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

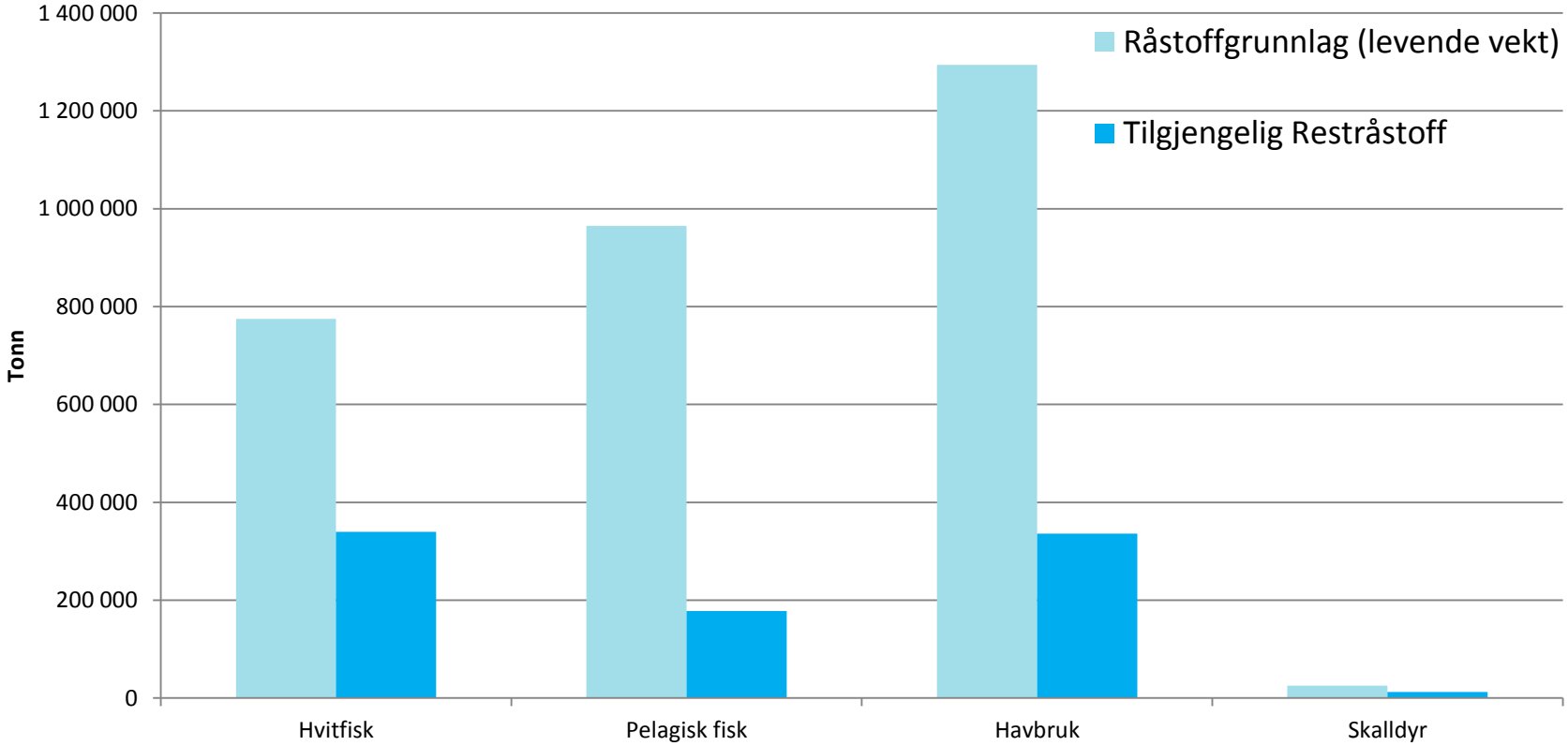
- *Analyse marint restråstoff, 2013*

  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

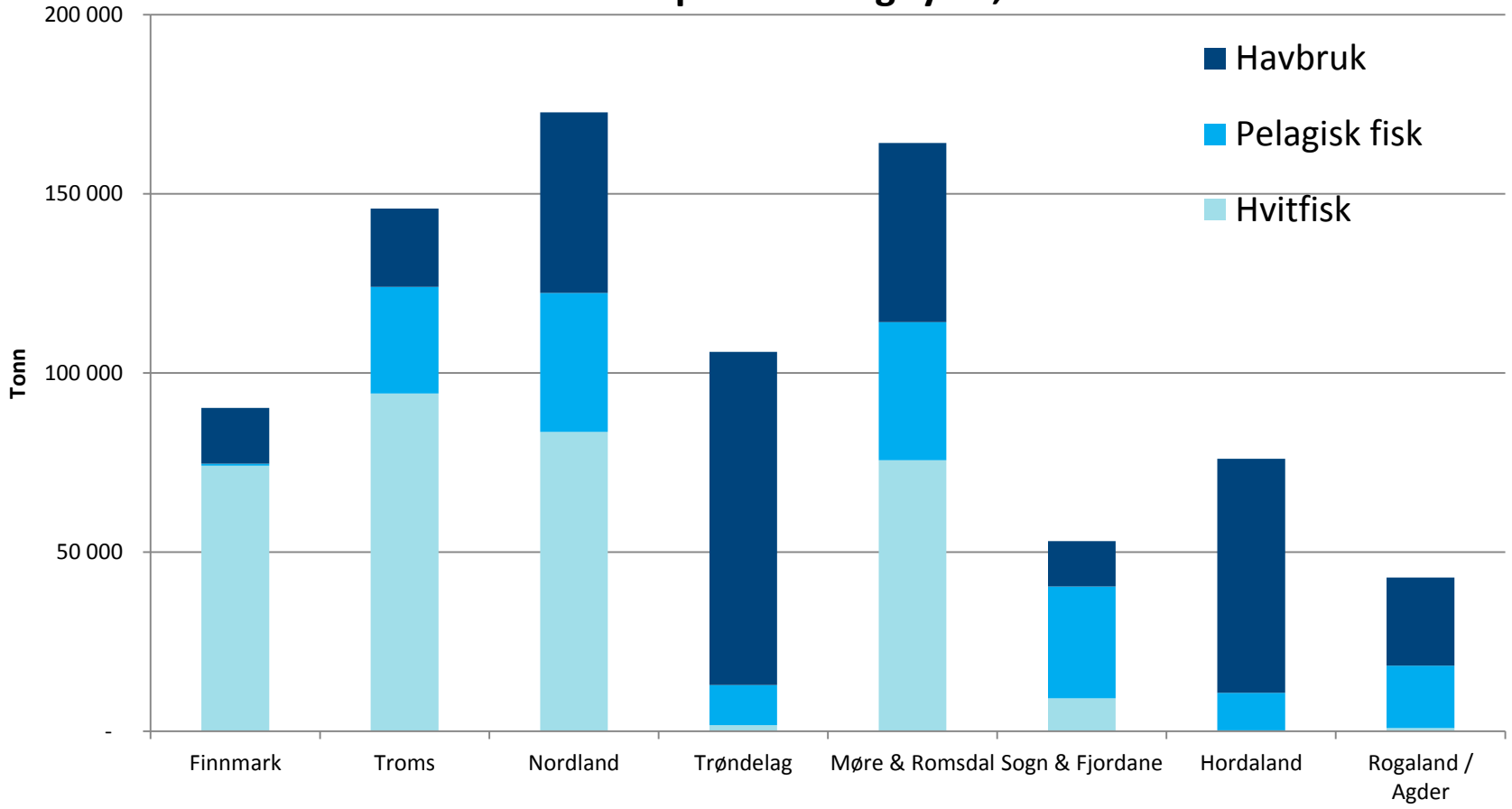
Finansiert av Fiskeri og havbruksnæringens forskningsfond

Råstoffgrunnlag og tilgjengelig restråstoff - Fordelt på sektor, 2013

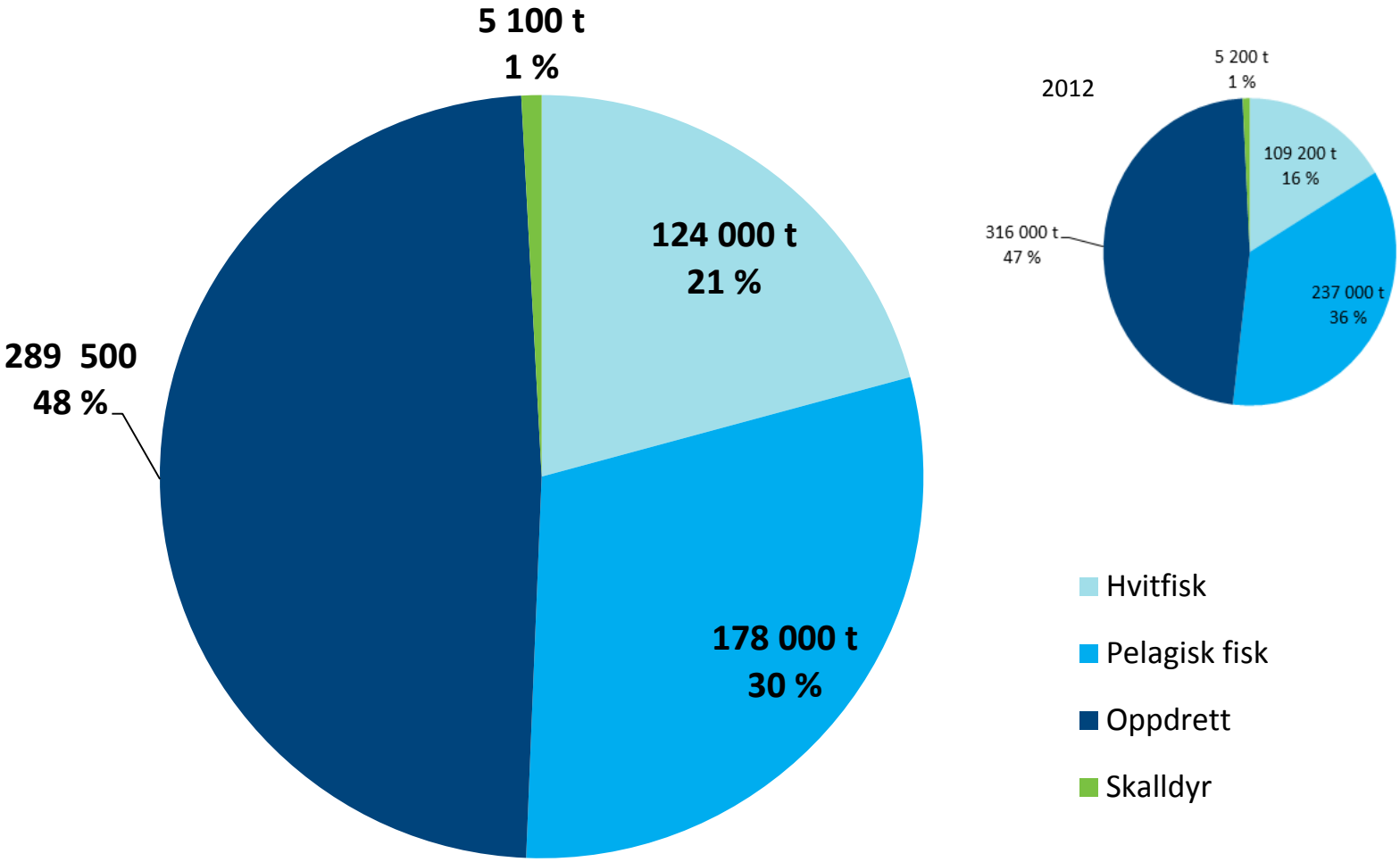


Totalt tilgjengelig restråstoff

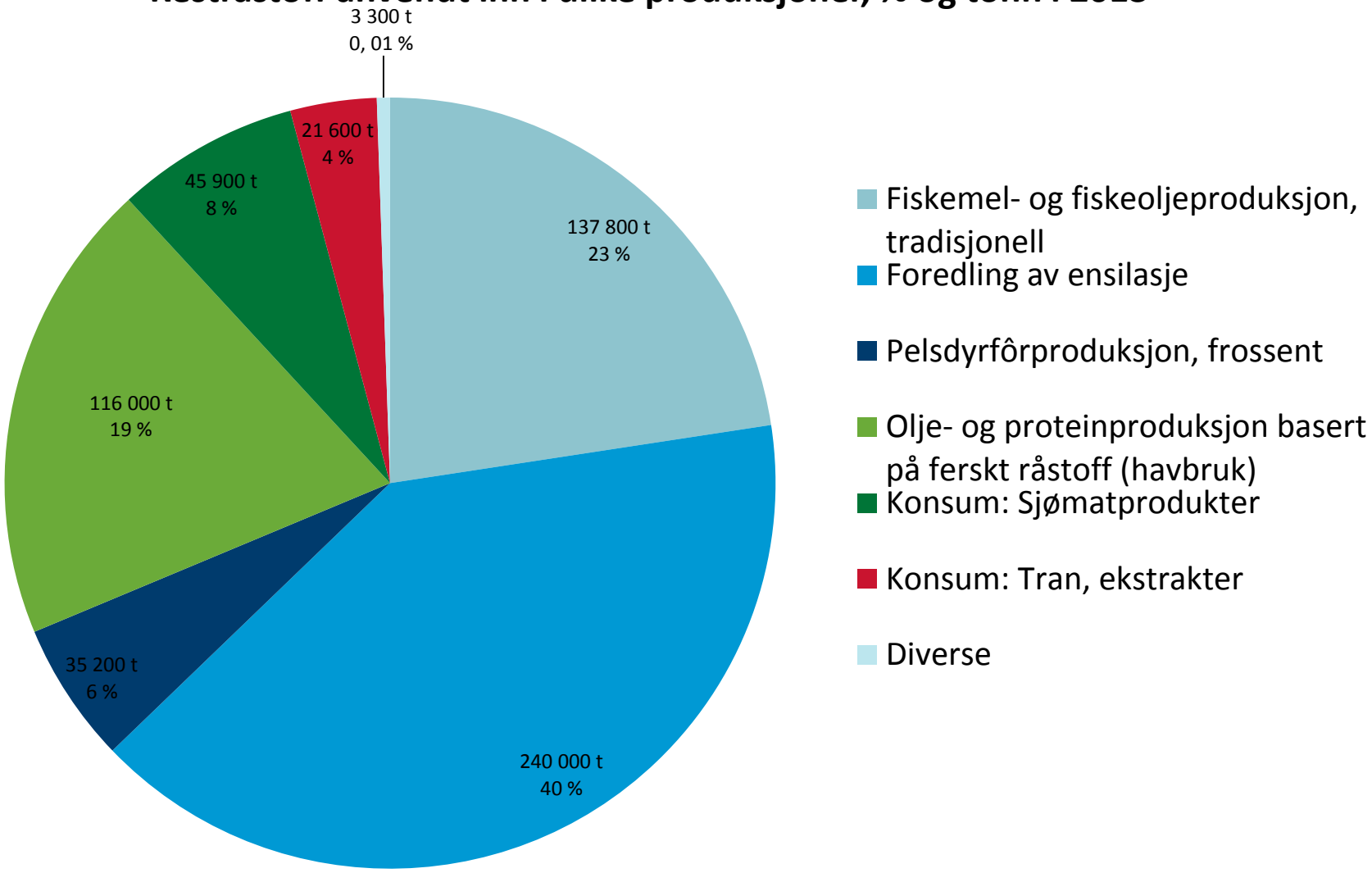
Fordelt på sektor og fylke, 2013

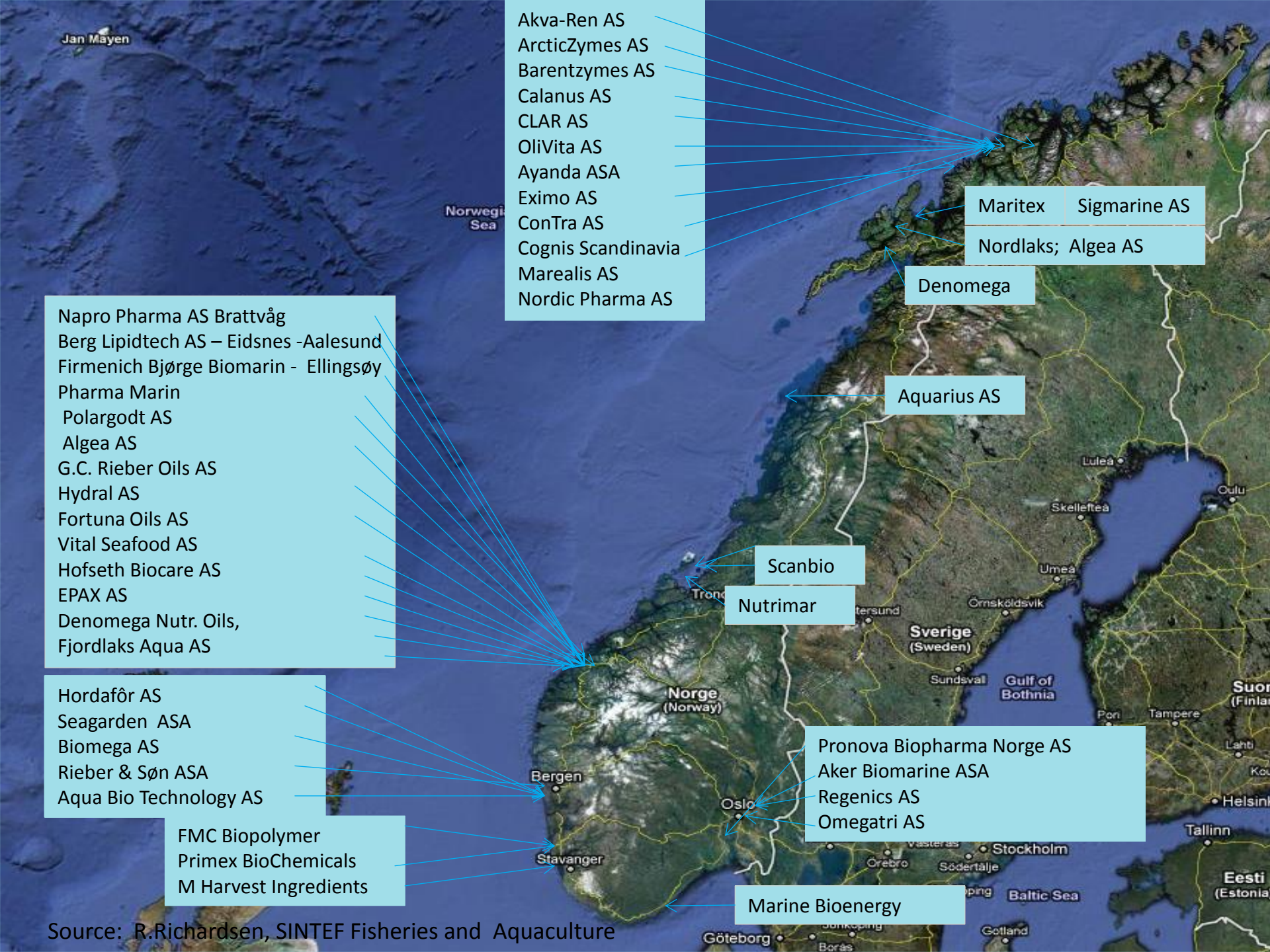


Mengde restråstoff som utnyttes fordelt på sektor 2013



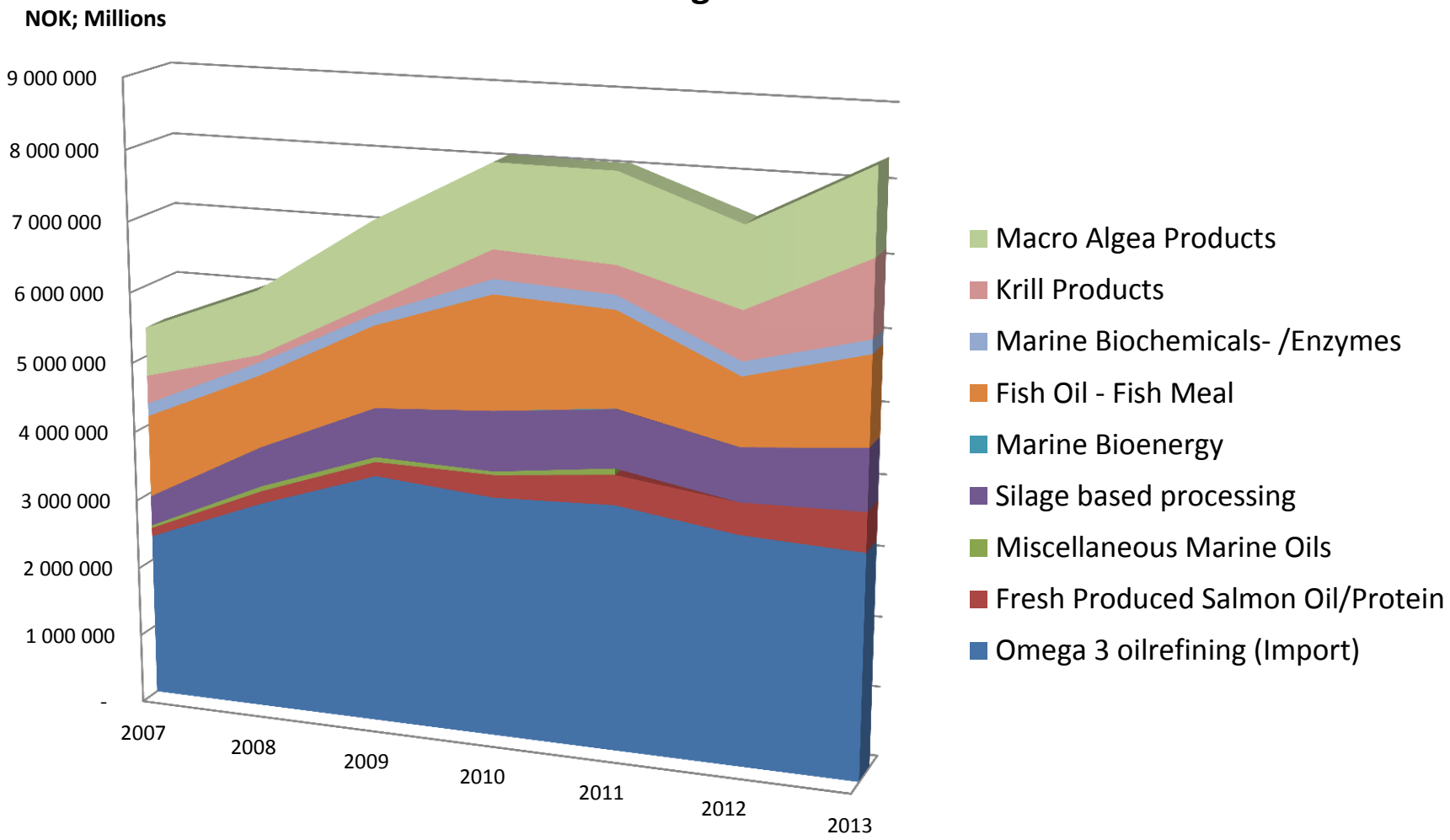
Restråstoff anvendt inn i ulike produksjoner, % og tonn i 2013



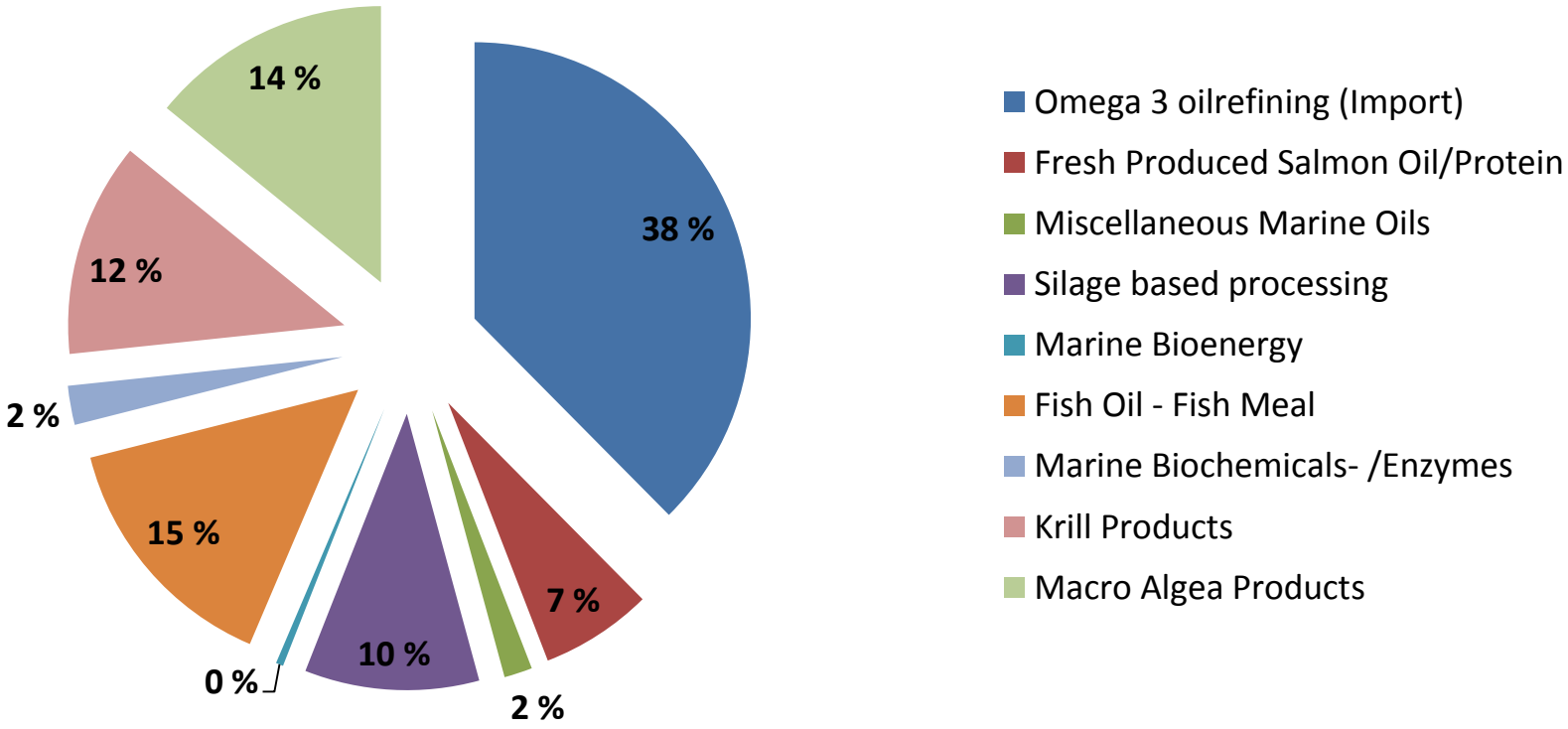


Source: R.Richardsen, SINTEF Fisheries and Aquaculture

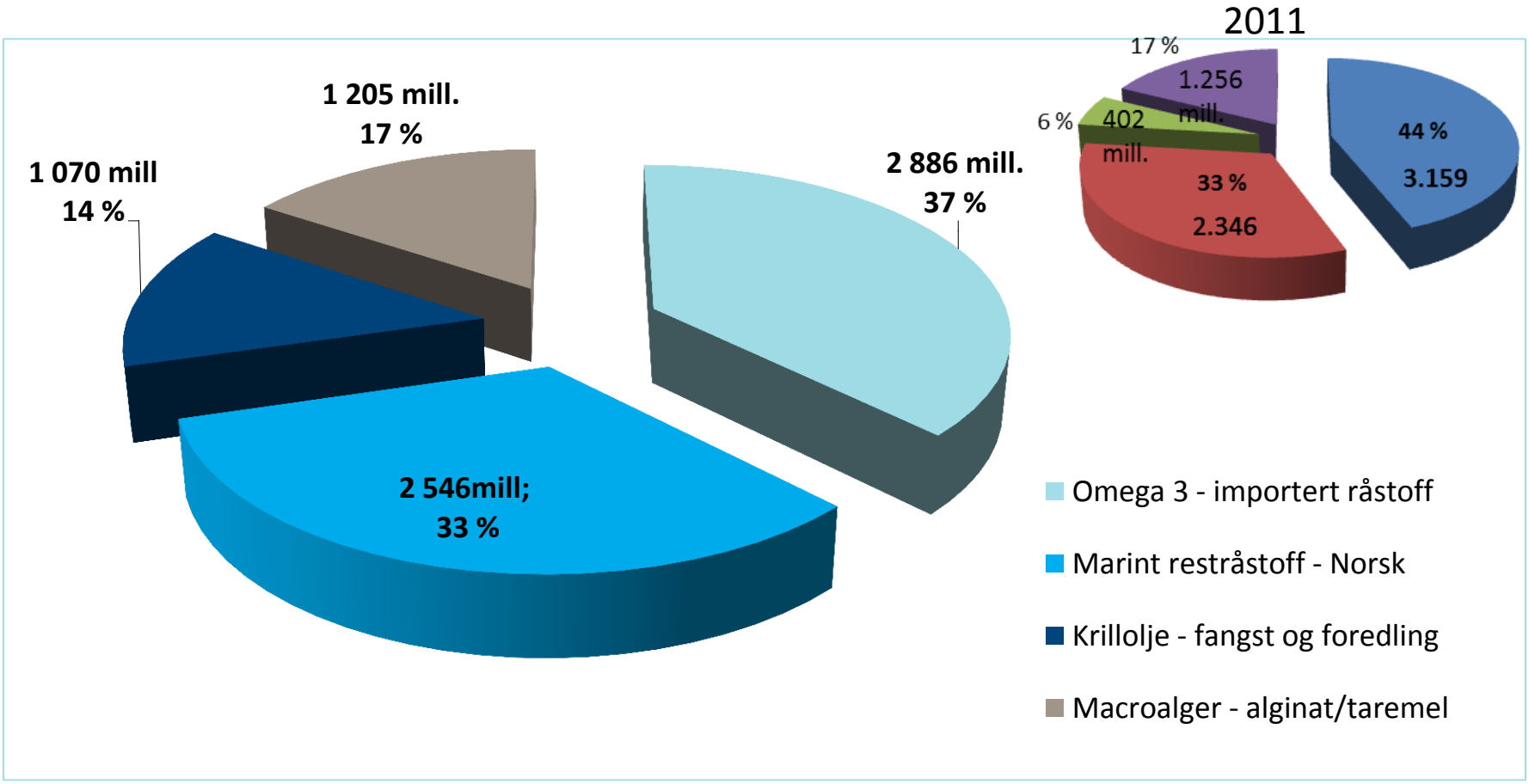
Total omsetning 2007-2013



Sektorvis andel av omsetning 2013



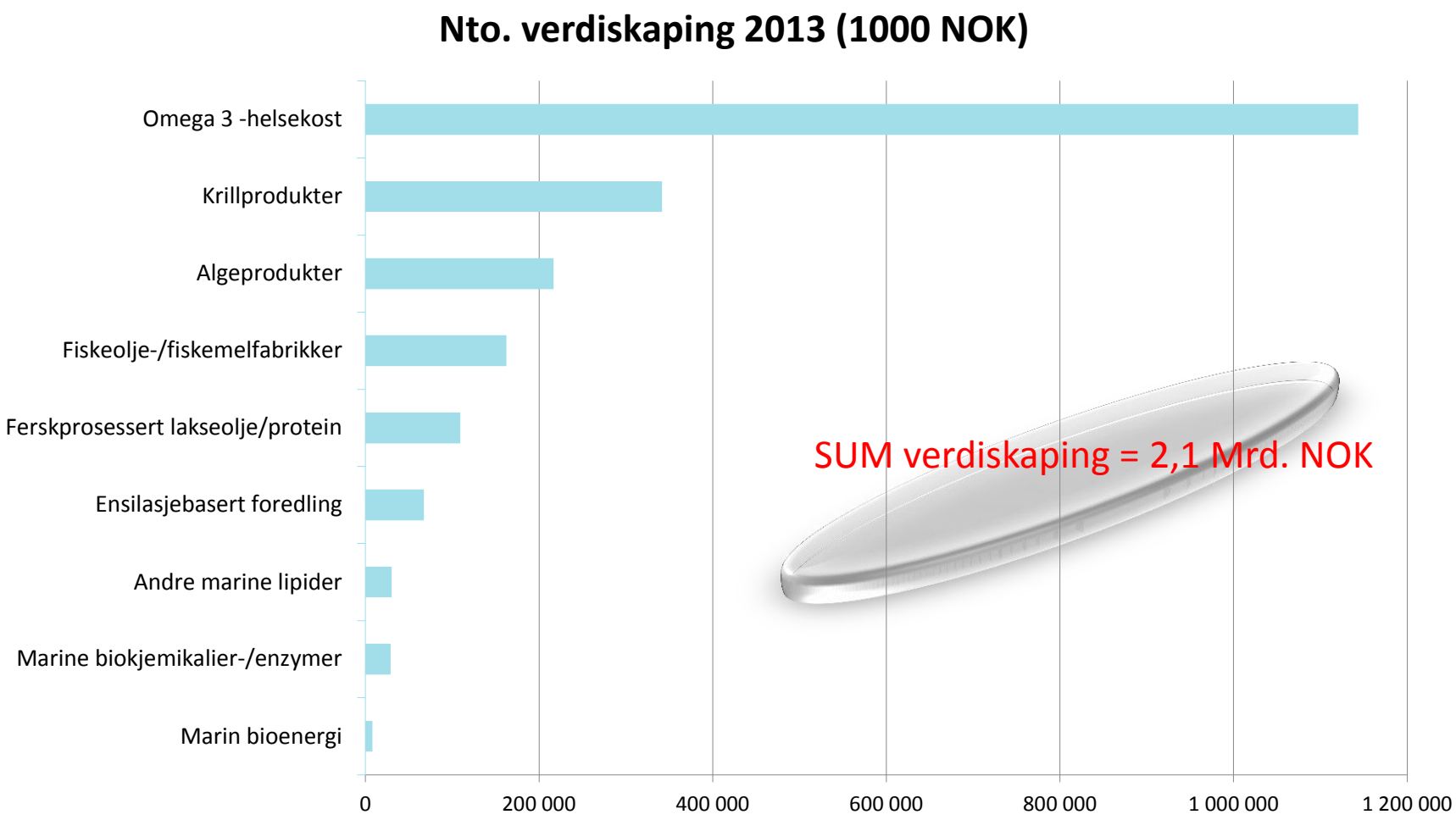
Omsetningverdi etter råstoffopprinnelse



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 !



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

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 Karmoynytt. "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.karmoynytt.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

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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: