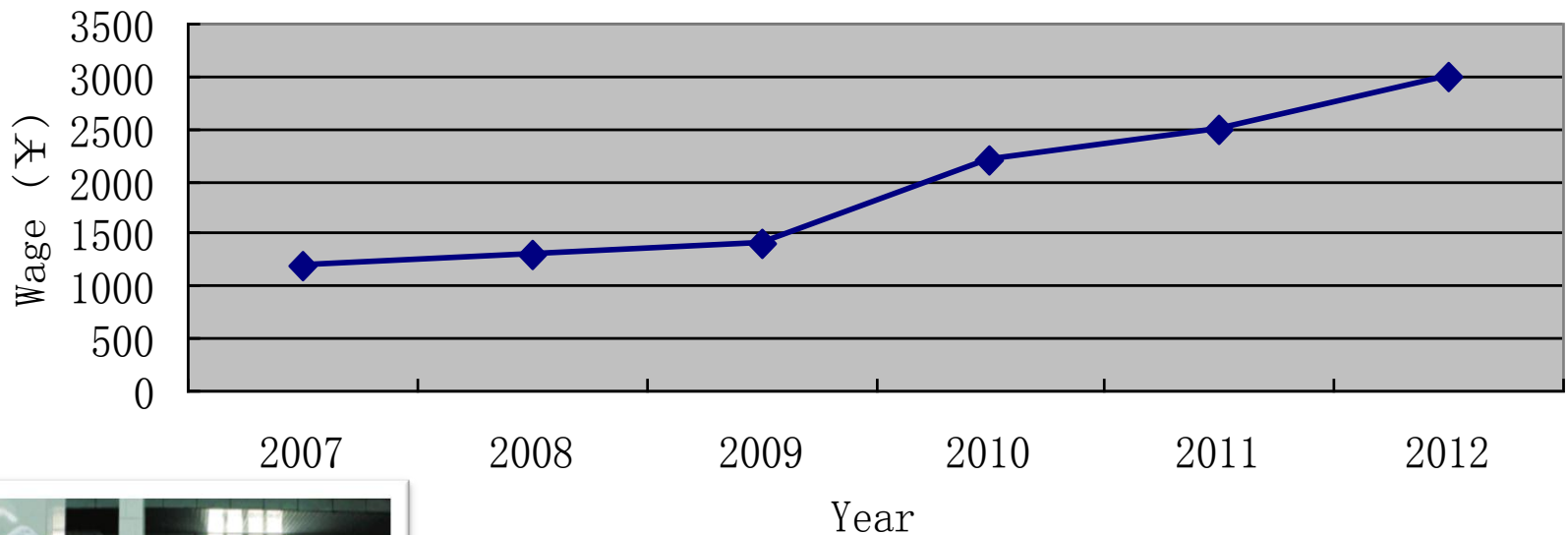
(\$4343-4877)

|                     | <b>Import Price<br/>(\$/T)</b> | <b>Export Price<br/>(\$/T)</b> |
|---------------------|--------------------------------|--------------------------------|
| <b>Pacific cod</b>  | <b>2350-2800</b>               | <b>4400-5000</b>               |
| <b>Atlantic cod</b> | <b>2500-2900</b>               | <b>4500-5000</b>               |
| <b>Haddock</b>      | <b>2400-2500</b>               | <b>4000-4500</b>               |
| <b>Pollock</b>      | <b>1300-1400</b>               | <b>2400-2600</b>               |



# INCREASING WAGE COST

The Trend of Workers' Average Wage in Aquatic Product Processing Enterprises from 2007 to 2012 in Shandong Province

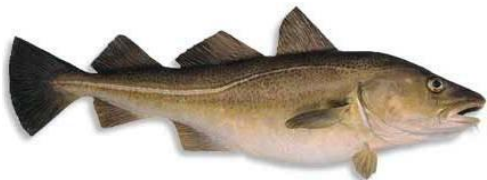




# 2013 TORSK

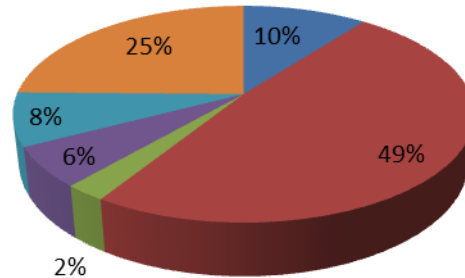
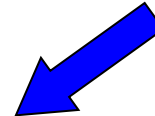
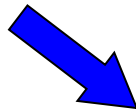
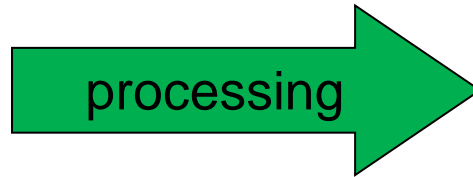
**(\$4441-4975)**

|                     | <b>Import Price<br/>(\$/T)</b> | <b>Export Price<br/>(\$/T)</b> |
|---------------------|--------------------------------|--------------------------------|
| <b>Pacific cod</b>  | <b>2350-2800</b>               | <b>4400-5000</b>               |
| <b>Atlantic cod</b> | <b>2500-2900</b>               | <b>4500-5000</b>               |
| <b>Haddock</b>      | <b>2400-2500</b>               | <b>4000-4500</b>               |
| <b>Pollock</b>      | <b>1300-1400</b>               | <b>2400-2600</b>               |

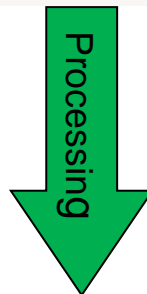


**Import price of pollock (\$1300-1400)**

**Cost of raw fish in value of frozen fillets (\$1733-1867)**



**Processing cost: \$1010-\$1060**



**Expected export price of frozen fillet (\$2743-2877)**

# 2012 AP

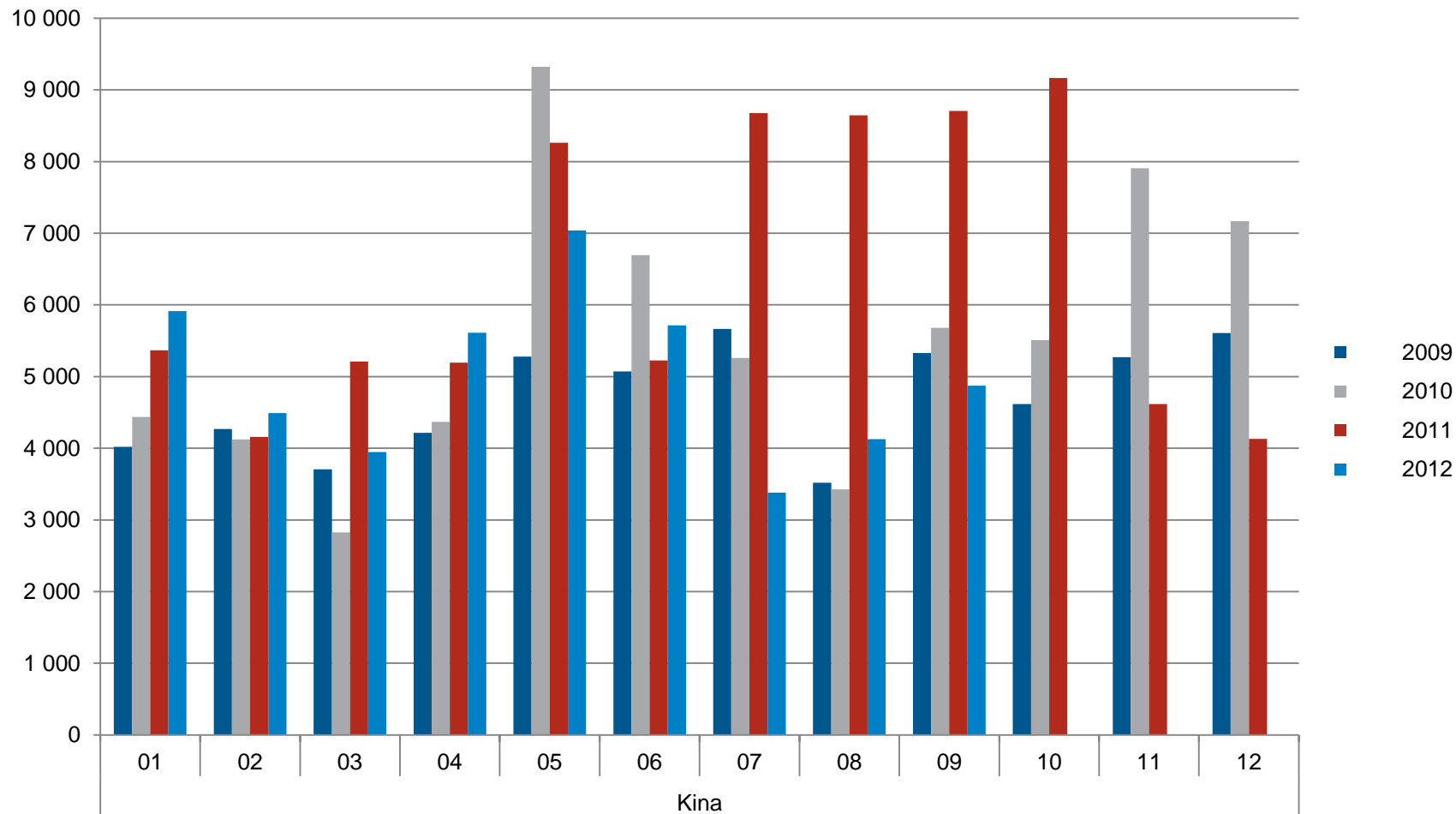
(\$2743-2877)

|                     | <b>Import Price<br/>(\$/T)</b> | <b>Export Price<br/>(\$/T)</b> |
|---------------------|--------------------------------|--------------------------------|
| <b>Pacific cod</b>  | <b>2350-2800</b>               | <b>4400-5000</b>               |
| <b>Atlantic cod</b> | <b>2500-2900</b>               | <b>4500-5000</b>               |
| <b>Haddock</b>      | <b>2400-2500</b>               | <b>4000-4500</b>               |
| <b>Pollock</b>      | <b>1300-1400</b>               | <b>2400-2600</b>               |



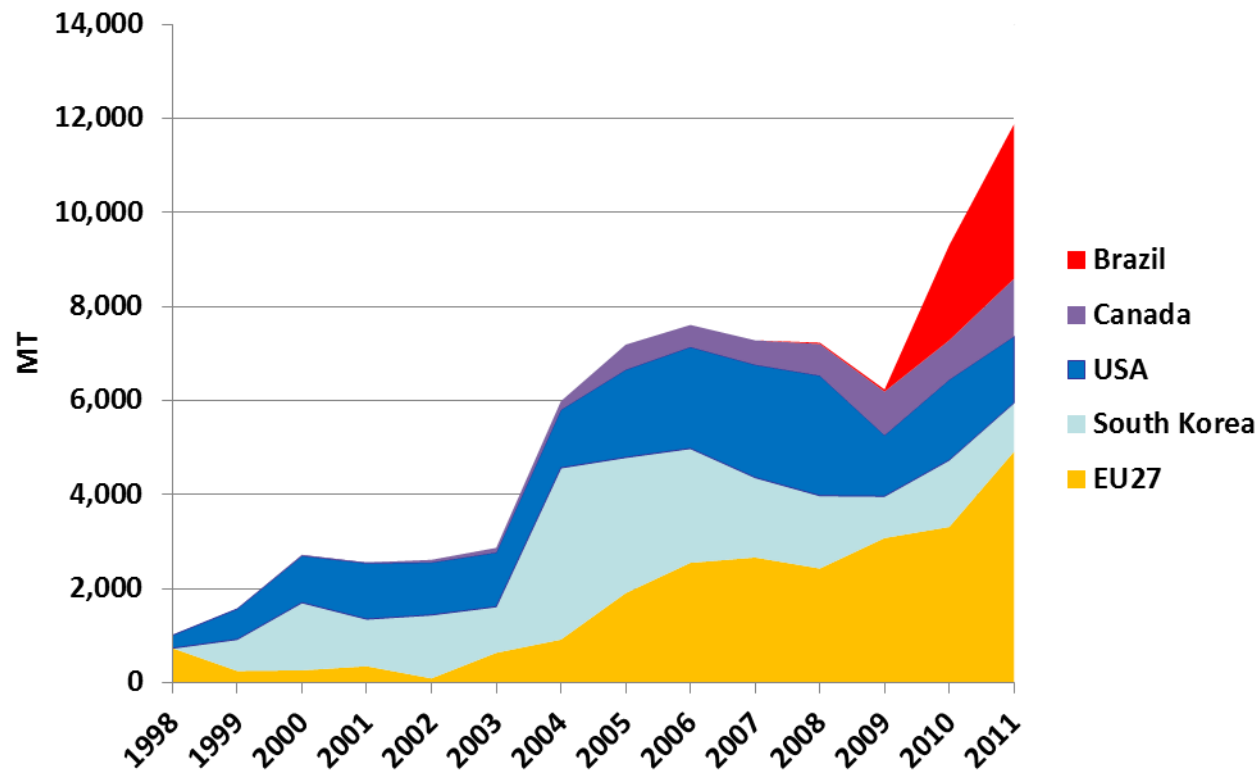
# EKSPORT TIL KINA

-14 346 tonn  
-24 %

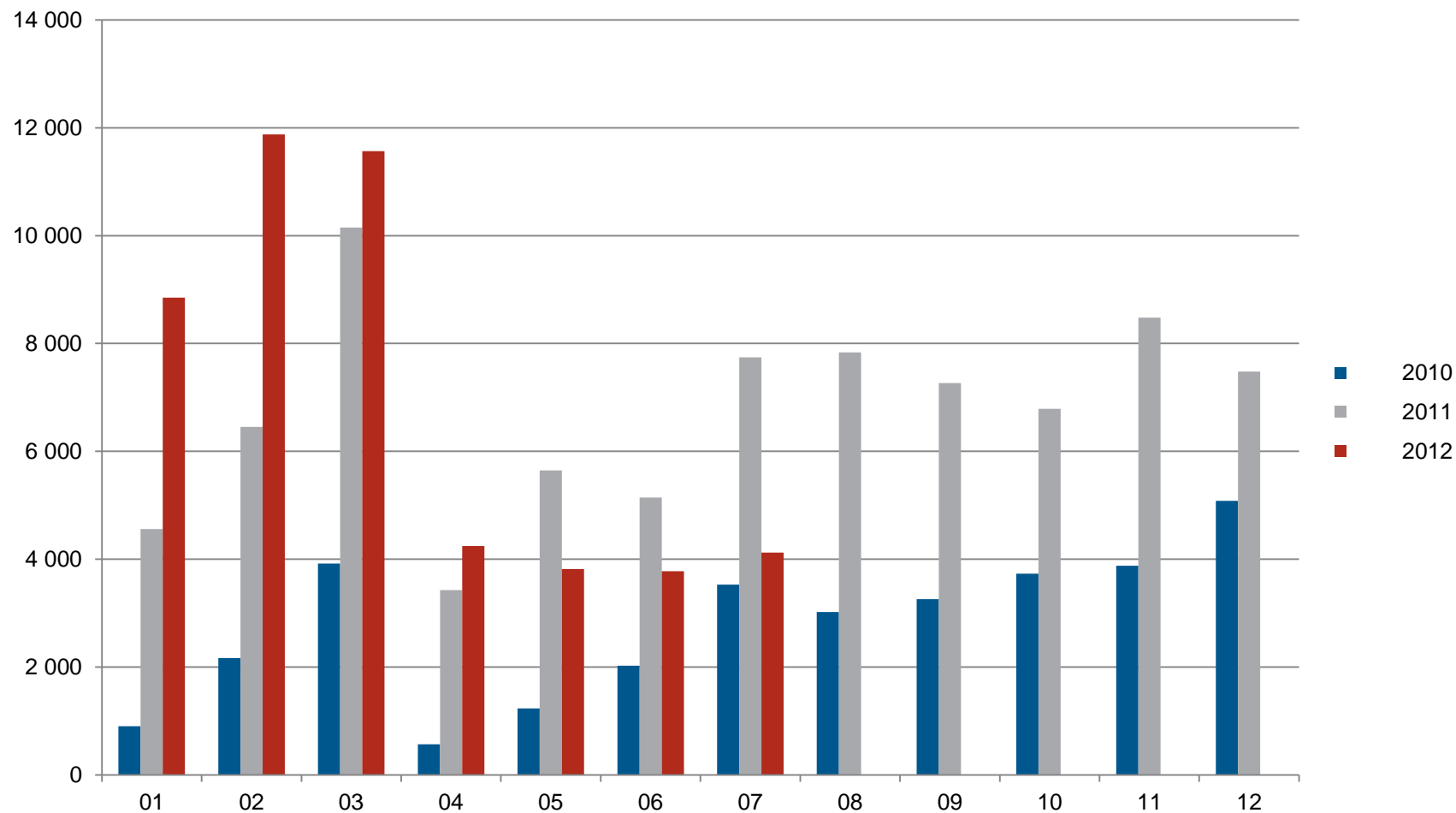


# KINESISK EKSPORT AV KONVENSJONELLE PRO

## Export of Salted/Kippfish/Tørrfisk



# BRASIL IMPORT FRA KINA

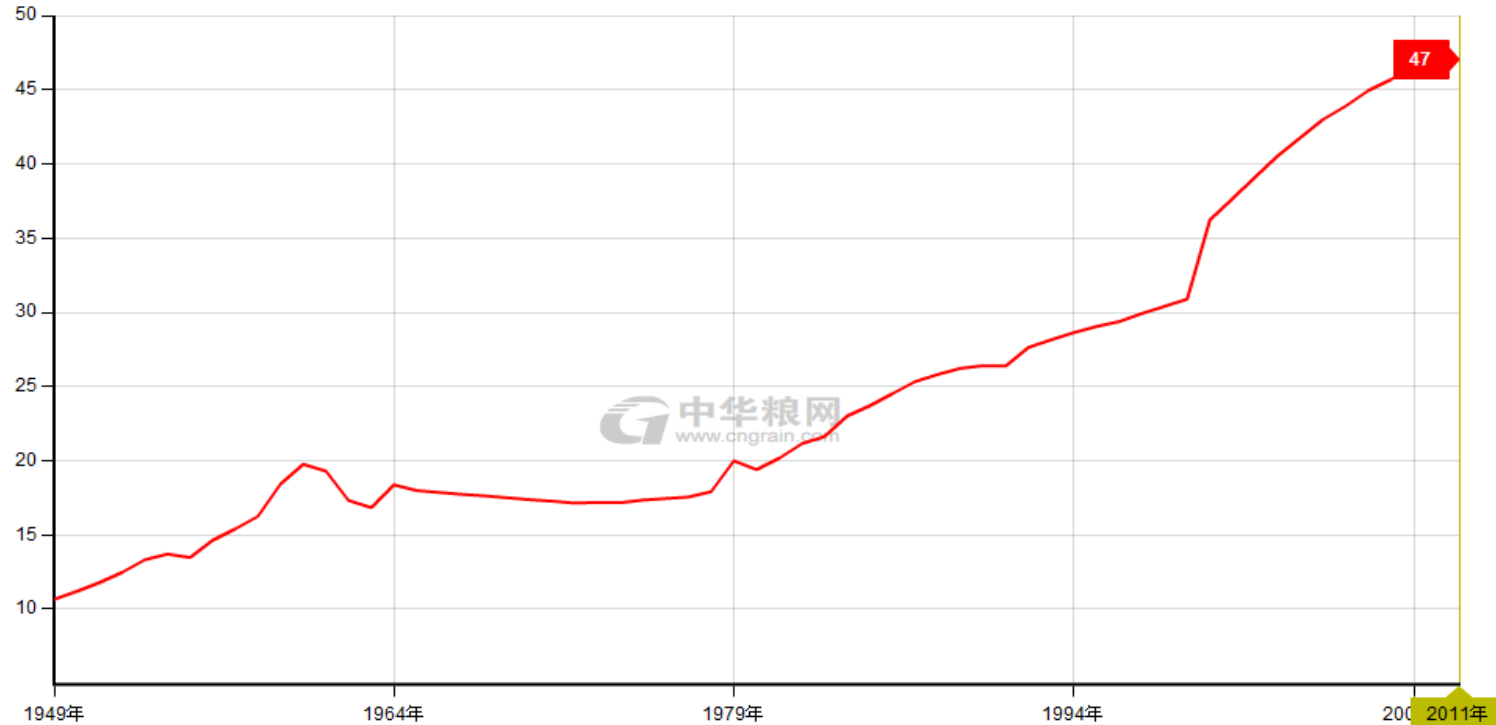


# BRASIL IMPORT FRA KINA 1. TERTIAL

|                    | 2010          | 2011          | 2012          |
|--------------------|---------------|---------------|---------------|
| pollack (lyr)      |               |               | 32 415        |
| annen fisk         | 9 669         | 32 252        | 7 469         |
| torsk              | 707           | 4 260         | 2 446         |
| annen hvitfisk     | 1 011         | 1 863         | 2 255         |
| laks               |               | 5             | 780           |
| andre torskefisker |               |               | 631           |
| sei                |               |               | 537           |
| annen flyndrefisk  |               |               | 399           |
| blåhai             |               | 147           | 285           |
| hake (lysing)      | 2 753         | 3 314         | 214           |
| malle (catfish)    |               |               | 26            |
| sild               |               |               | 19            |
| hyse               |               |               | 12            |
| tannfisk           | 196           | 224           |               |
| annen laksefisk    | 20            | 23            |               |
| <b>Sum</b>         | <b>14 356</b> | <b>43 125</b> | <b>48 259</b> |

Volum i tonn

# URBANISING



Source: <http://datacenter.cngrain.com/IndexMacroEcoView.aspx?MId=11&IId=32>

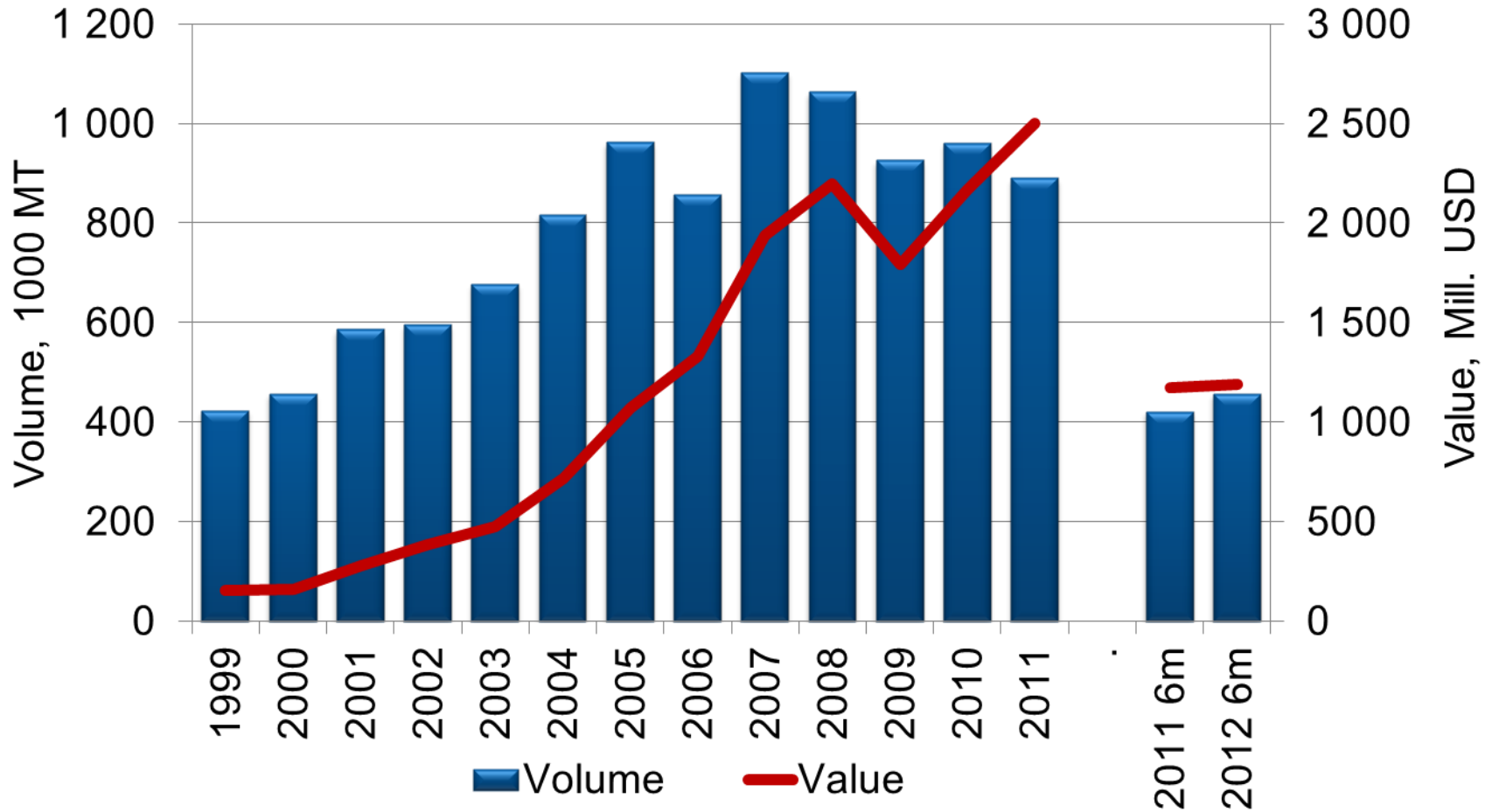


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# RUSSLAND

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# RUSSIAN IMPORTS OF SEAFOOD



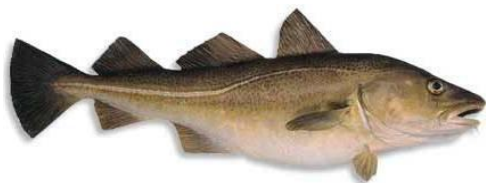
# **RUSSISK FANGST ATLANTISK TORSK 2008-2012 (TONN)**

| <b>Catches</b>                 | <b>Atlantic<br/>Cod</b> |
|--------------------------------|-------------------------|
| <b>2008</b>                    | 192 324                 |
| <b>2009</b>                    | 236 230                 |
| <b>2010</b>                    | 275 407                 |
| <b>2011</b>                    | 319 527                 |
| <b>2011 (6 months)</b>         | 185 019                 |
| <b>2012 (6 months)</b>         | 178 444                 |
| <b>2012 vs 2012 (6 months)</b> | - 6 575                 |

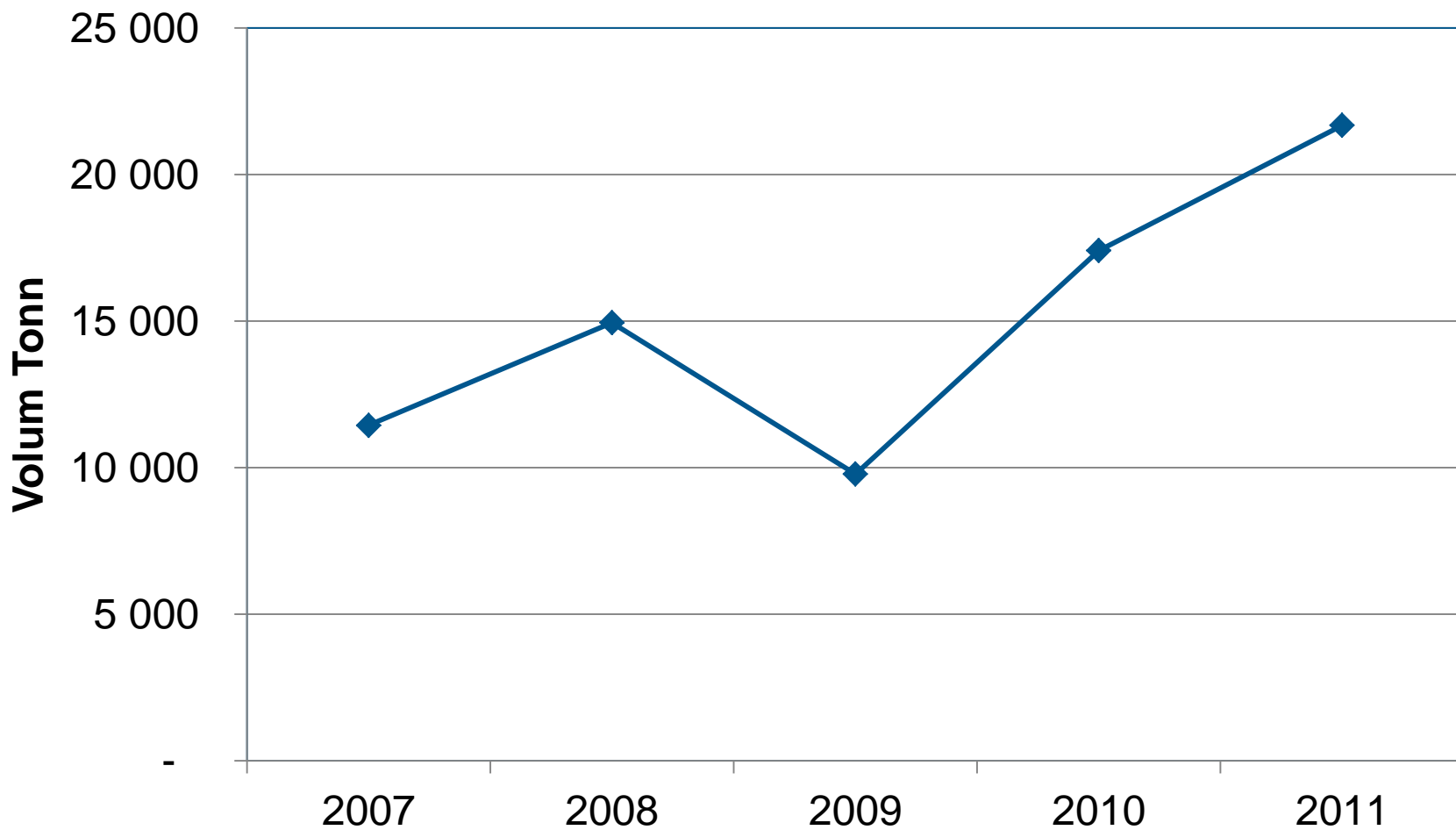
Source: Russian catch statistics

# RUSSISK EKSPORT AV FRYST HEL ATLANT. TORSK, MT

|              | 2008          | 2009          | 2010          | 2011          |  | 2011 6m       | 2012 6m       |
|--------------|---------------|---------------|---------------|---------------|--|---------------|---------------|
| China        | 76 816        | 57 007        | 77 822        | 61 864        |  | 28 746        | 60 858        |
| Norway       | 15 969        | 8 180         | 10 403        | 6 043         |  | 3 216         | 3 165         |
| UK           | 5 506         | 3 545         | 5 224         | 4 295         |  | 3 255         | 1 449         |
| Portugal     | 1 224         | 2 560         | 2 500         | 1 515         |  | 640           | 212           |
| <b>Total</b> | <b>99 515</b> | <b>71 293</b> | <b>95 948</b> | <b>73 715</b> |  | <b>35 856</b> | <b>65 684</b> |



# RUSSISK EKSPORT AV TORSK- FILET



# RUSSISK EKSPORT AV FILET 2012

|           | 1.halvår 2011 | 1.halvår 2012 |
|-----------|---------------|---------------|
| Nederland | 2 763         | 8 151         |
| UK        | 955           | 312           |
| Belgia    | 460           | 375           |
| Danmark   | 389           | 234           |
| Tyskland  | 210           | 201           |
| Norge     | 23            | 624           |
| Estland   | 0             | 919           |
| Andre     | 1 240         | 343           |
| Sum       | 6 040         | 11 159        |



# TOTAL EKSPORT AV ATL. TORSK -EXPORTANDEL AV TOTAL FANGST



|                       | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | 6/2011  | 6/2012  |
|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| Transit               | 119 898 | 104 787 | 130 972 | 94 037  | 92 106  | 70 511  | 38 900  | 93 578  |
| Export frozen whole   | 22 625  | 17 875  | 9 594   | 7 477   | 42 383  | 35 717  | 10 121  | 7 378   |
| Export frozen fillets | 17 059  | 13 718  | 15 388  | 8 940   | 24 522  | 35 020  | 9 070   | 8 969   |
| Export other          | 5 196   | 3 204   | 2 768   | 2 041   | 8 607   | 8 656   | 6 404   | 8 897   |
| (statistikkfeil)      |         |         |         |         |         | 60 000  |         |         |
| Export total          | 164 778 | 139 584 | 158 722 | 112 495 | 167 618 | 209 904 | 64 495  | 118 822 |
| Catch                 | 207 529 | 189 867 | 194 610 | 224 226 | 262 329 | 319 527 | 181 512 | 178 444 |
| % Export / Catch      | 79      | 74      | 82      | 50      | 64      | 66      | 36      | 67      |

*\*live weight*

# RUSSISK FANGST AV ALASKA POLLOCK

## 2008-2012 (TONN)

| Catches                 | Alaska Pollock |
|-------------------------|----------------|
| 2008                    | 1 314 128      |
| 2009                    | 1 326 497      |
| 2010                    | 1 581 410      |
| 2011                    | 1 573 970      |
| 2011 (6 months)         | 1 047 966      |
| 2012 (6 months)         | 1 032 384      |
| 2012 vs 2012 (6 months) | -15 582        |

Source: Russian catch statistics



Norwegian Seafood Council  
Seafood.no





# TOTAL EKSPORT AV ALASKA POLLOCK -EKSPORTANDEL AV TOTAL FANGST

|                         | 2008             | 2009             | 2010             | 2011             | 6/2011           | 6/2012          |
|-------------------------|------------------|------------------|------------------|------------------|------------------|-----------------|
| Transit                 | 808 571          | 83 681           | -                | -                | -                |                 |
| Export frozen whole     | 31 580           | 735 007          | 1 023 504        | 993 762          | 593 688          | 552 279         |
| Export frozen fillets   | 1 157            | 115 766          | 104 555          | 123 961          | 116 012          | 47 549          |
| Export other            | 4                | 12 569           | 16 461           | 16 874           | 16 576           | 17 590          |
| <b>Export total</b>     | <b>841 312</b>   | <b>947 023</b>   | <b>1 144 520</b> | <b>1134 597</b>  | <b>726 276</b>   | <b>617 418</b>  |
| <b>Catch</b>            | <b>1 316 100</b> | <b>1 326 532</b> | <b>1 576 551</b> | <b>1 577 995</b> | <b>1 050 755</b> | <b>1032 384</b> |
| <b>% Export / Catch</b> | <b>64</b>        | <b>71</b>        | <b>73</b>        | <b>74</b>        | <b>69</b>        | <b>60</b>       |

*\*live weight*



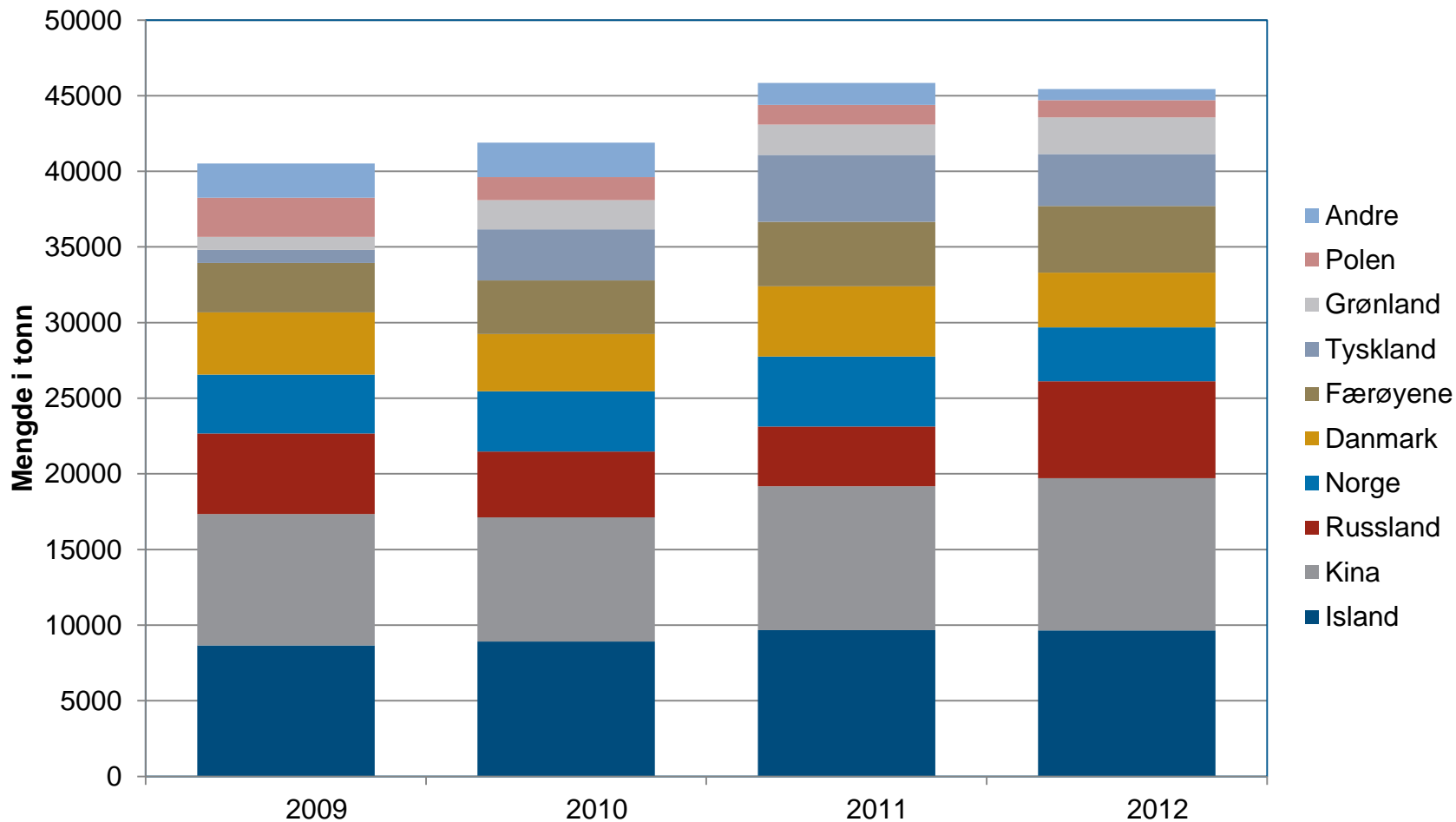
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# MARKED

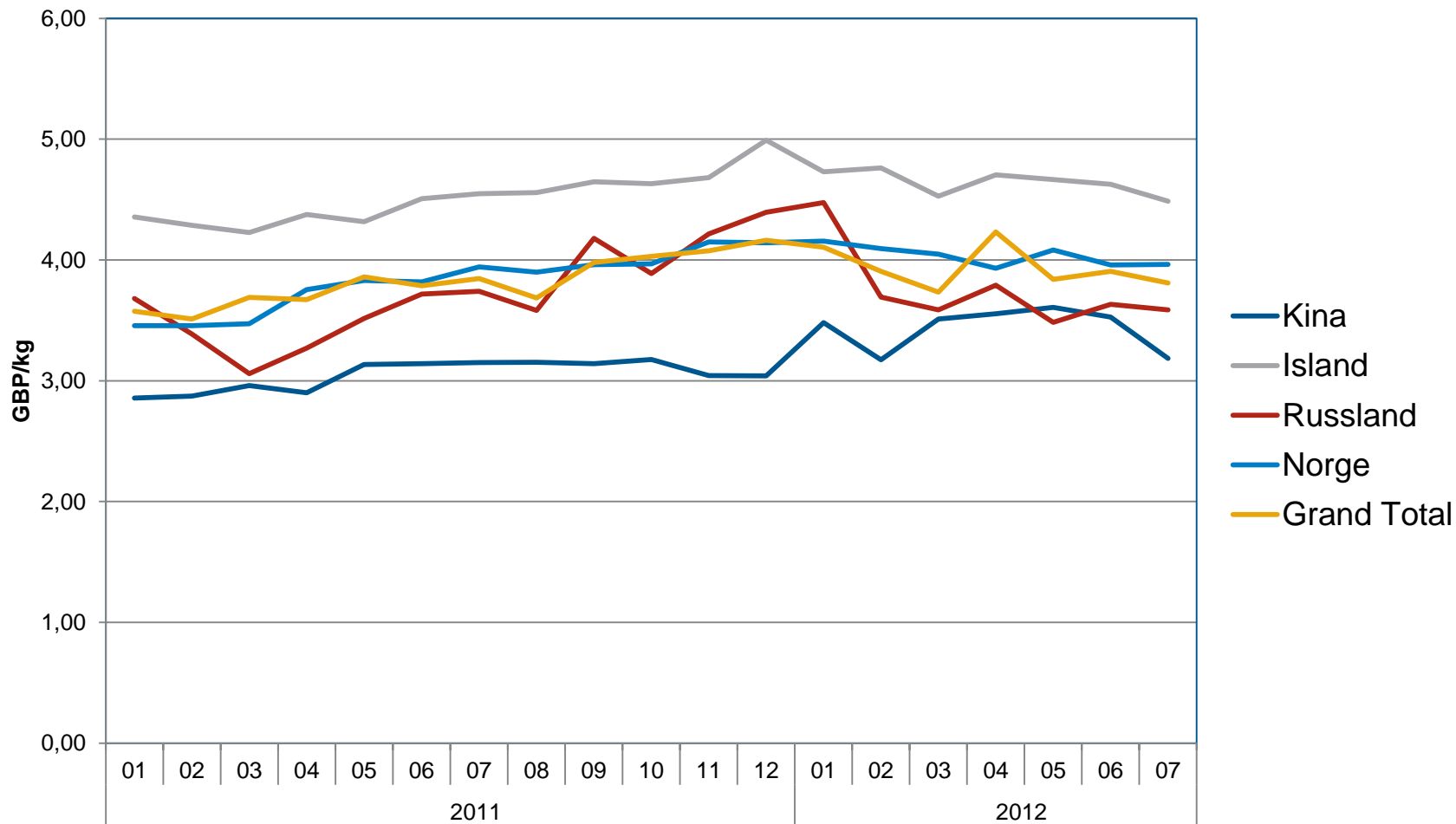
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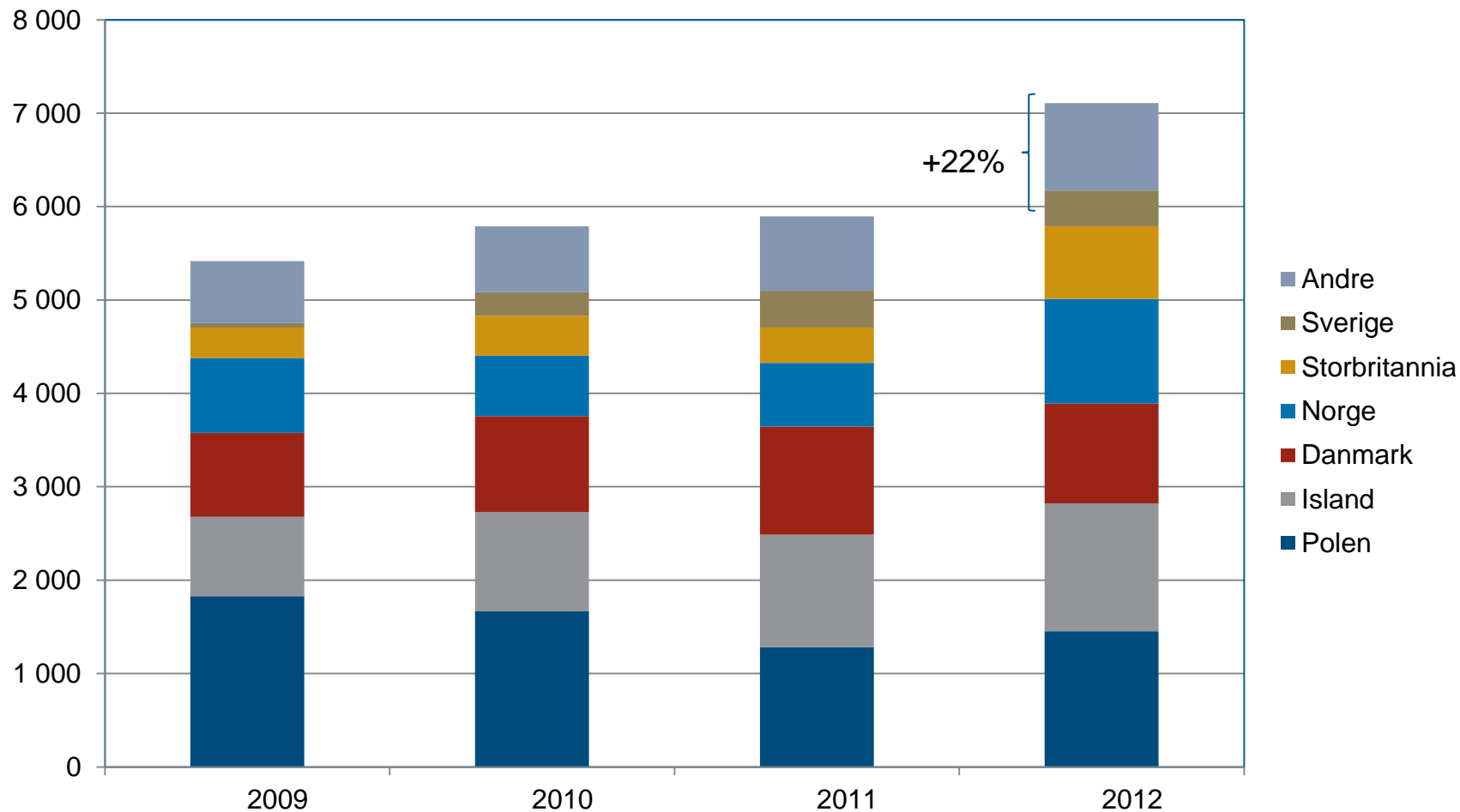
# UK FRYST FILET TORSK



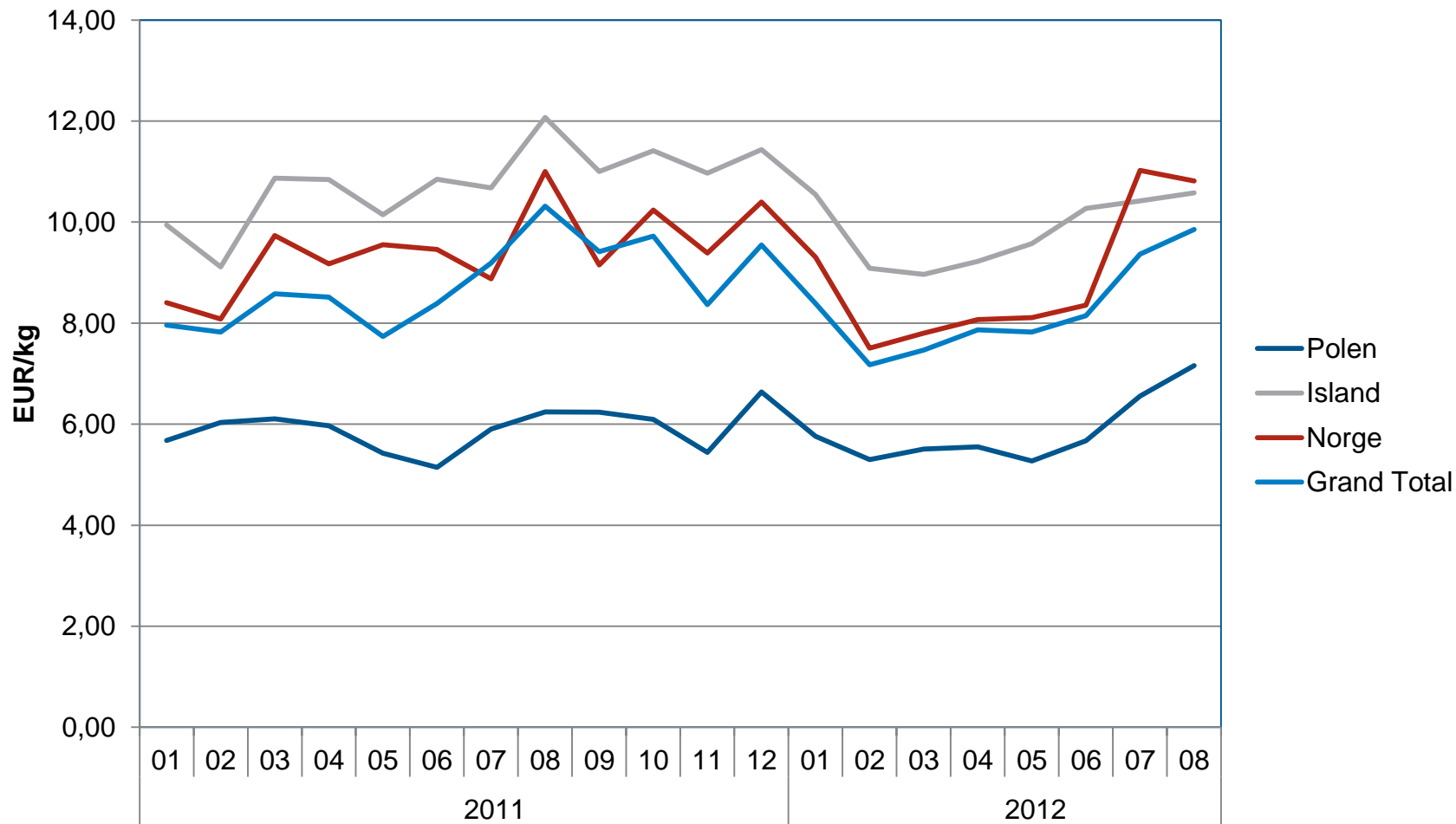
# UK FRYST FILET TORSK



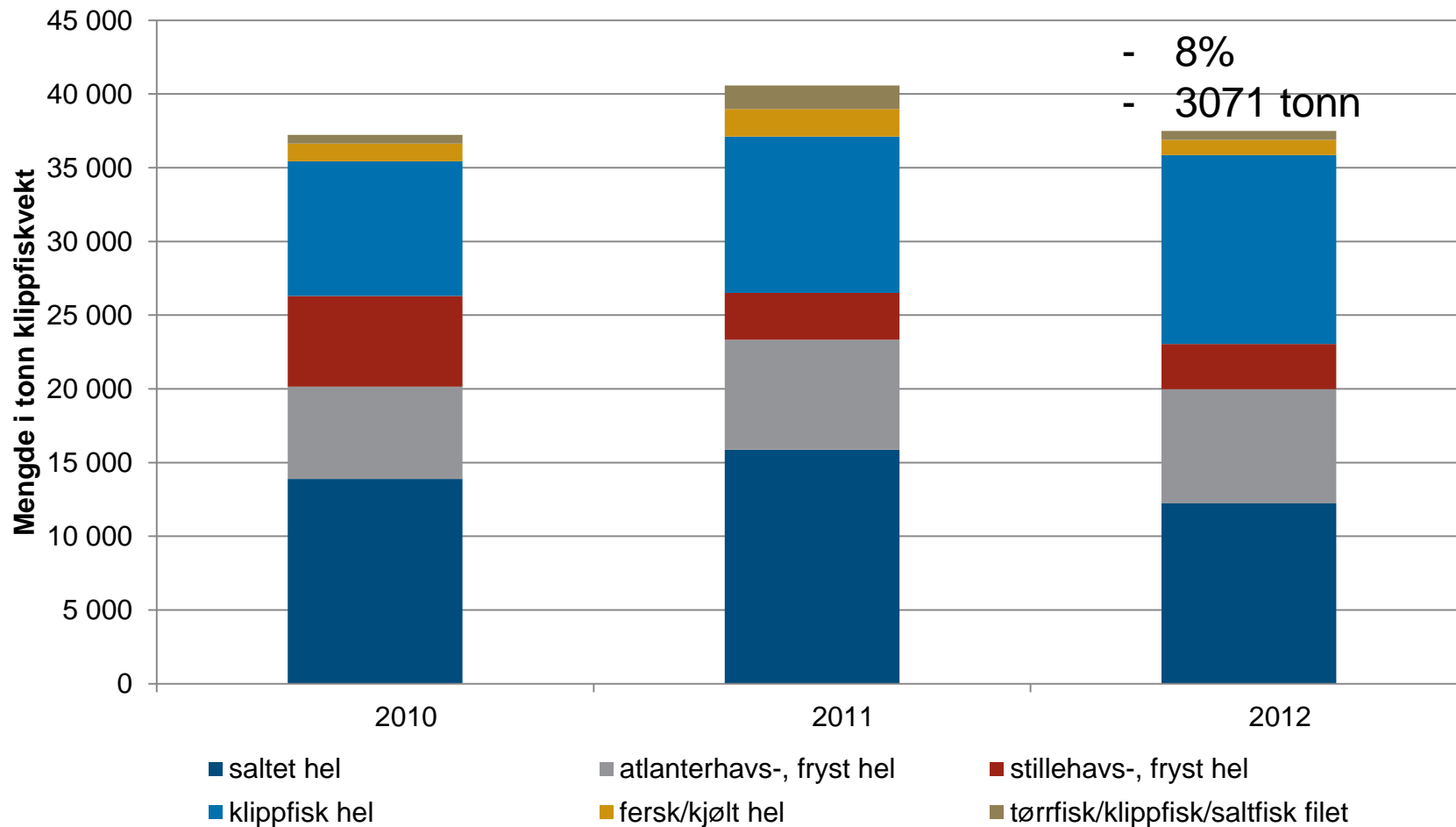
# FRANKRIKE FERSK TORSKEFILET



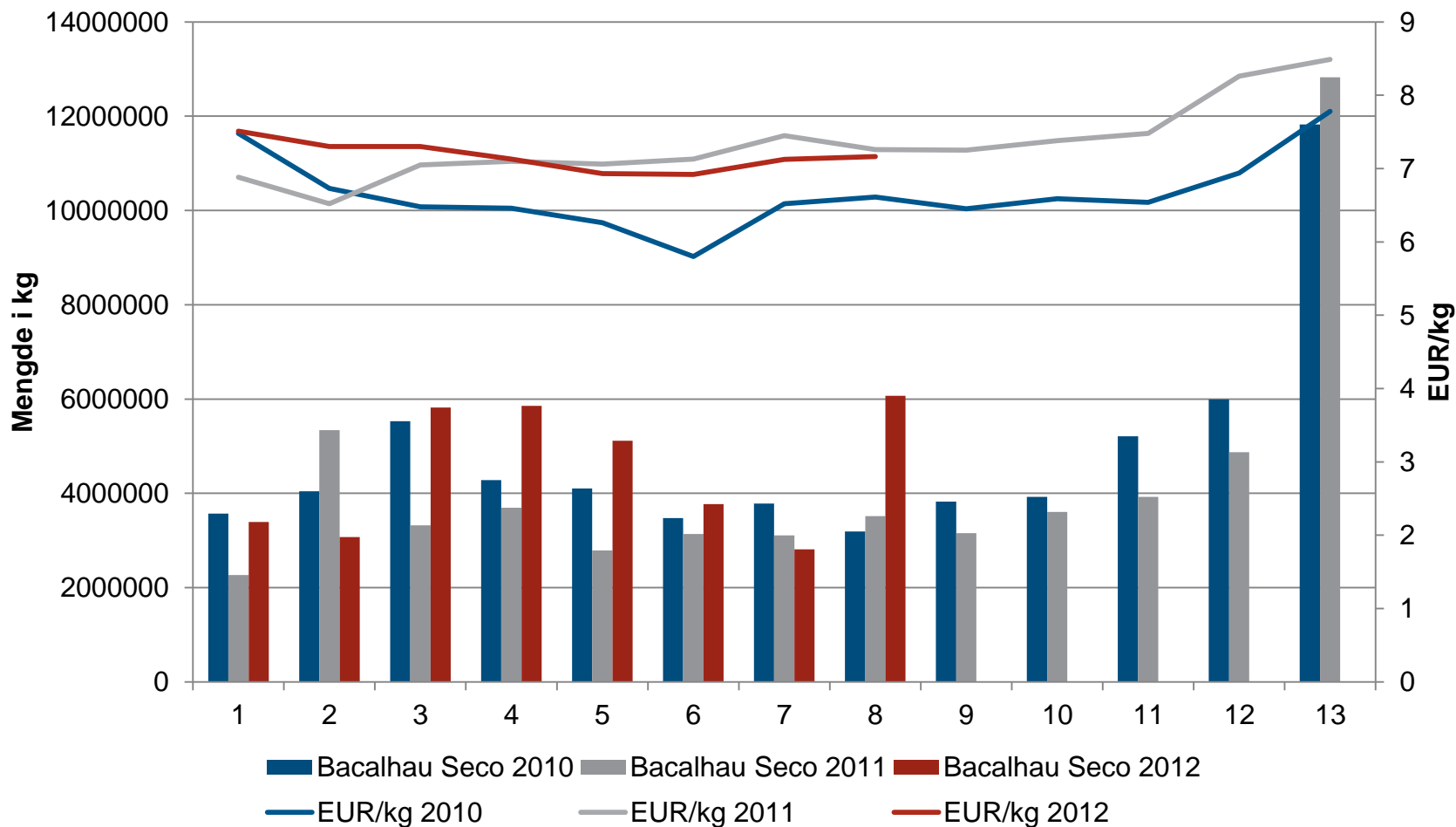
# FRANKRIKE FERSK TORSKEFILET



# PORTUGAL IMPORT TORSK 1. HALVÅR

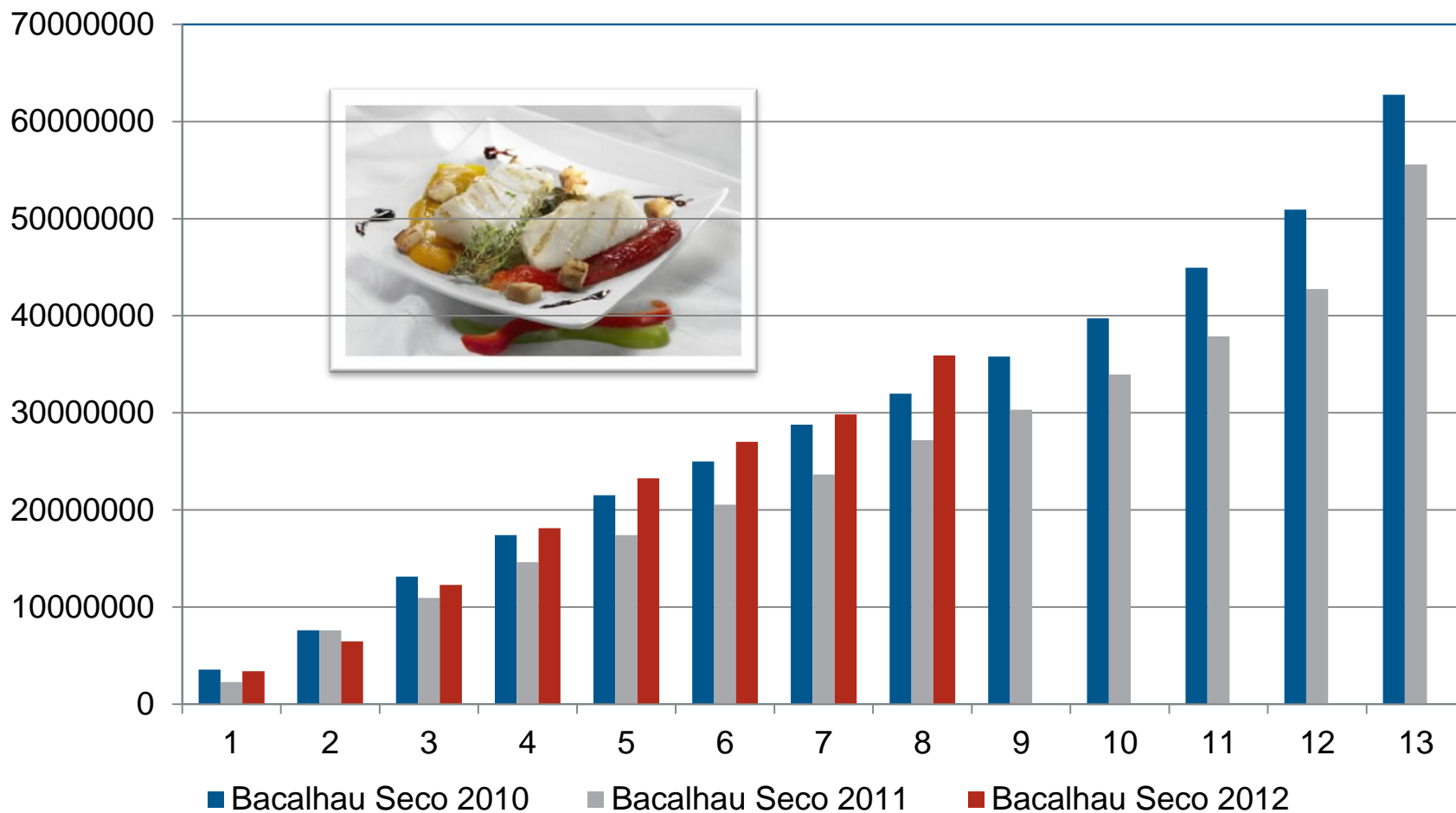


# HJEMMEKONSUM





# HJEMMEKONSUM

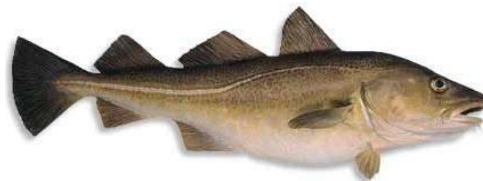


# PORTUGALS IMPORT AV TORSK FRA RUSSLAND

## 1. HALVÅR

|  | 2010         | 2011         | 2012         |
|--|--------------|--------------|--------------|
| Torsk, atlantehavs-, fryst hel                     | 2 881        | 2 894        | 3 296        |
| Torsk, klippfisk, ikke filet/biprodukter*          | 566          | 1 074        | 2 273        |
| Torsk, atlantehavs-, fryst fiskekjøtt, ikke surimi | 0            | 124          | 106          |
| Torsk, atlantehavs-/grønlands-, fryst filet        | 0            | 0            | 7            |
| Torsk, saltet, ikke filet/biprodukter*             | 366          | 422          | 0            |
| <b>Grand Total</b>                                 | <b>3 823</b> | <b>4 514</b> | <b>5 682</b> |

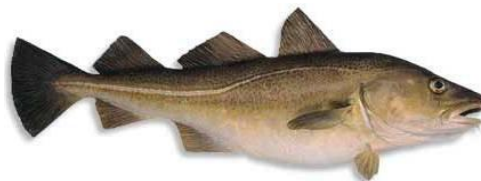
Mengde i tonn



# PORTUGAL EKSPORT TORSK 1. HALVÅR

|                                    | 2010        | 2011        | 2012        |
|------------------------------------|-------------|-------------|-------------|
| konvensjonell *                    | 5146        | 4722        | 4705        |
| <b>klippfisk hel *</b>             | <b>3534</b> | <b>3337</b> | <b>2942</b> |
| AFRIKA                             | 230         | 397         | 332         |
| ASIA                               | 44          | 27          | 28          |
| EUROPA                             | 1177        | 962         | 1088        |
| NORD-AMERIKA                       | 78          | 53          | 48          |
| OCEANIA                            | 10          | 10          | 21          |
| SØR-AMERIKA                        | 1995        | 1888        | 1425        |
| UKJENT                             |             |             |             |
| <b>saltet hel, konvensjonell *</b> | <b>821</b>  | <b>916</b>  | <b>767</b>  |
| AFRIKA                             | 0           | 42          | 47          |
| ASIA                               | 56          | 1           | 2           |
| EUROPA                             | 765         | 873         | 718         |
| NORD-AMERIKA                       | 0           |             |             |
| OCEANIA                            |             |             |             |
| SØR-AMERIKA                        | 0           |             |             |

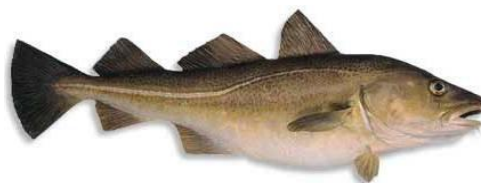
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# PORTUGAL EKSPORT TIL BRASIL 1. HALVÅR

|   | 2010        | 2011        | 2012        |
|---|-------------|-------------|-------------|
| Torsk, klippfisk, ikke filet/biprodukter*                   | 1970        | 1863        | 1350        |
| Torsk, atlantehavs-, fryst hel                              | 111         | 246         | 580         |
| Annen fisk, tørket/tørket & saltet, ikke filet/biprodukter* | 441         | 96          | 453         |
| Torsk, stillehavs-, fryst hel                               | 329         | 792         | 439         |
| Torsk, atlantehavs-, fryst fiskekjøtt, ikke surimi          | 235         | 612         | 357         |
| Torsk, stillehavs-, fryst fiskekjøtt, ikke surimi           | 318         | 602         | 306         |
| Sei, fryst hel  | 302         | 241         | 159         |
| Torsk, atlantehavs-/grønlands-, fryst filet                 |             |             | 83          |
| Torsk, tilberedt/konservert, hel/stykker                    | 1           | 2           | 55          |
| Alaska pollock, fryst fiskekjøtt, ikke surimi               |             |             | 47          |
| Torsk, stillehavs-, tørrfisk/klippfisk/saltfisk filet       |             |             | 13          |
| Torsk, fersk filet  |             |             | 9           |
| Lange, fryst hel  | 13          | 14          |             |
| Alaska pollock, fryst filet                                 |             | 14          |             |
| <b>Grand Total *</b>  | <b>3913</b> | <b>4744</b> | <b>4490</b> |

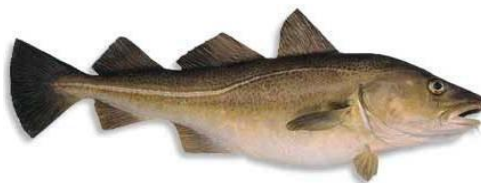
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# PORTUGAL EKSPORT TIL BRASIL 1. HALVÅR

|   | 2010        | 2011        | 2012        |
|---|-------------|-------------|-------------|
| Torsk, klippfisk, ikke filet/biprodukter                    | 1970        | 1863        | 1350        |
| Torsk, atlantehavs-, fryst hel                              | 111         | 246         | 580         |
| Annen fisk, tørket/tørket & saltet, ikke filet/biprodukter* | 441         | 96          | 453         |
| Torsk, stillehavs-, fryst hel                               | 329         | 792         | 439         |
| Torsk, atlantehavs-, fryst fiskekjøtt, ikke surimi          | 235         | 612         | 357         |
| Torsk, stillehavs-, fryst fiskekjøtt, ikke surimi           | 318         | 602         | 306         |
| Annet   |             |             |             |
| <b>Grand Total</b>  | <b>3913</b> | <b>4744</b> | <b>4490</b> |

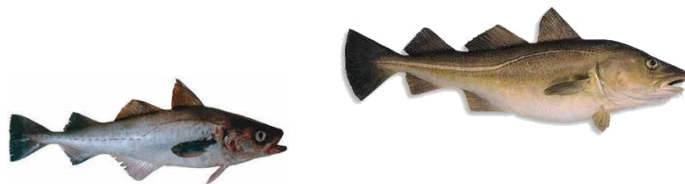
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# BRASIL IMPORT 1. HALVÅR

|                           | 2010    | 2011    | 2012    |
|---------------------------|---------|---------|---------|
| annen fisk                | 34 794  | 73 083  | 31 504  |
| haifisk                   | 11 807  | 13 459  | 13 933  |
| flyndrefisk               | 41      |         | 401     |
| hvitfisk uten flyndrefisk | 54 277  | 52 253  | 86 638  |
| laksefisk                 | 20 490  | 21 860  | 36 442  |
| pelagisk uten tunfisk     | 23 796  | 28 585  | 39 964  |
| tunfisk                   | 4 372   | 5 558   | 4 832   |
| Grand Total *             | 152 026 | 199 047 | 216 446 |

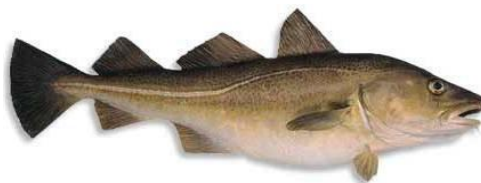
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# BRASIL IMPORT FRA PORTUGAL 1. TERTIAL

|                             | 2010         | 2011          | 2012         |
|-----------------------------|--------------|---------------|--------------|
| torsk                       | 3 166        | 4 706         | 4 159        |
| annen fisk                  | 1 608        | 4 095         | 1 006        |
| annen hvitfisk              | 558          | 167           | 625          |
| pollack (lyr)               |              |               | 517          |
| blåhai                      |              | 841           | 469          |
| annen pelagisk uten tunfisk | 100          | 111           | 190          |
| sei                         | 154          | 141           | 134          |
| sardin                      | 30           | 21            | 45           |
| hake (lysing)               |              | 241           | 44           |
| andre torskfisker           |              |               | 28           |
| annen tunfisk/pelamide      | 27           | 19            | 26           |
| makrell                     |              |               | 0            |
| taggmakrell (hestemakrell)  |              |               | 0            |
| tannfisk                    | 16           | 3             |              |
| <b>Grand Total *</b>        | <b>5 667</b> | <b>10 363</b> | <b>7 290</b> |

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# HVA SKJER?

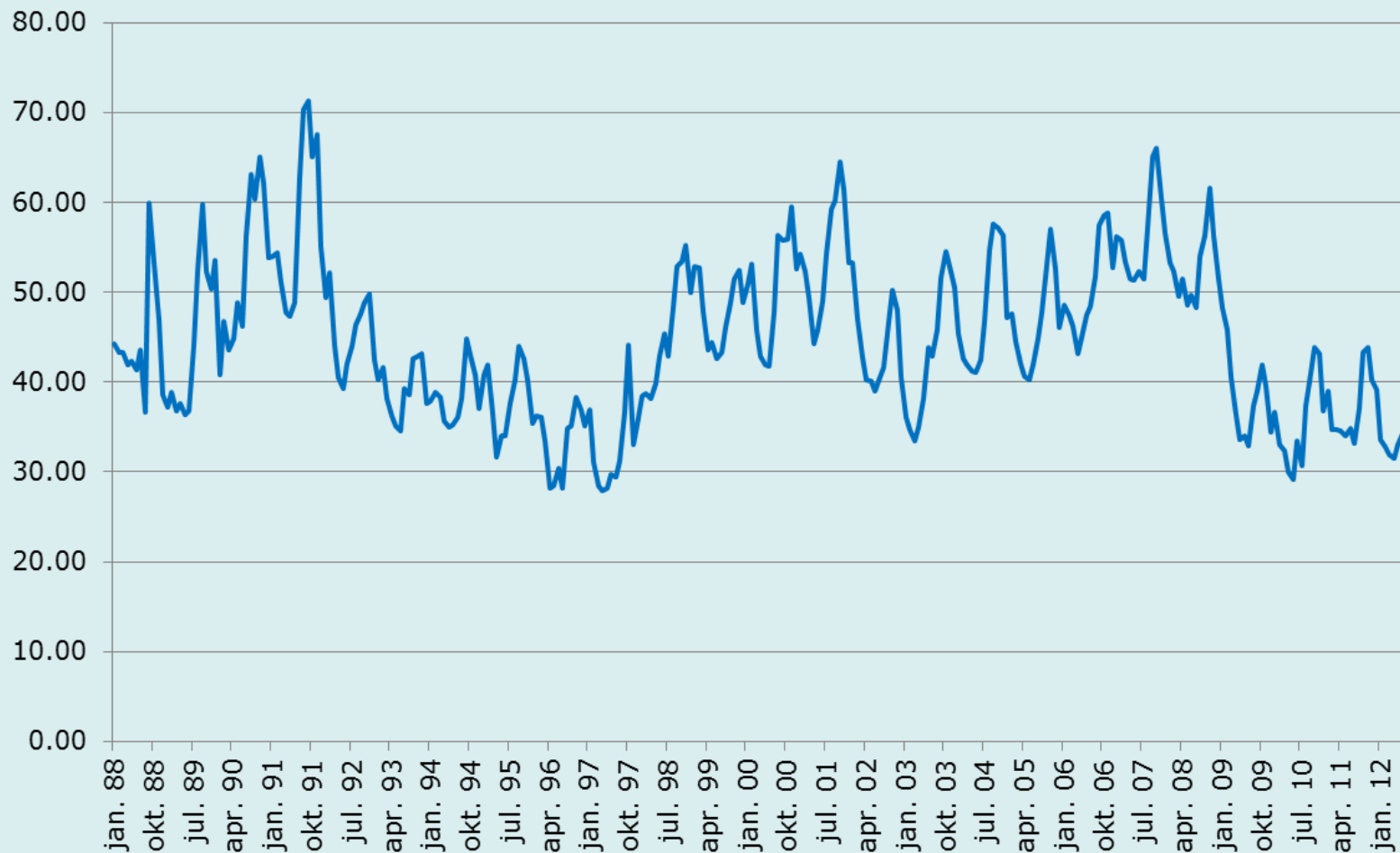
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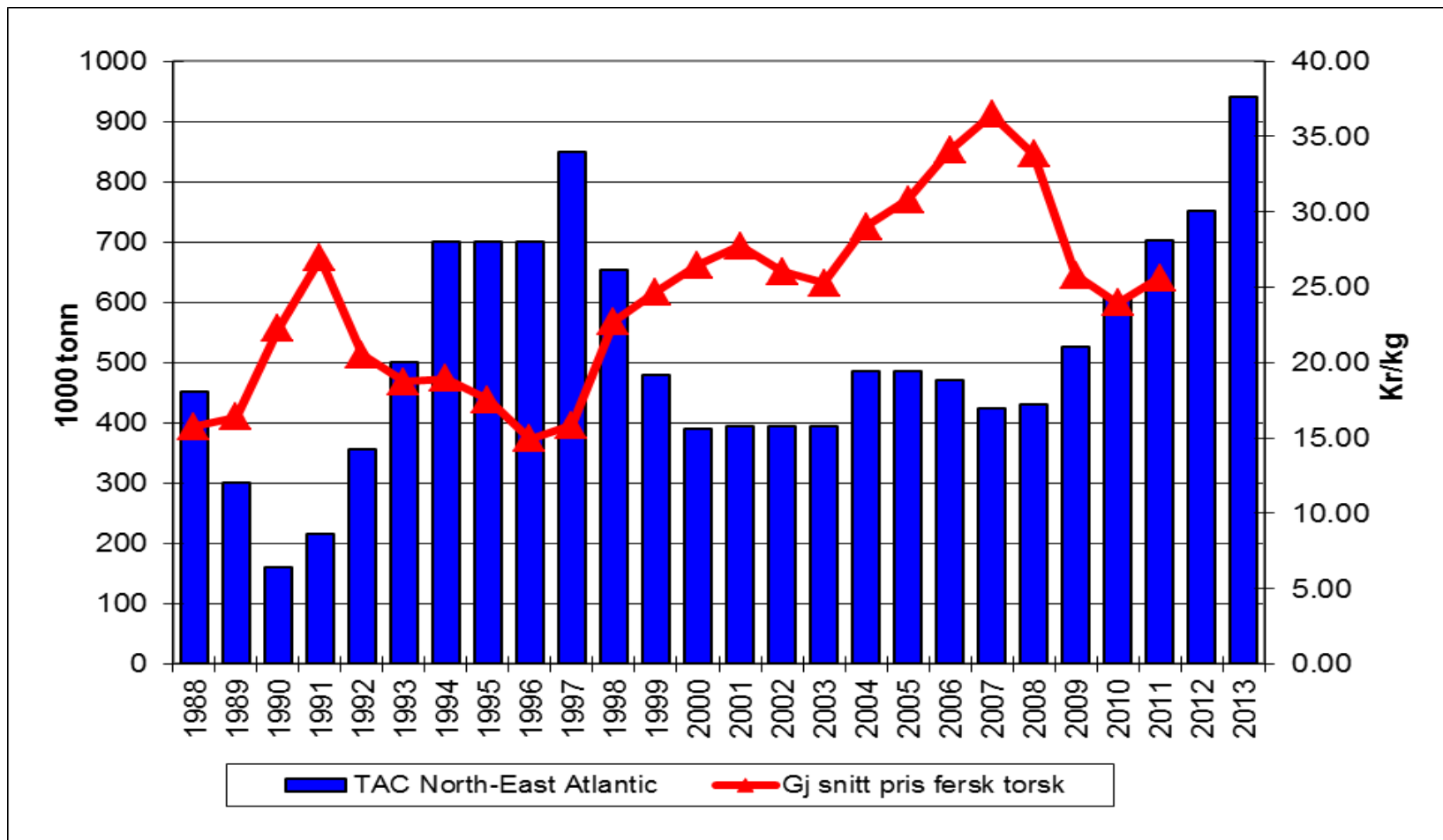
# EKSPORTPRIS SAMLET FOR ALL TORSK:

## NEST LAVESTE REELL PRIS SIDEN 1996-7.

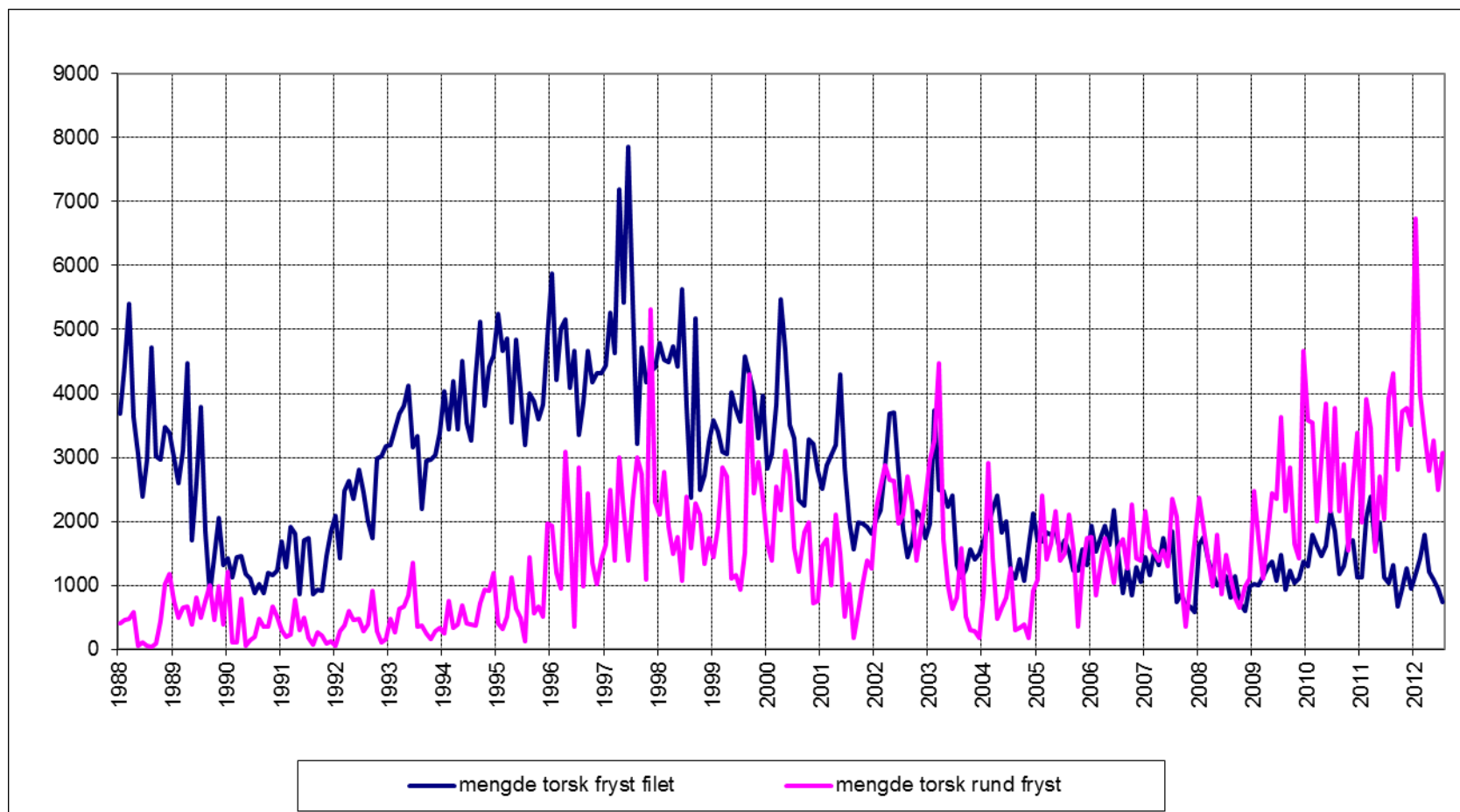
### SESONGSVINGNINGER SKYLDES PRODUKTSAMMENSETNING



# GJENNOMSNIITTLIG PRIS FERSK TORSK I FORHOLD TIL TAC: NEGATIV MEN IKKE SIGNIFIKANT SAMMENHENG PÅ ÅRSNIVÅ



# MENGDE SKIFTER FRA FRYST FILET TIL FRYST RUND

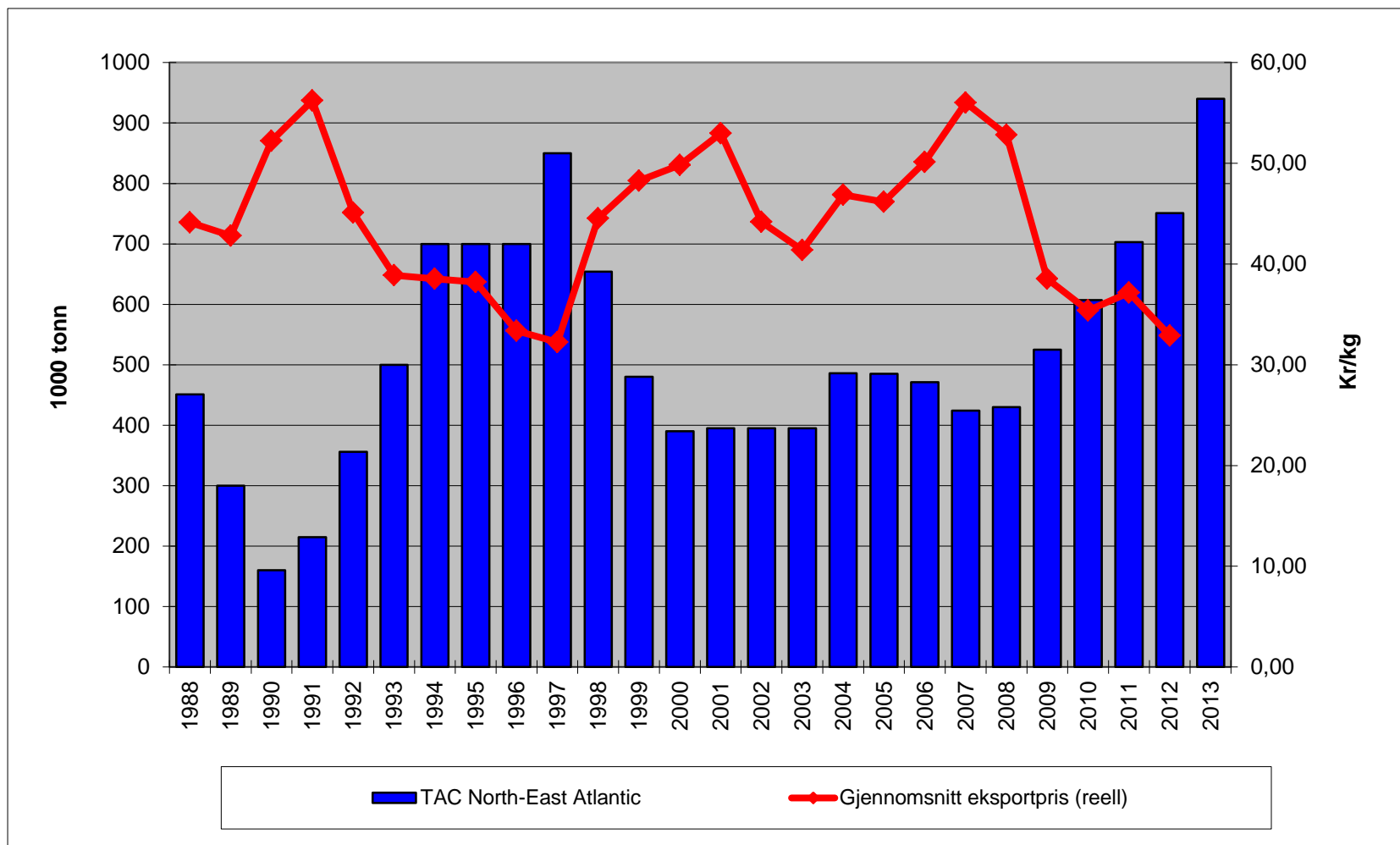


Norwegian Seafood Council

Seafood.no

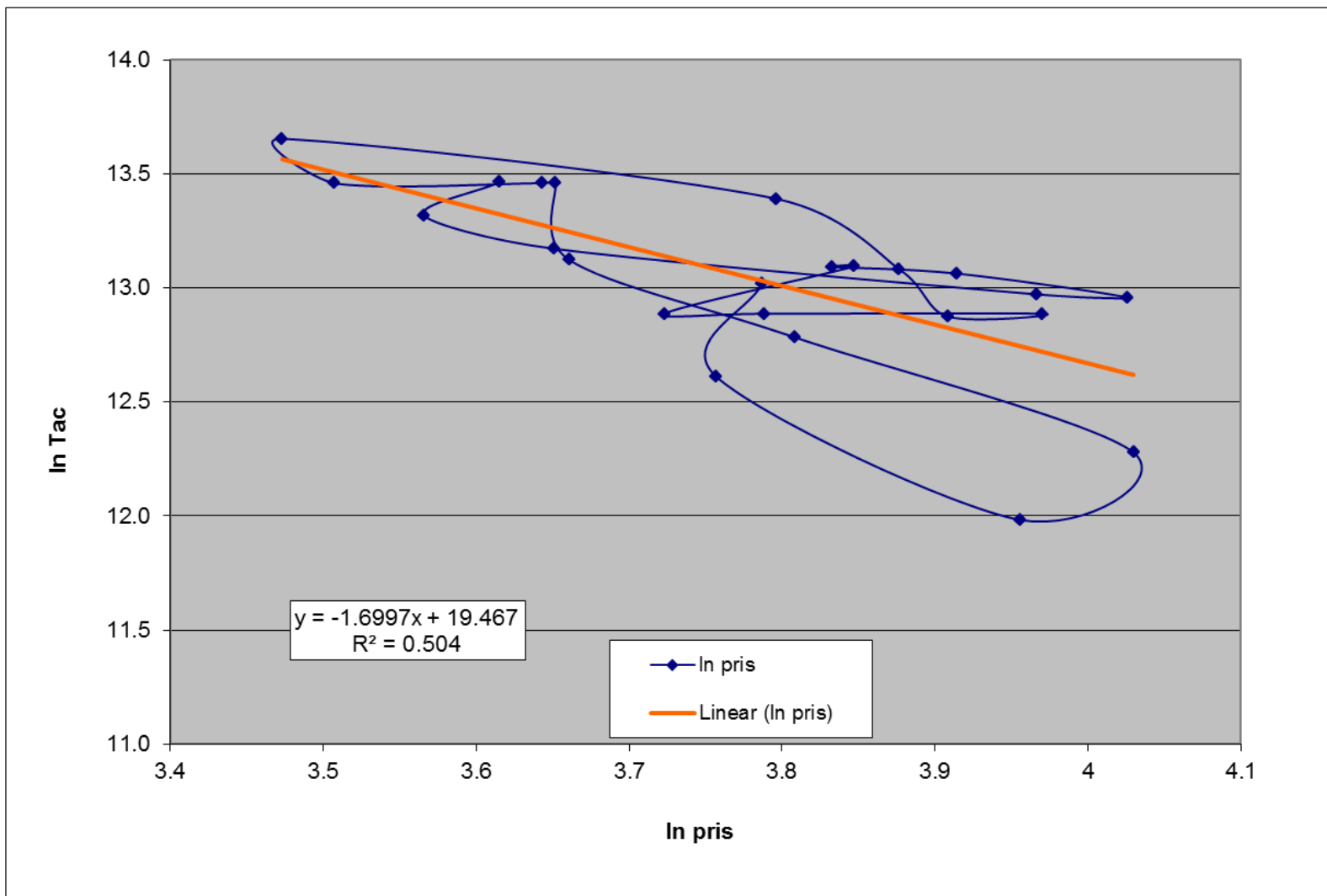


# SAMMENHENG TAC TORSK OG REALPRIS EKSPORT PER KG

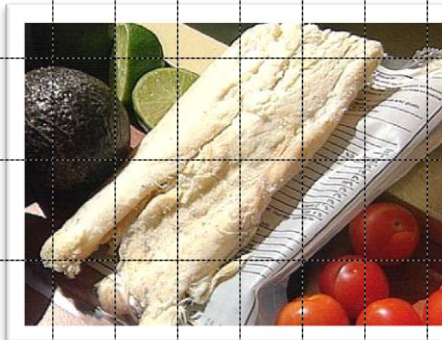
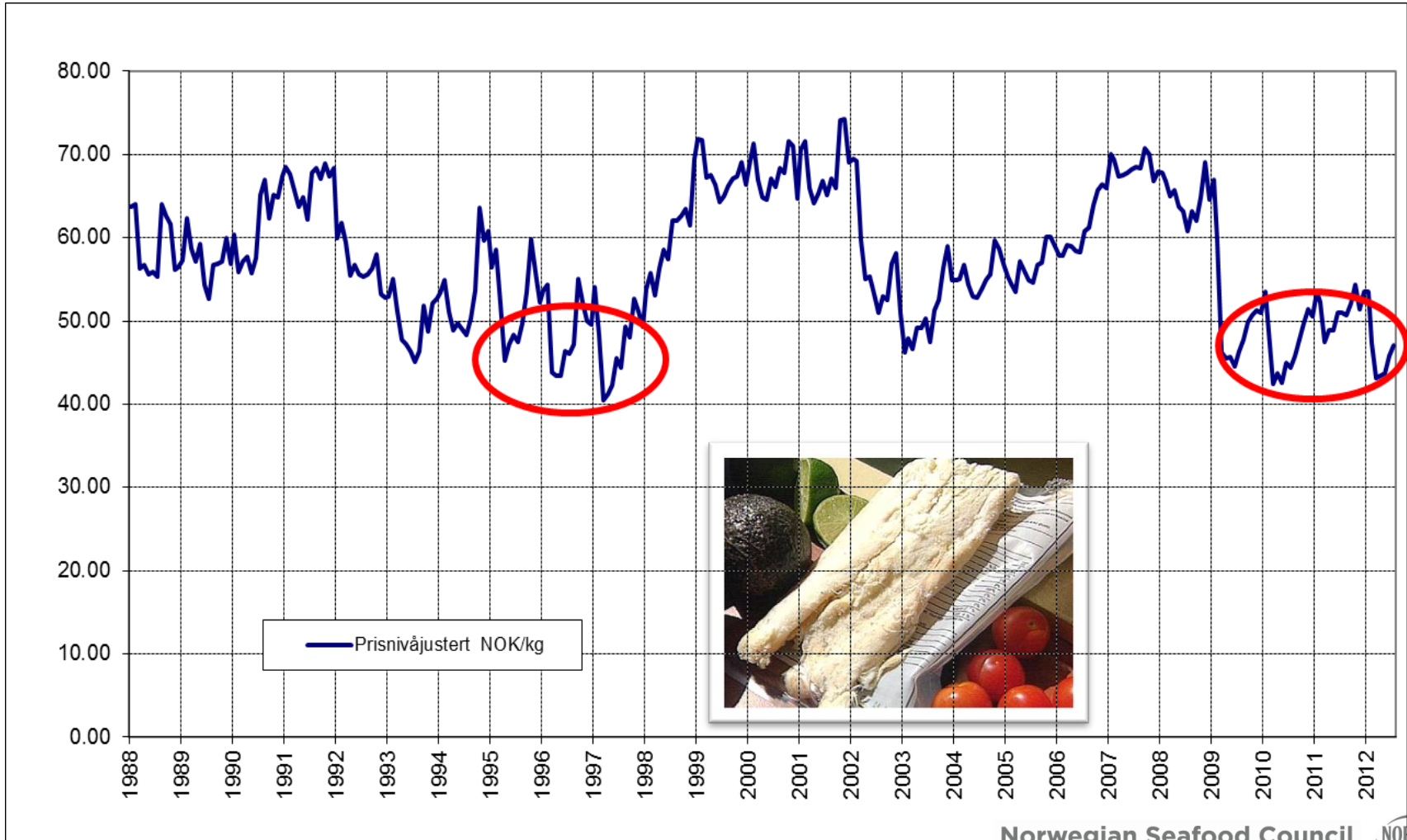


# PRISELASTISITET FOR PRODUKTPRIS MOT TAC ER:

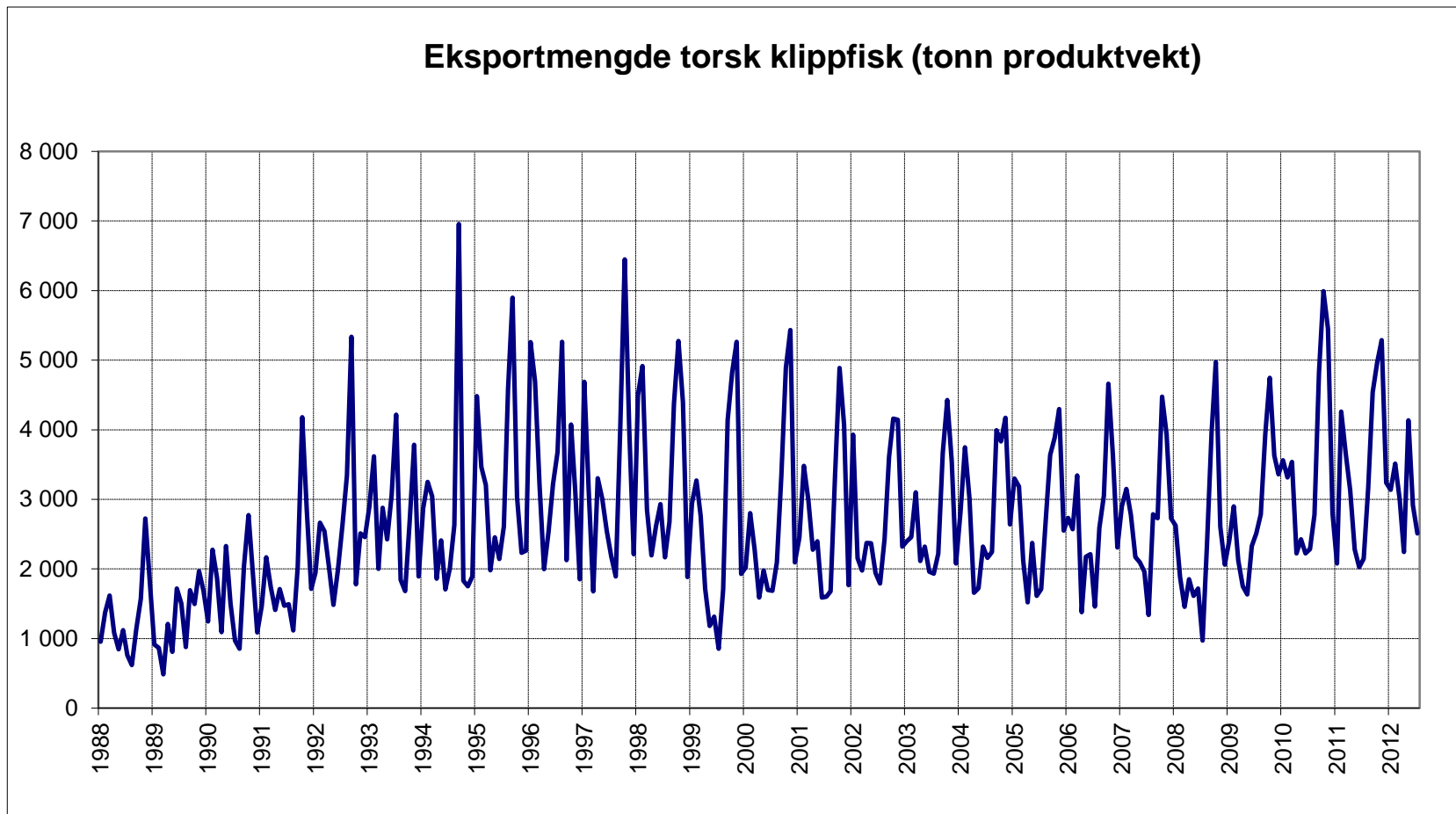
**-1.6997**



# KLIPPFISK: PRISNIVÅ LAVEST SIDEN 1997



# KLIPPFISK: SESONGFORDELT SALG, MEN FORHOLDSVIS UAVHENGIG AV TAC



# OPPSUMMERING

- Tilførsel – økning på torsk
- Produksjon
  - Kina har problemer
  - Russland øker filetproduksjonen
- Marked
  - Finanskrisen gir 'just in time' etterspørsel
  - Ingen endring i sjømatkonsumet
  - Endring mellom arter?
- 2013



Seafood from Norway.  
Raised in clear, cold water.

