





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

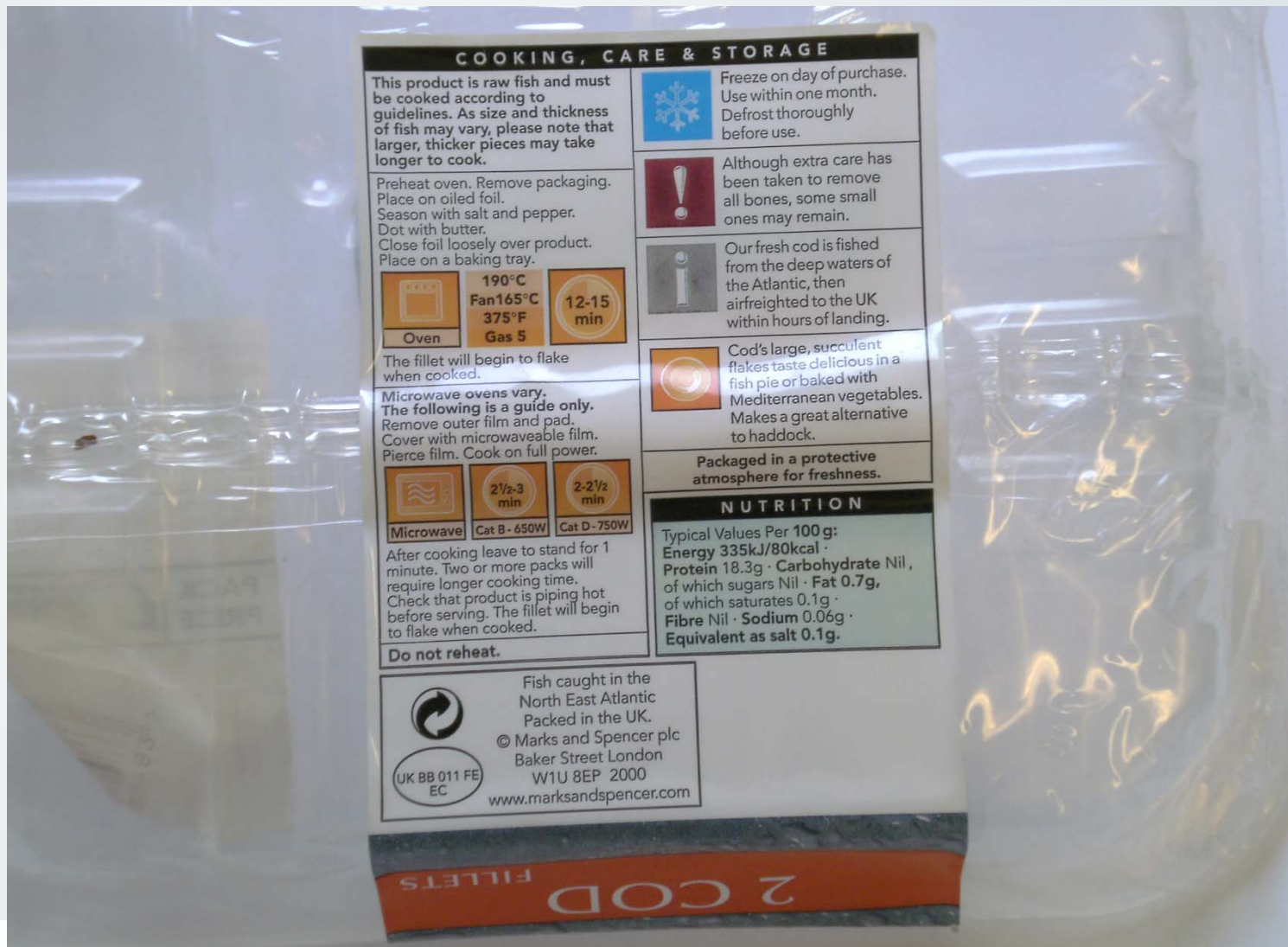
Utvikling innen brettpakkede torskeprodukter

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

Marks&Spencer 2003



Marks&Spencer 2003 (bakside)



Marks&Spencer 2005



Marks&Spencer 2005 (bakside)

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.

190°C
Fan 165°C
375°F
Gas 5

10-12 min

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.

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 ones may remain.

NUTRITION

Typical Values	Per 100 g
Energy kJ	335
Energy 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	

Packed in the UK with North East 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.

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Marks&Spencer 2010



Marks&Spencer 2010 (bakside)

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.

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.

NUTRITION		GDA
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	8g

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

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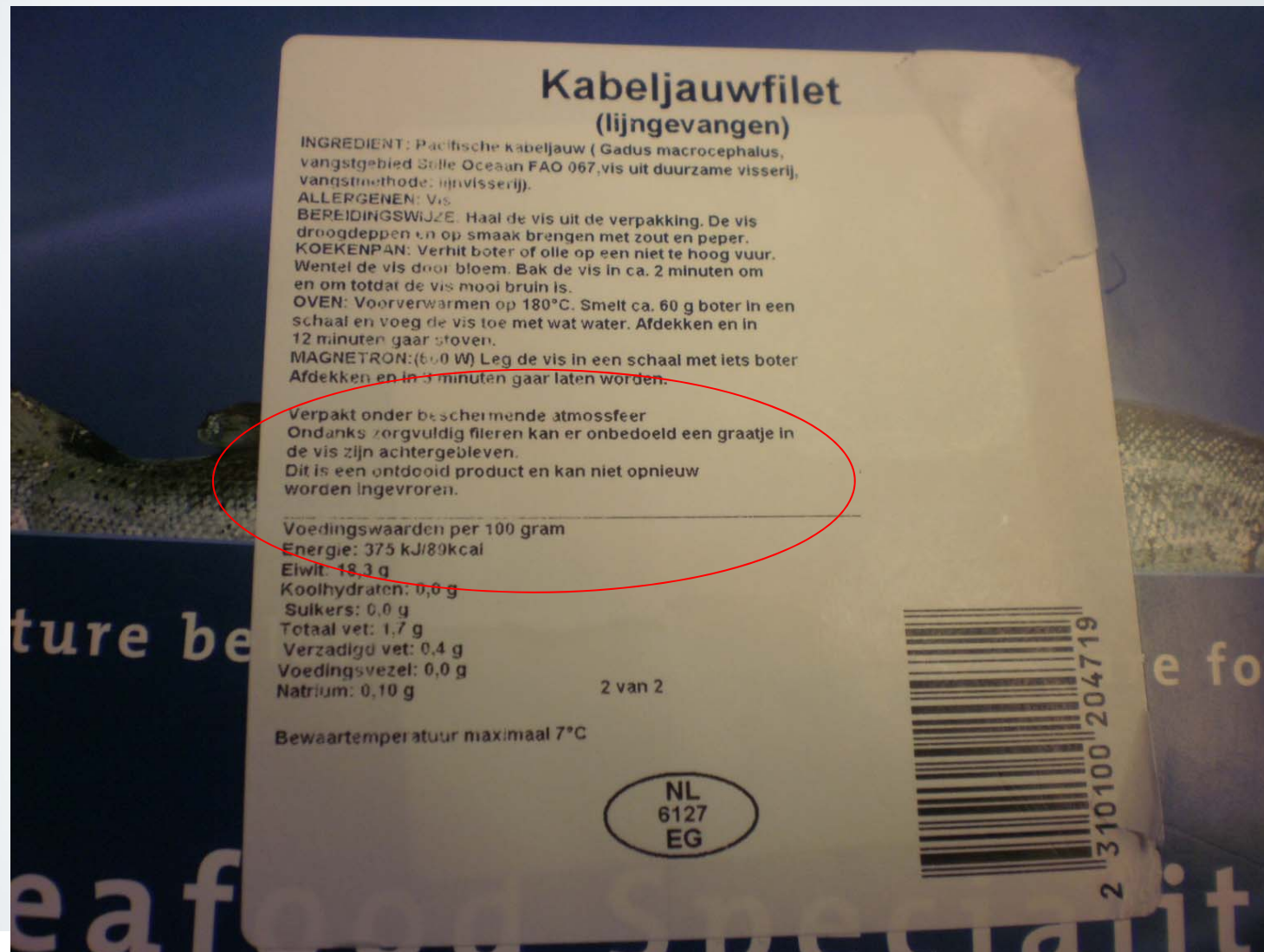
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Utviklingen i Storbritannia

- Tint fisk er i ferd med å erstatte fersk fisk
- Skifte hos de største aktørene
 - Tesco
 - ASDA
 - Sainsbury's
 - Marks & Spencer
- Differensieringsstrategi, fokus på fersk fisk
 - Morrisons

Nederland



Sverige



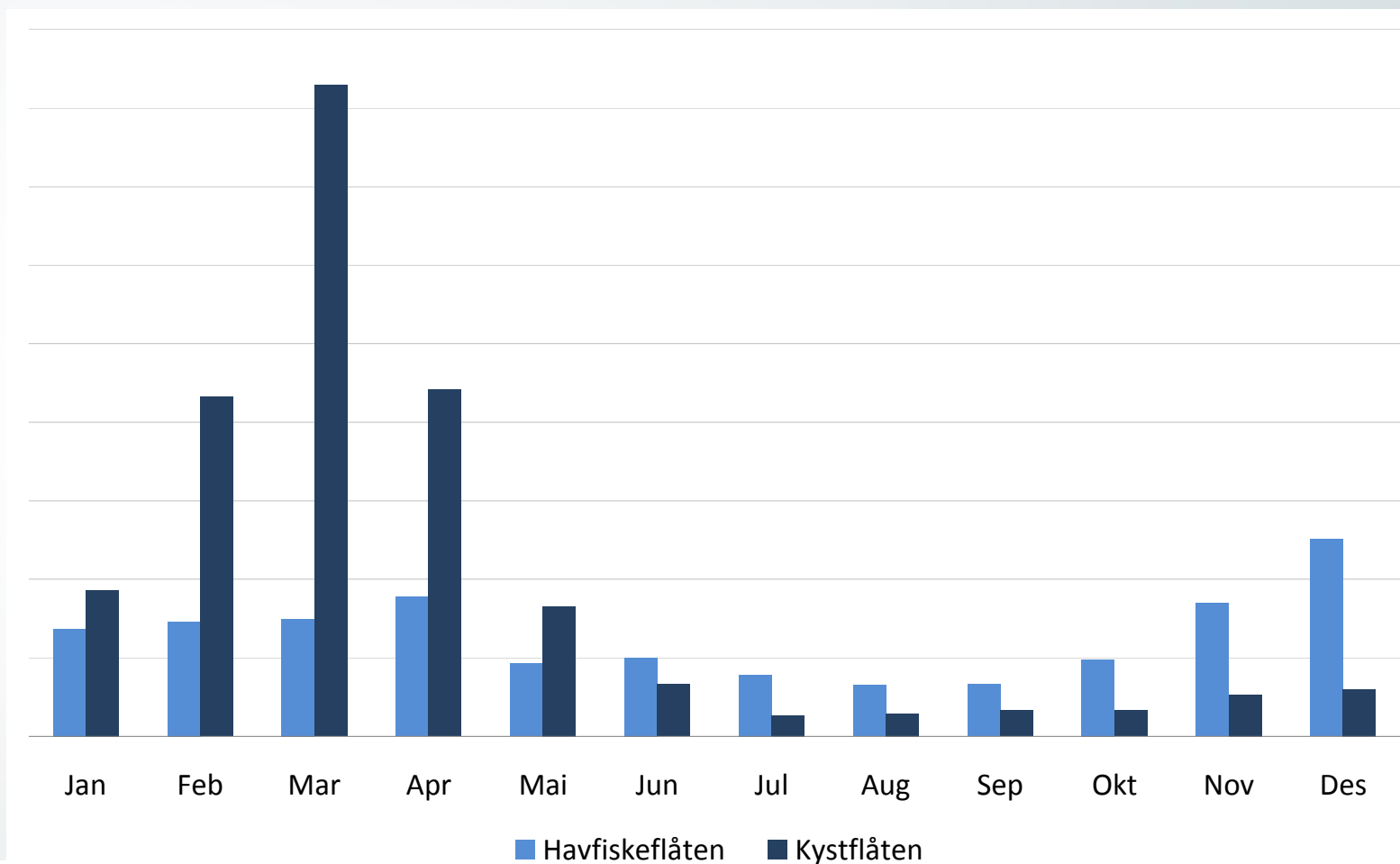
Norge



OPPBEVARING

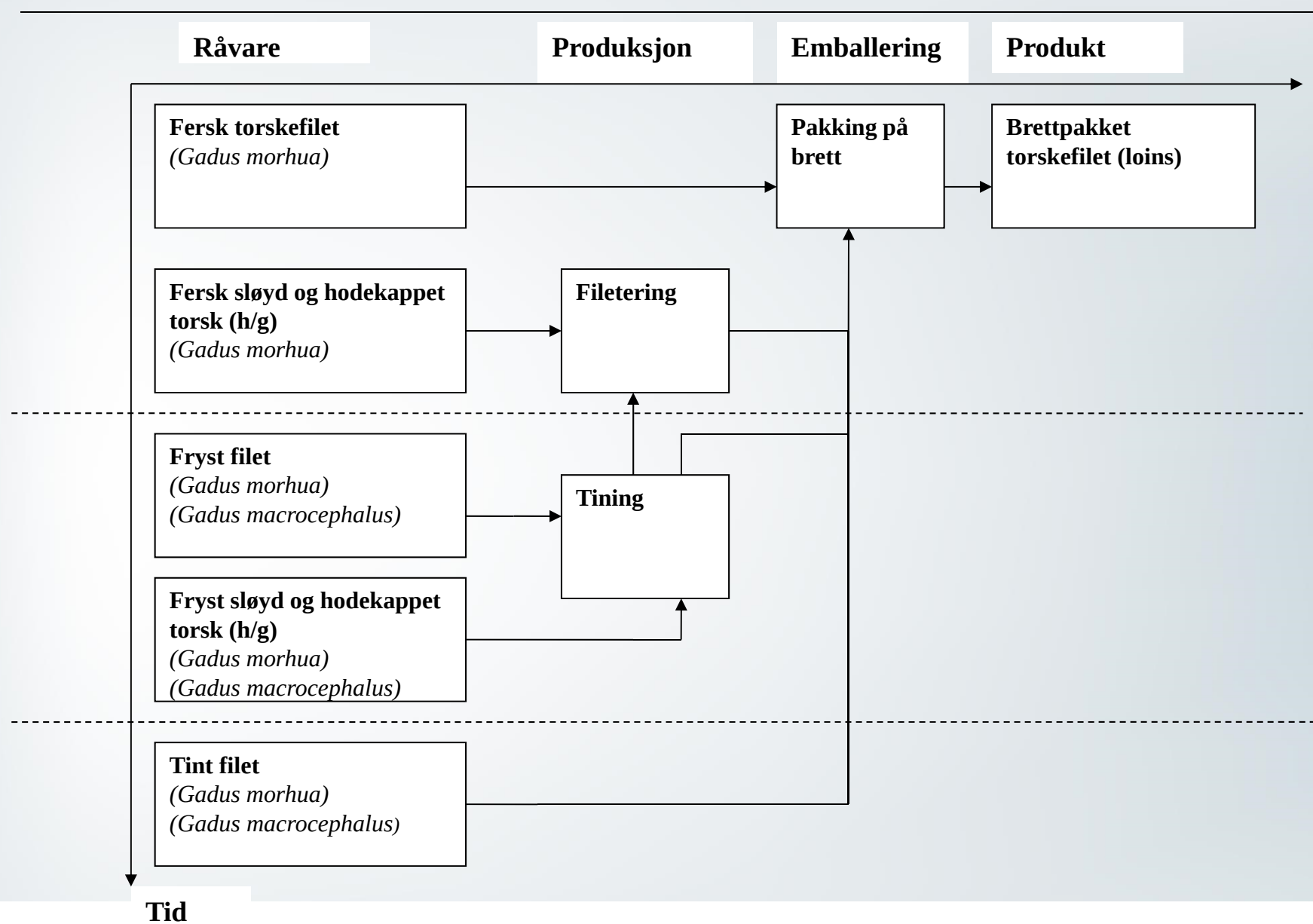
Kjølevare til 0-4 °C,
Produktet har vært frosset.
Bør ikke fryses på nytt.

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

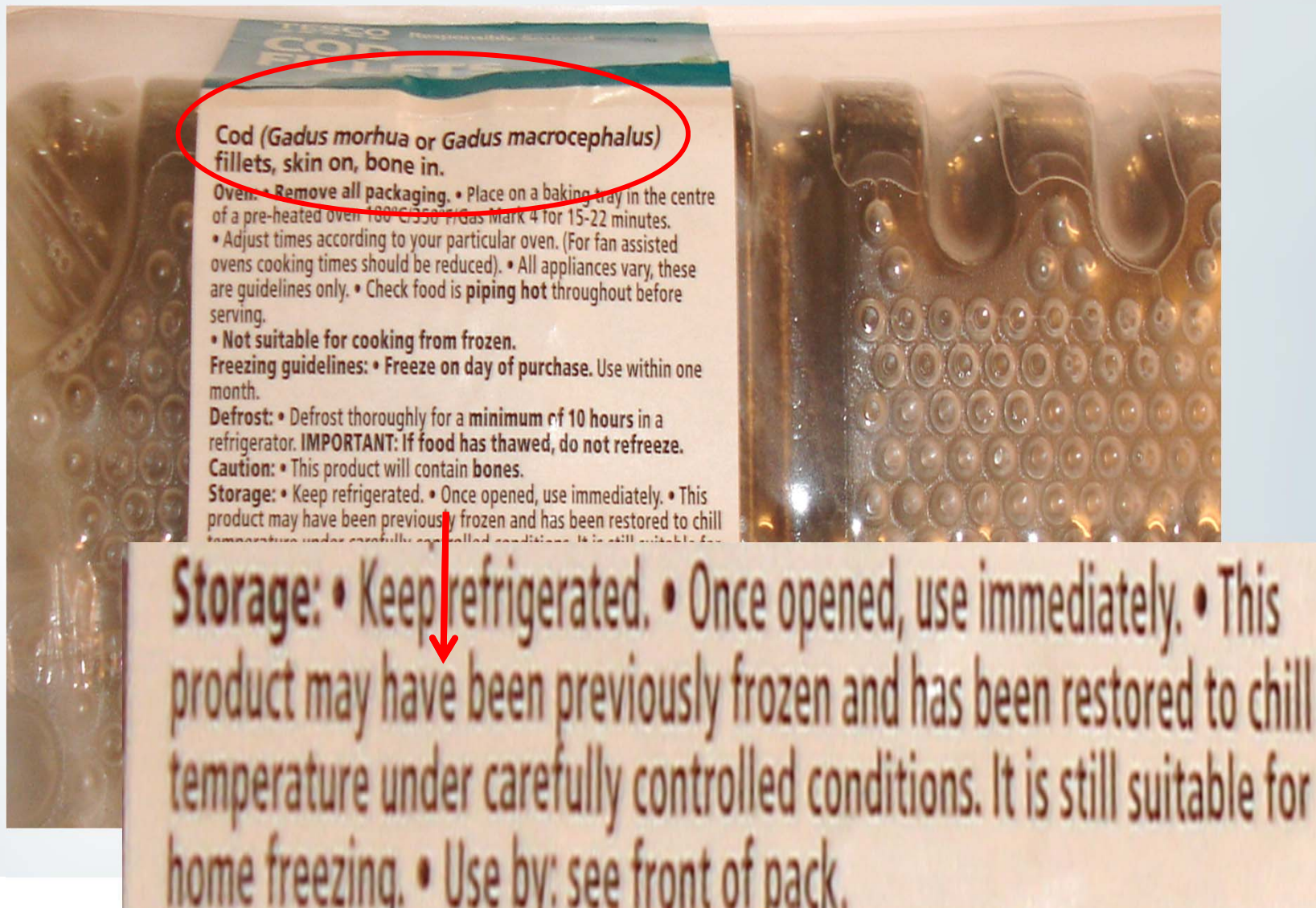


Hvorfor tint fisk foretrekkes

- Forutsigbar
 - Tilgjengelig hele året
 - Kort leveringstid
 - Enkel logistikk
 - Færre uforutsette hendelser
 - Kvalitet
- Mindre svinn
- Økt profitt i hele verdikjeden



Tesco 2010



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 (Storbritannia, Nederland etc.)**
 - Større eksport av fryst sløyd og hodekappet fisk
3. Fryst råstoff som tines, fileteres, fryses, tines og selges kjølt (dobbeltofryst)
 - **Foredling i Kina/Polen/Baltikum/Storbritannia**
 - Større eksport av fryst sløyd og hodekappet fisk

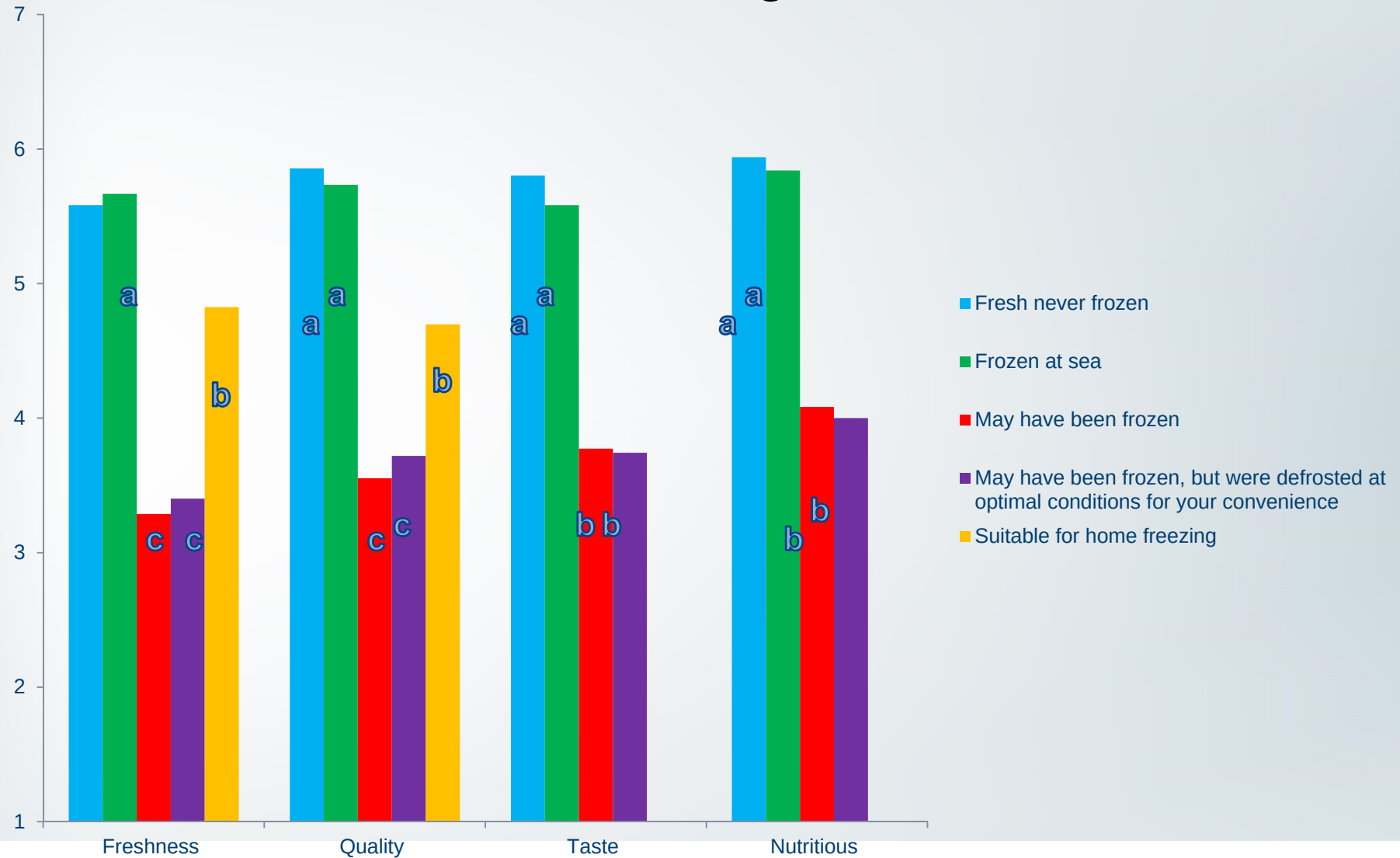
Potensielle konsekvenser for norsk fiskerinæring

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

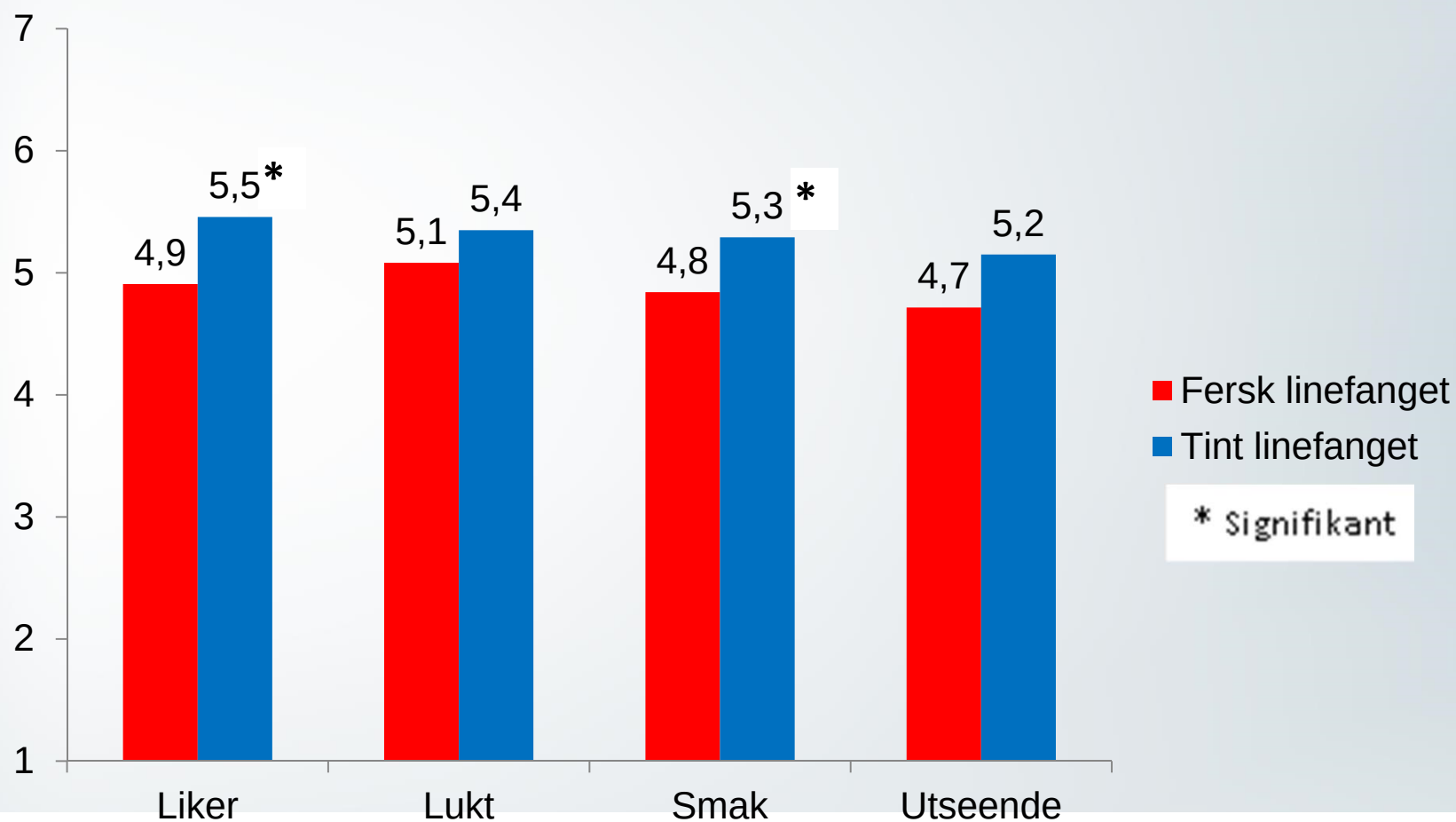
Muligheter for norsk fiskerinæring

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

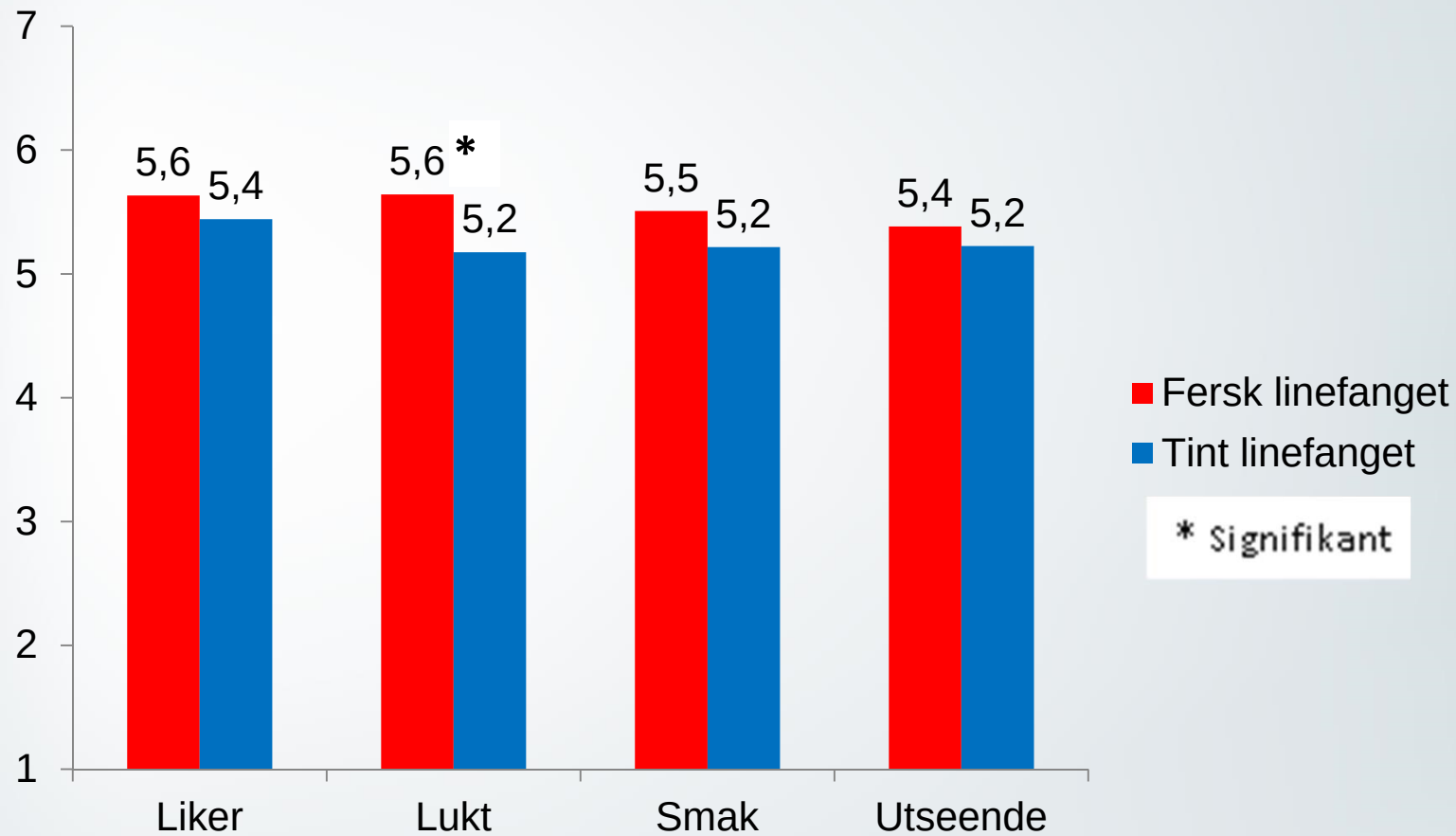
Effekt av merking av fisk



Hva med forbrukerne? Evaluering av tilberedt torskefilet uten informasjon



Evaluering av tilberedt 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?
 - Tine filet eller tine hel torsk og filetere?
- Hvordan kan norskprodusert fersk eller tint filet differensieres i markedet?
 - Frozen at/by sea
 - Norsk **FERSK** torsk

Oppsummering

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