

MARING Fagdag, Gardermoen 27.november 2014

Analyse av marin ingrediensindustri

Roger Richardsen
SINTEF Fiskeri og havbruk

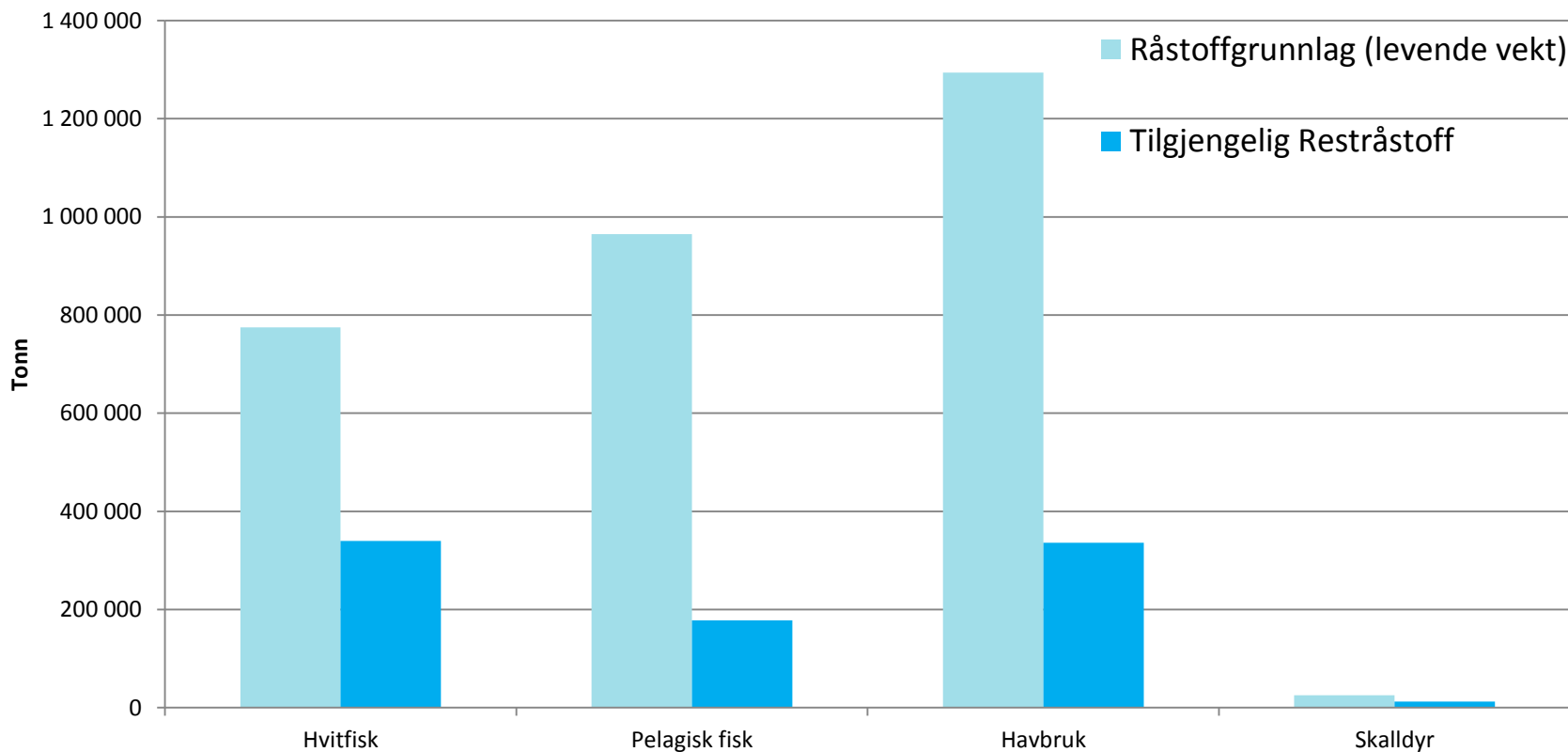
Arr.: Fiskeri og havbruksnæringens landsforening
Fiskeri og havbruksnæringens forskningsfond

Marint restråstoff gir stor verdiskaping

- Presentasjon av to rapporter
- *Norsk marin ingrediensindustri – struktur, økonomi og utviklingstrekk*
Roger Richardsen, SINTEF Fiskeri og havbruk
- *Analyse marint restråstoff, 2013*
Analyse av tilgang og anvendelse for marint restråstoff i Norge
Trude Olafsen, Roger Richardsen, SINTEF Fiskeri og havbruk AS
Ragnar Nystøyl, Gunn Strandheim, Jan Petter Kosmo, Kontali Analyse AS

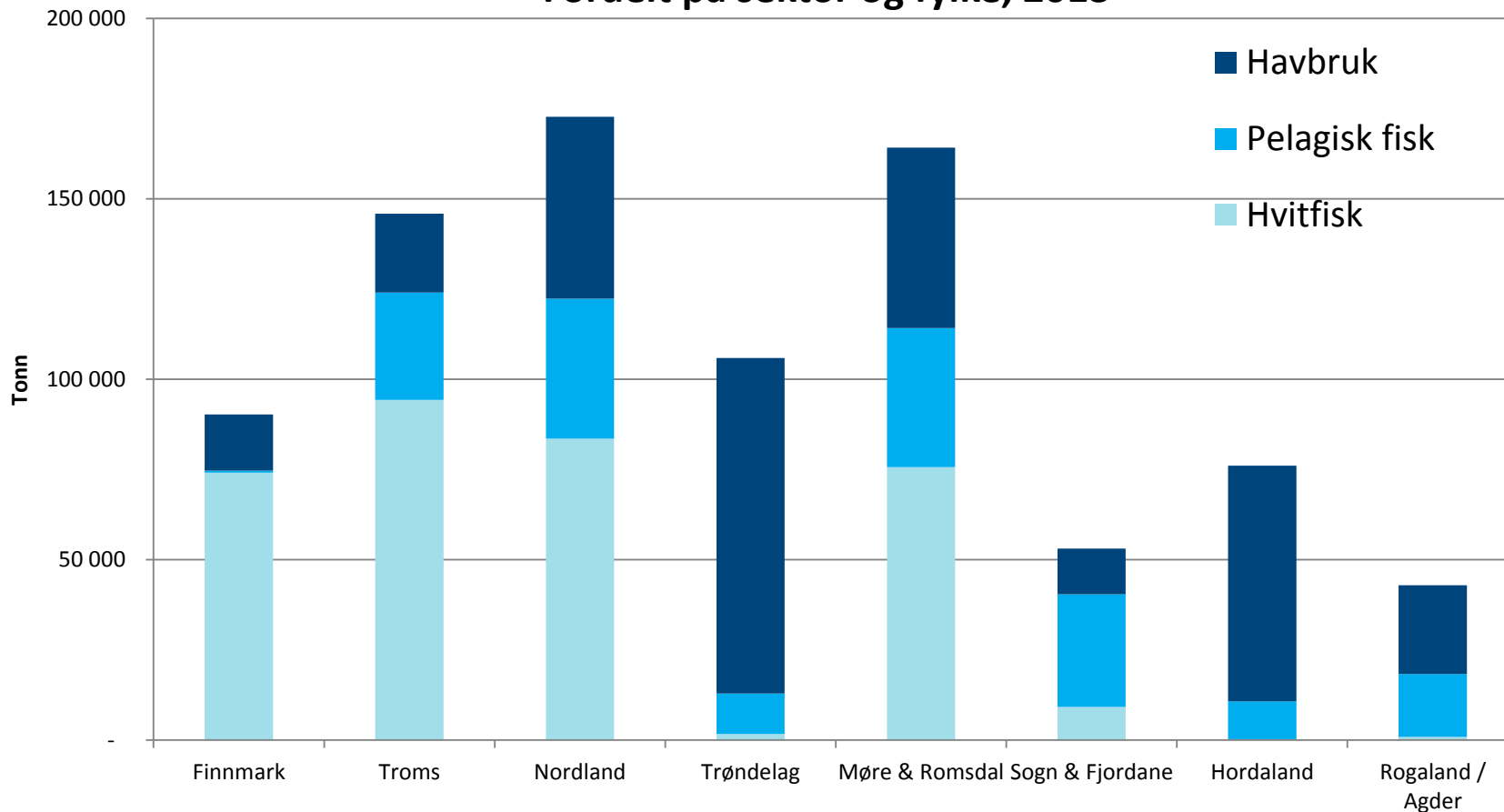
Finansiert av Fiskeri og havbruksnæringens forskningsfond

Råstoffgrunnlag og tilgjengelig restråstoff - Fordelt på sektor, 2013

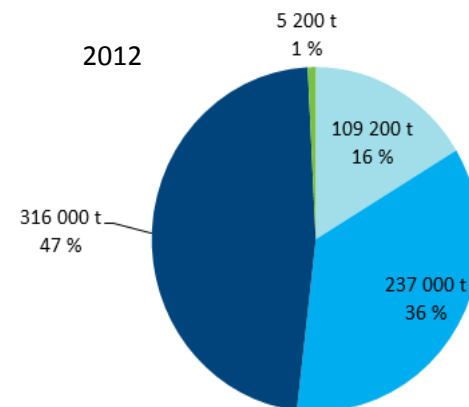
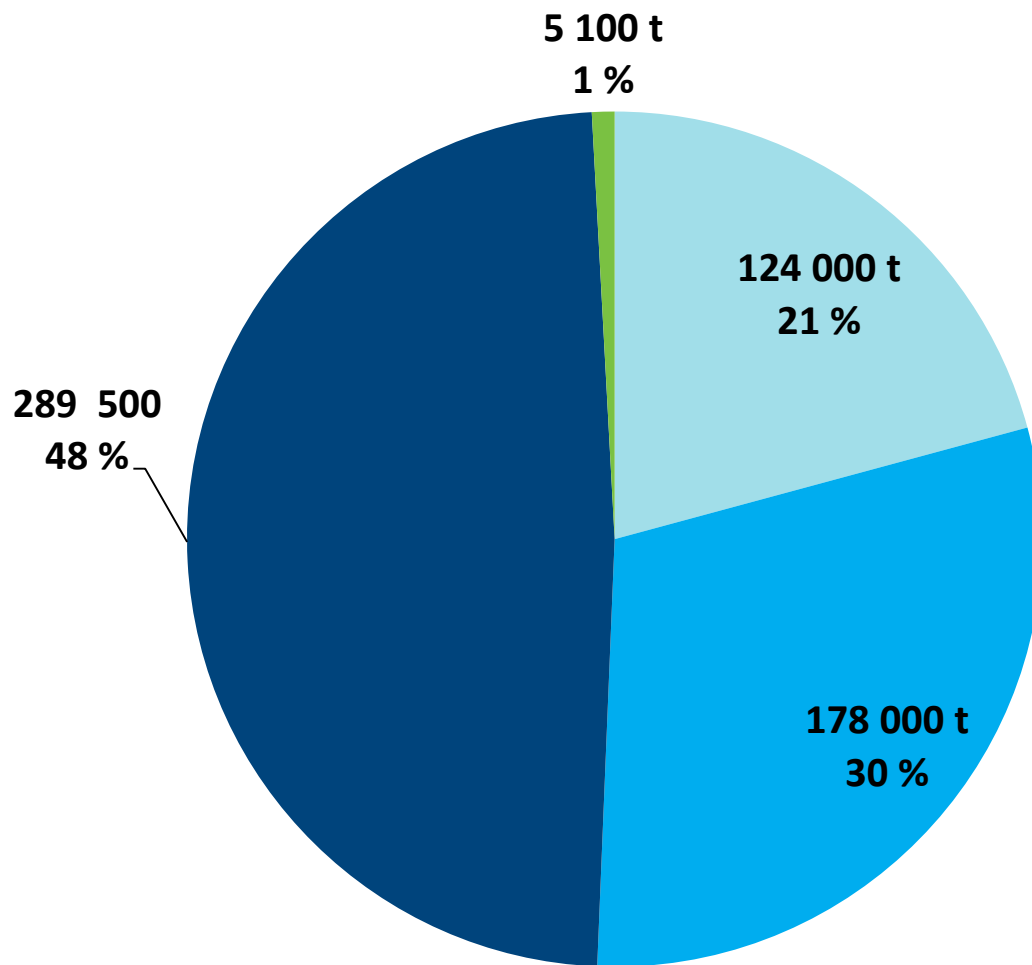


Totalt tilgjengelig restråstoff

Fordelt på sektor og fylke, 2013

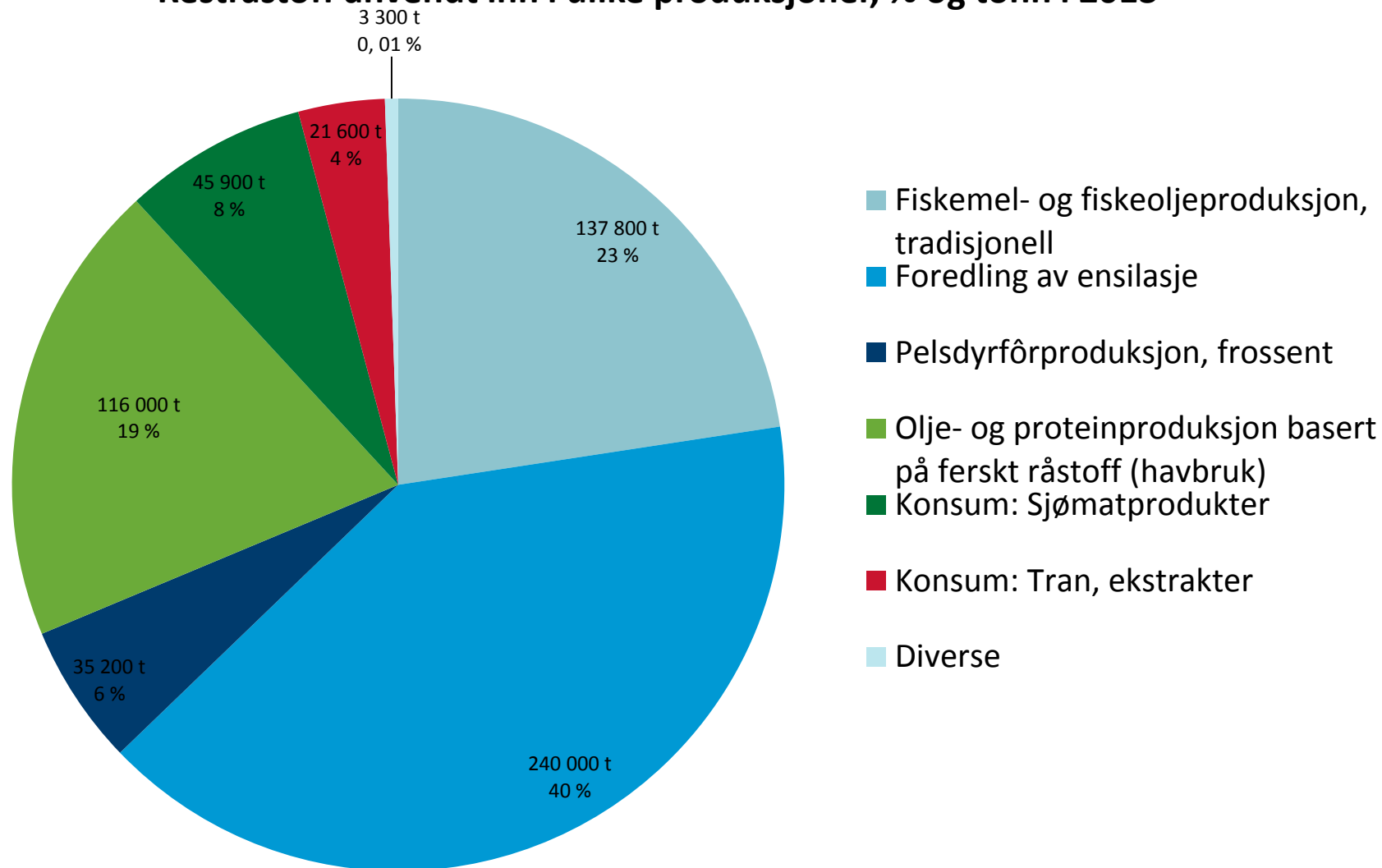


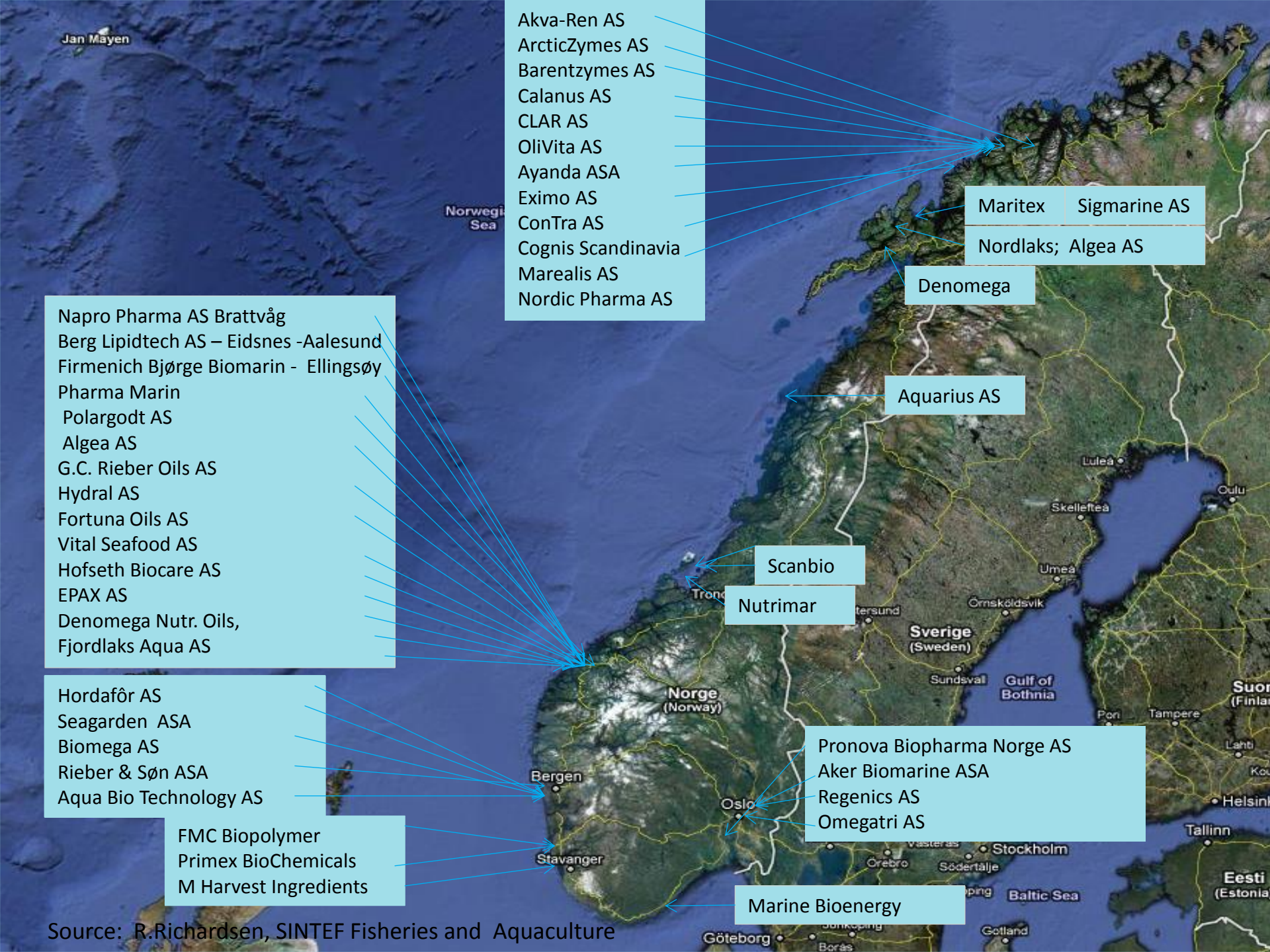
Mengde restråstoff som utnyttet fordelt på sektor 2013



- Hvitfisk
- Pelagisk fisk
- Oppdrett
- Skalldyr

Restråstoff anvendt inn i ulike produksjoner, % og tonn i 2013





- Akva-Ren AS
- ArcticZymes AS
- Barentzymes AS
- Calanus AS
- CLAR AS
- OliVita AS
- Ayanda ASA
- Eximo AS
- ConTra AS
- Cognis Scandinavia
- Marealis AS
- Nordic Pharma AS

- Maritex
- Sigmarine AS
- Nordlaks; Algea AS

Denomega

Aquarius AS

Scanbio

Nutrimar

- Pronova Biopharma Norge AS
- Aker Biomarine ASA
- Regenics AS
- Omegatri AS

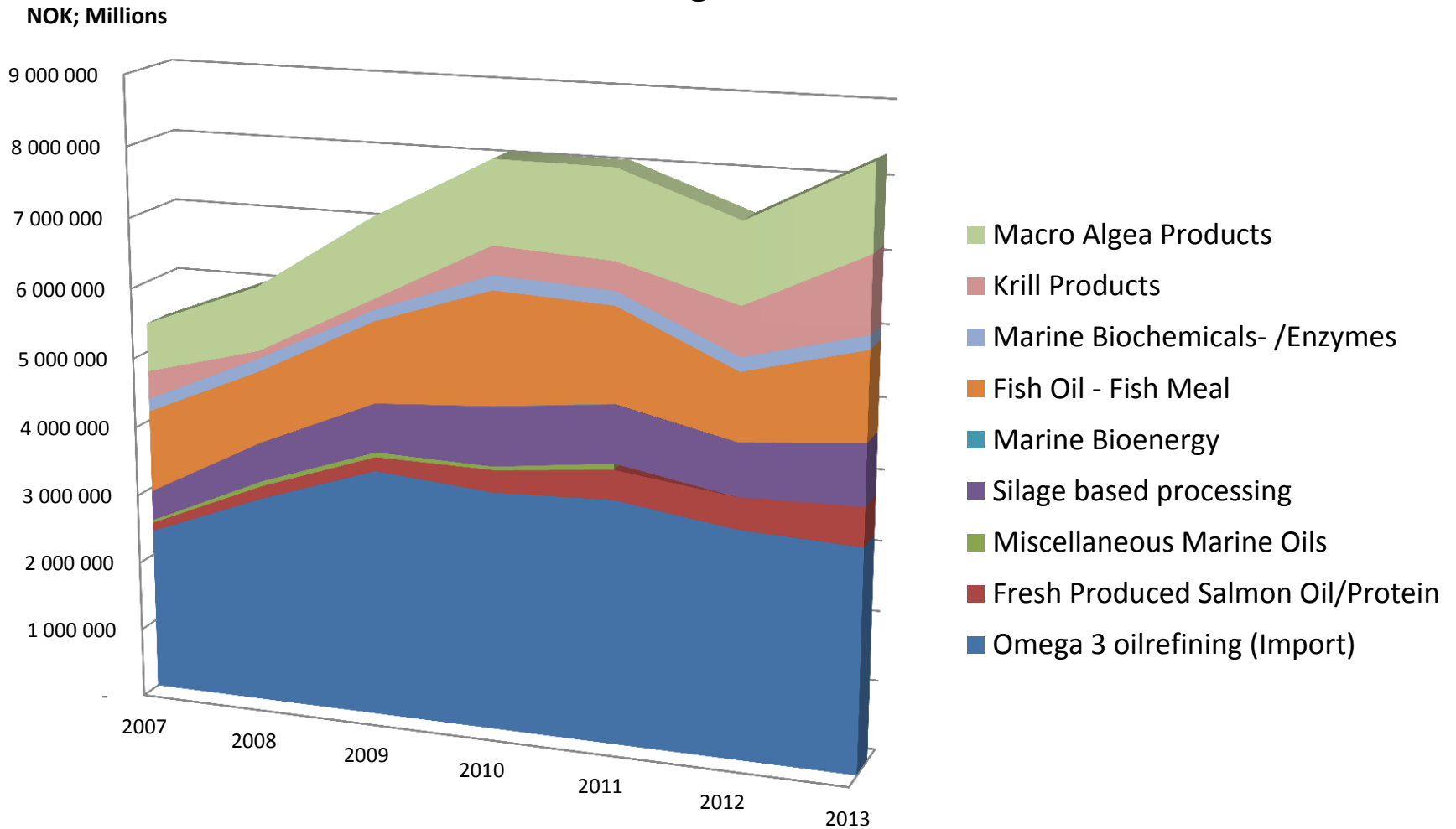
Marine Bioenergy

- Napro Pharma AS Brattvåg
- Berg Lipidtech AS – Eidsnes -Aalesund
- Firmenich Bjørge Biomarin - Ellingsøy
- Pharma Marin
- Polargodt AS
- Algea AS
- G.C. Rieber Oils AS
- Hydral AS
- Fortuna Oils AS
- Vital Seafood AS
- Hofseth Biocare AS
- EPAX AS
- Denomega Nutr. Oils,
- Fjordlaks Aqua AS

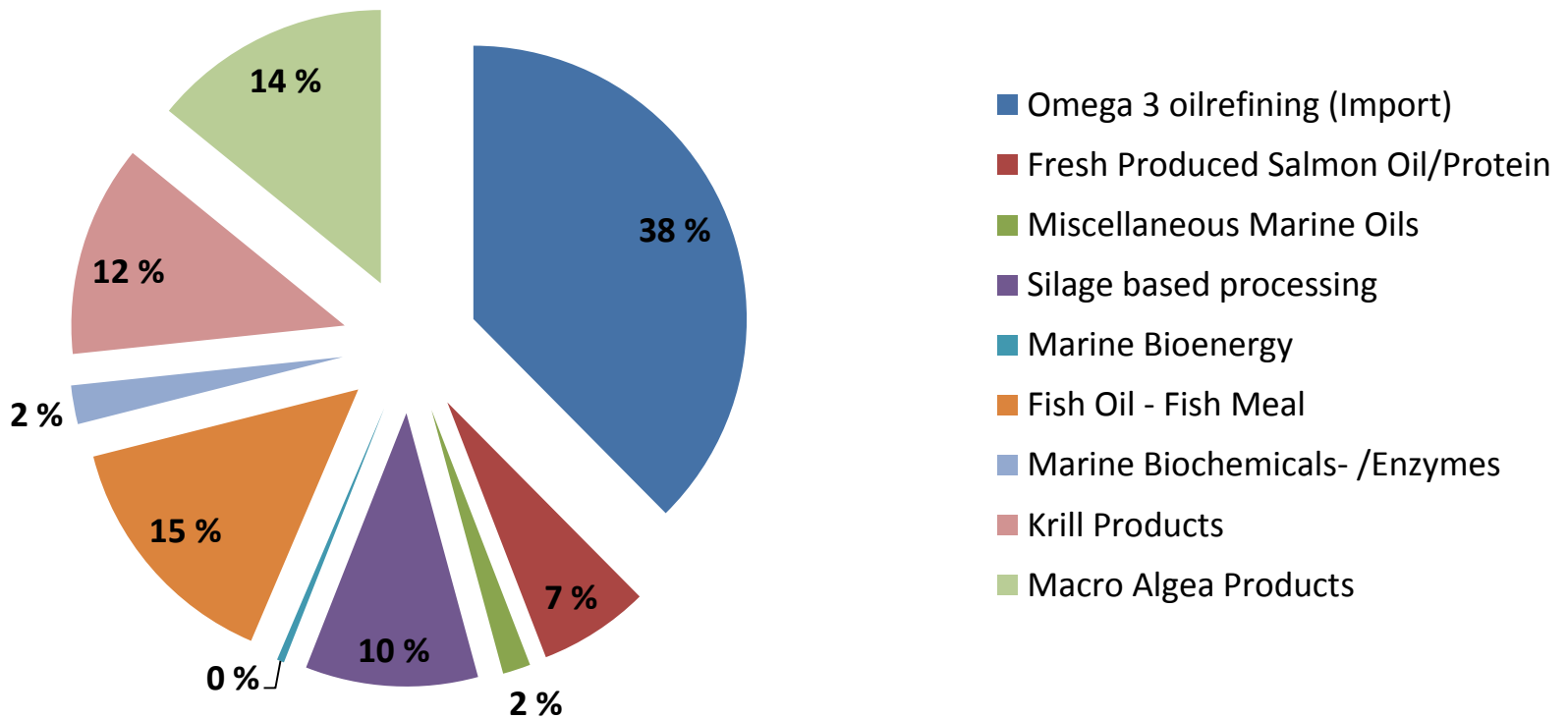
- Hordafôr AS
- Seagarden ASA
- Biomega AS
- Rieber & Søn ASA
- Aqua Bio Technology AS

- FMC Biopolymer
- Primex BioChemicals
- M Harvest Ingredients

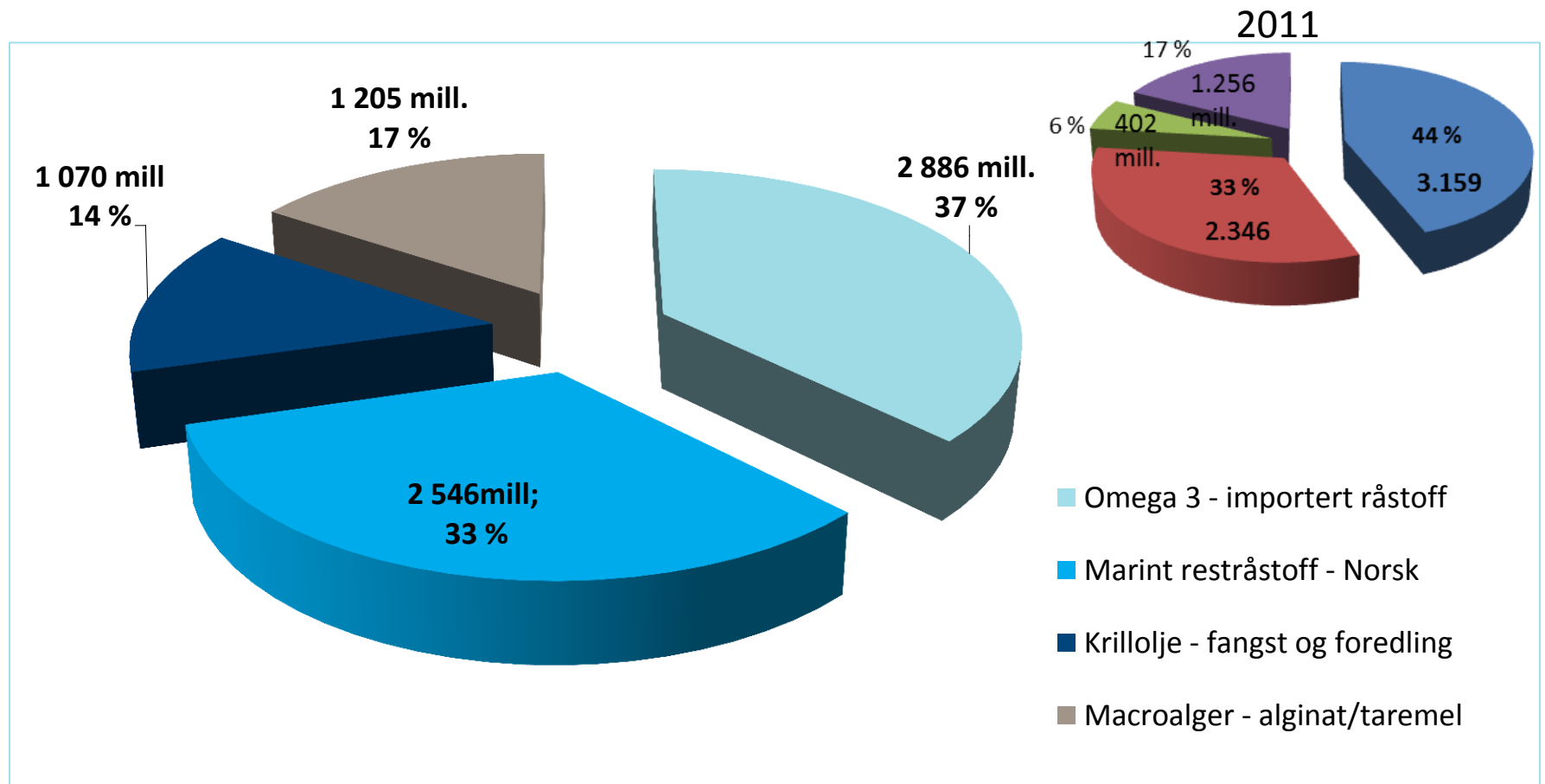
Total omsetning 2007-2013



Sektorvis andel av omsetning 2013



Omsetningverdi etter råstoffopprinnelse

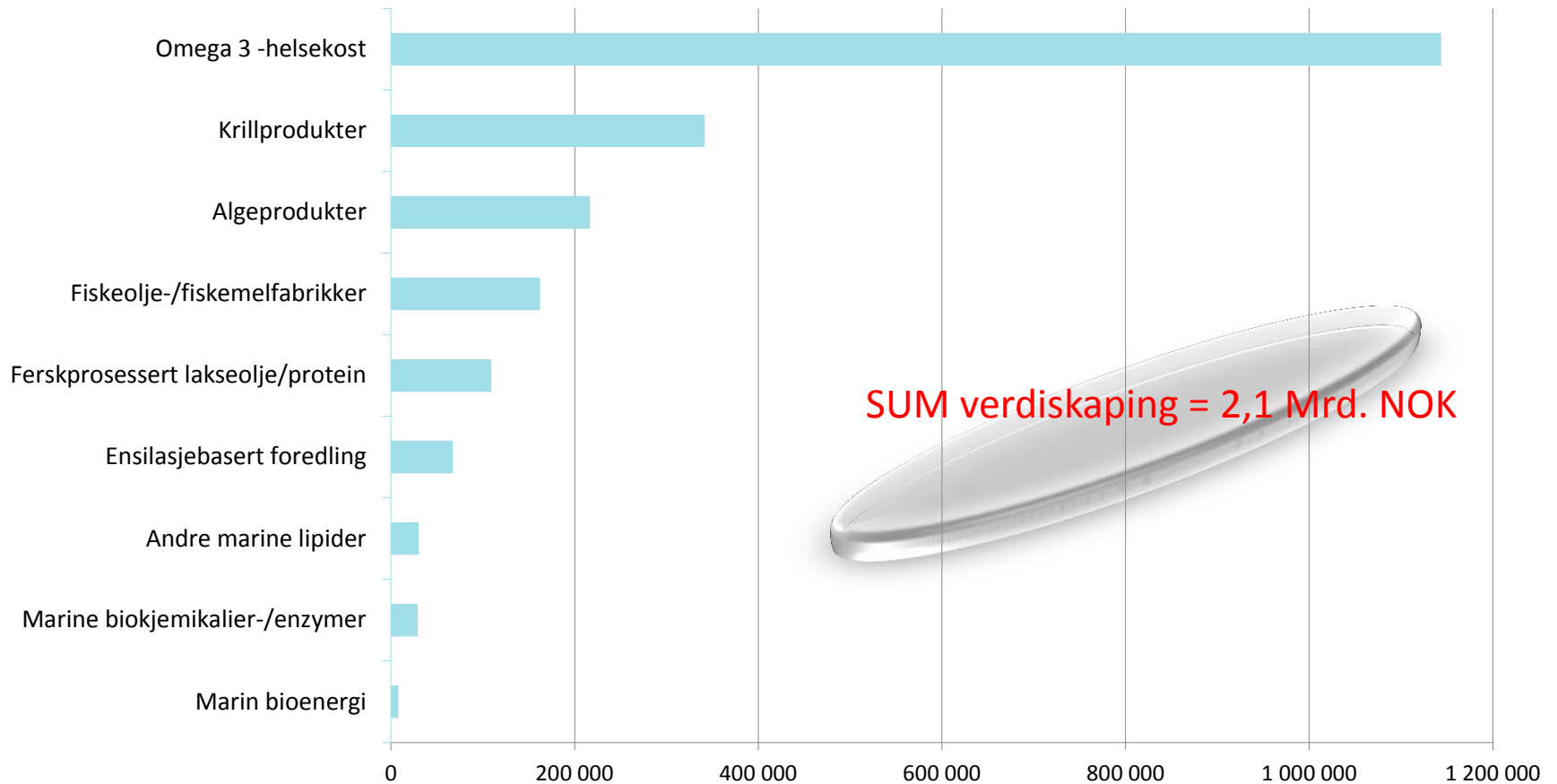


EBIT per undergruppe av marin ingrediensindustri

	EBIT (Mill. NOK)							EBIT margin	EBIT margin
	2013	2012	2011	2010	2009	2008	2007	2007 -2011	2009 -2013
Omega 3 oilrefining (Import)	722	662	361	367	655	612	412	15 %	16 %
Fresh Produced Salmon Oil/Protein	10	19	58	45	9	22	11	15 %	7 %
Miscellaneous Marine Oils	-4	-28	-37	-36	-28	5	-17	-35 %	-29 %
Silage based processing	-33	66	93	120	54	38	56	11 %	6 %
Marine Bioenergy	3	3	-3	0	0	-	-	-31 %	5 %
Fish Oil - Fish Meal	60	47	57	219	130	113	35	9 %	8 %
Marine Biochemicals- /Enzymes	-37	-12	-28	-12	-17	-54	-26	-15 %	-11 %
Krill Products	170	100	-148	133	-300	-193	-151	-63 %	-11 %
Macroalgea Products	71	57	136	52	-92	-26	-7	1 %	4 %
	962	915	489	622	411	517	313		

Betydelig verdiskaping fra sektoren !

Nto. verdiskaping 2013 (1000 NOK)



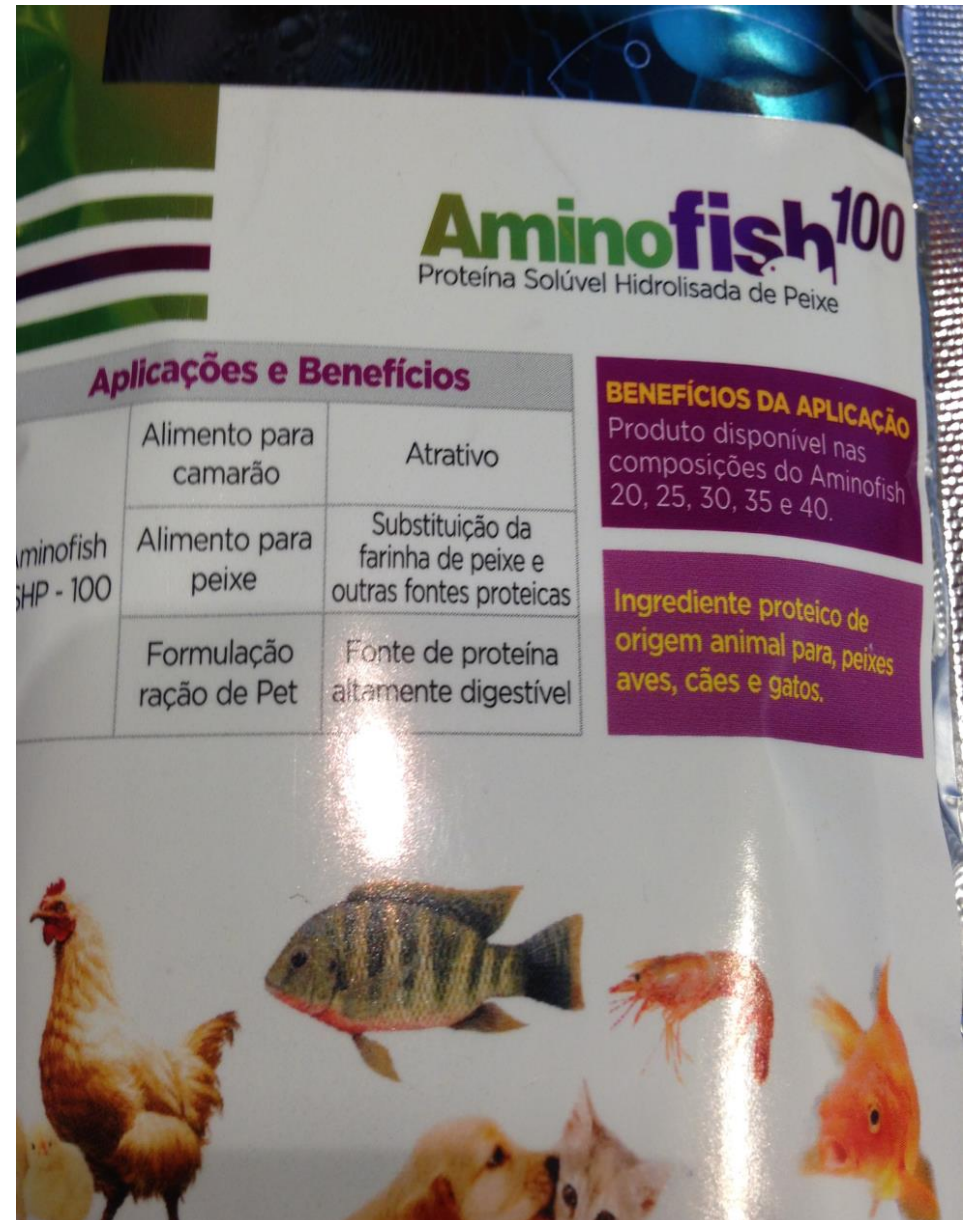
NFR's innovasjonspris 2014



Restråstoff får innovasjonspris !
FPC danner basis + attraktanter = formulert sportfiskeagn

Flere tenker restråstoff- utnyttelse

- Hydrolyserte marine proteiner
– eksempel fra Brasil
- Til petfood
- Startfôr fiskeyngel
- Broilerfôr



Aminofish¹⁰⁰
Proteína Solúvel Hidrolisada de Peixe

Aplicações e Benefícios

aminofish SHP - 100	Alimento para camarão	Atrativo
	Alimento para peixe	Substituição da farinha de peixe e outras fontes proteicas
	Formulação ração de Pet	Fonte de proteína altamente digestível

BENEFÍCIOS DA APLICAÇÃO
Produto disponível nas composições do Aminofish 20, 25, 30, 35 e 40.

Ingrediente proteico de origem animal para peixes, aves, cães e gatos.



FMC Biopolymer to invest EUR60 Million in Seaweed and Alginate

Oct 23 2014

121 13 1



“We strongly believe that the kelp and macroalgae will become Norway’s next major coastal industry”, says plant manager Tor Arthur Halvorsen, FMC Biopolymer to Norwegian paper Karmøynytt. “The raw material base is huge - and the Norwegian kelp has unique characteristics. The next five years, we plan to invest NOK100 million (EUR12 million) each year to streamline the production and to contribute to exciting new products that can save lives.” Read more in Karmøynytt (Norwegian): <http://www.karmøynytt.no/2014/10/17/investerer-500-millioner-kroner-tare-og-alginat>

Thu. Nov 6 2014

Fishmeal prices face explosive rise as buyers begin to react to failure of Peru's 2nd anchovy season

Supreme Court hints prosecutor overreach in use of harsh law on fisherman's undersize fish discards

Letters: Oceana denies saying '30% of US shrimp mislabeled', says it was 30% of their samples only



Ocean Gold mourns the sudden passing of its CEO, Dennis Rydman

Alaska's 2013 seafood workforce highest in over a decade driven by seasonal salmon jobs (Fish Radio)

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Fishmeal prices face explosive rise as buyers begin to react to failure of Peru's 2nd anchovy season



SEAFOODNEWS.COM by John Sackton Nov 6, 2014

Fishmeal prices (and fish oil prices) face an explosive rise to their highest levels ever reported due to the increasingly severe impact of El Nino on Peru's anchovy fishery. Peru is the world's largest supplier of fishmeal and oil.

Peru's anchovy fishery is conservatively managed, ...

To read the rest of **Fishmeal prices face explosive rise as buyers begin to react to failure of Peru's 2nd anchovy season**, Please Login Below: