

Frossenfiskens renessanse

Morten Heide og Finn-Arne Egeness

Agenda

- Utviklingen fra ferske til tinte torskeprodukter i britisk og europeisk dagligvarehandel
- Bakgrunn for markedsendringer
- Konsekvenser og muligheter for norsk fiskerinæring

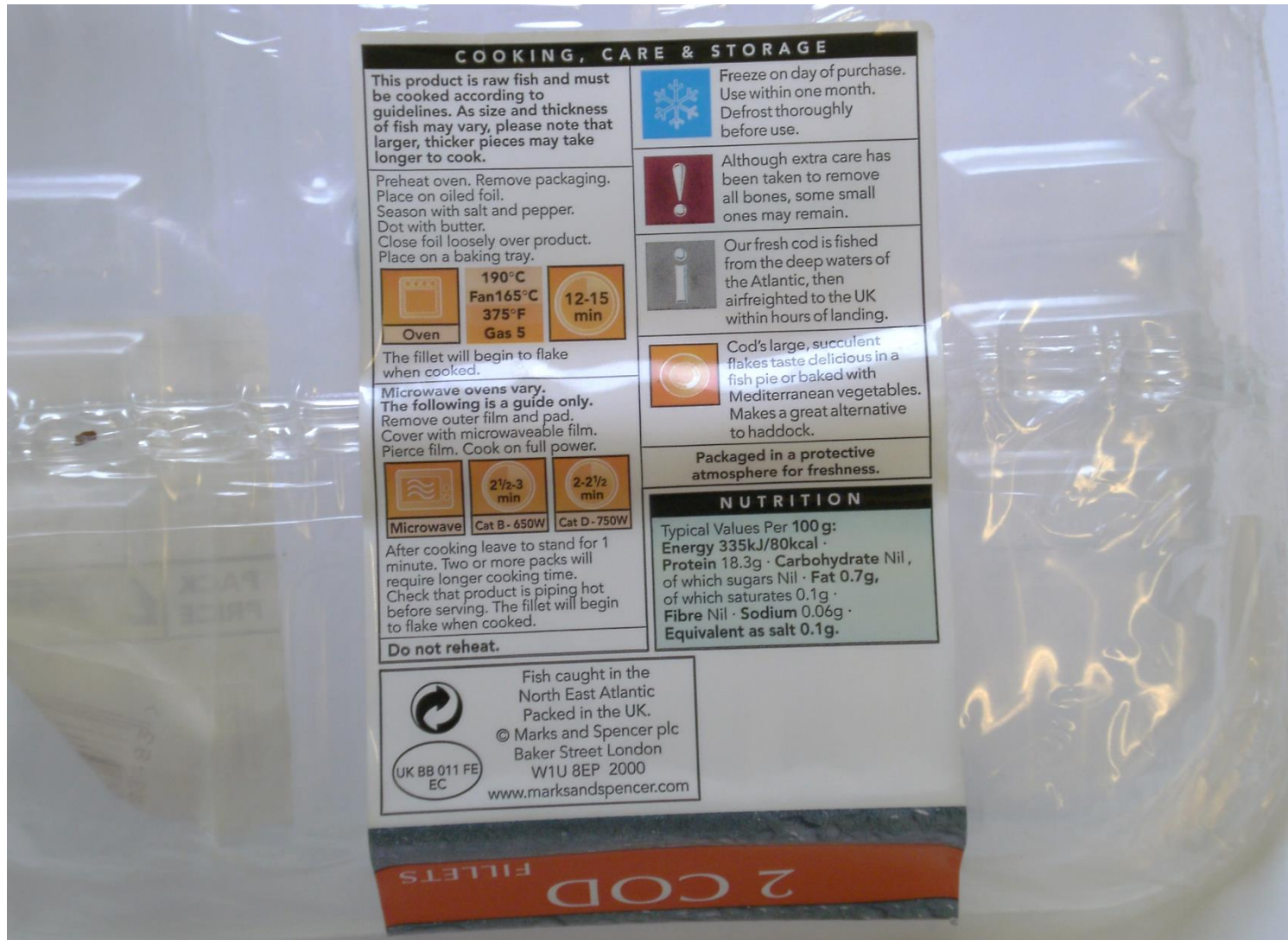
Utvikling innen brettpakkede torskeprodukter

- Eksempler fra kjøledisken til Marks & Spencer (UK)
 - 2003
 - 2005
 - 2010

Marks&Spencer 2003



Marks&Spencer 2003



Marks&Spencer 2005



Marks&Spencer 2005



COOKING, CARE & STORAGE

This product is raw fish and must be cooked according to the cooking instructions. As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook. Remove all packaging.

For best results oven bake.
Preheat oven. Place product on foil.
Dot with butter and season with salt and pepper to taste.
Wrap product loosely in foil and place on baking tray.

Oven **190°C** **15-17 min**
Fan 165°C 375°F Gas 5

Domestic grills vary. The following is a guide only.
Preheat grill to medium. Coat fillets lightly in seasoned flour.
Place product directly on base of grill pan.
Dot with butter. Turn once during cooking.

Grill **10-12 min**

Do not reheat.

Freeze on day of purchase.
Use within one month.
Defrost thoroughly before use.

Although extra care has been taken to remove all bones, some small bones may remain.

NUTRITION

Typical Values	Per 100 g
Energy kJ	335
kcal	80
Protein g	18.3
Carbohydrate g	Nil
of which sugars g	Nil
Fat g	0.7
of which saturates g	0.1
Fibre g	Nil
Sodium g	0.06
Equivalent as salt g	0.1

GUIDELINE DAILY AMOUNTS
Recommended by nutrition professionals for average adults

	Per 100 g	Woman	Man
Calories	80	2000	2500
Fat g	0.7	70	95
Salt g	0.1	5	6

Packed in the UK with North Atlantic cod.
Marks and Spencer plc
PO Box 3339 Chester
CH99 9QS 2000
M 0177 627 5

find out more www.marksandspencer.com

for the love of food...
All of our fresh cod is caught in the deep, icy cold water around Iceland.
We work in partnership with the best boats and fishermen who pride themselves on catching the finest cod every day. It is line caught, not trawled, which means that there is less damage to the fish therefore maintaining quality, texture and colour. The cod is then hand filleted and flown daily to the UK ensuring fantastic freshness. Olafur Bjornsson fishes cod for Marks and Spencer. "Icelanders have a passion for fish which is passed down for generations. For this reason we ensure that we fish sustainably which means care for the environment goes hand in hand with managing fish stocks."

to make this even more special...
Lightly season the cod fillets with salt and cracked black pepper and bake in buttered foil.
Serve with grilled tomatoes, garlic mushrooms and some buttery mashed potatoes.

2 Fresh Cod

Marks&Spencer 2010



Marks&Spencer 2010

STORAGE

 Suitable for freezing. This product may have been frozen and returned to chill temperature. Further freezing will not affect quality. Freeze on day of purchase. Use within one month. Defrost thoroughly before use.

COD LOIN FILLETS

Fry, grill, bake or poach - **FOR BEST RESULTS BAKE**
As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook.

OVEN
Remove all packaging. Preheat oven. Place product on foil. Dot with butter and season with salt and pepper to taste. Wrap product loosely in foil and place on baking tray.

 **190°C Fan 165°C 375°F Gas 5**

 **15-17 mins**

Do not reheat.

NUTRITION

Typical values	per 100g	adult
Energy kJ	380	
Energy kcal	90	2000
Protein	18.8g	45g
Carbohydrate	0.3g	230g
of which sugars	0.3g	90g
Fat	1.5g	70g
of which saturates	1.0g	20g
Fibre	0.3g	24g
Sodium	0.06g	2.4g
Equivalent as salt	0.20g	6g

GDA = Guideline daily amount

IMPORTANT

 This product is raw fish and must be cooked according to the cooking instructions. Although extra care has been taken to remove all bones, some small ones may remain.



Our cod is caught with hook and line by a small number of fishing boats, specially selected by M&S. Our fish is selected from the best of the daily catch and filleted by hand for outstanding quality.

As part of a healthy balanced diet, you should eat at least 2 portions of fish a week.

DISPOSAL

PACK

 plastics

NOT CURRENTLY RECYCLABLE

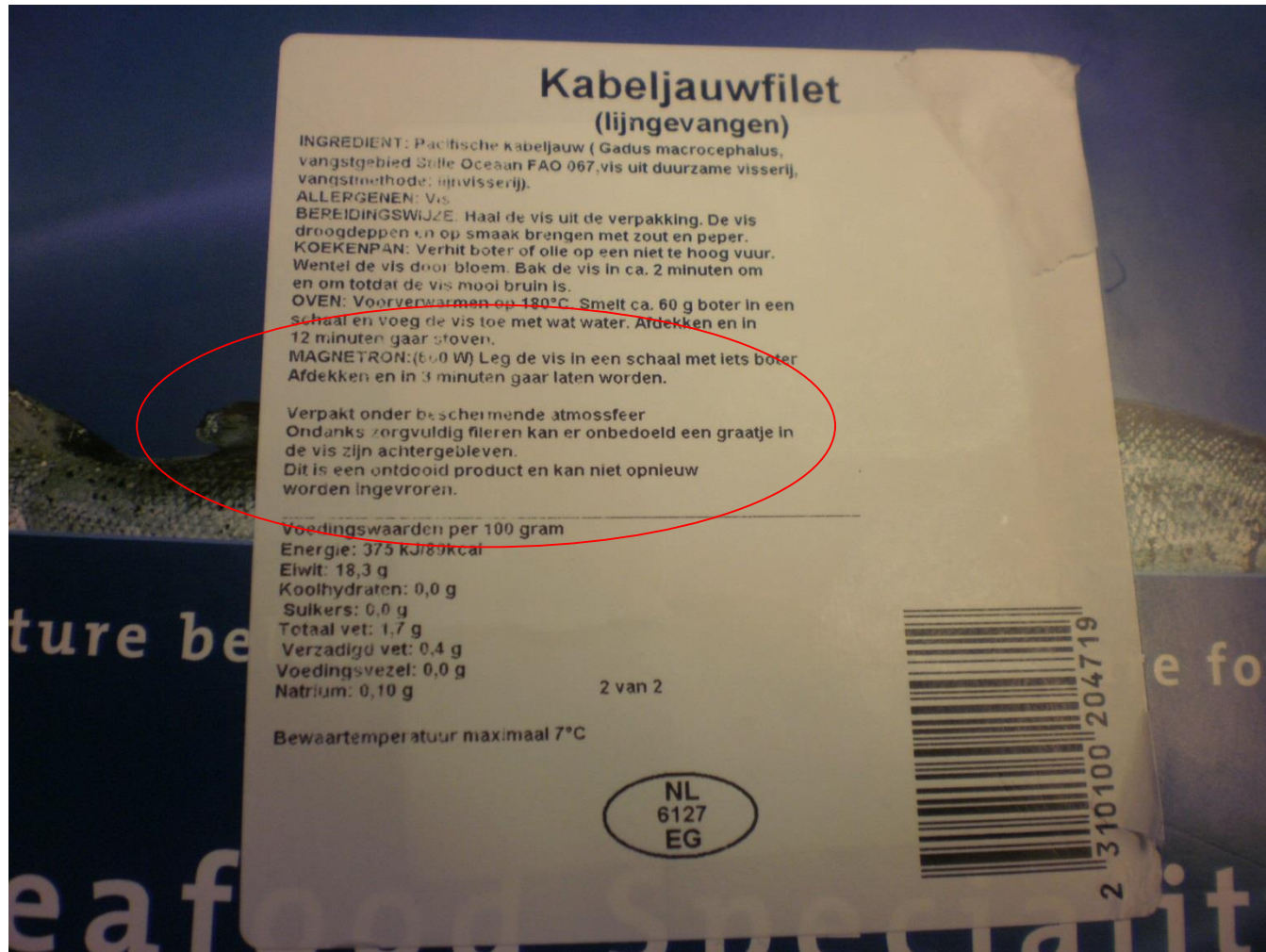
Packed in Scotland with cod caught in the North East Atlantic. 2000
© Marks and Spencer plc
PO Box 3339 Chester CH99 9QS
marksandspencer.com

UK
BB 011
EC

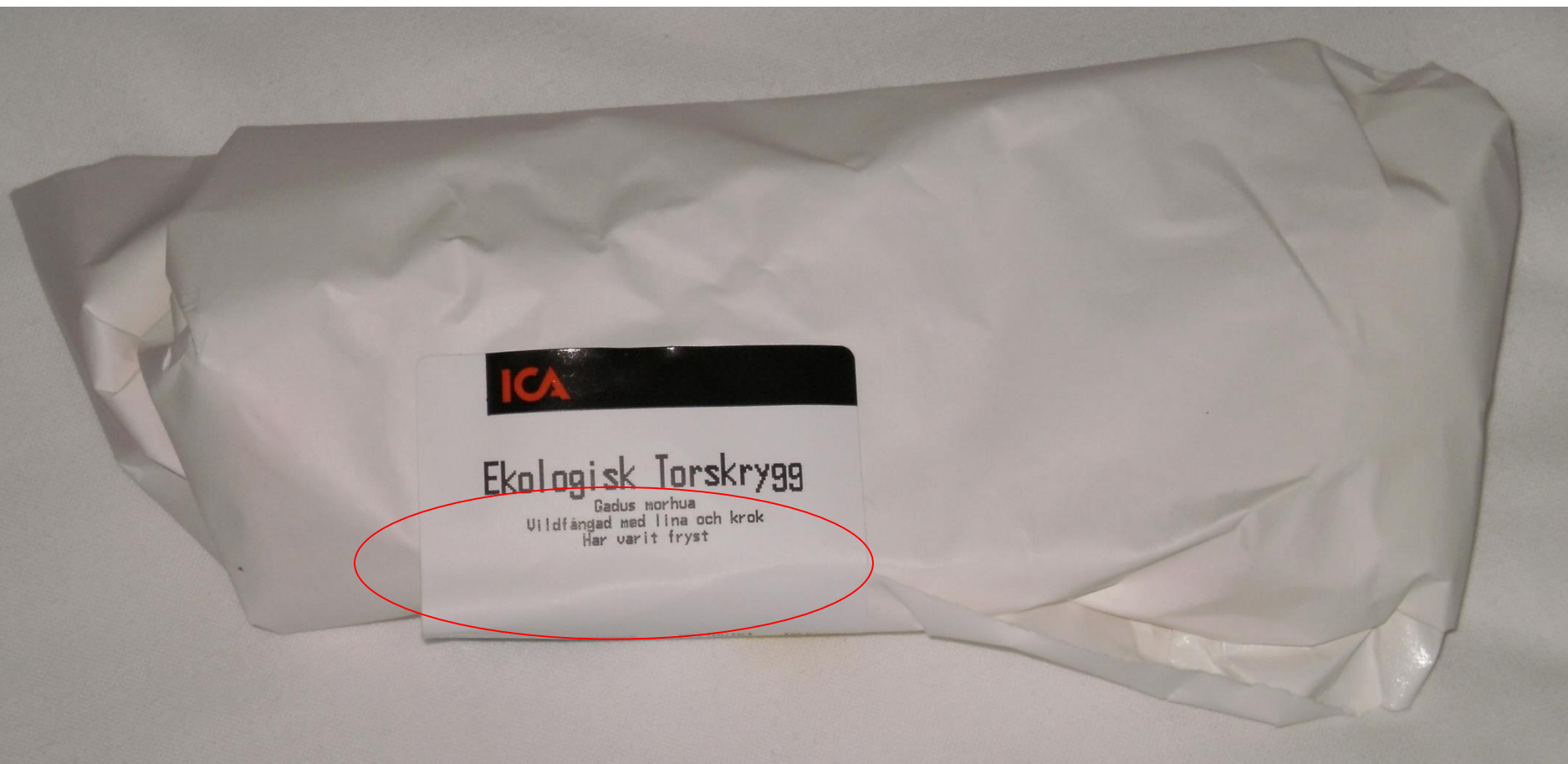
Storbritannia

- Tint fisk er i ferd med å erstatte fersk fisk
- Skifte hos de største aktørene
 - Tesco
 - ASDA
 - Sainsbury`s
 - Marks & Spencer
- Mer produktinformasjonen
 - bærekraft
 - fangstredskap
- Differensieringsstrategier
 - Morrisons

Nederland



Sverige



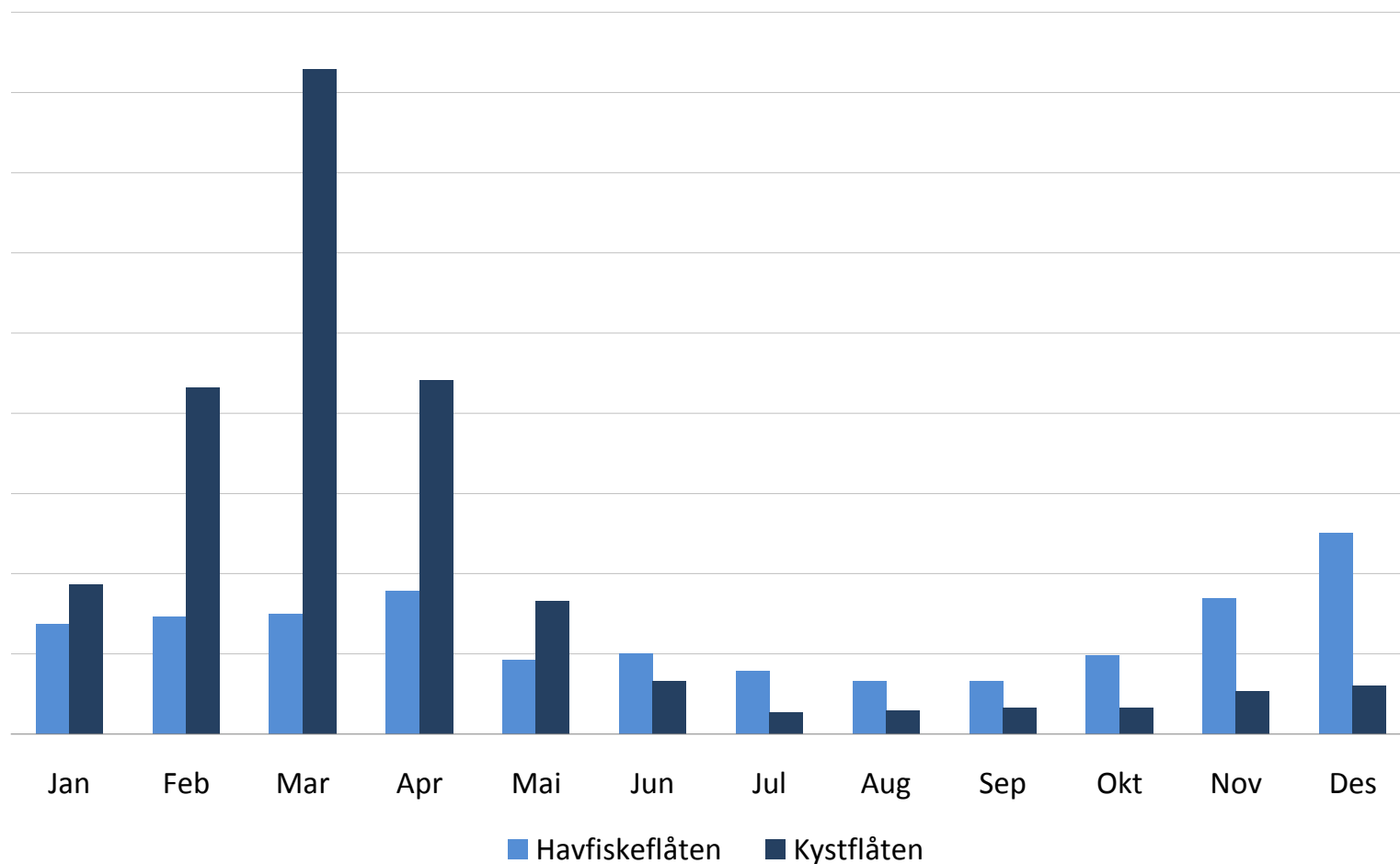
Norge



OPPBEVARING

Kjøleware til 0-4 °C.
Produktet har vært frosset.
Bør ikke fryses på nytt.

Norske fartøys landinger av torsk etter måned i perioden 2000 - 2008



Hvorfor tint fisk er bedre enn fersk

- Verdikjedens tilpassning til markedskrav og profittmaksimering
- Tilgjengelighet
 - Sesongvariasjoner
- Kort leveringstid
 - Leverer på bestilling
- Transaksjonskostnader
 - Svinn
 - Logistikk
 - Færre uforutsette hendelser
- Kvalitet

**Cod (*Gadus morhua* or *Gadus macrocephalus*)
fillets, skin on, bone in.**

Oven: • Remove all packaging. • Place on a baking tray in the centre of a pre-heated oven 180°C/350°F/Gas Mark 4 for 15-22 minutes.

• Adjust times according to your particular oven. (For fan assisted ovens cooking times should be reduced). • All appliances vary, these are guidelines only. • Check food is piping hot throughout before serving.

• Not suitable for cooking from frozen.

Freezing guidelines: • Freeze on day of purchase. Use within one month.

Defrost: • Defrost thoroughly for a minimum of 10 hours in a refrigerator. **IMPORTANT: If food has thawed, do not refreeze.**

Caution: • This product will contain bones.

Storage: • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

Nutrition

Additional information:

• Packaged in a protective

Storage: • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

Additional information:

Råvare

Produksjon

Emballering

Produkt

Fersk torskefilet
(*Gadus morhua*)

Pakking på brett

Brettpakket torskefilet (loins)

Fersk sløyd og hodekappet torsk (h/g)
(*Gadus morhua*)

Filetering

Fryst filet
(*Gadus morhua*)
(*Gadus macrocephalus*)

Tining

Fryst sløyd og hodekappet torsk (h/g)
(*Gadus morhua*)
(*Gadus macrocephalus*)

Tint filet
(*Gadus morhua*)
(*Gadus macrocephalus*)

Tid

Tre mulige scenarioer

1. Ferskt råstoff som fileteres, fryses, tines og selges kjølt (enkeltfryst)
 - **Foredling nært fangststed (Norge og Island)**
 - **Eventuelt Polen**
2. Fryst råstoff som tines, fileteres og selges kjølt (enkeltfryst)
 - **Foredling nært utsalgsstedet**
 - Større eksport av sløyd og hodekappet fisk
3. Fryst råstoff som tines, fileteres, fryses, tines og selges kjølt (dobbelthfryst)
 - **Foredling i Kina/Polen/Baltikum**
 - Større eksport av sløyd og hodekappet fisk

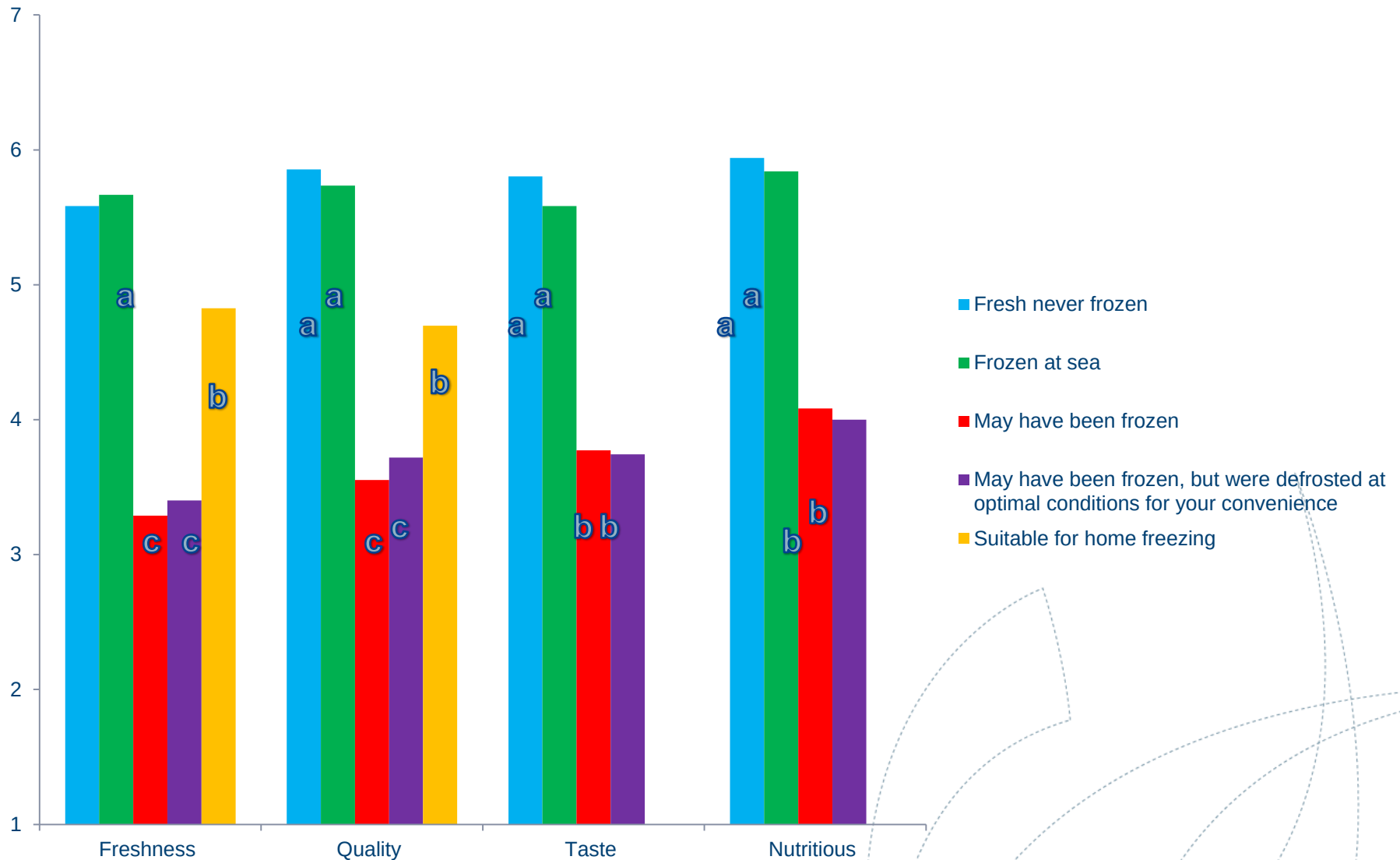
Potensielle konsekvenser for norsk fiskerinæring

- Tinte produkter kan true videreforedling i Norge
- Årsak er fortrinnene ved produksjonen av tinte produkter i utlandet
 - Nærhet til sluttbruker/market
 - Lave arbeidskraftkostnader

Muligheter for norsk fiskerinæring

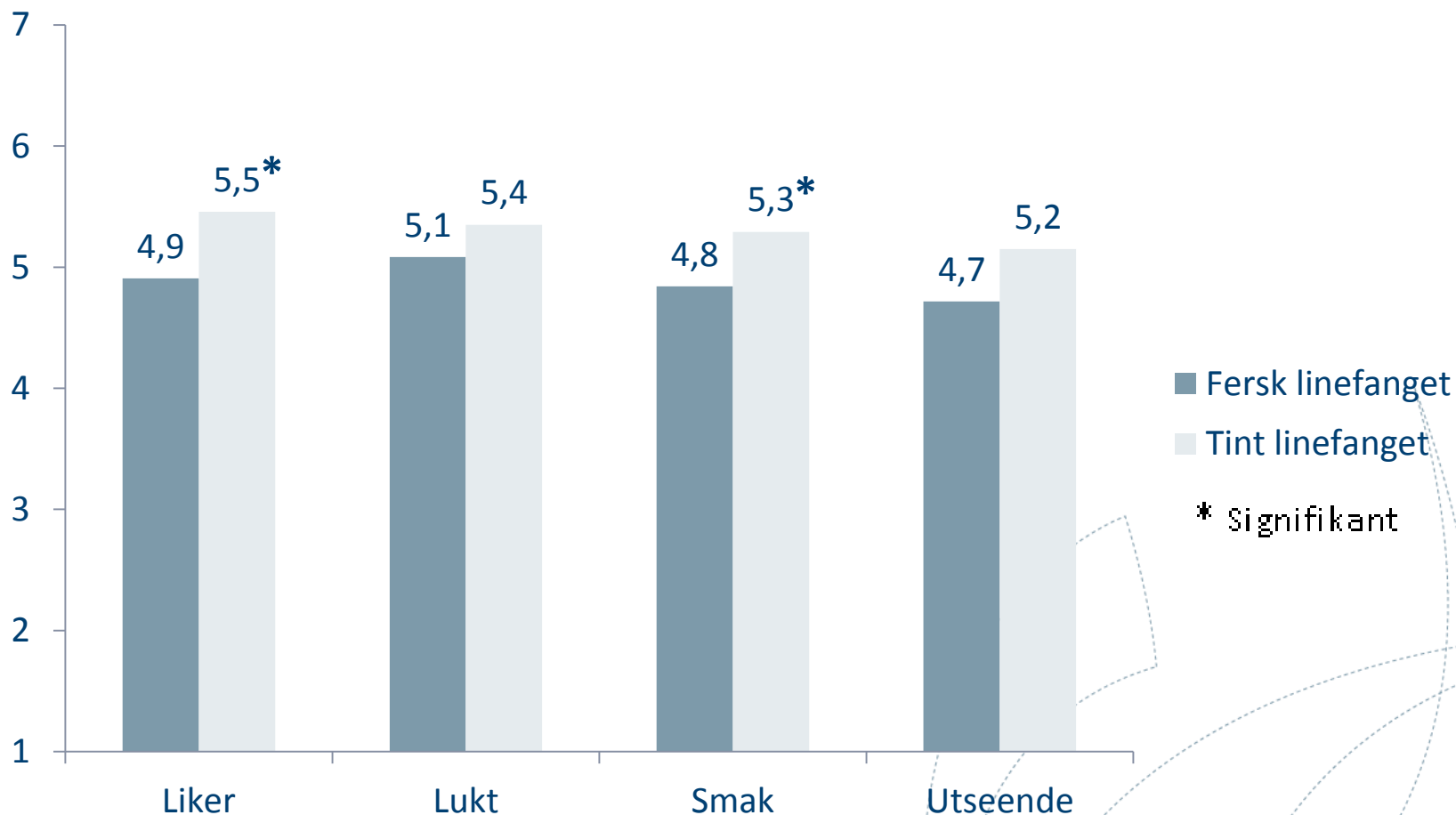
- Utnytte våre fortrinn
 - Nærhet til et førsteklasses ferskt råstoff
- Differensieringsstrategier
 - Tint råstoff
 - Enkelfryst
 - Frozen at sea/fresh frozen
 - Ferskt råstoff

Effekt av merking av fisk

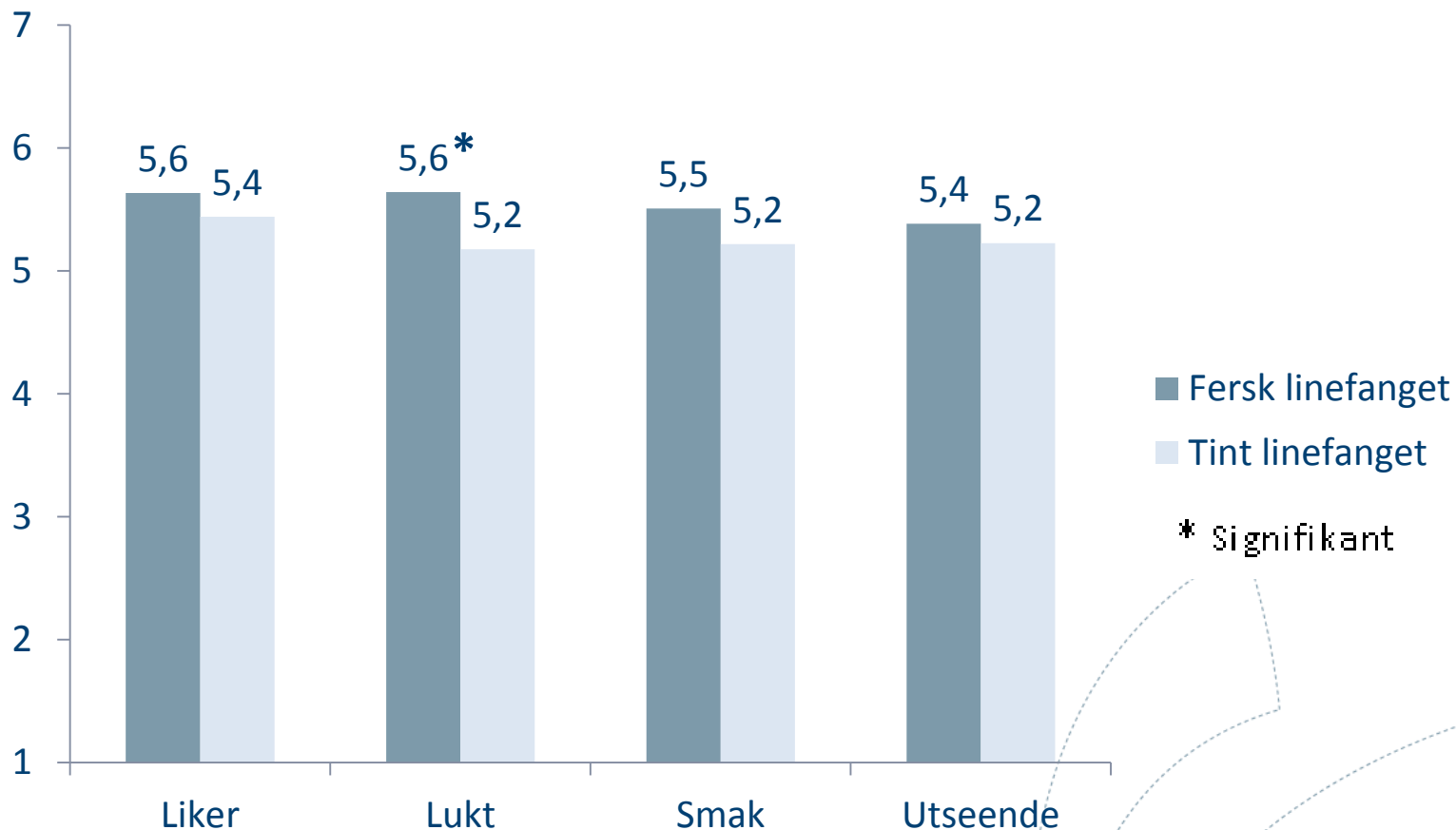


Hva med forbrukerne?

Evaluering av torskefilet uten informasjon



Evaluering av torskefilet med informasjon om at fisken er fersk eller tint



Kunnskapsbehov

- Mangler kunnskap om hvilke råvarealternativer som er best egnet til produksjon av tinte fiskeprodukter
 - Enkelt/dobbelfryst?
 - Filetert fra fersk eller fryst råstoff?
- Hvordan kan norskprodusert fersk eller tint filet differensieres i markedet?
- Kan norsk industri bli den foretrukne leverandøren av fryste produkter som kan omsettes i tint tilstand?

Oppsummering

- Tint torsk har fått innpass i etablerte kanaler for fersk fisk fordi den løser supermarkedskjedenes utfordringer med kjølte fiskeprodukter
 - Forutsigbarhet
 - Profittmaksimering
- Hvilke konsekvenser vil dette få for norsk torskesektor?