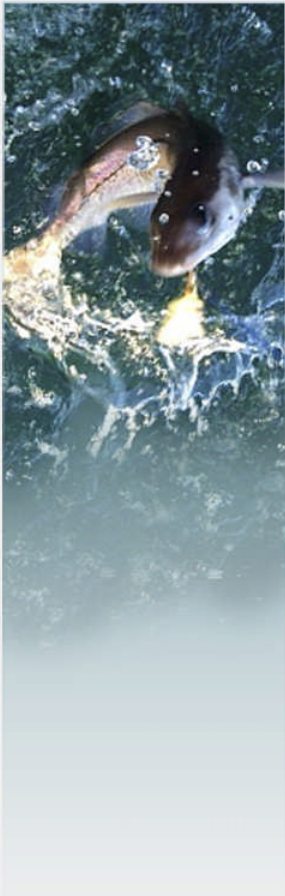


*fresh treats from the Atlantic Ocean*

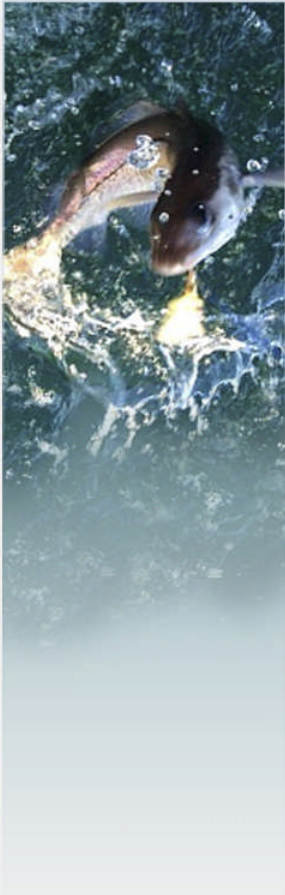
# Samkeppnisstaða Íslands í ferskum fiski

**Sjávarútvegsráðstefnan 2011**  
Frá tækifærum til tekjusköpunar  
Grand Hótel Reykjavík  
13. – 14. október 2011

Svavar Þór Guðmundsson

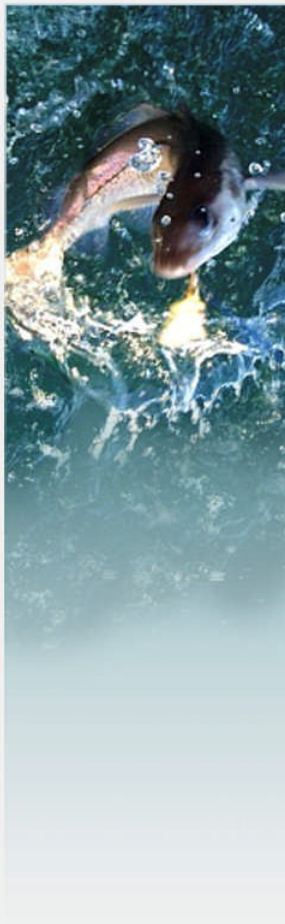


- 1 Hversu mikilvægur er ferskfiskmarkaður okkar Íslendinga?
- 2 Erum við með forystu inn á helstu markaði okkar eða erum við að tapa stríðinu við Noreg?
- 3 Sérstaða Íslendinga í ferskum fiski?



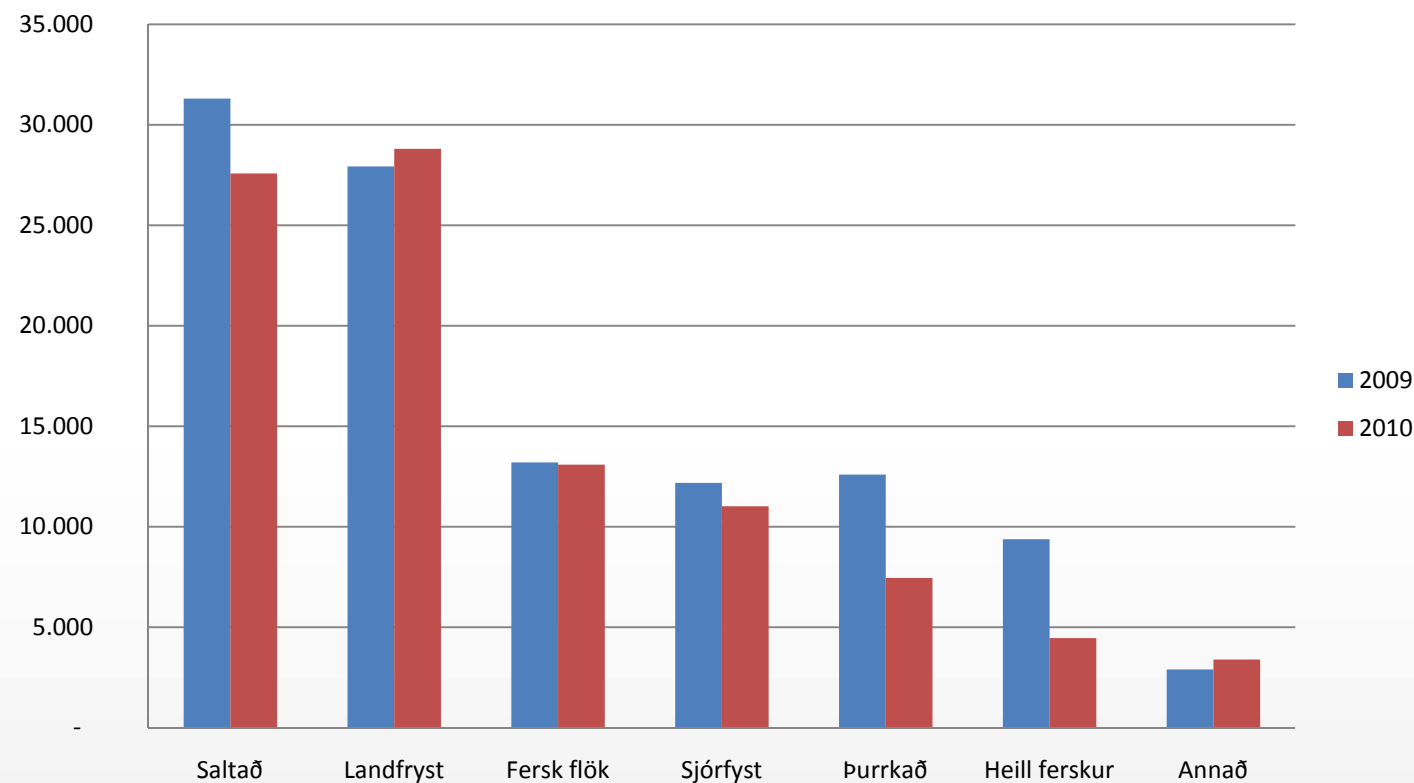
1

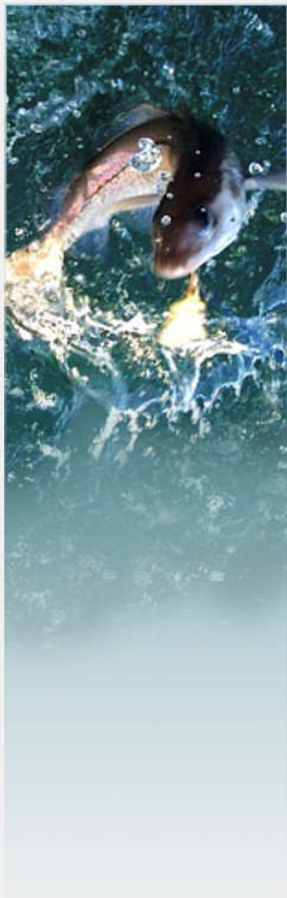
**Hversu mikilvægur er ferskfiskmarkaður okkar Íslendinga?**



### Útflutningur þorskafurða 2009 og 2010

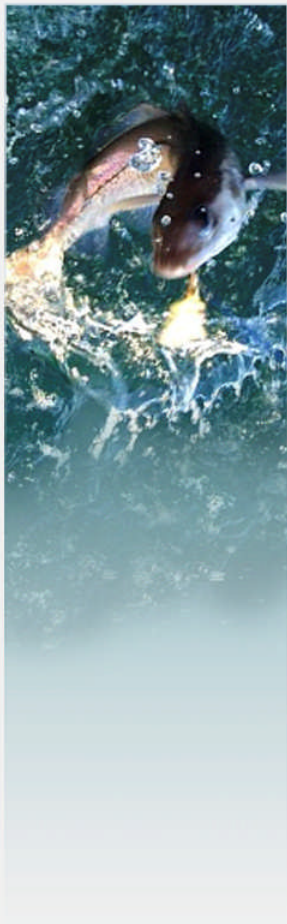
Tonn





### Útflutningur Þorskafurða 2010

	KG	% af KG	ISK	% af Verðmætum
Heill ferskur	4.450.735	4,65%	1.820.322.902	2,51%
Fersk flök	13.092.131	13,67%	17.232.173.955	23,78%
Sjórfyst	11.011.381	11,50%	8.788.937.412	12,13%
Landfryst	28.800.966	30,07%	18.768.485.699	25,90%
Saltað	27.575.512	28,79%	20.639.860.534	28,48%
Þurrkað	7.456.165	7,79%	3.752.667.606	5,18%
Annað	3.386.608	3,54%	1.474.382.164	2,03%
	<b>95.773.498</b>	<b>100,00%</b>	<b>72.476.830.272</b>	<b>100,00%</b>



### Útflutningur ýsuafurða 2009 og 2010

Tonn

25.000

20.000

15.000

10.000

5.000

-

■ 2009

■ 2010

Heill ferskur

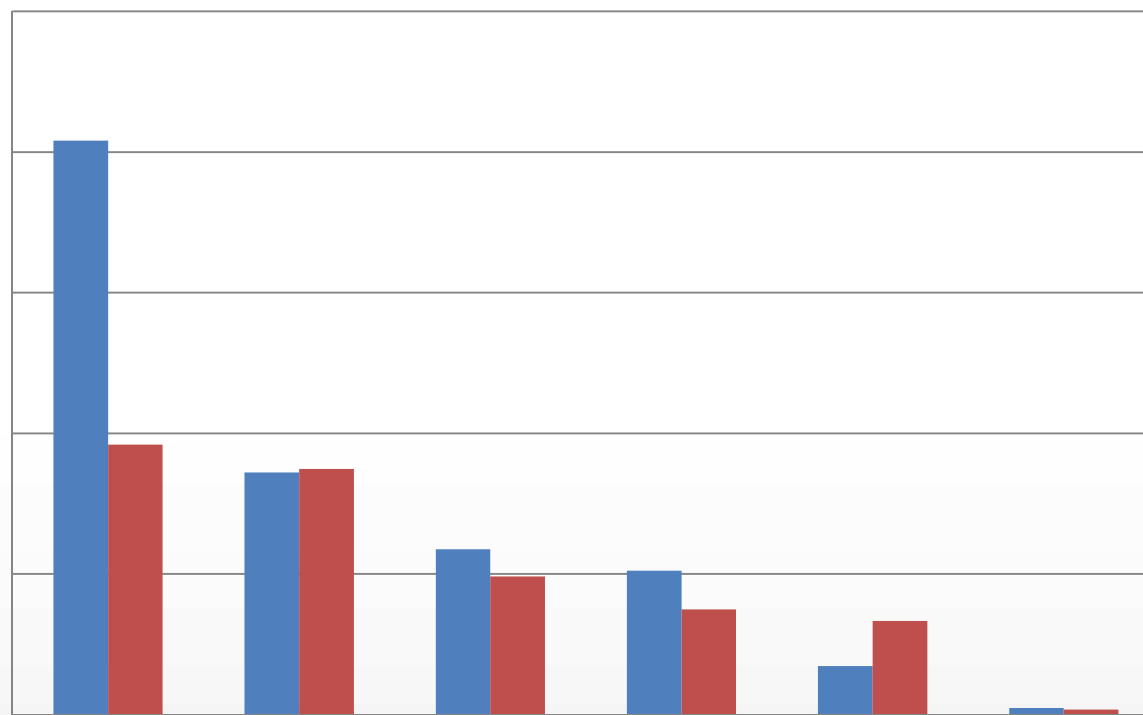
Landfryst

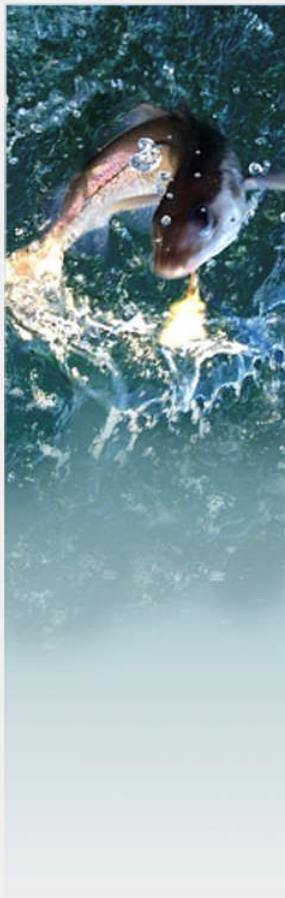
Fersk flök

Sjórfyst

Þurrkað

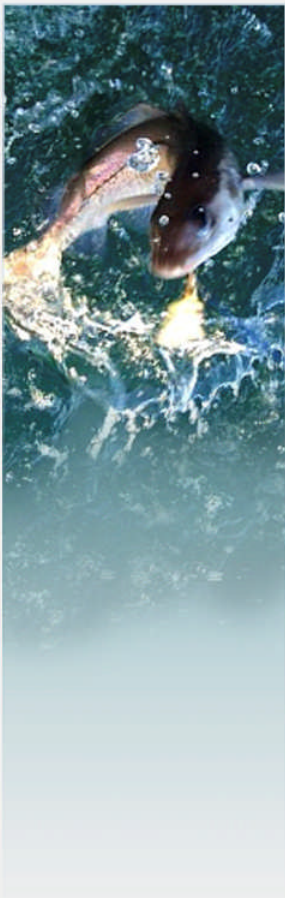
Annað





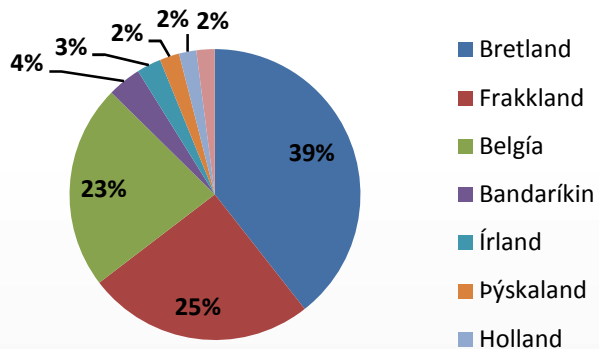
## Útflutningur Ýsuafurða 2010

	KG	% af KG	ISK	% af Verðmætum
Heill ferskur	9.600.506	31,46%	2.803.221.733	14,64%
Fersk flök	4.911.788	16,10%	5.132.848.362	26,80%
Sjórfyst	3.742.610	12,27%	2.780.488.721	14,52%
Landfryst	8.736.236	28,63%	6.607.006.121	34,50%
Saltað	185.681	0,61%	90.406.249	0,47%
Þurrkað	3.337.249	10,94%	1.736.695.195	9,07%
	<b>30.514.070</b>	<b>100,00%</b>	<b>19.150.666.381</b>	<b>100,00%</b>

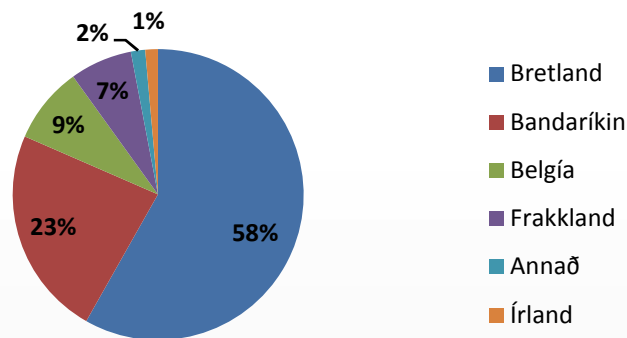


## Helstu útflutningsmarkaðir fyrir ferskan unnin fisk

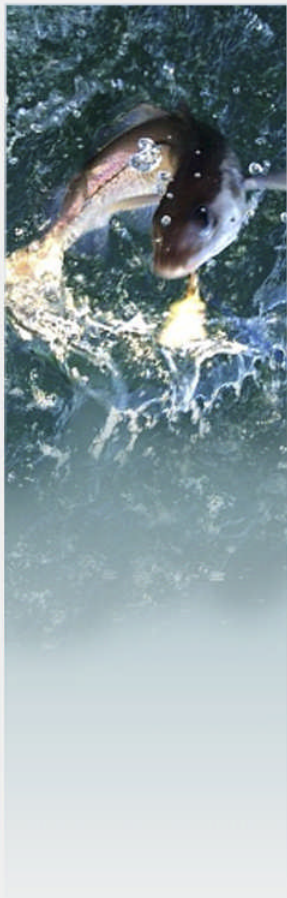
**Þorskur**  
Útflutningslönd 2010



**Ýsa**  
Útflutningslönd 2010

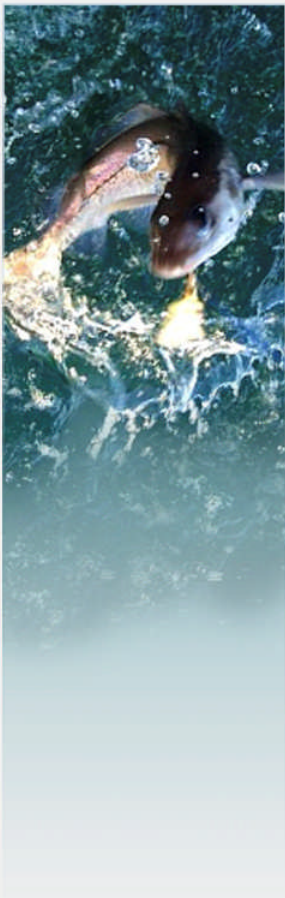






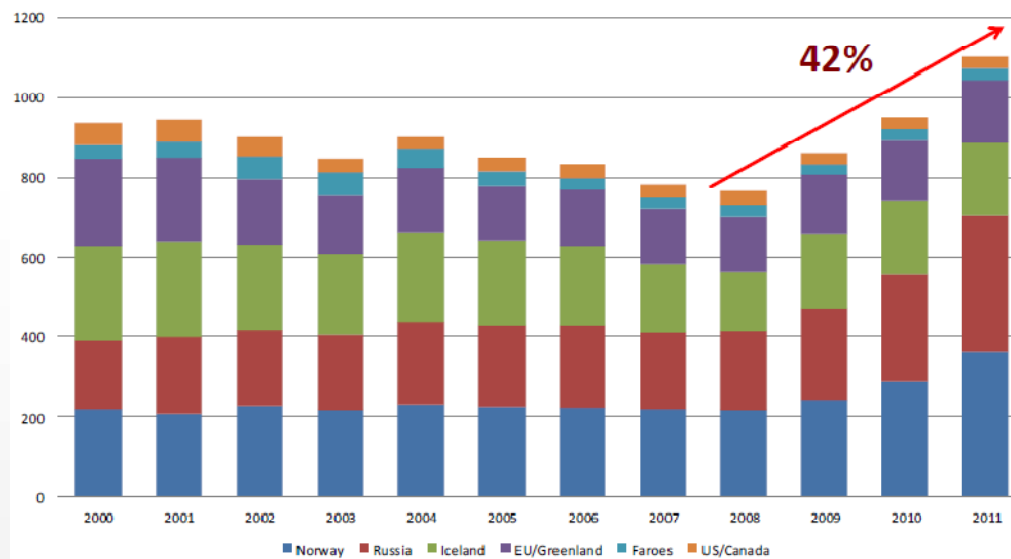
2

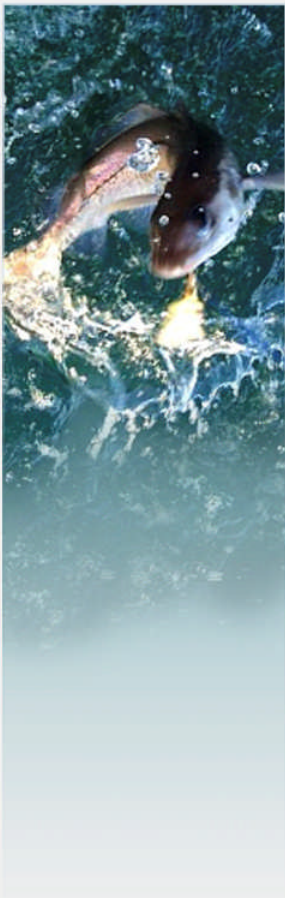
**Erum við í forystu inn á helstu markaði okkar eða erum við að tapa stríðinu við Noreg?**



## Heimsframboð af Þorski

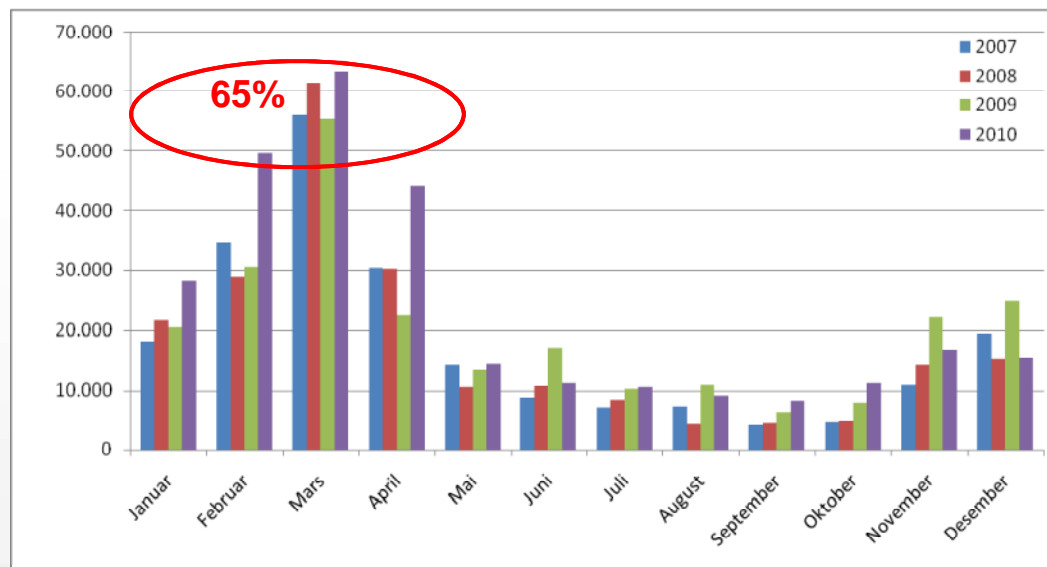
Áætlað framboð af þorski 2011 er 1,1 milljón tonna og ef þessar spár ganga eftir þá hefur heimsframboð af þorski aukist um 42% frá árinu 2008





## Framboð af Þorski í Noregi

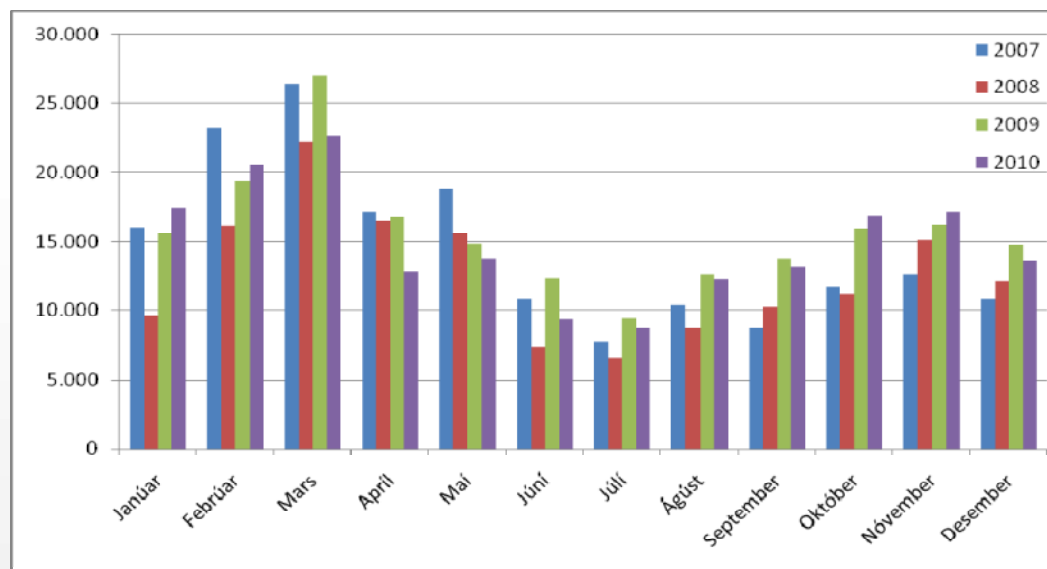
- Norðmenn veiddu 383 þús tonn af þorski árið 2010 og var það 16% aukning frá fyrra ári – megnið veitt feb, mar, apr
- Spár gera ráð fyrir að veiðar þeirra í ár verði um 360 þús tonn

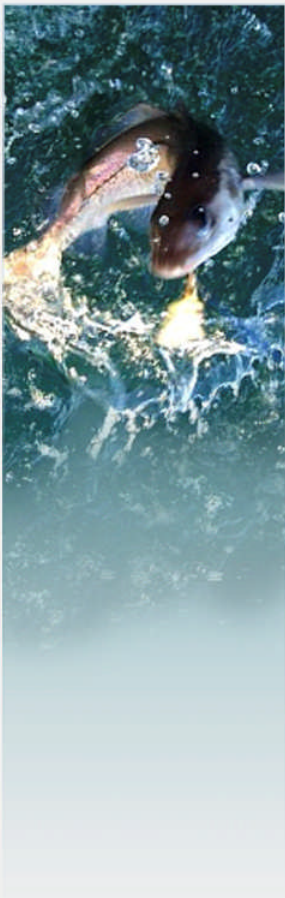




## Framboð af Þorski á Íslandi

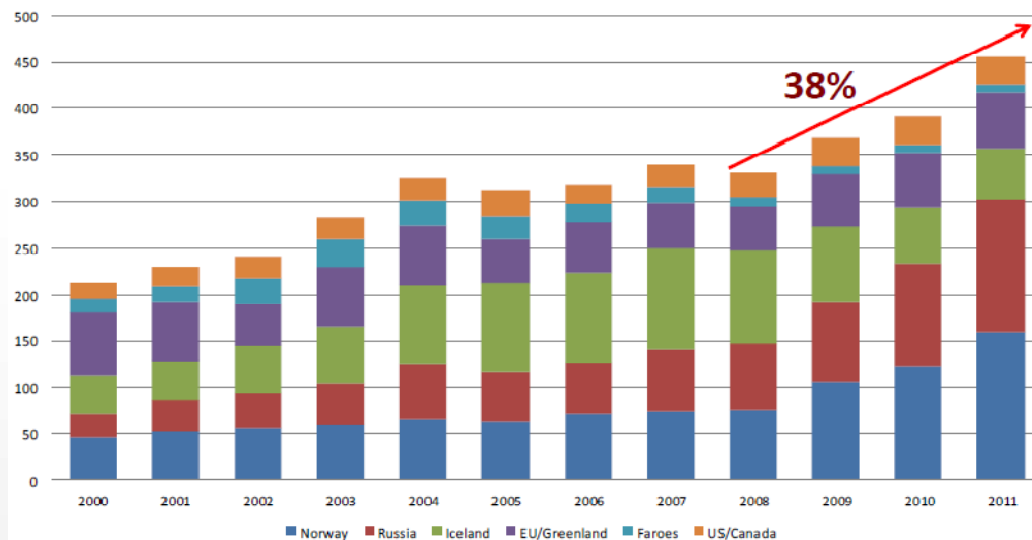
- Íslendingar veiddu 178 þús tonn í fyrra sem var samdráttur um 6% frá 2009 – mun stöðugara framboð
- Spár gera ráð fyrir svipuðu magni í ár eða um 180 þús tonnum

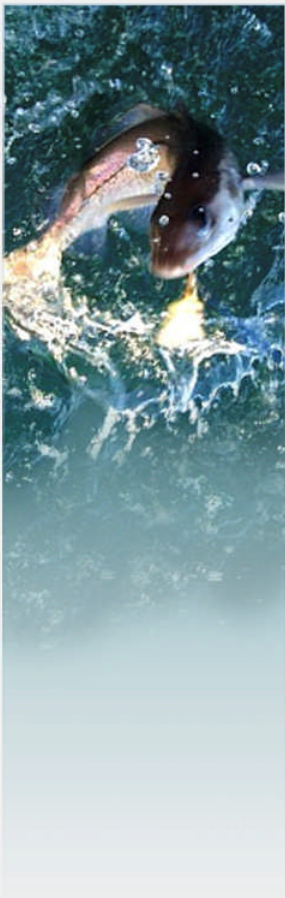




## Heimsframboð af Ýsu

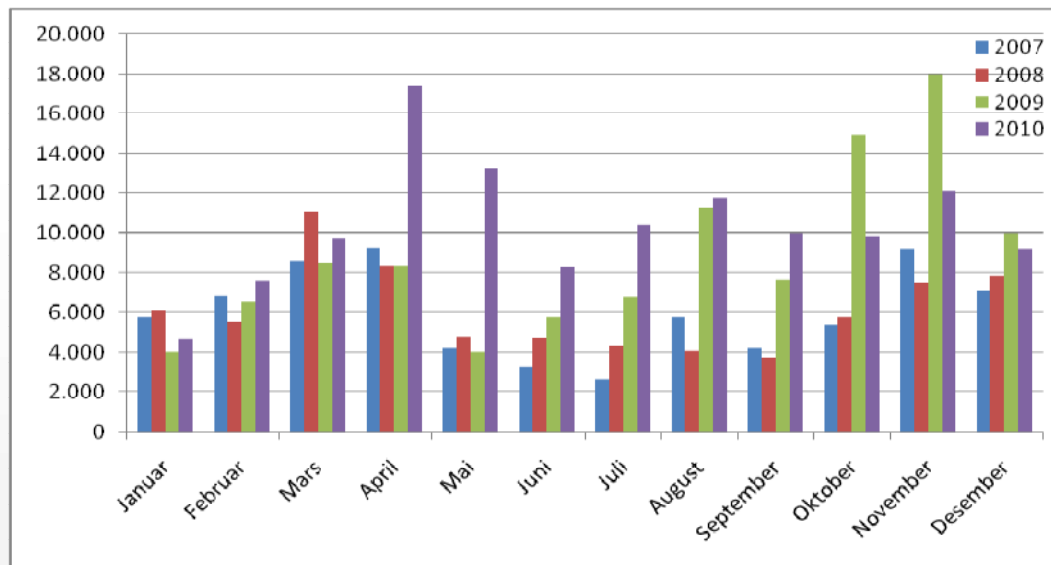
Áætlað framboð af ýsu árið 2011 er um 450 þús tonn og erum við að sjá svipaða þróun og með þorskin, heimsframboð af ýsu hefur aukist um 38% frá árinu 2008

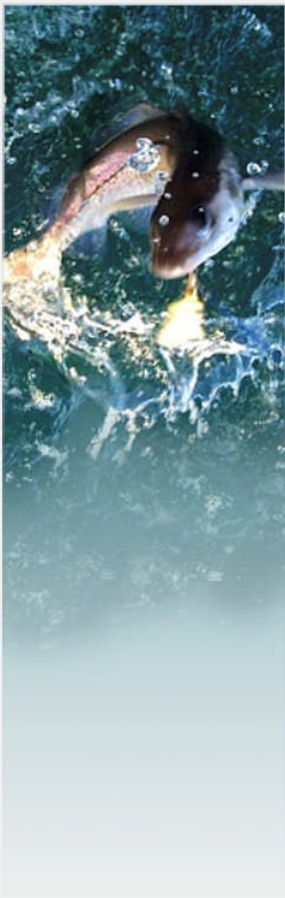




## Framboð af Ýsu í Noregi

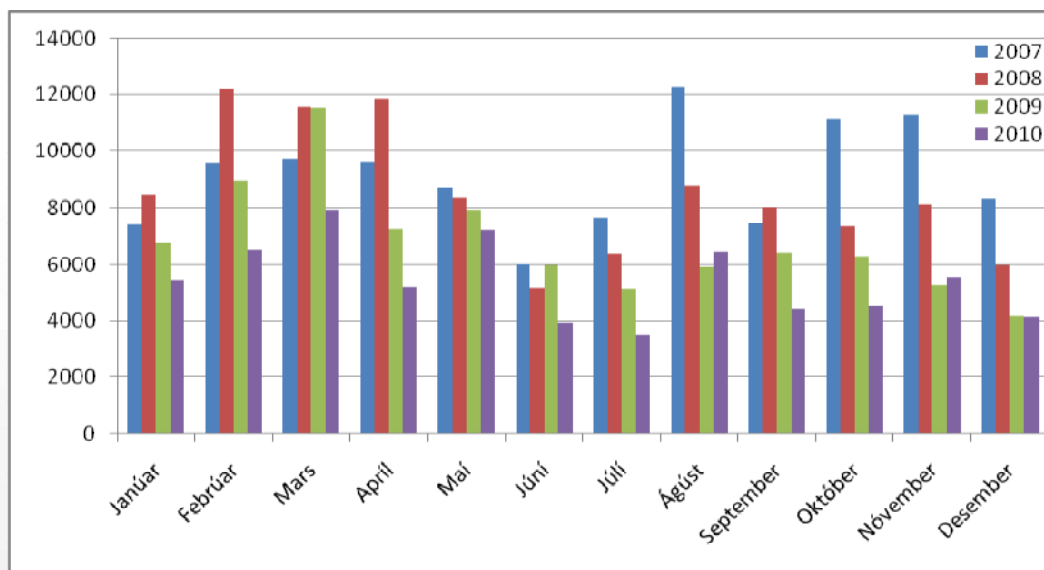
- Norðmenn veiddu 125 þús tonn af ýsu árið 2010 og var það 17% aukning frá fyrra ári
- Spár gera ráð fyrir 155 þús tonnum í ár





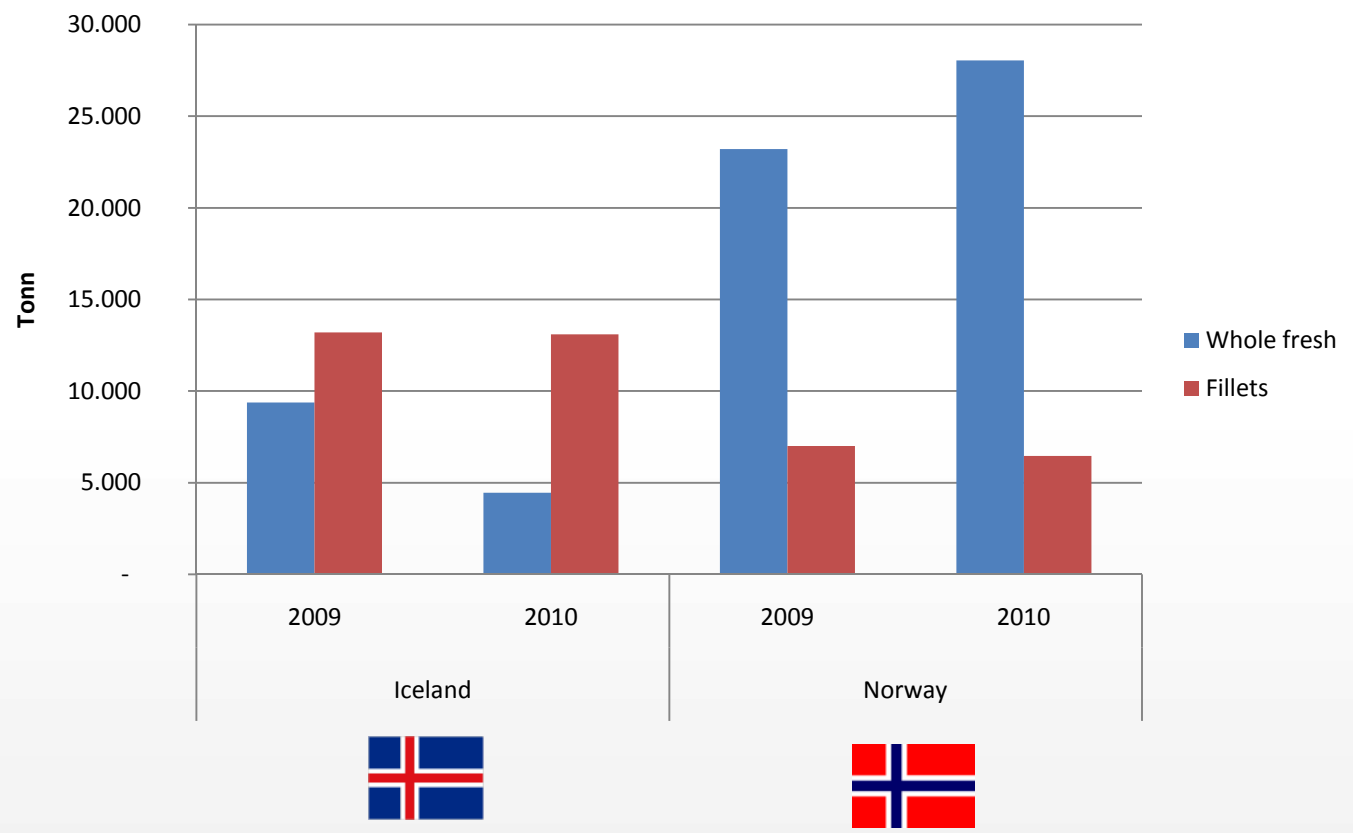
## Framboð af Ýsu á Íslandi

- Íslendingar veiddu 65 þús tonn af ýsu árið 2010 og var það 20% samdráttur frá árinu 2009
- Spár gera ráð fyrir um 55 þús tonnum í ár

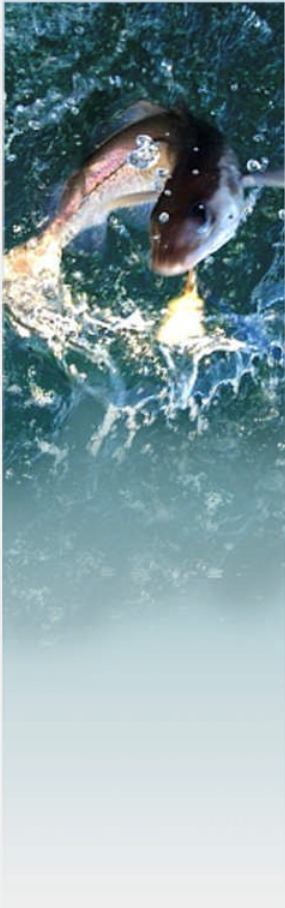




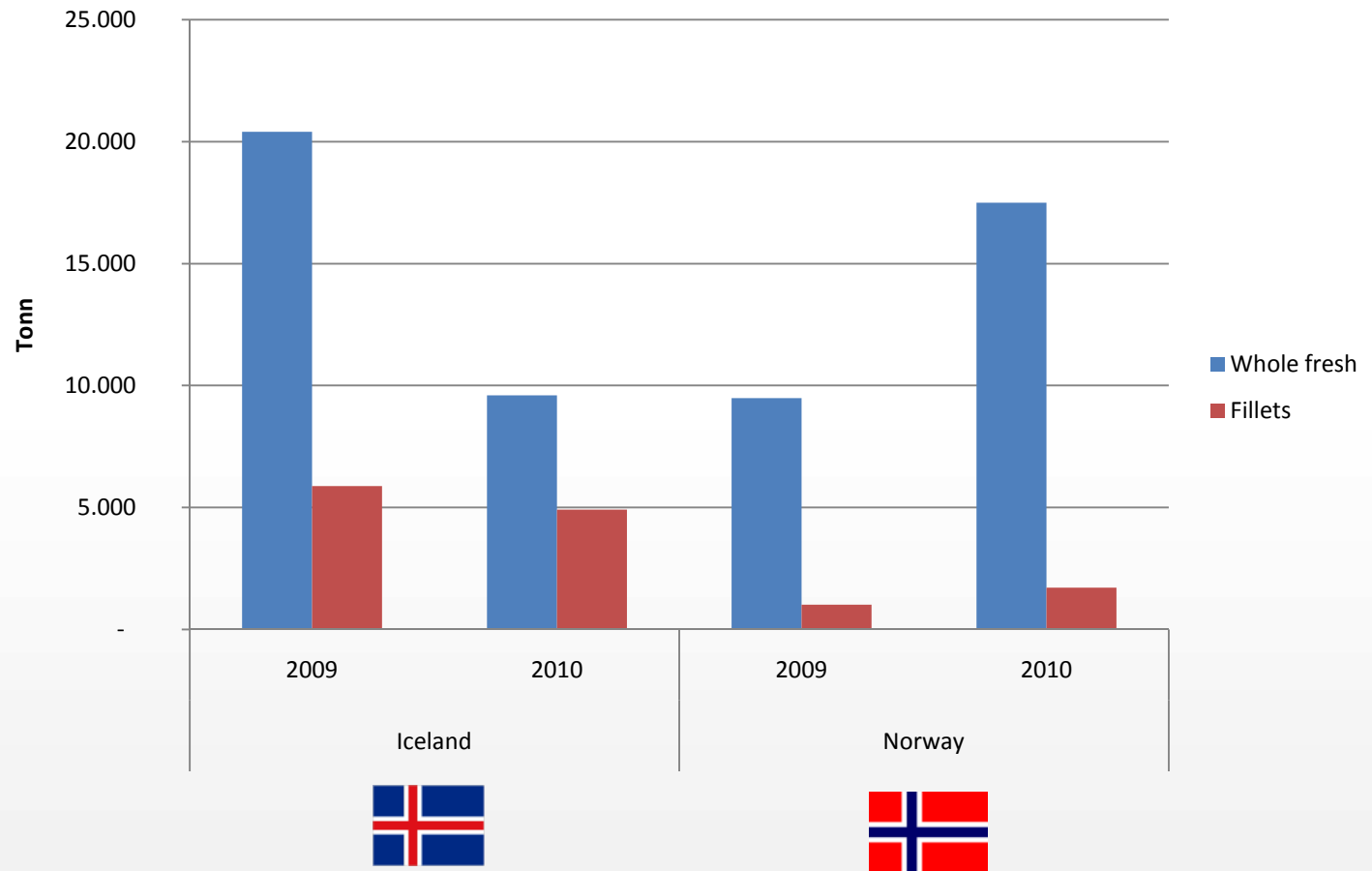
### Ferskur Þorskur - Útflutningur 2009-2010

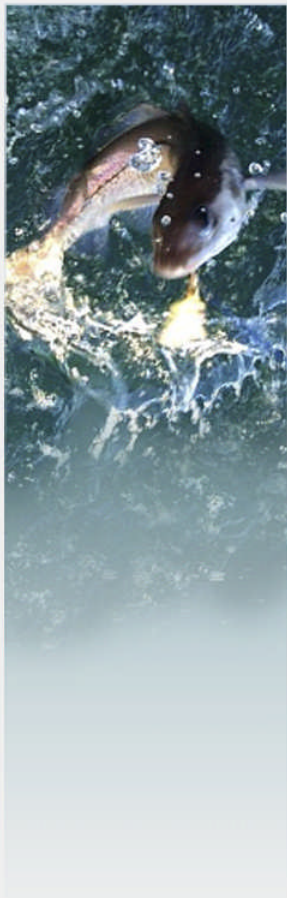






### Fersk Ýsa - Útflutningur 2009-2010



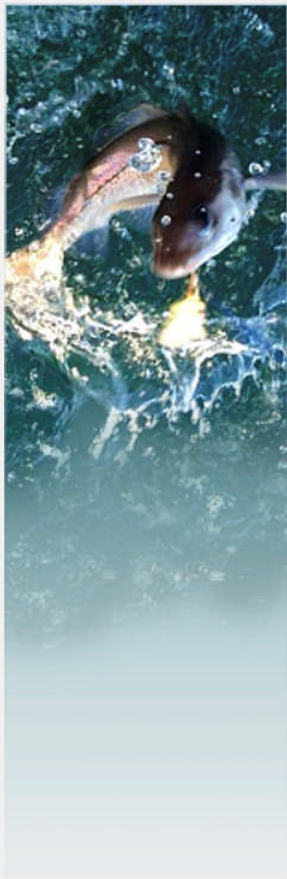


3

**Sérstaða Íslendinga í ferskum fiski?**



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## Sainsbury's

### Einn af þeim 5 stóru í Bretlandi

Sæmark hefur starfað með **Sainsbury's** frá árinu 2006

- Yfir 930 verslanir
- 150.000 starfsmenn
- 30.000 vörutegundir

**100% línuveiddur fiskur frá 2007**

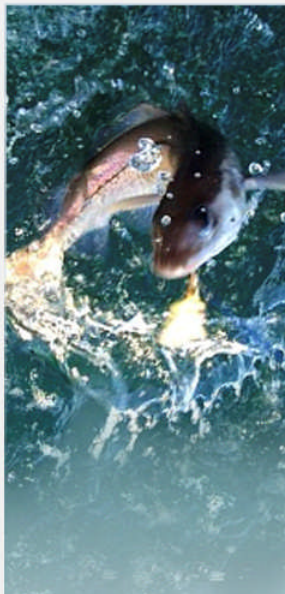
**100% ferskt frá maí 2010**

**MSC haust 2011**





*fresh treats from the Atlantic Ocean*



**Sainsbury's hefur skýra markaðsstefnu og selur meira og meira undir eigin merkjum**



**“Taste the Difference” er hágæða lína þar sem meðal annars er boðið upp á línuveiddan fisk frá Íslandi**





As a leading food retailer we focus on being

**1. BEST FOR FOOD AND HEALTH**



And because we source from around the world and sell in the UK we have to show

**3. RESPECT FOR OUR ENVIRONMENT**



All this is possible through the commitment of our colleagues so we make Sainsbury's

**5. A GREAT PLACE TO WORK**



<http://www.jsainsbury.co.uk/cr/>

...that's why we're so committed to...

**2. SOURCING WITH INTEGRITY**



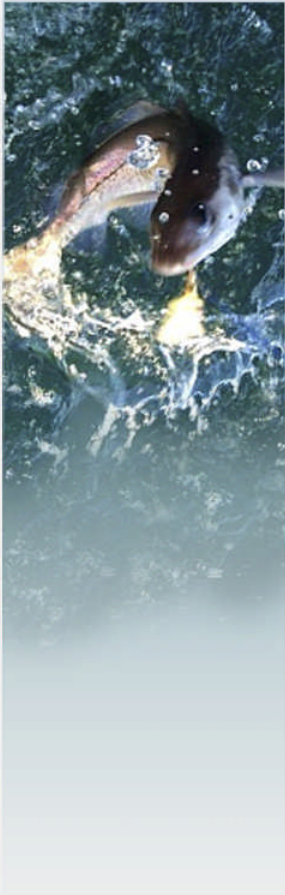
...and play an active role in the communities that we serve

**4. MAKING A POSITIVE DIFFERENCE TO OUR COMMUNITY**



And that's why we believe

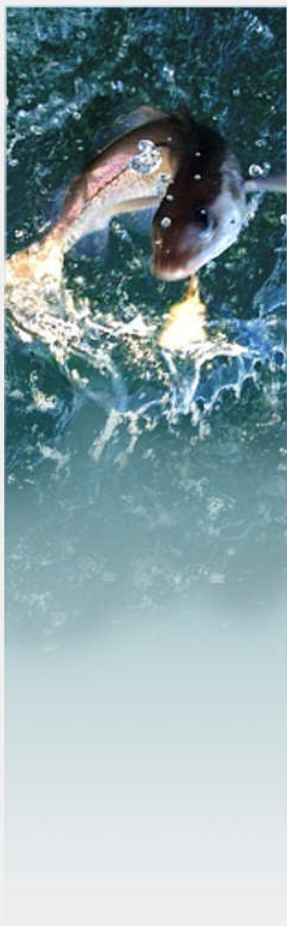
**OUR VALUES MAKE US DIFFERENT**



- 1 Hversu mikilvægur er ferskfiskmarkaður okkar Íslendinga?
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- 3 Sérstaða Íslendinga í ferskum fiski?



SÆMARK



*fresh treats from the Atlantic Ocean*

Takk fyrir