

# Norsk Akvakultur 1 million tonn i 2010 ?

v/ Ragnar Nystøyl

Kontali analyse 2



Sjømatdagene 2010

Rica Hell, Stjørdal  
19. Januar - 2010



# Et lite tilbakeblikk....

# Sjømat-Norge & Norsk Akvakultur i 2009



# Norsk sjømatnæring – 2009

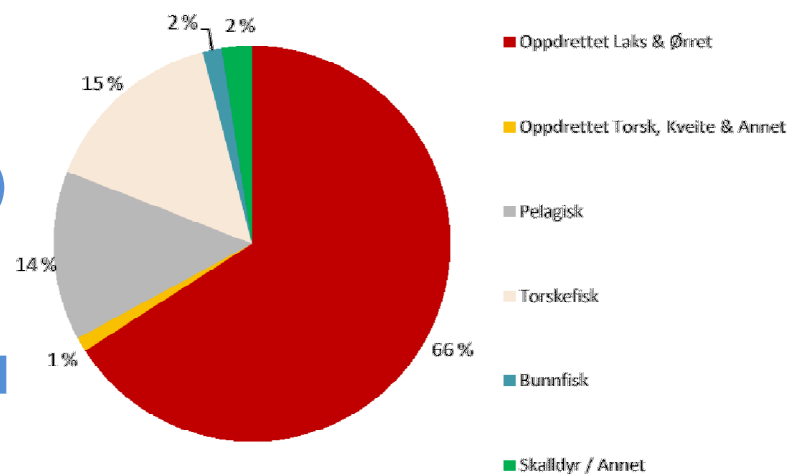
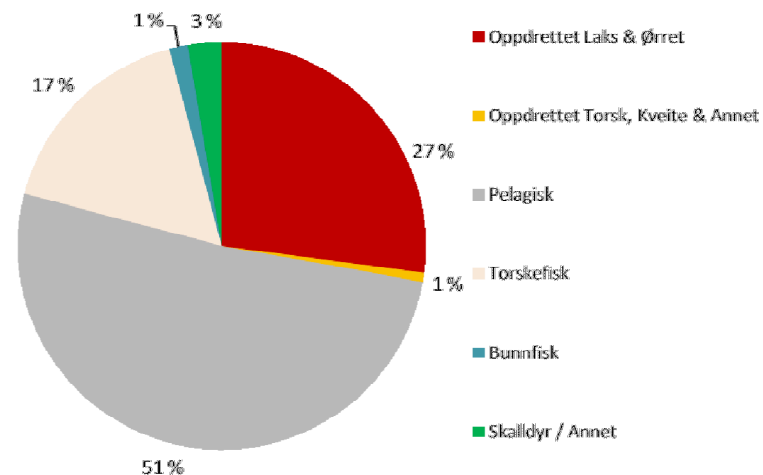
## Førstehåndsnivå

**2,5 mill tonn fra FISKERI (+ 90' tonn)**

**0,96 mill tonn fra AKVAKULTUR (+ 110' tonn)**

**11,0 Mrd NOK – 1.H verdi FISKERI (- 1,0 Mrd)**

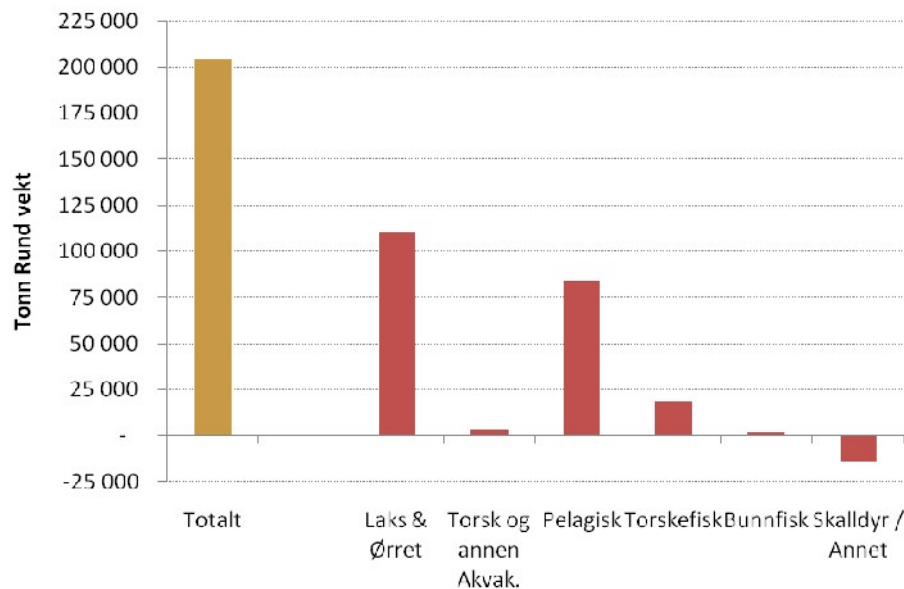
**22,5 Mrd NOK – ” ” AKVAKULTUR (+ 5,9 Mrd)**



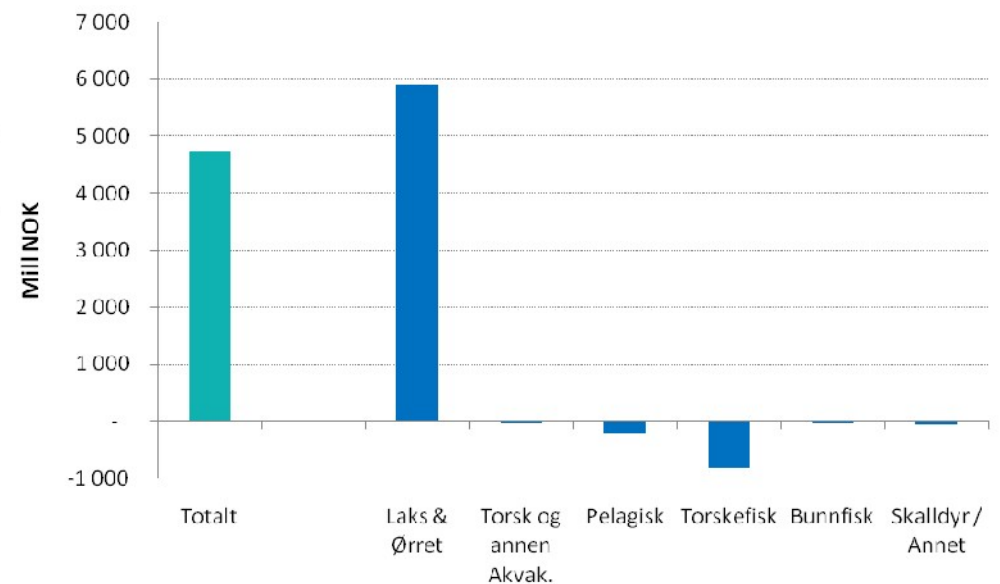
# Norsk Sjømatnæring - 09 vs. 08

## Hvilke arter står for hhv. vekst og fall?

Volum-ændring



Verdi-ændring

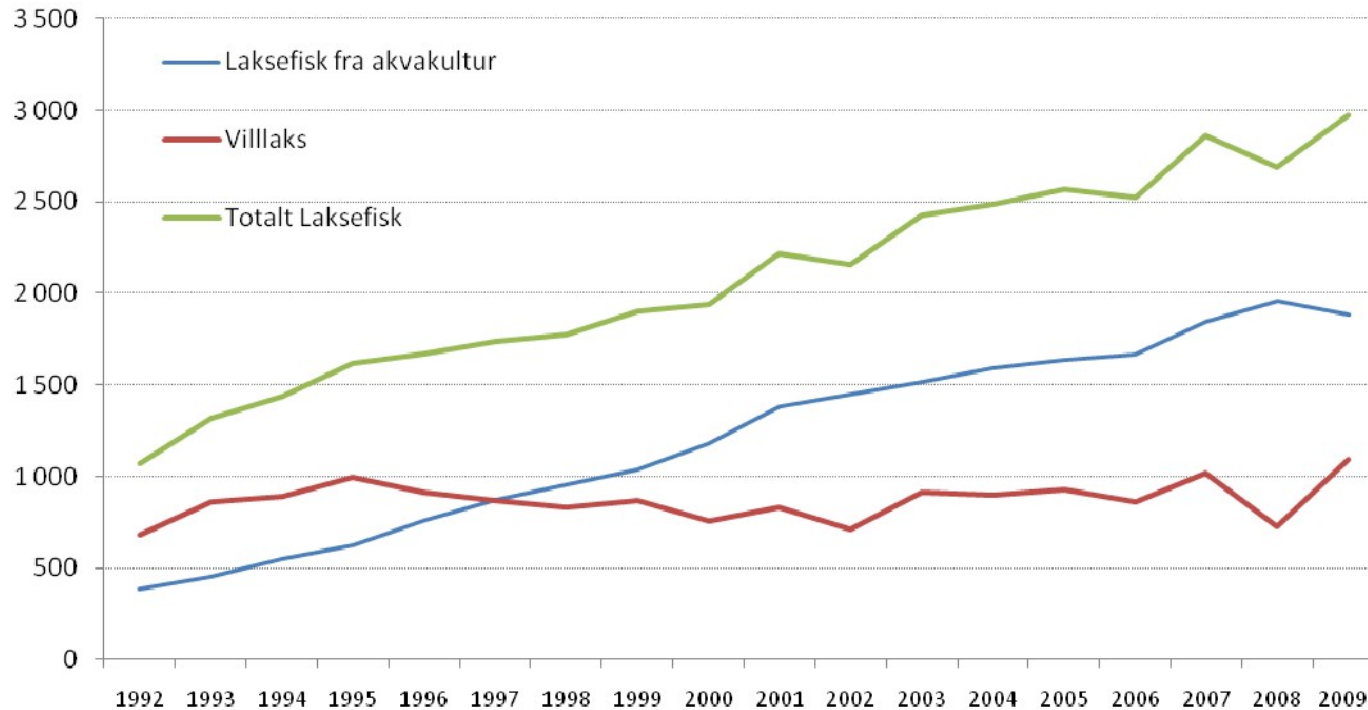




# Laks & Ørret

# Laksefisk – Det store bildet

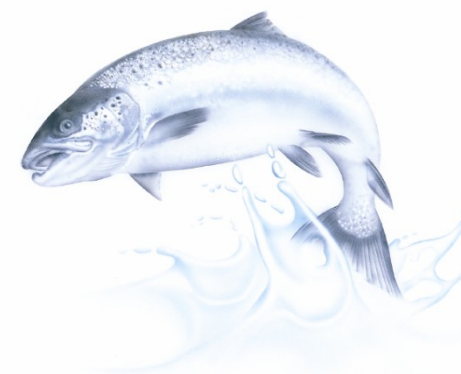
1000 Tonn r.w.



Laks & ørret fra akvakultur: - 80' tonn  
Laks fra fiskerier: + 365' tonn  
+ 285' tonn

# Atlantisk Laks – 2009

## Salgskvantum & Markedsutvikling



### Salgskvantum

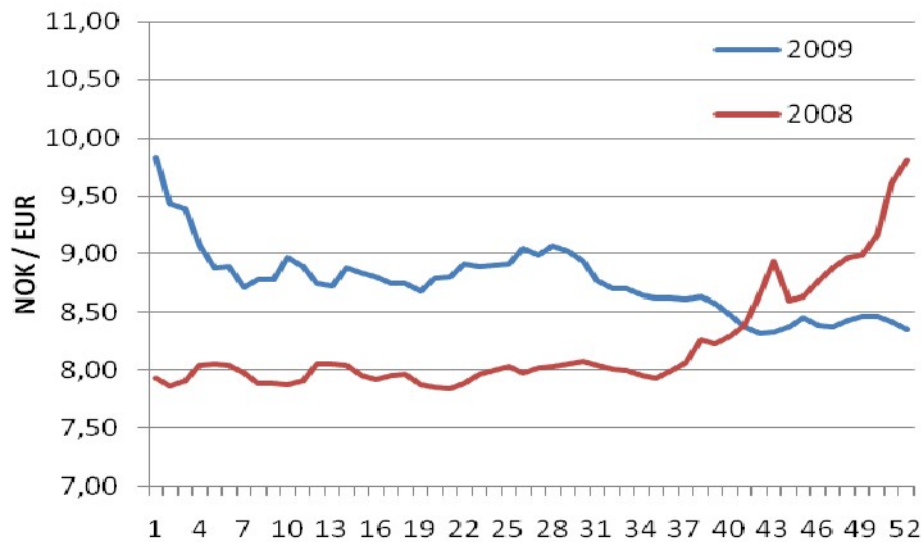
	2008	2009	Endr.
Norge	740	856	16 %
Chile	378	273	-28 %
UK	136	145	6 %
Nord-Amerika	136	130	-4 %
Færøyene	38	48	25 %
Andre	39	48	24 %
<b>Totalt</b>	<b>1467</b>	<b>1499</b>	<b>2 %</b>

### Markedsfordeling

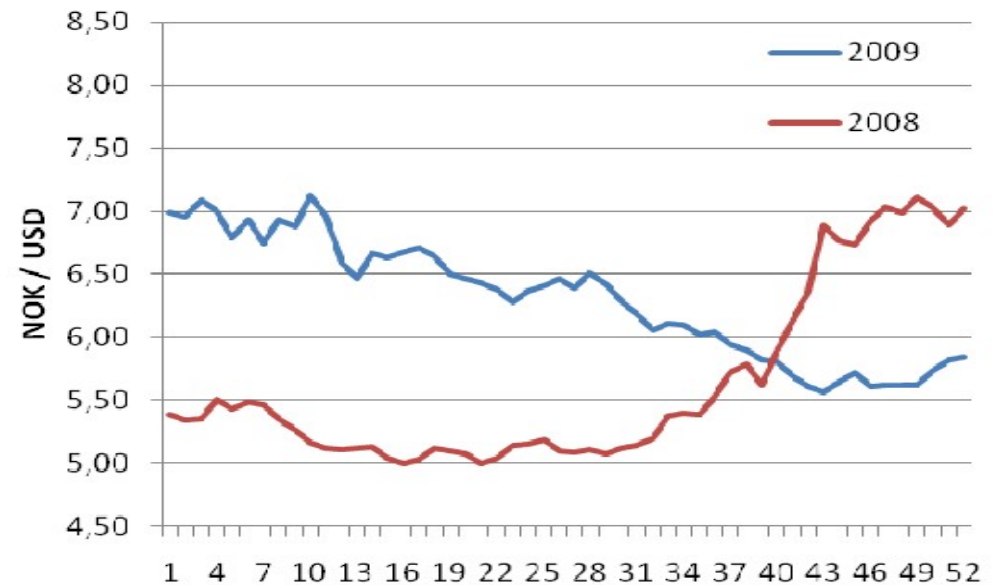
	2008	2009	Endr.
EU	737	769	4 %
USA	294	278	-5 %
Russland	75	78	4 %
Japan	47	40	-15 %
Andre	314	334	6 %
<b>Totalt</b>	<b>1467</b>	<b>1499</b>	<b>2 %</b>

# Valuta

## NOK / EUR



## NOK / USD

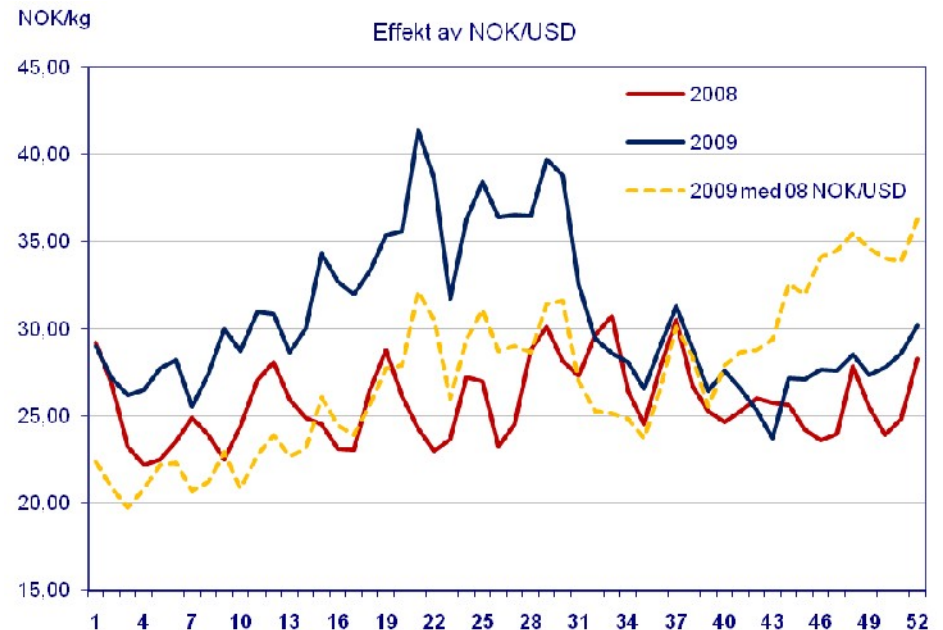
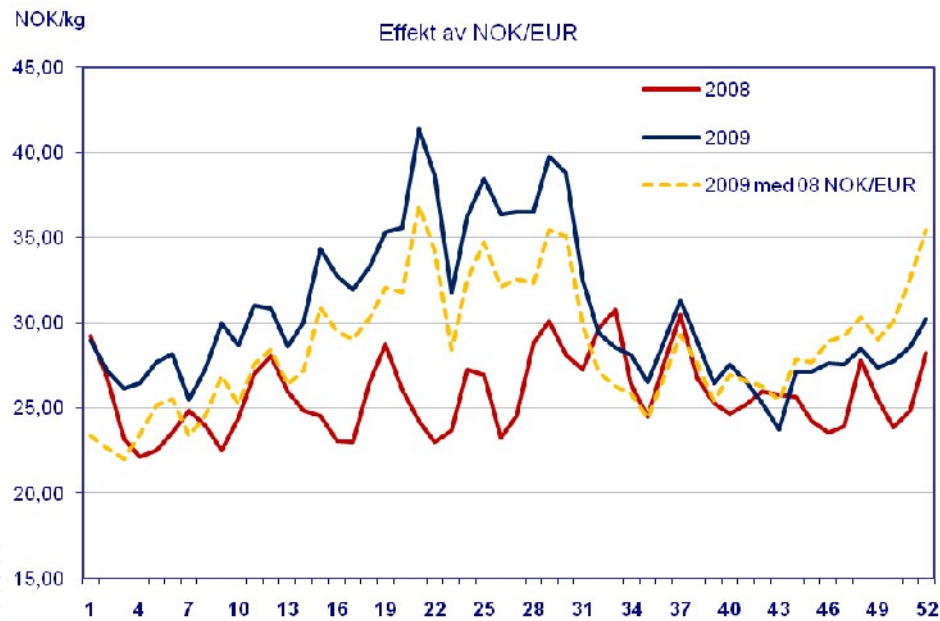




# Valuta - Effekt på førstehåndspris..

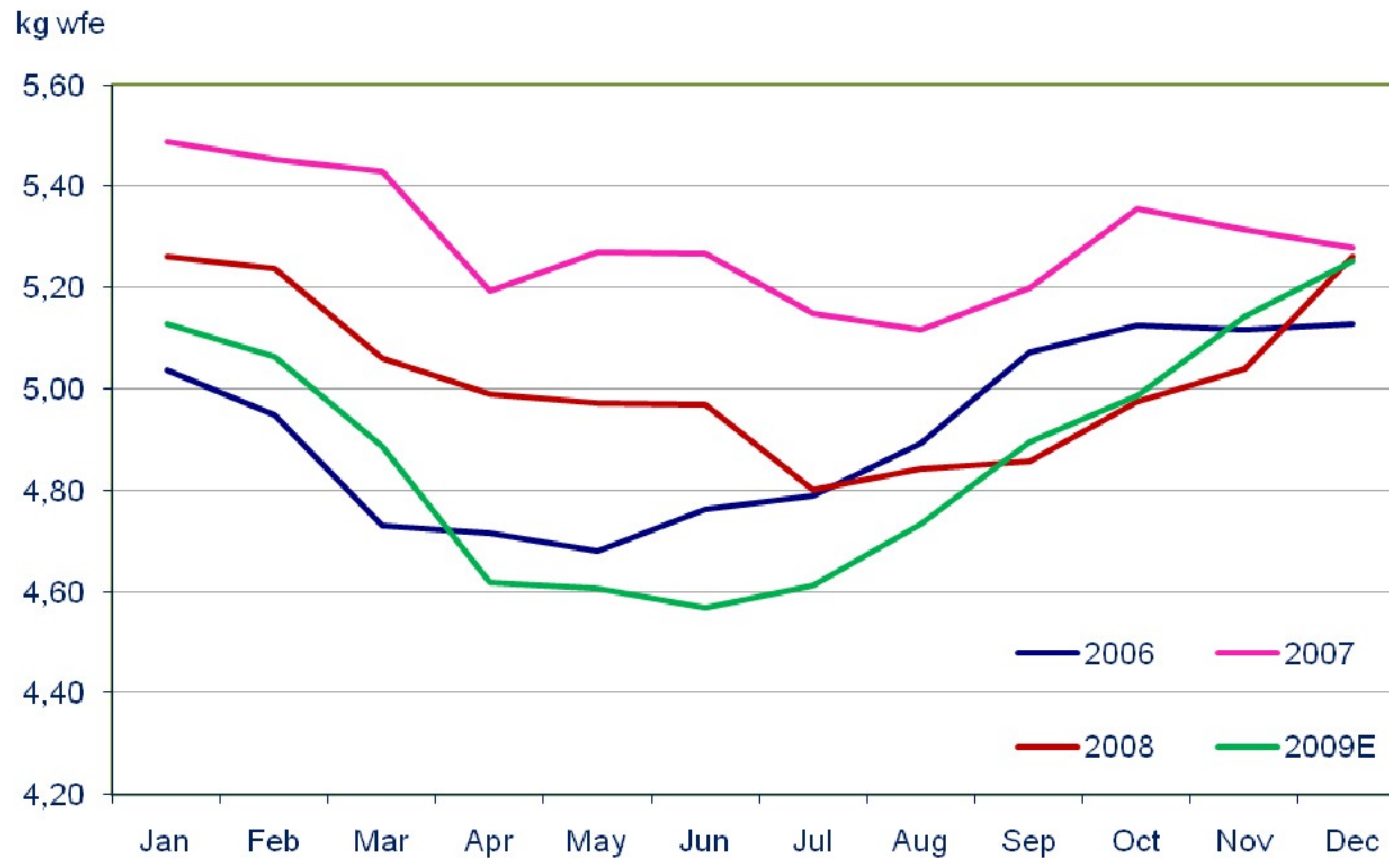
Hva ville prisen vært i 2009 dersom:

- Valuta som i 2008....
- Uendret pris til markedene...

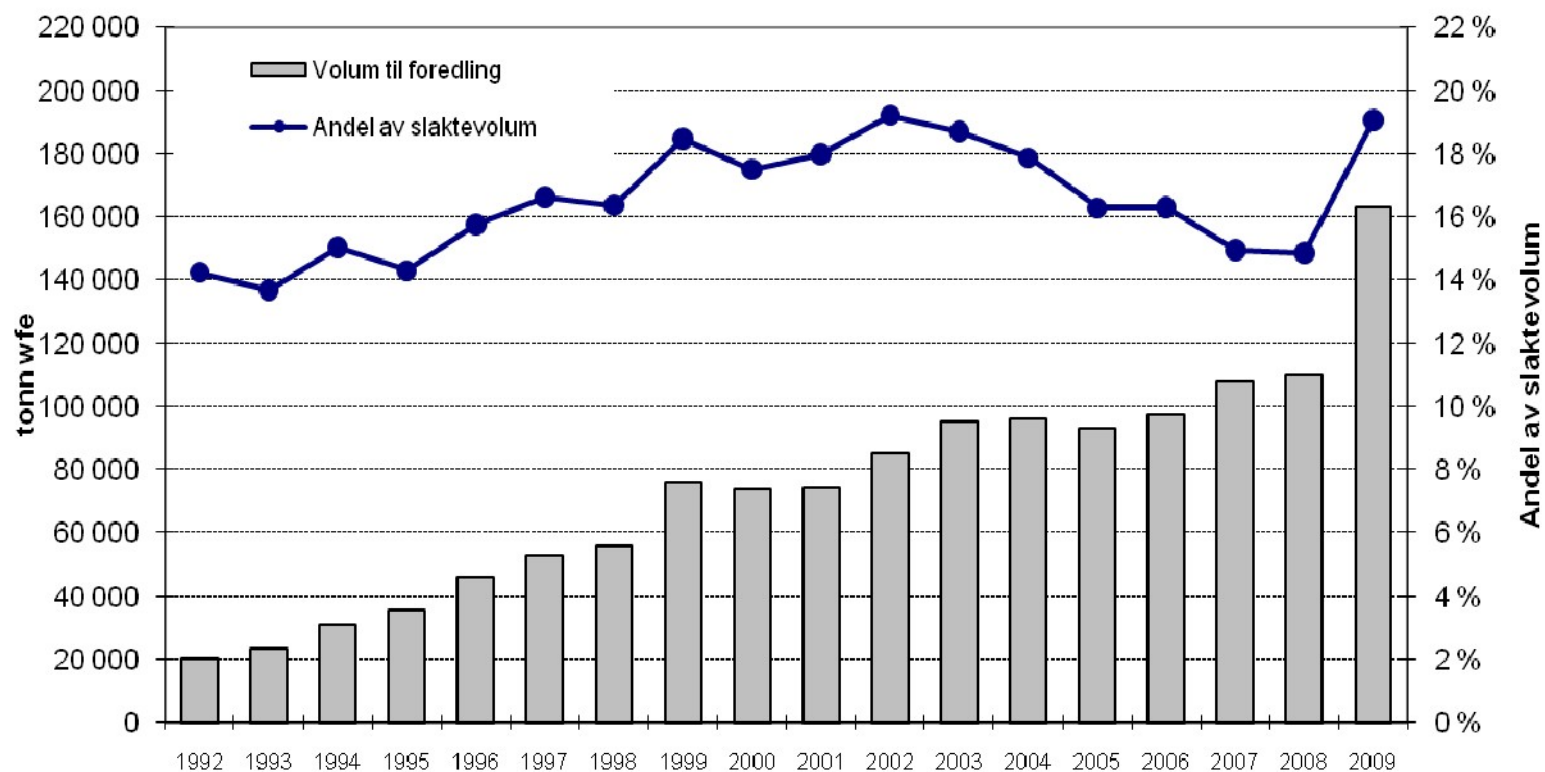


# Utvikling i slaktevevter 2009

## Atlantisk Laks - Norge



# Foredling / Filetering i Norge 2009 – Året for det store skiftet



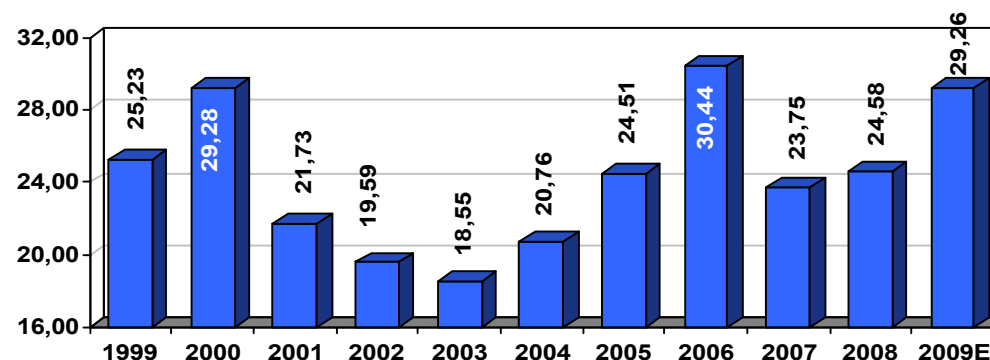
# Utviklingstrekk – Atlantisk Laks, Norge

1999 – 2009E

## Prisutvikling

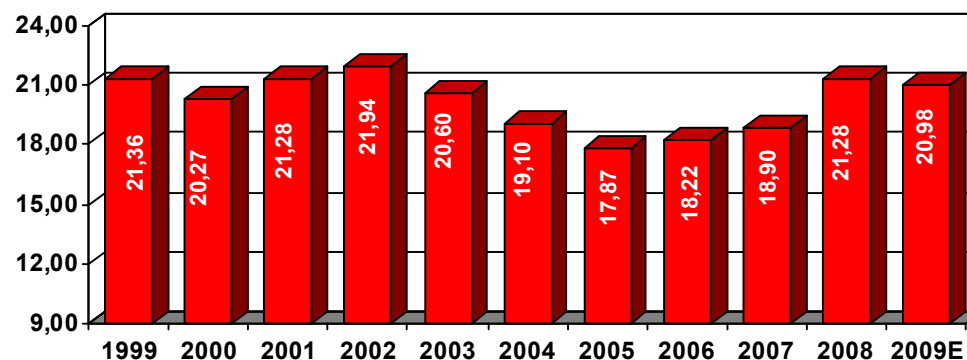
kr. / kg

(til oppdretter i Norge)



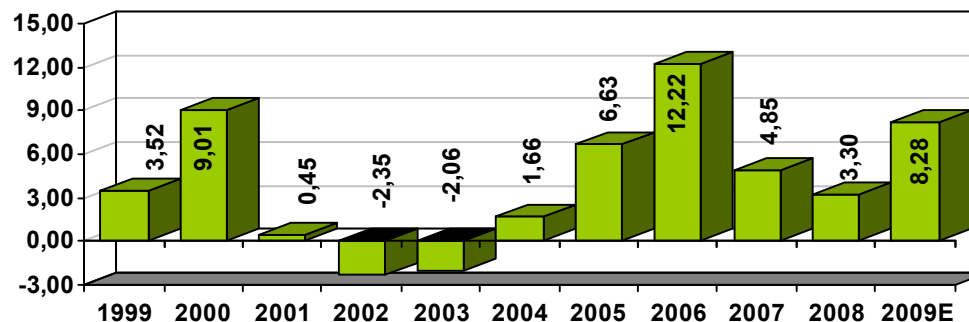
## Produksjonskostnader

pr. kg. levert slakteri,  
sløyd fisk



## Margin Norge kr./ kg

Estimat atlantisk laks  
pr. kg. sløyd fisk



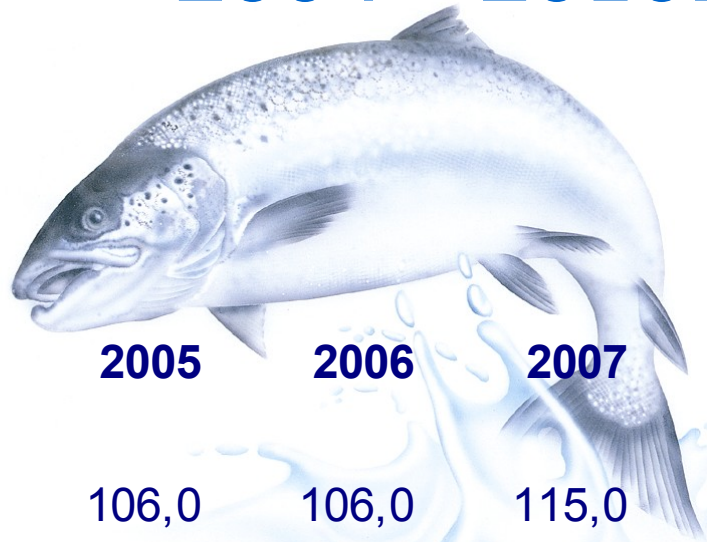
# Biomasse – Atlantisk Laks Norge

1000 FISH/TONNES WFE (ROUND BLEED WEIGHT)

Estimated stock per 2009-12-01					Stock per 2008-12-01					Change %
08 G	119 000	a	3,8	448 300	07 G	105 700	a	3,5	371 600	
09 G	213 200	a	0,8	168 400	08 G	212 800	a	0,7	156 300	
<b>Total stock (wfe)</b>					<b>Total stock (wfe)</b>					<b>17 %</b>
Harvested					Harvested					
93 400					74 000					
Net growth					Net growth					
74 300					63 300					
<b>Change</b>					<b>Change</b>					
<b>-19 100</b>					<b>-10 700</b>					
Estimated stock per 2009-12-31					Stock per 2008-12-31					
08 G	99 900	a	3,9	393 200	07 G	90 600	a	3,6	327 400	
09 g	212 600	a	1,0	204 400	08 G	212 300	a	0,9	189 800	
<b>Total stock (wfe)</b>					<b>Total stock (wfe)</b>					<b>16 %</b>
<b>597 600</b>					<b>517 200</b>					
Converted gutted weight					Converted gutted weight					
538 000					465 000					

# Smoltutsett - Atlantisk laks Norge

## 2004 - 2010E



*MILL. SMOLT*

	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009E</b>	<b>2010E</b>
S1	105,0	106,0	106,0	115,0	130,0	131,0	138,0
S0	47,0	56,0	76,0	92,0	100,0	106,0	112,0
<b>TOTAL</b>	<b>152,0</b>	<b>162,0</b>	<b>182,0</b>	<b>207,0</b>	<b>230,0</b>	<b>237,0</b>	<b>250,0</b>

# Chile – Nedgang i salgsvolum vil fortsette..

2009E: - 110' tonn wfe

	2008	2009E	Endring	Endr. i %
<b>USA / Canada</b>	184 000	113 000	-71 000	-39 %
<b>Brasil</b>	42 000	49 000	7 000	17 %
<b>Øvrige Sør- / Mellom-Amerika</b>	30 000	22 000	-8 000	-27 %
<b>EU</b>	68 000	40 000	-28 000	-41 %
<b>Russland</b>	6 000	5 000	-1 000	-17 %
<b>Japan</b>	14 000	7 000	-7 000	-50 %
<b>Øvrige Asia</b>	18 000	23 000	5 000	28 %
<b>Resten av verden</b>	18 000	11 000	-7 000	-39 %
	<b>380 000</b>	<b>270 000</b>	<b>-110 000</b>	<b>-29 %</b>

2010E: - 175' tonn wfe ?

	2009E	2010E	Endring	Endr. i %
<b>USA / Canada</b>	113 000	43 000	-70 000	-62 %
<b>Brasil</b>	49 000	20 000	-29 000	-59 %
<b>Øvrige Sør- / Mellom-Amerika</b>	22 000	8 000	-14 000	-64 %
<b>EU</b>	40 000	12 000	-28 000	-70 %
<b>Russland</b>	5 000	1 000	-4 000	-80 %
<b>Japan</b>	7 000	2 000	-5 000	-71 %
<b>Øvrige Asia</b>	23 000	6 000	-17 000	-74 %
<b>Resten av verden</b>	11 000	3 000	-8 000	-73 %
	<b>270 000</b>	<b>95 000</b>	<b>-175 000</b>	<b>-65 %</b>

# Utsikter – Atlantisk Laks

## Slaktevolum

	2008	2009	Endr.	2010E	Endr.
Norge	741	856	16 %	931	9 %
Chile	403	234	-42 %	92	-61 %
UK	136	145	6 %	141	-3 %
Nord-Amerika	136	130	-4 %	137	5 %
Færøyene	38	48	25 %	41	-14 %
Andre	39	49	26 %	50	3 %
<b>Totalt</b>	<b>1493</b>	<b>1462</b>	<b>-2 %</b>	<b>1392</b>	<b>-5 %</b>

## Markedsfordeling

	2008	2009	Endr.	2010E	Endr.
EU	737	769	4 %	778	1 %
USA	294	278	-5 %	235	-16 %
Russland	75	78	4 %	80	3 %
Japan	47	40	-15 %	38	-5 %
Andre	314	334	6 %	261	-22 %
<b>Totalt</b>	<b>1467</b>	<b>1499</b>	<b>2 %</b>	<b>1392</b>	<b>-7 %</b>



# Utsikter – Stor Ørret

## Salgskvantum

	2008	2009	Chg.	2010E	Chg.
Chile	180	148	-18 %	162	9 %
Norge	97	80	-17 %	65	-19 %
EU	43	43	0 %	44	2 %
Andre	22	25	10 %	17	-29 %
<b>Totalt</b>	<b>342</b>	<b>296</b>	<b>-14 %</b>	<b>288</b>	<b>-3 %</b>

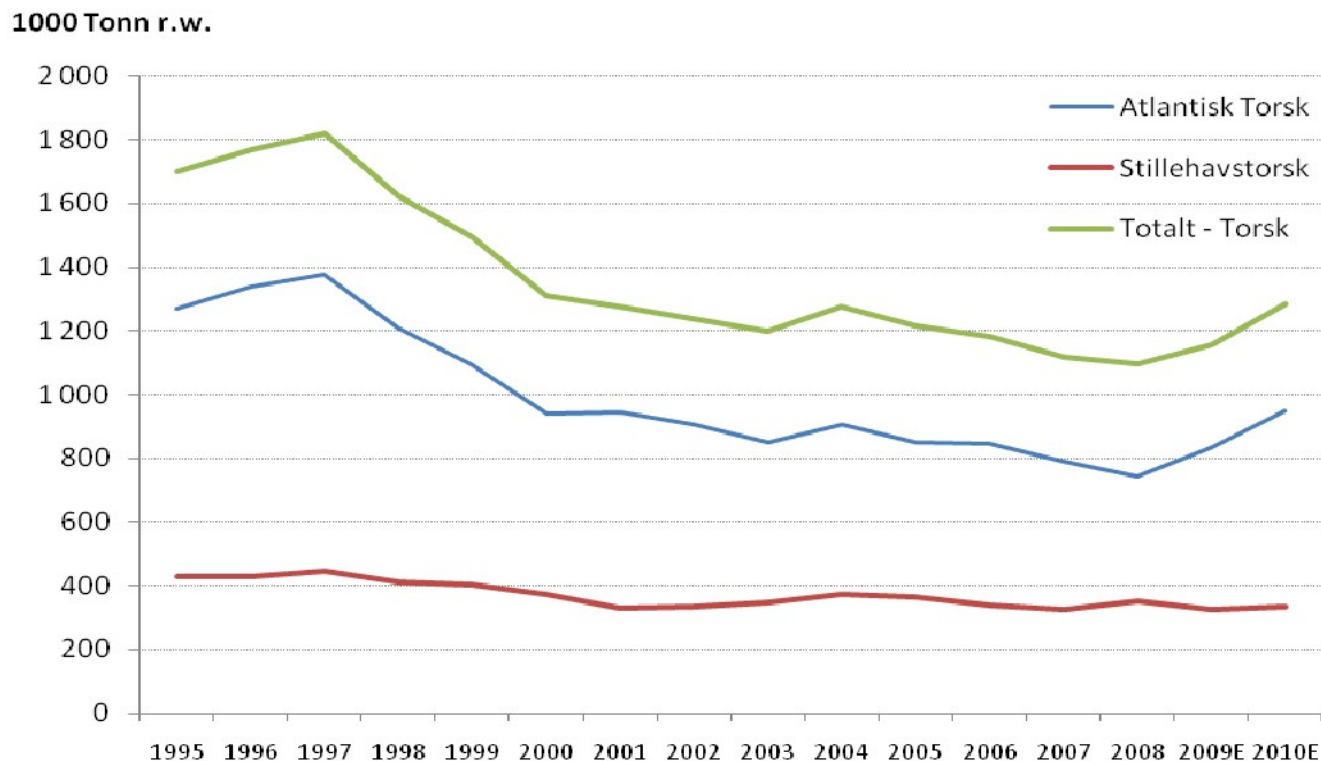
## Markedsfordeling

	2008	2009	Chg.	2010E	Chg.
Japan	121	107	-12 %	107	0 %
Russland	84	68	-19 %	63	-7 %
EU	47	43	-9 %	44	2 %
USA	10	12	20 %	15	30 %
Andre	80	67	-16 %	59	-12 %
<b>Totalt</b>	<b>342</b>	<b>296</b>	<b>-13 %</b>	<b>288</b>	<b>-3 %</b>



# Torsk

# Torsk – Det store bildet



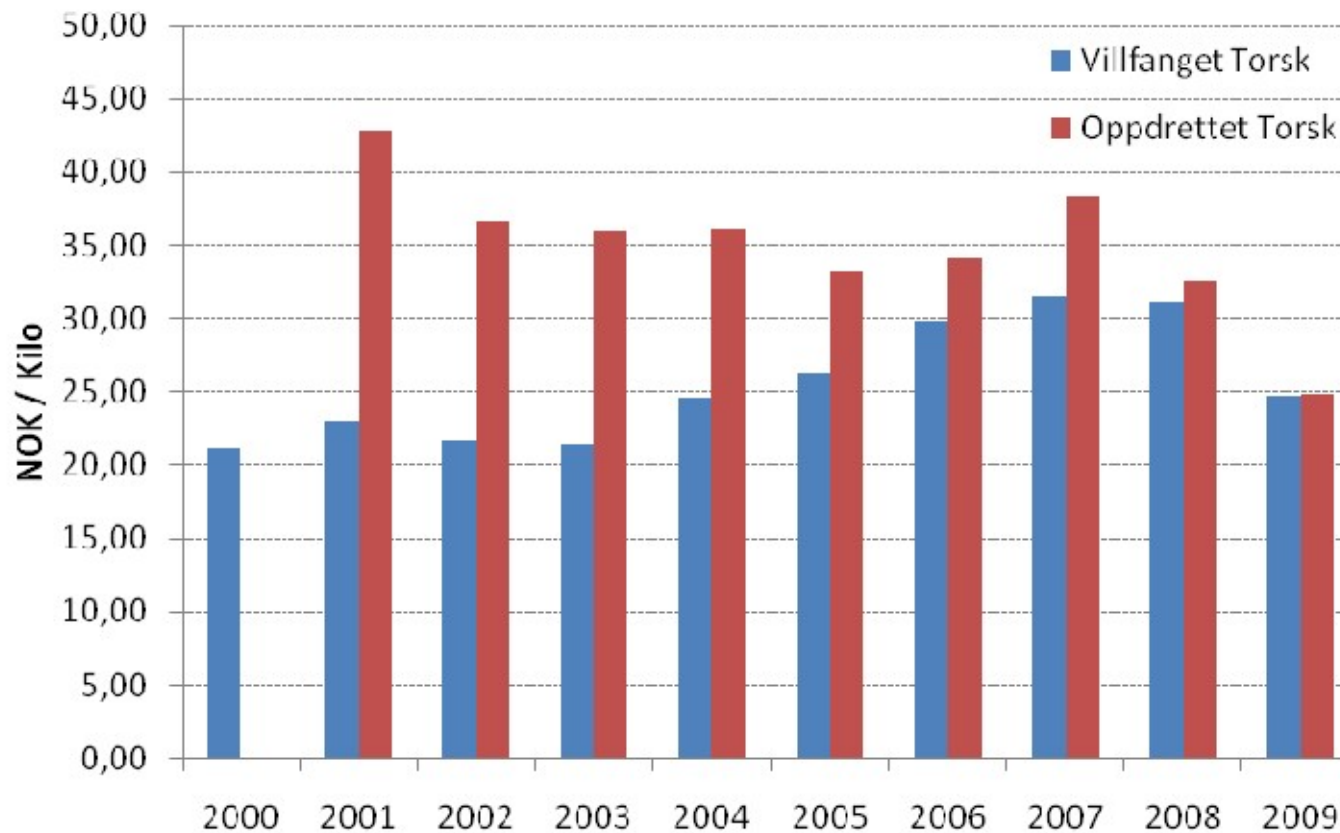
## Atlantisk Torsk: 2008–2010E:

Tilgjengelig volum - 2009 vs. 2008:  
" " " " " - 2010 vs. 2009:

+ 90' tonn  
Nye 100' tonn opp ?

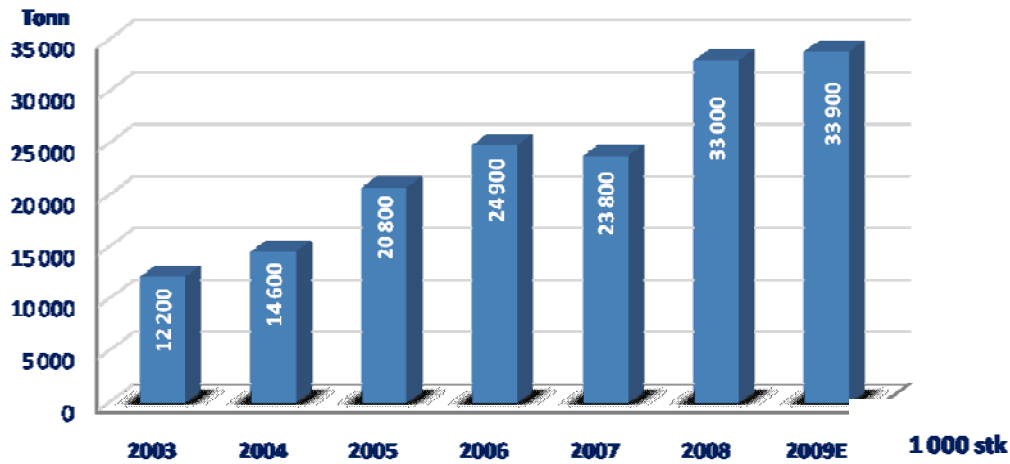
# Prisutvikling – Torsk

## Fob Eksportpris, Fersk sløyd u/hode

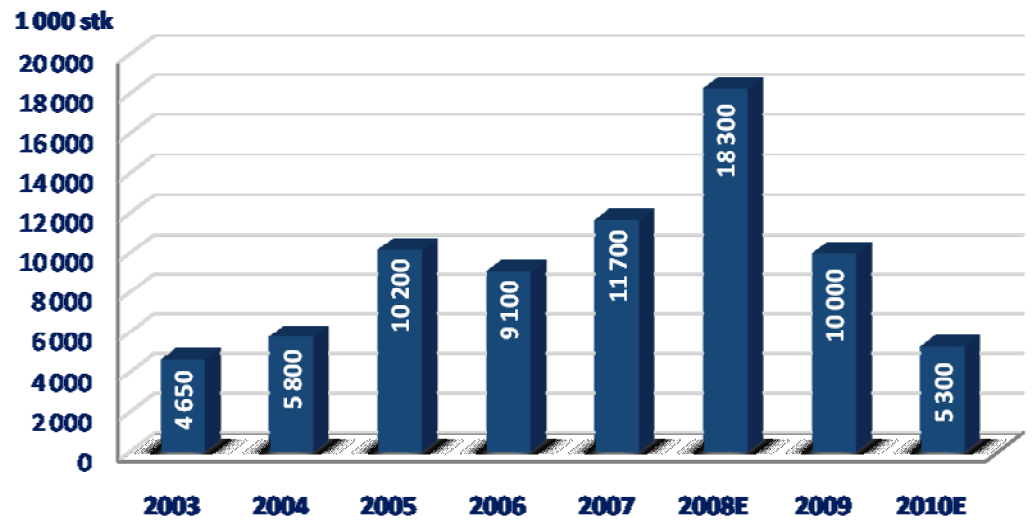


# Produksjonsutvikling - Torsk

Fórsalg; Torsk - Norge



Utsett av settefisk; Torsk - Norge

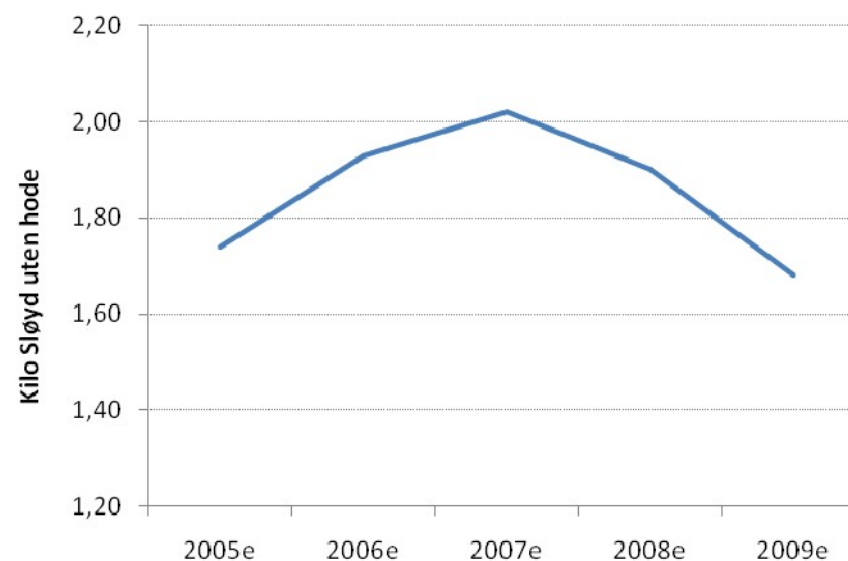


# Produksjonsutvikling Torsk - 2009

Slaktekvantum; Torsk Norge

	(eks. villfanget)		tonn wfe
	2008	2009	
Jan	1 300	1700	31 %
Feb	600	1100	83 %
Mar	400	1200	200 %
Apr	400	900	125 %
Mai	500	800	60 %
Jun	800	1100	38 %
Jul	1 200	1400	17 %
Aug	1 200	1000	-17 %
Sep	1 200	1700	42 %
Okt	1 900	2700	42 %
Nov	1 900	2200	16 %
Des	1 700	2100	24 %
<b>Totalt</b>	<b>13 100</b>	<b>17 900</b>	<b>37 %</b>

Utvikling Slaktevekter; Torsk Norge



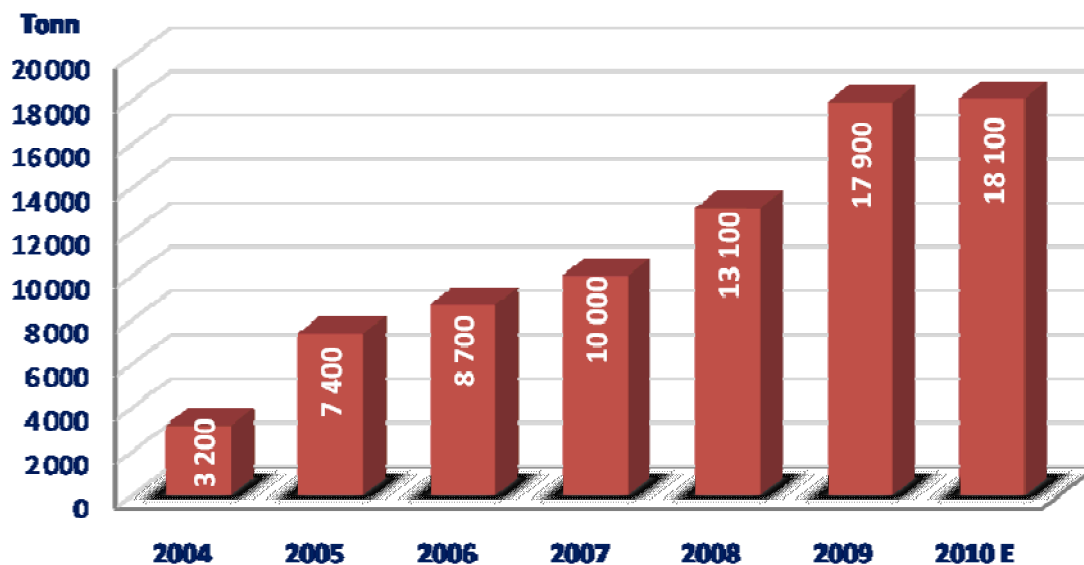
# Status og utsikter - Torsk

## Biomasse, Torsk - Norge

1 000 individuals / kg / tonnes

Estimated stock, ultimo Des 2009			Estimated stock, ultimo Des 2008			Chg %
07 G	900	à 2,7 2 400	06 G	800	à 3,0 2 400	0 %
08 G	8 500	à 1,7 14 600	07 G	7 400	à 1,8 13 300	10 %
09 G	8 100	à 0,6 5 200	08 G	16 900	à 0,6 10 000	-48 %
Total (wfe)			Total (wfe)			-14 %
Total (head off, gutted)			Total (head off, gutted)			
22 200			25 700			
14 900			17 200			

## Slakteprognose, Torsk - Norge



# 2010

- ## Laks & Ørret

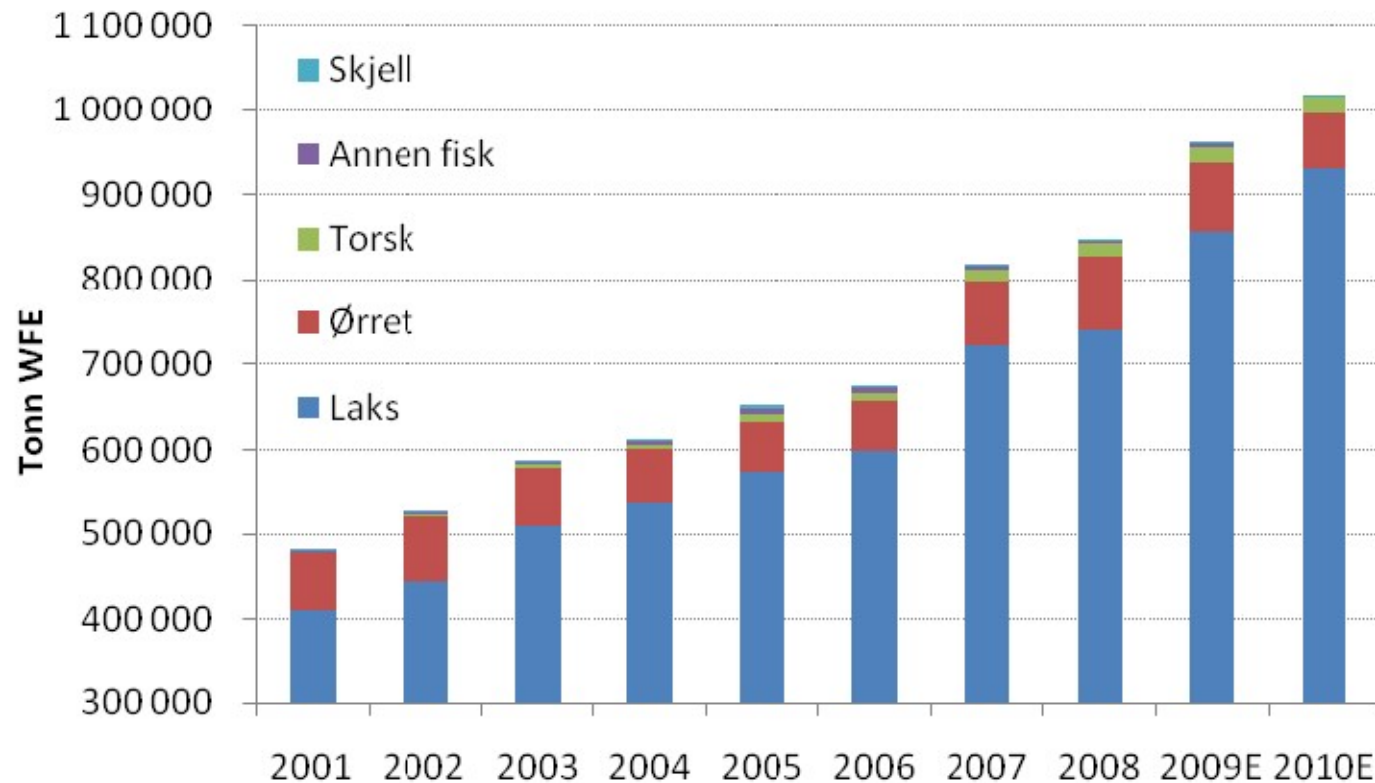
- Valuta ?
- Temperaturer, tilvekst og slakteveker..
- Lus, fiskehelse & omdømme ?

- ## Torsk

- Hva bestemmer prisen...
- MIP for Torsk under 2,5 el 1 kilo i salgslagene?
- Villfanget torsk – Fortsatt økt fersk-andel?



# Vil vi passere 1 million tonn i 2010 ?



# Takk for oppmerksomheten !