

# Status fra våre viktige makrellmarkeder - Japan og Sør-Korea.

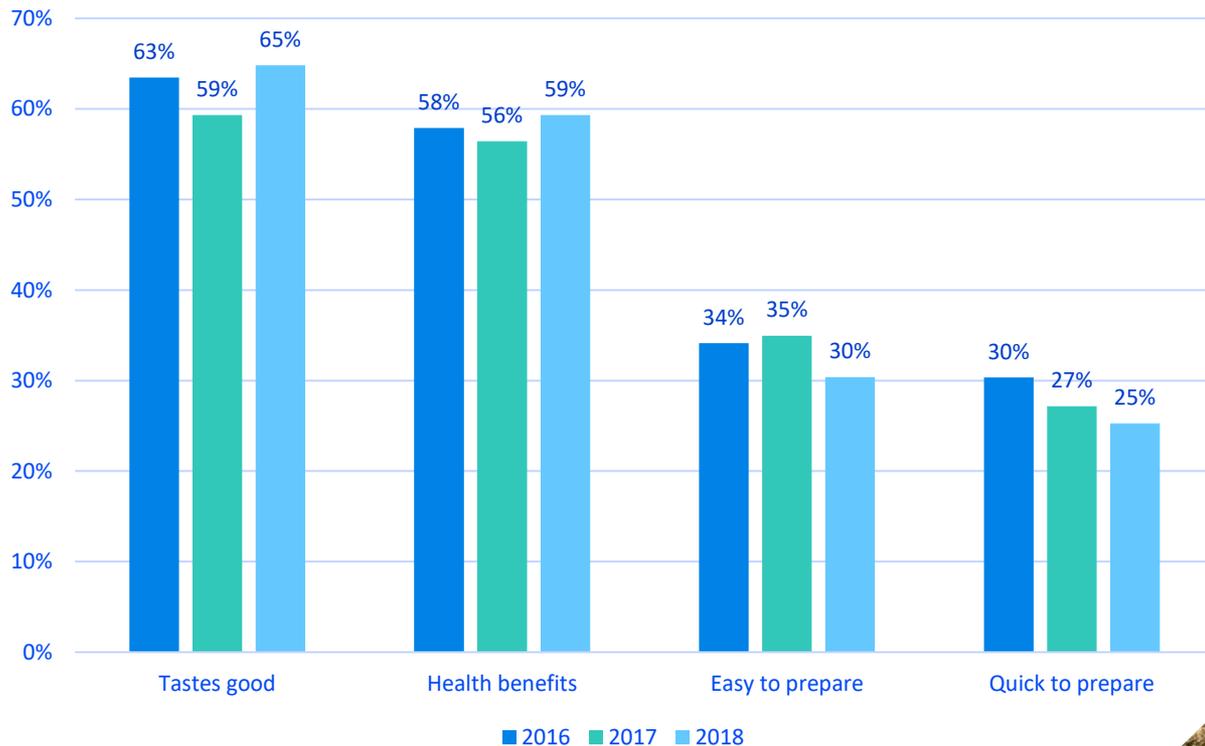
Gunvar L. Wie  
Fiskeriutsending Japan & Korea

Pelagisk Arena, Ålesund - 5.september 2019

# Japan

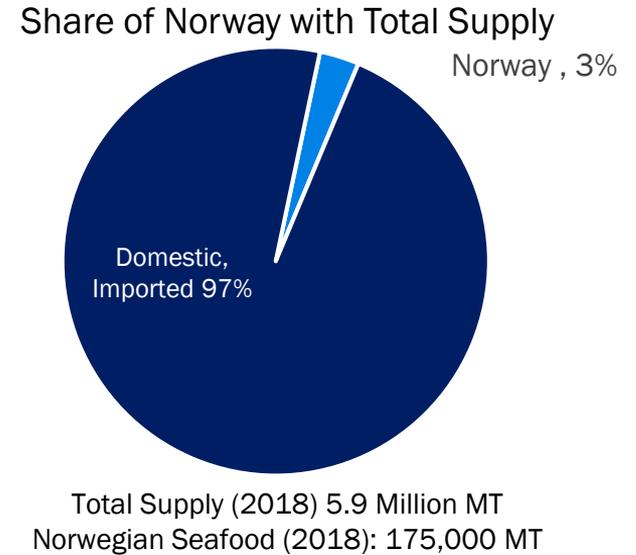
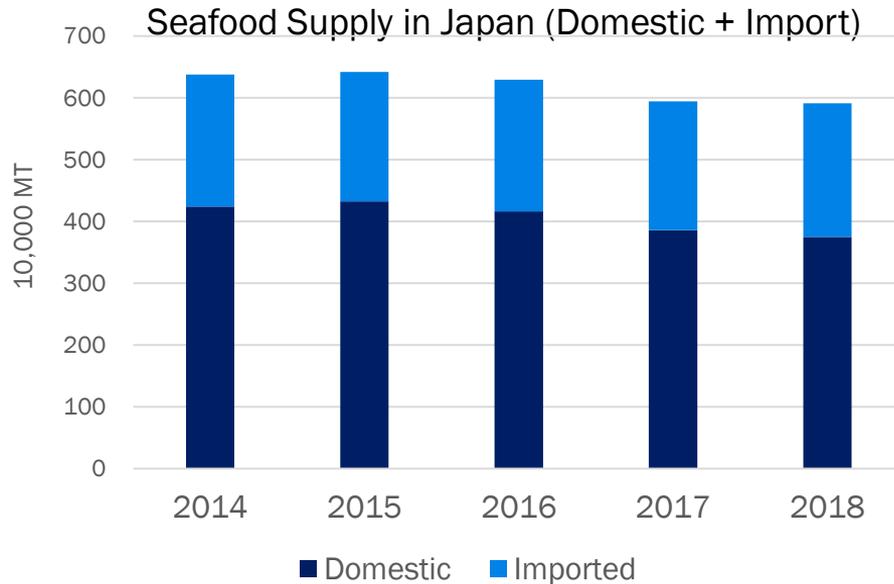


Drivere for sjømatkonsum i Japan er smak, helse og enkel tilgang



# Det japanske sjømatmarkedet endres ....

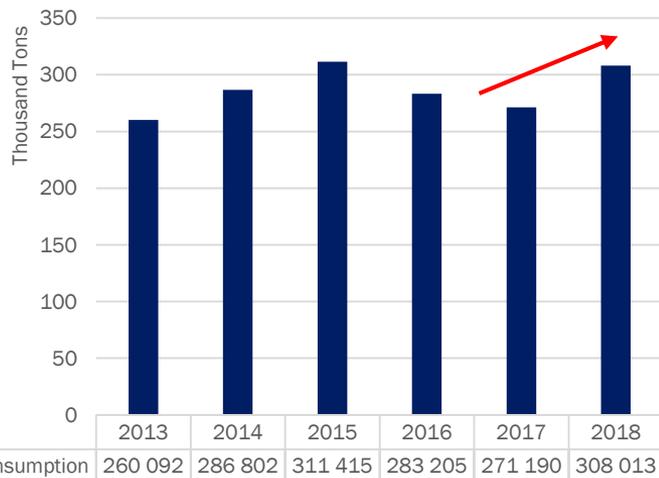
- ◆ 2013 → 2018 dropped 7% (domestic supply decreased 12%)
- ◆ 37% imported seafood.



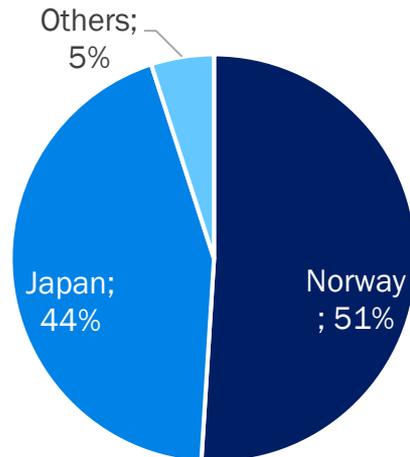
# Men, makrellkonsumet øker ...

- ◆ “SABA Boom” – “Gurunavi: Dish of the year 2018”
- ◆ 2018, mackerel consumption approx. 308,000 MT; 14% increase from 2017.
- ◆ The share of others is increasing, from 8% in 2018, up from 5% in 2016

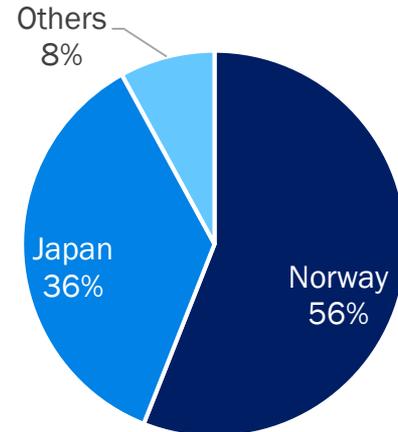
Japan Mackerel Consumption (2013-2018) (WFE)



Mackerel Market Share, by Country (2016)



Mackerel Market Share, by Country (2018)

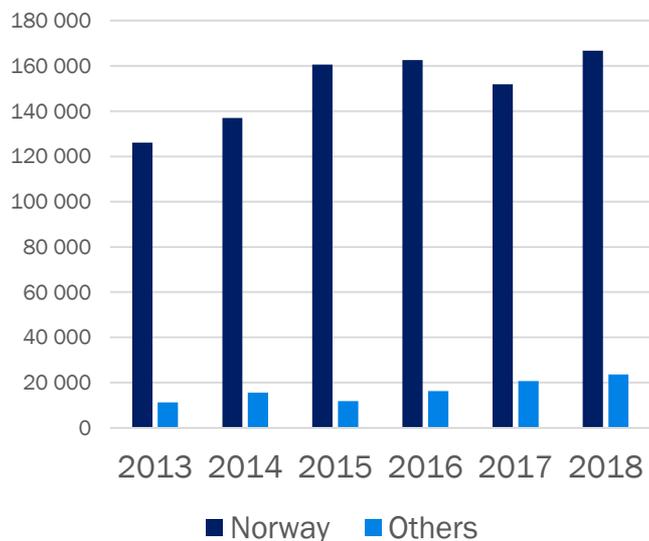


Source: Ministry of Finance, Ministry of Agriculture, Forestry and Fisheries, 2018 data estimated by Promar Consulting

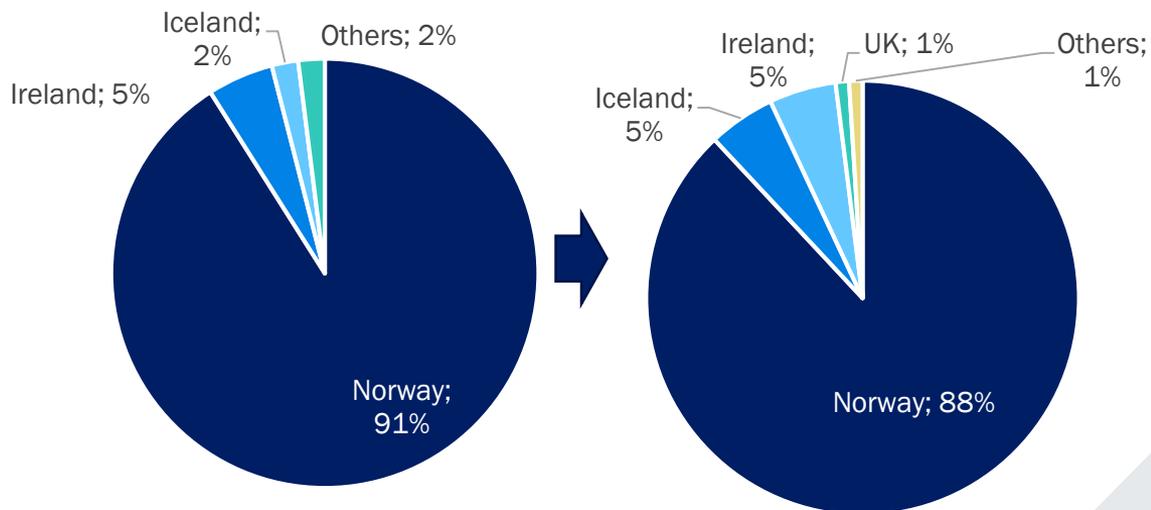
# 88% av importert makrell var norsk i 2018

- ◆ Since 2015, mackerel supply from Norway has been consistent.
- ◆ Of the mackerel imports in 2016, approx. 91% were from Norway – 88% in 2018

Imported Mackerel (2013-2018)



Imported Mackerel by Country (2016) - (2018)



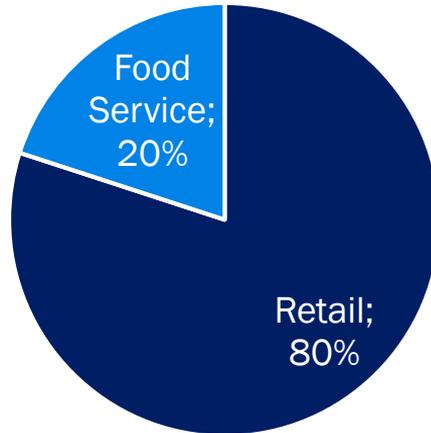


# Retail er den viktigste kanalen for norsk makrell, og sjømat forøvrig

- ◆ Retail is increasing its marketing efforts - clearly communicating origin
  - ◆ *Retail giants like AEON & ITO Yokado has expanded their range of products, differentiating the segment*
- ◆ Increasing sales and marketing of norwegian mackerel in Food Service
  - ◆ *There is specialty restaurants targeting younger consumers – purely selling mackerel.*



Mackerel specialty restaurants using Norwegian mackerel “Sugoi Saba”

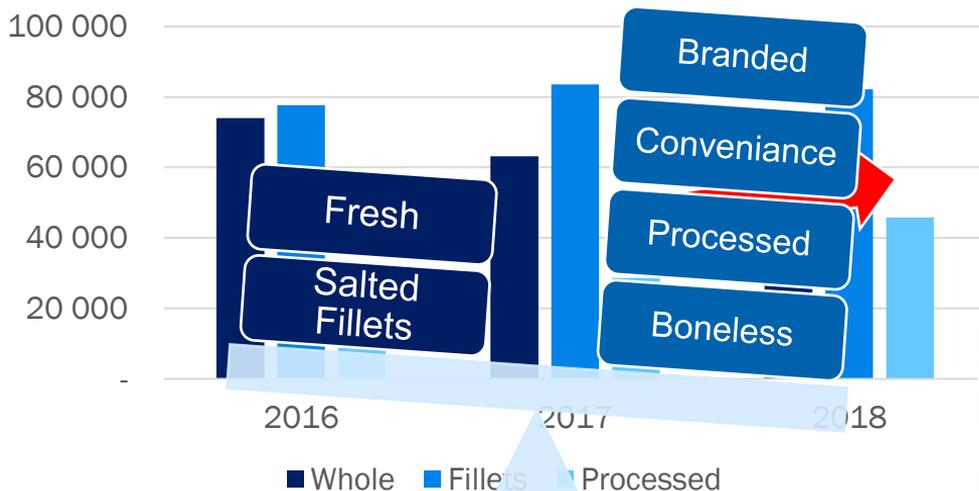


Norwegian Mackerel at AEON Retail

# Trend: Branding & value-added produkter øker

Imported Mackerel (WFE) - Processed has increased by 60%

**Past** **Current**



■ Processed mackerel often use Norwegian mackerel



Norwegian Premium "sabakan"



Branded Domestic Mackerel



Norwegian processed Mackerel



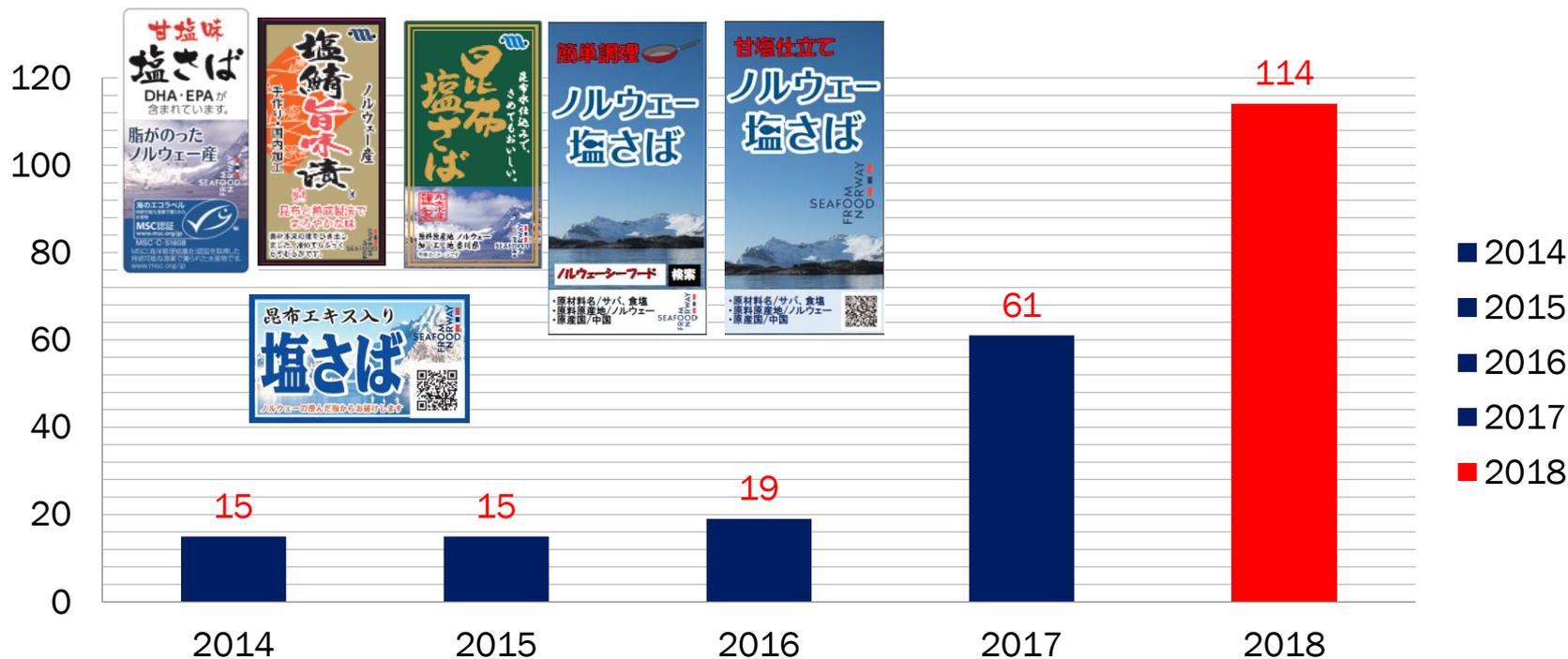
Norwegian boneless

# Økende andel tilgjengelige sjømatprodukter “ready to eat”

- ◆ New mackerel products have been launched steadily in 2018/2019.
- ◆ Specialty cans, Onigiri, SABA Miso soup, SABA salad and so on.
- ◆ Established Saba section has been established.



# Antall selskaper som bruker “seafood from norway” og opphav i kommunikasjonen har økt betraktelig siden 2015





ノルウェーほど  
住むことに適した環境はない。

それは、サバにとって。

SEAFOOD  
MARK  
NORWAY

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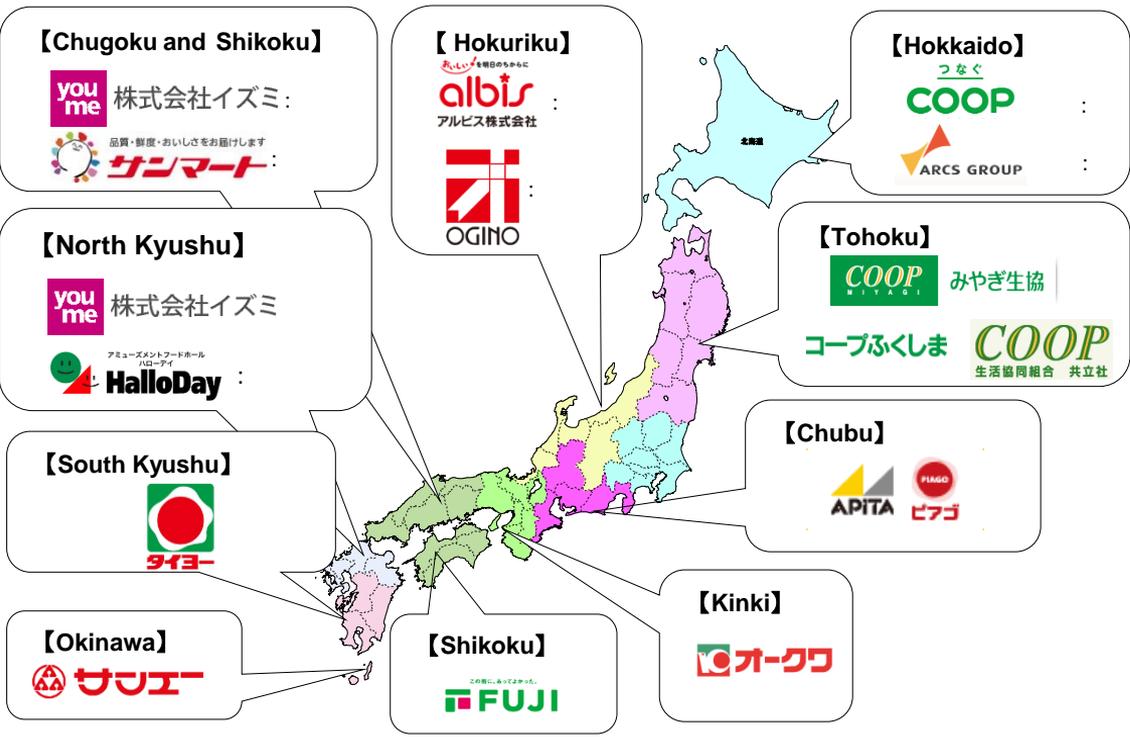
それは、サバにとって。

SEAFOOD  
MARK  
NORWAY

# In-store examples

Promotional Campaign Program by Region

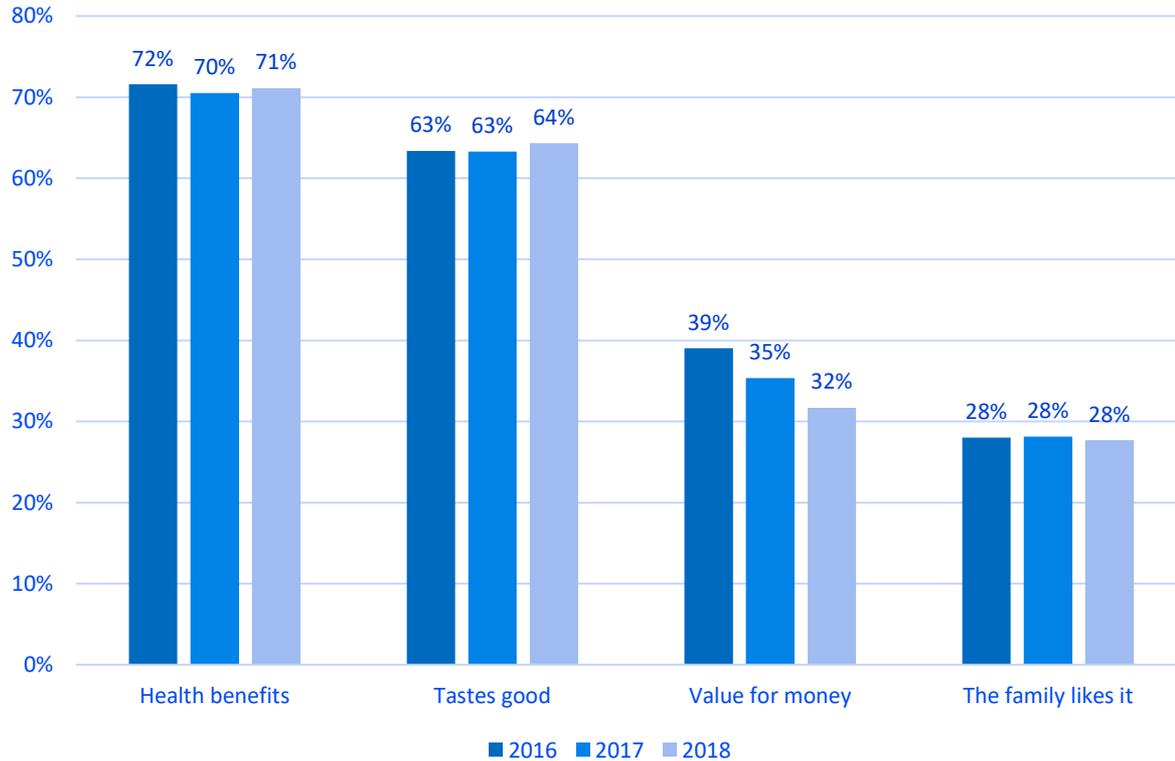
- 【National Account】**
1. **AEON** :
  2. **イトーヨーカドー** :
  3. **COSTCO WHOLESALE** :



# Korea

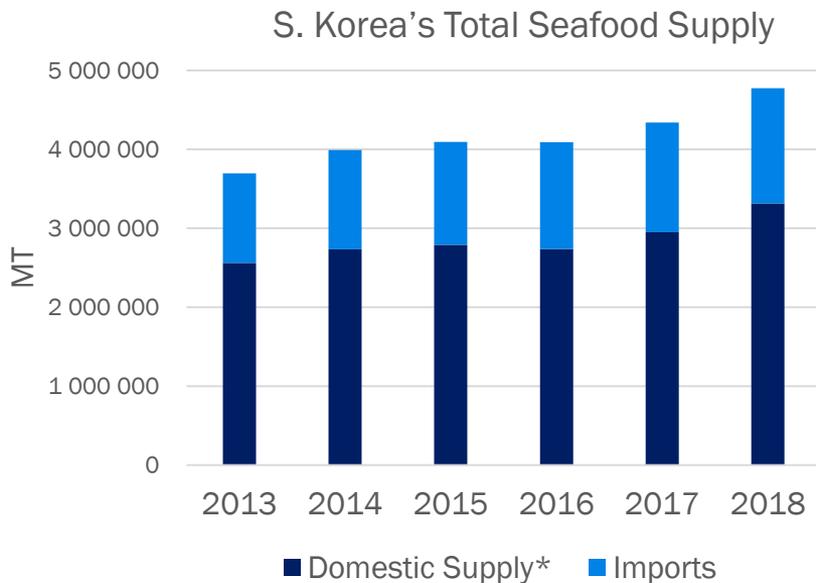


Drivere for sjømatkonsum i Korea er helse, smak og «value for money»

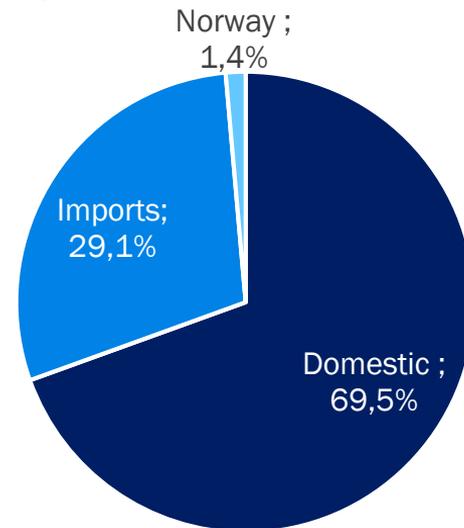


# Det koreanske sjømatmarkedet øker - både importer og egenprodusert

- ◆ 2013 to 2018, total seafood volume increase by approx. 30%



Norway's Share within the Total Supply

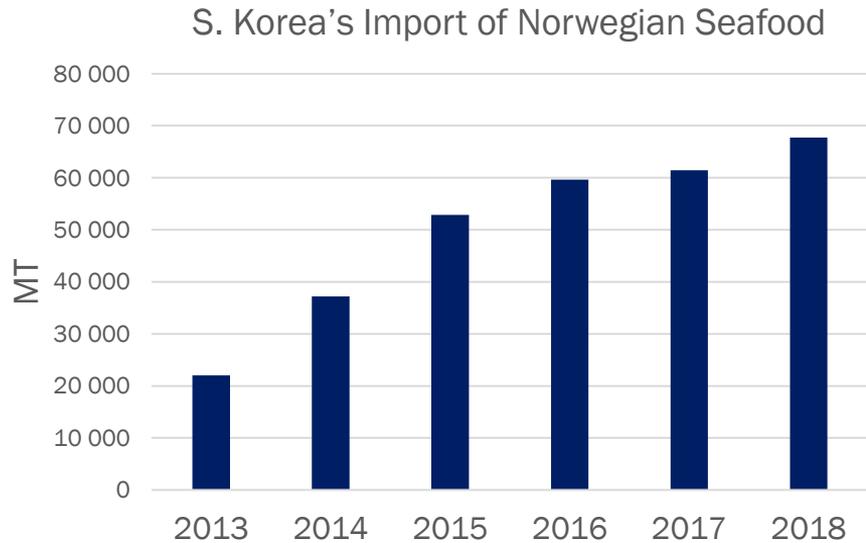


4.8 Million MT

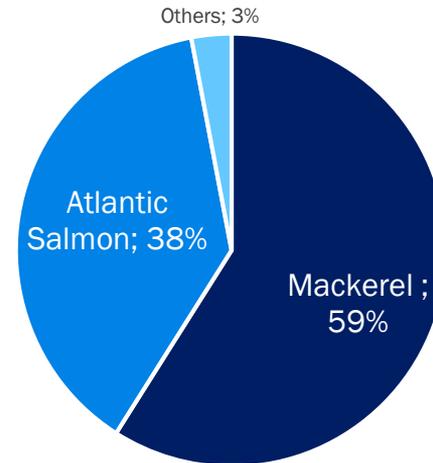
\*Domestic Supply = Domestic Catch + Farmed - Export

# Importen av norsk sjømat setter nye rekorder hvert år i Korea

- ◆ S. Korea imported approximately 68,000 MT of Norwegian seafood in 2018
- ◆ Mackerel accounted for 59% of the volume and 19% of the value.

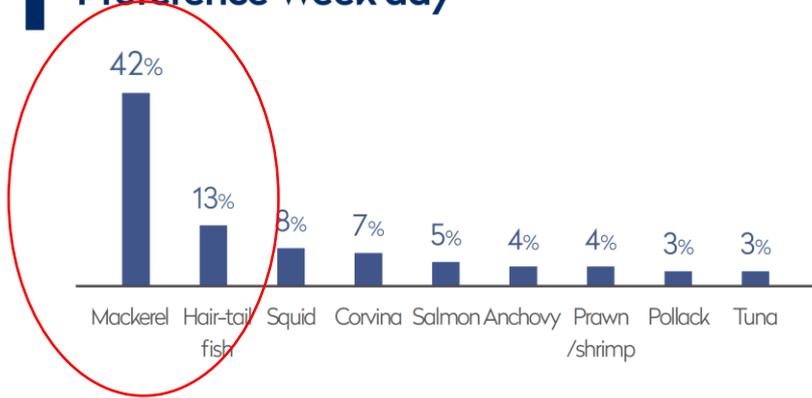


Norwegian Seafood Import by Product (2018)

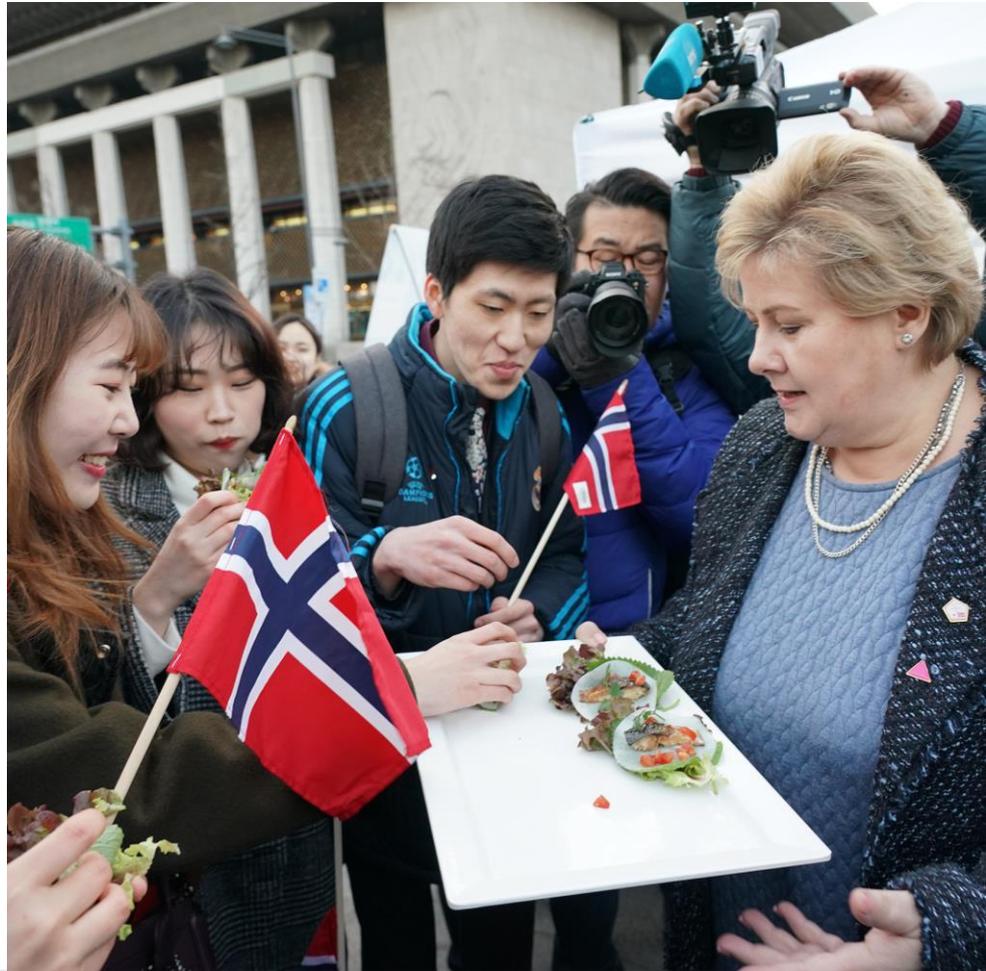
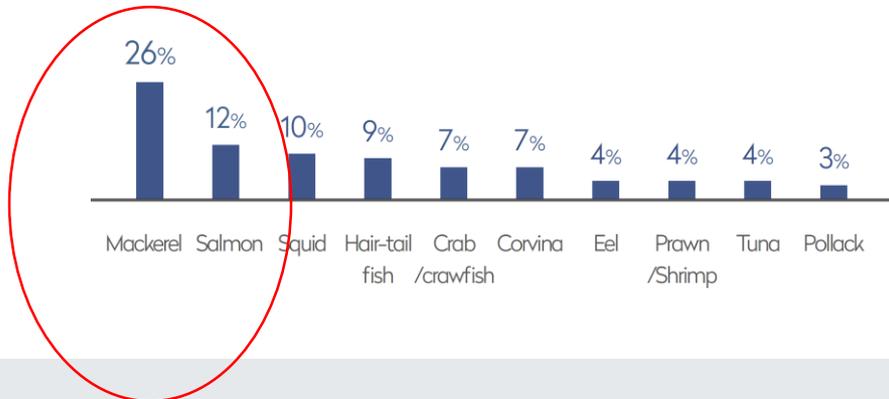


Norway's Volume (2018): 68,000 MT

## Preference Week day



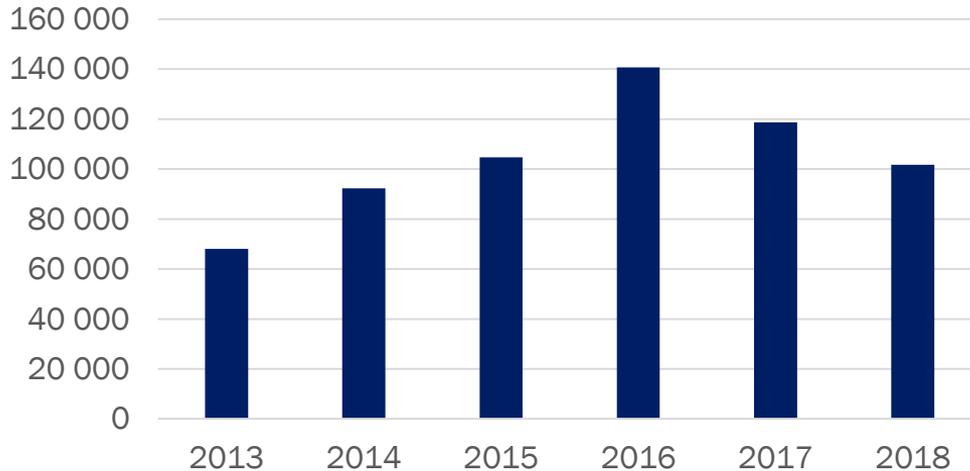
## Preference Weekend



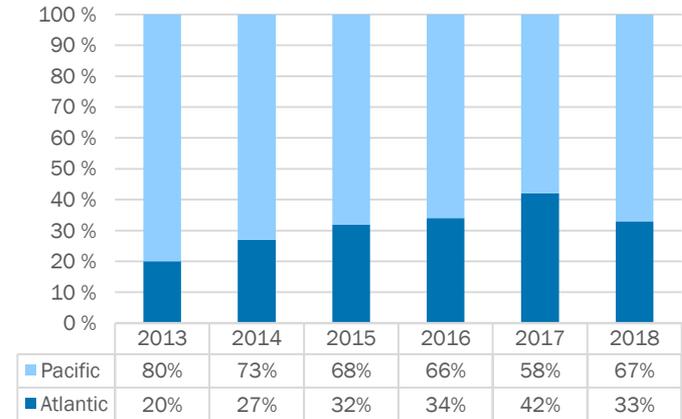
# Makrell konsumet økte frem til 2016

- ◆ The share of Atlantic mackerel in Korea has increased from 20% in 2013 to 42% in 2017.
- ◆ A decrease in Atlantic mackerel 2018 is likely attributed to an 87% increase in Pacific mackerel.
- ◆ Norway had 98% import share of Atlantic mackerel in Korea in 2018

Mackerel consumption in Korea 2013 - 2018

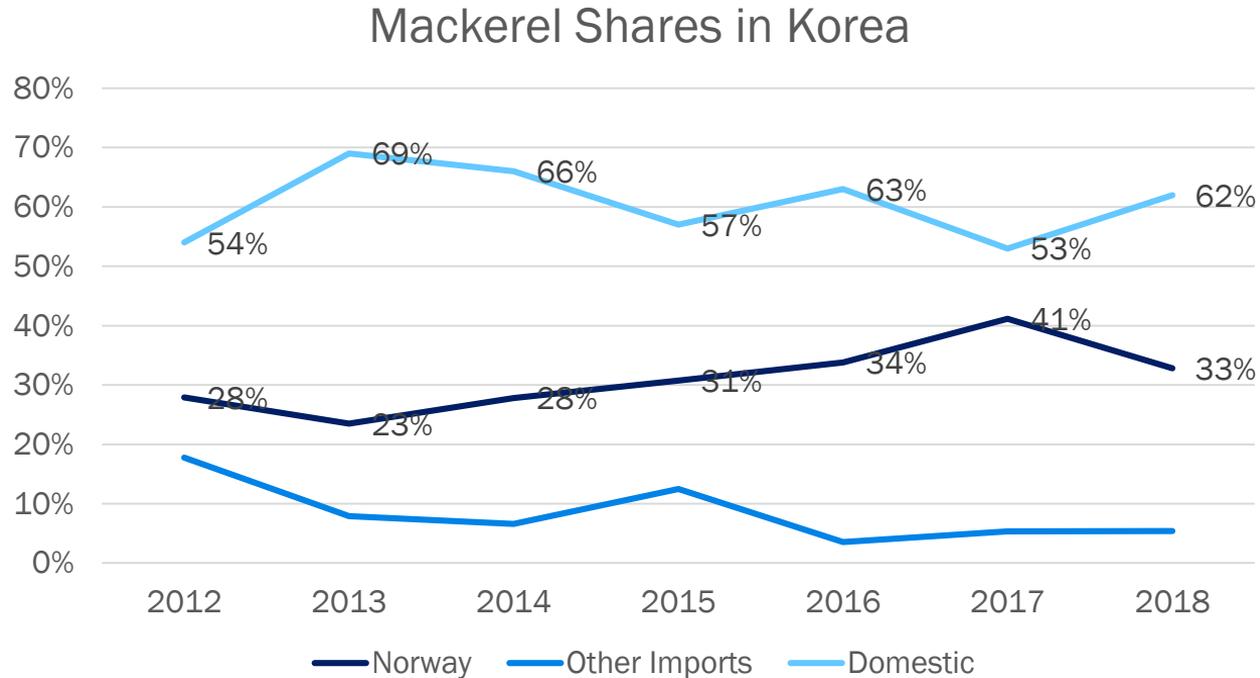


Atlantic Mackerel Share in Korea (Frozen whole in WFE)



Source: Korea Customs Service  
 \*2018 data is provisional data.

# Markedsandeler for makrell i Korea

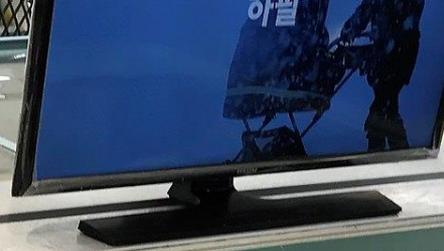


# 노르웨이의 완벽한 자연 환경

## 최적의 고등어 생태 환경

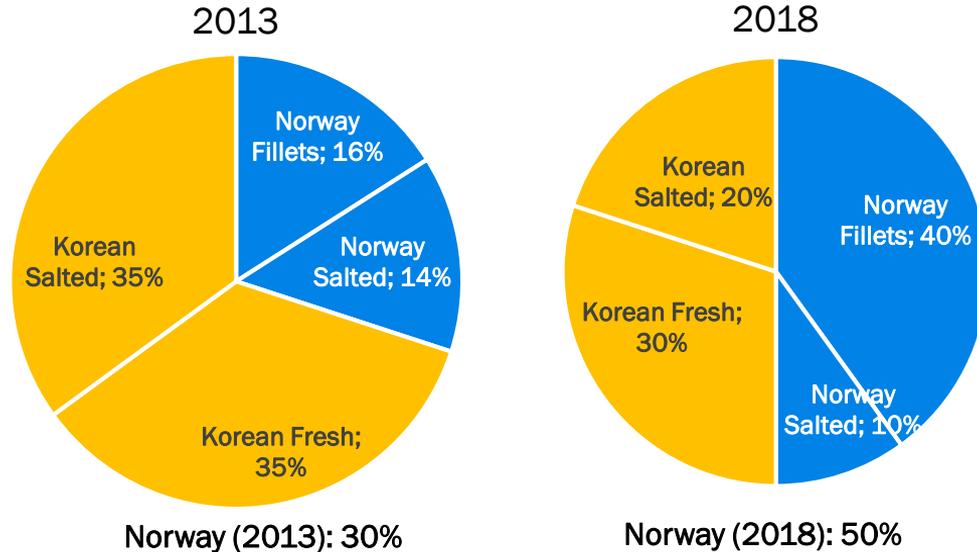
얼음처럼 차가운 바다가 길러낸 고등어는  
속살이 짙고 육질이 촉촉하며 깊은 풍미로 가득합니다.

SEAFOOD  
FROM  
NORWAY



# Norsk makrell står for opp mot 50% av salget i sjømatkategorien

Retailers have noted that an increasing number of consumers are recognizing Norwegian mackerel and actually prefer Norwegian over Korean mackerel.

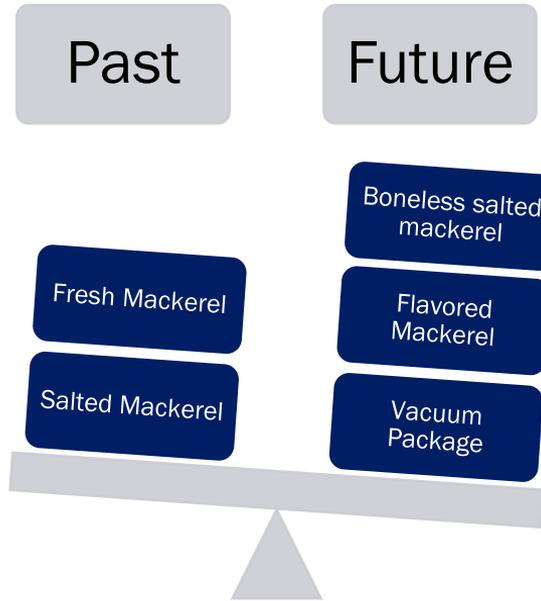


Source: Interview conducted by Promar Consulting in 2017  
The percentages are still believed to be valid.



# Produktrender: Easy-to-eat, easy-to-prepare home meal replacement (HMR)

- ◆ Most value-added mackerel products use Norwegian mackerel



Boneless Mackerel



Vacuum Package



# Produkttrender: Online øker og TV blir et viktigere medium ...

- ◆ Of the mackerel sales, an estimated 10% are online sales and TV shop sales
- ◆ Origin is important. The usage of “Seafood from Norway” mark is increasing every month.



Source: Interview conducted by Promar Consulting in 2018



# Mackerel marketing highlights in Korea

RETAIL

OFFLINE

- Digital screen and elevator LED at different districts of Seoul



- Lightbox display at **Starfield Goyang**, a major shopping complex



ONLINE

- YouTube – Acuity Ad**  
The convenience of cooking and the premium quality make it popular with customers.



- Facebook**  
The convenience of cooking and the premium quality make it popular with customers.



# NORWEGIAN SEAFOOD COUNCIL

