



marineharvest



Whitefish market performance France and Benelux

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MARINE HARVEST CONSUMER PRODUCTS

25-11-2017
REYKJAVIK

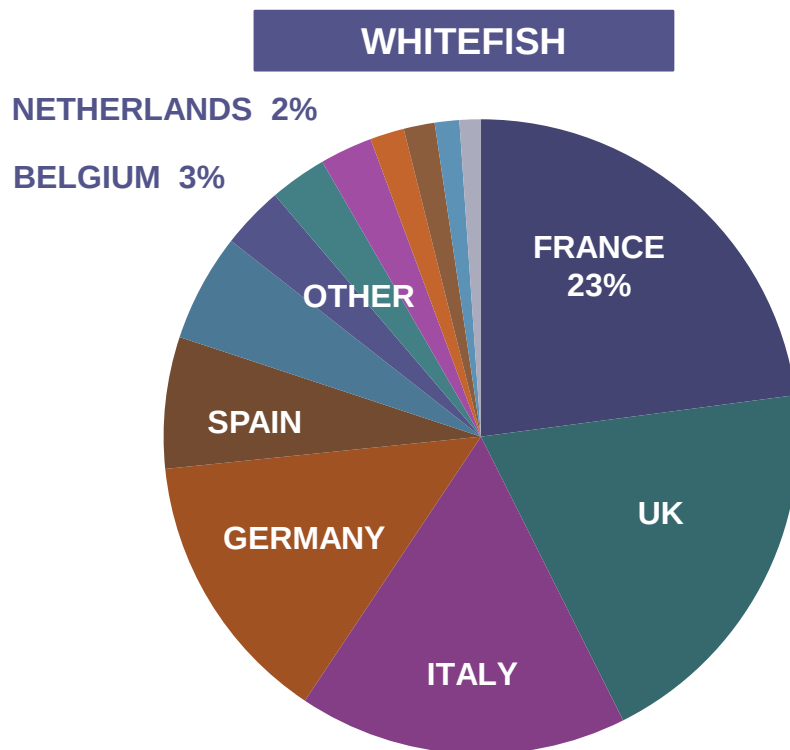
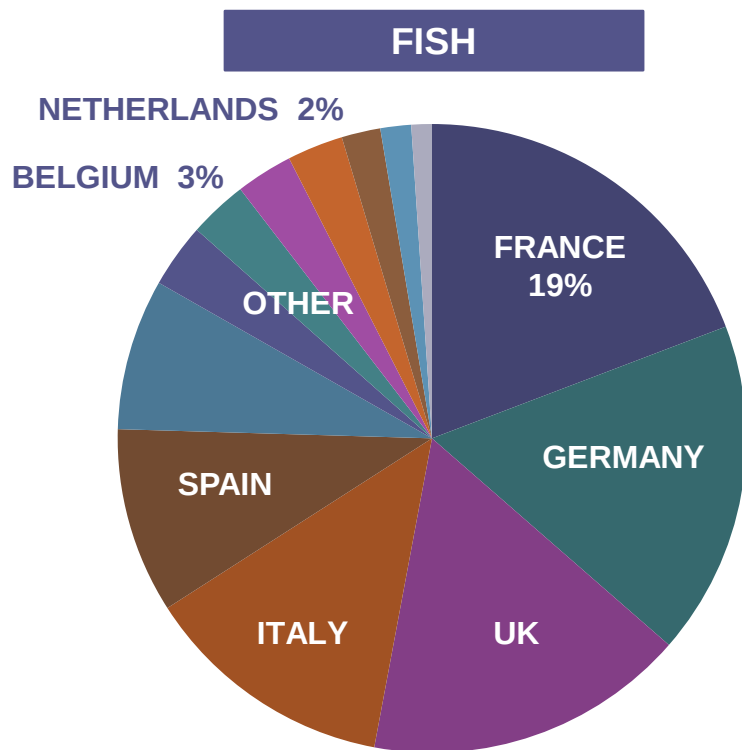
Sjávarútvegsráðstefnan 2016, Hörpu, 24.-25. nóvember

FRANCE & BENELUX WHITEFISH MARKET

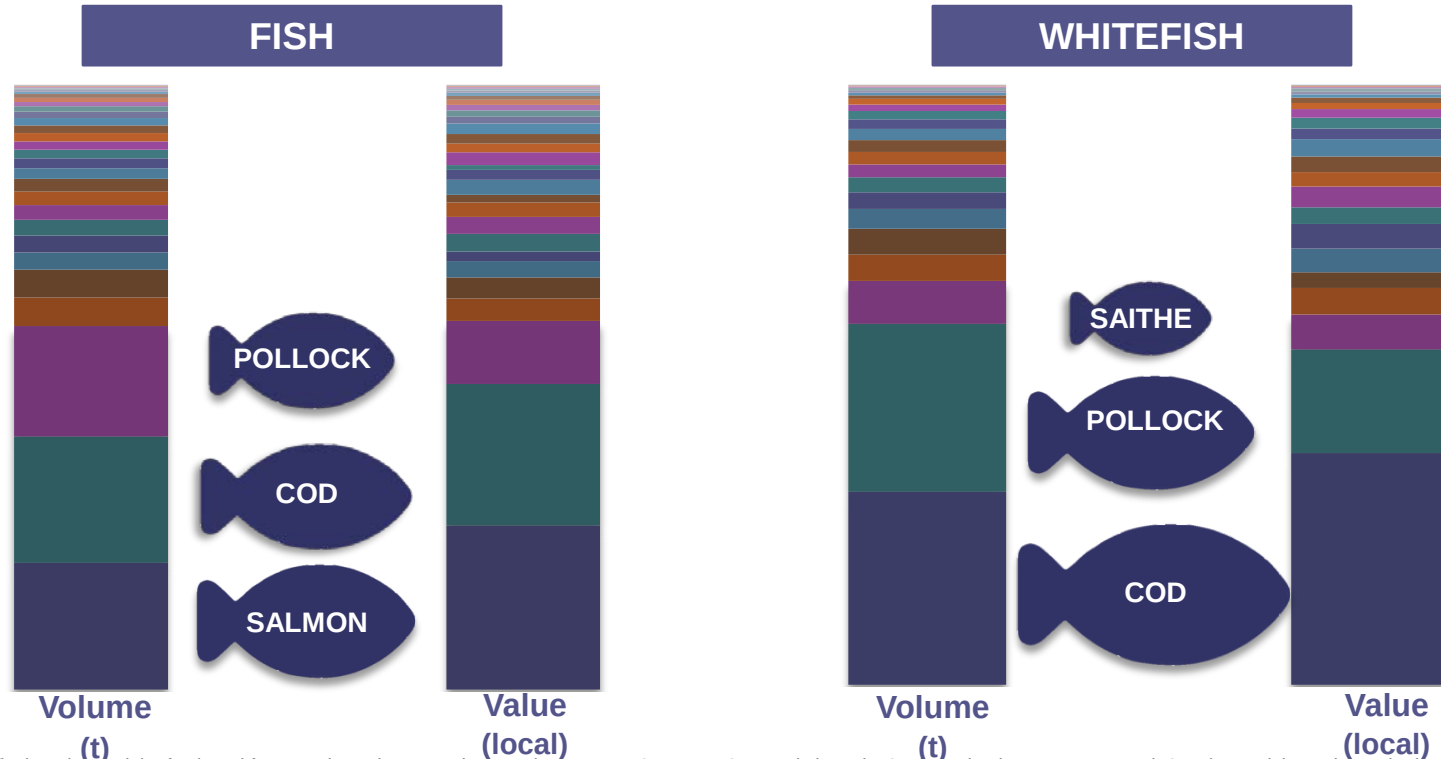
LANDSCAPE



FRANCE & BENELUX MARKET: SIZE



FRANCE & BENELUX MARKET: MAIN SPECIES



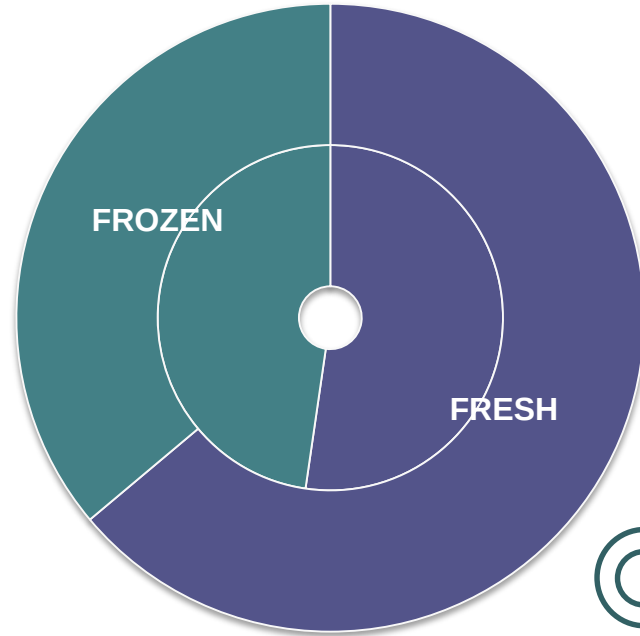
Main species, final product weight; fresh and frozen only, main consuming countries: France, Germany, Great-Britain, Italy, Spain, Poland, Norway, Portugal, Sweden, Belgium, The Netherlands, Czech Republic and Slovakia; NSC, Home Consumption Figures EU 2016 4

FRANCE & BENELUX: WHITEFISH MARKET SEGMENTAION

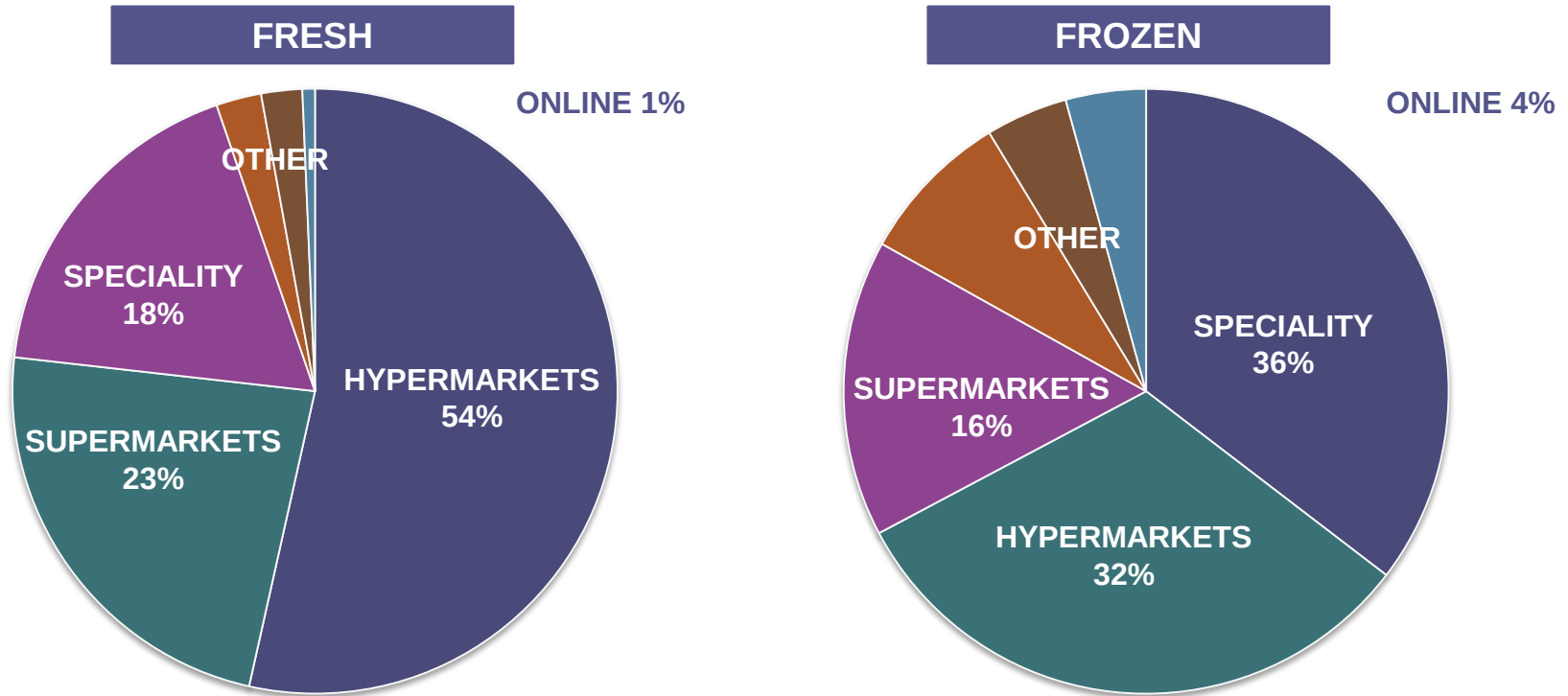
SEGMENT



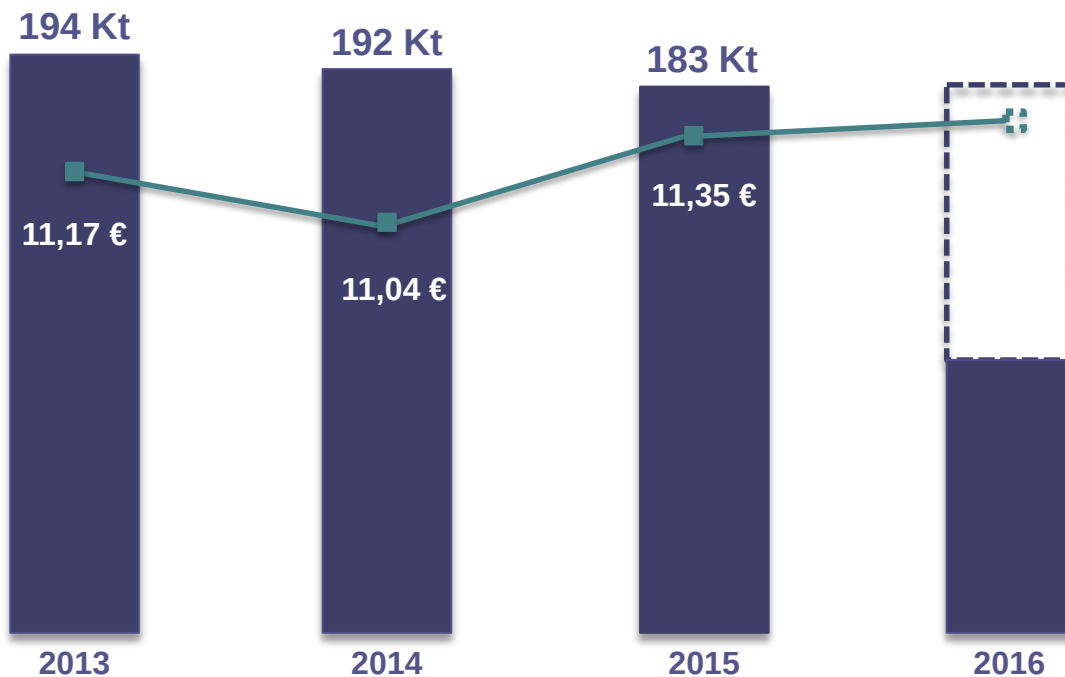
TEMPERATURE



WHITEFISH SALES: RETAIL SEGMENTATION

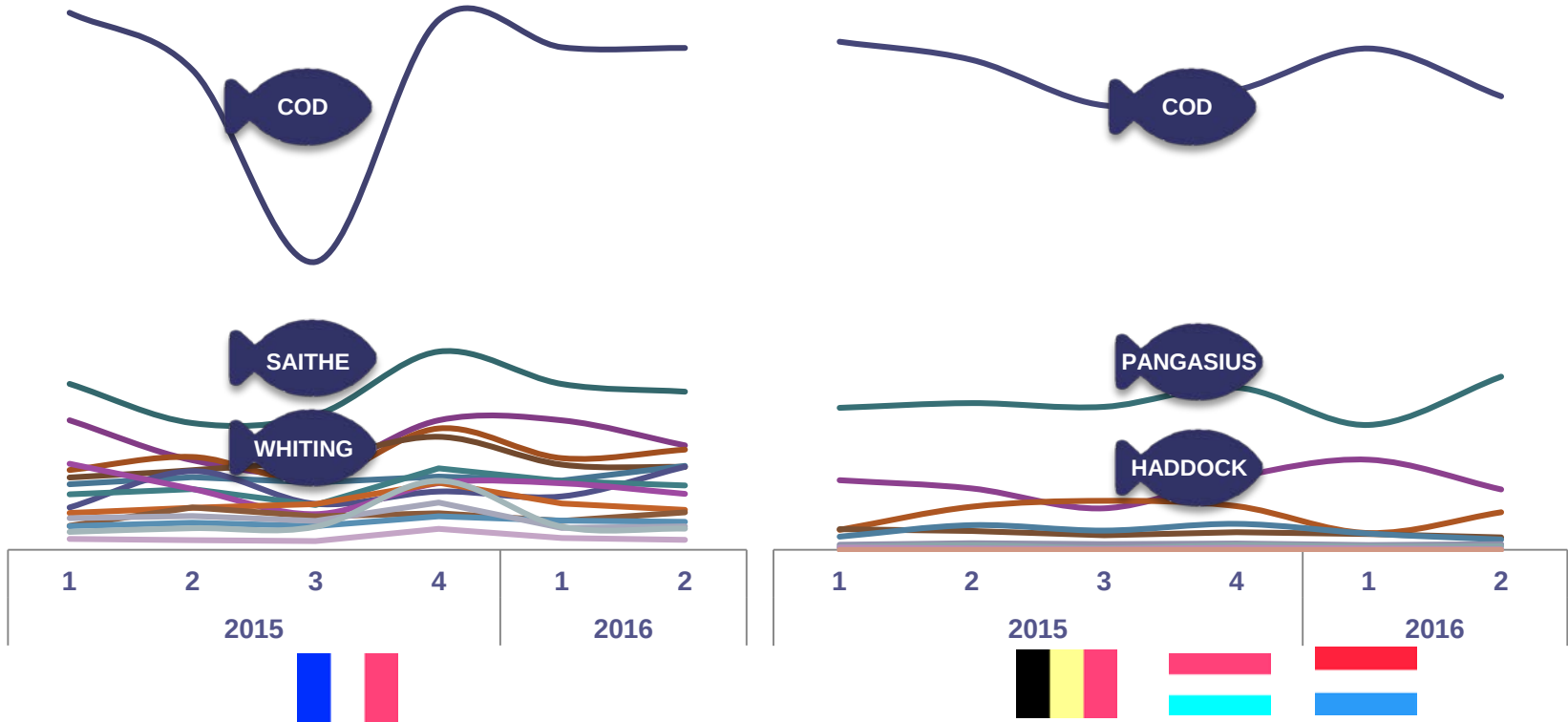


FRANCE & BENELUX MARKET: WHITEFISH VOLUME & PRICE

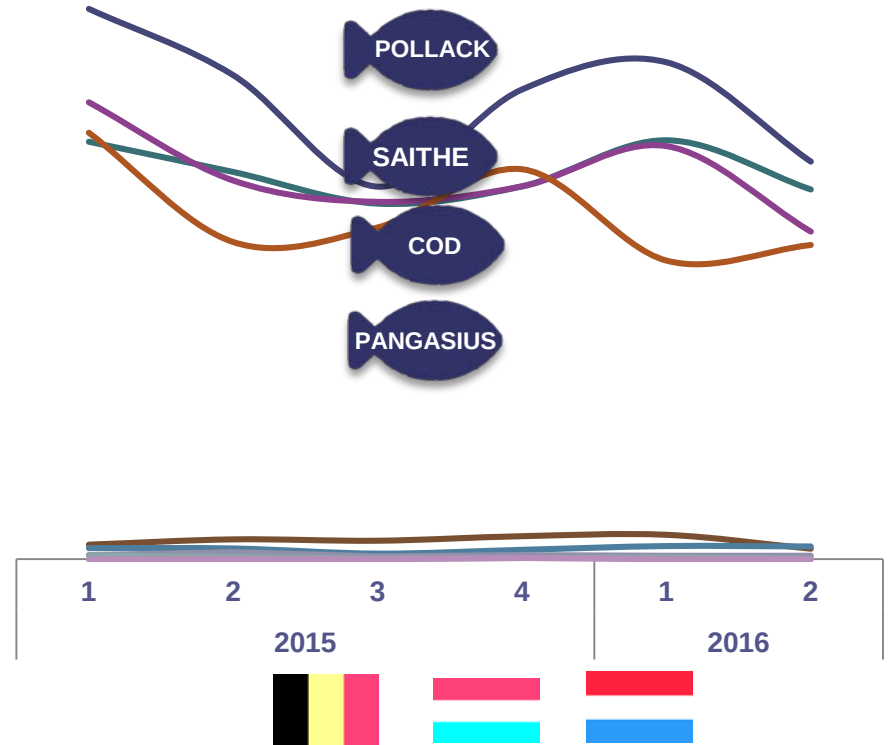
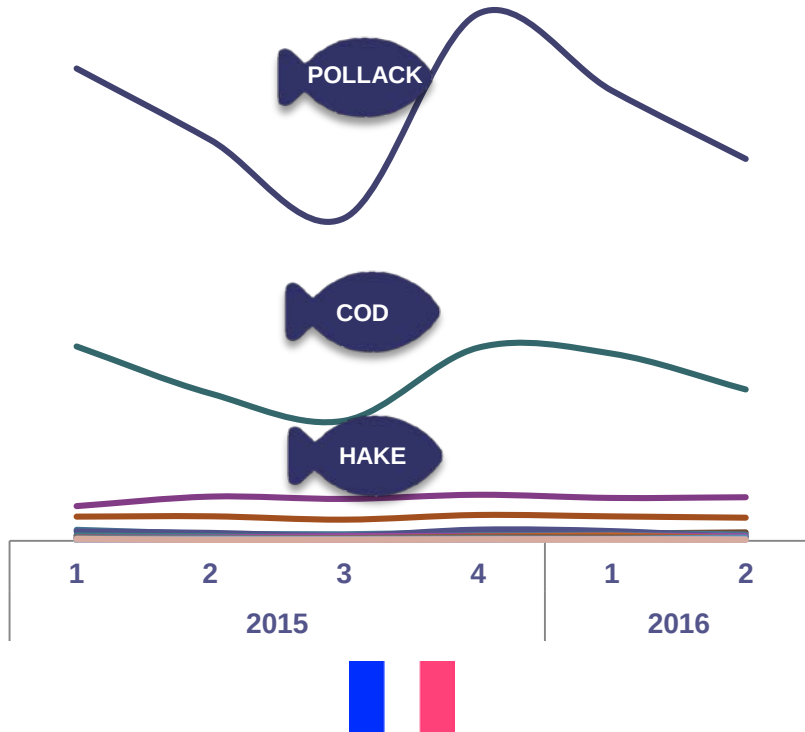


Main species, final product weight, fresh and frozen only, NSC, Home Consumption Figures EU 2013-2016 (FY est.)

FRANCE & BENELUX MARKET: FRESH WHITEFISH



FRANCE & BENELUX MARKET: FROZEN WHITEFISH



FRANCE & BENELUX WHITEFISH MARKET

CONSUMPTION INSIGHTS



FRANCE & BENELUX MARKET: SEAFOOD CONSUMPTION

HOUSHOLD
EXPENDITURE



EXPENDITURE
PER CAPITA

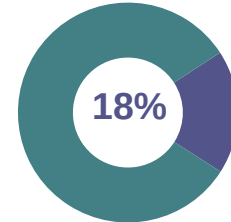
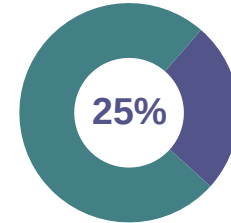
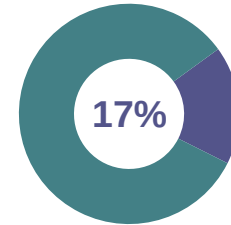


FRANCE & BENELUX MARKET: SEAFOOD CONSUMPTION

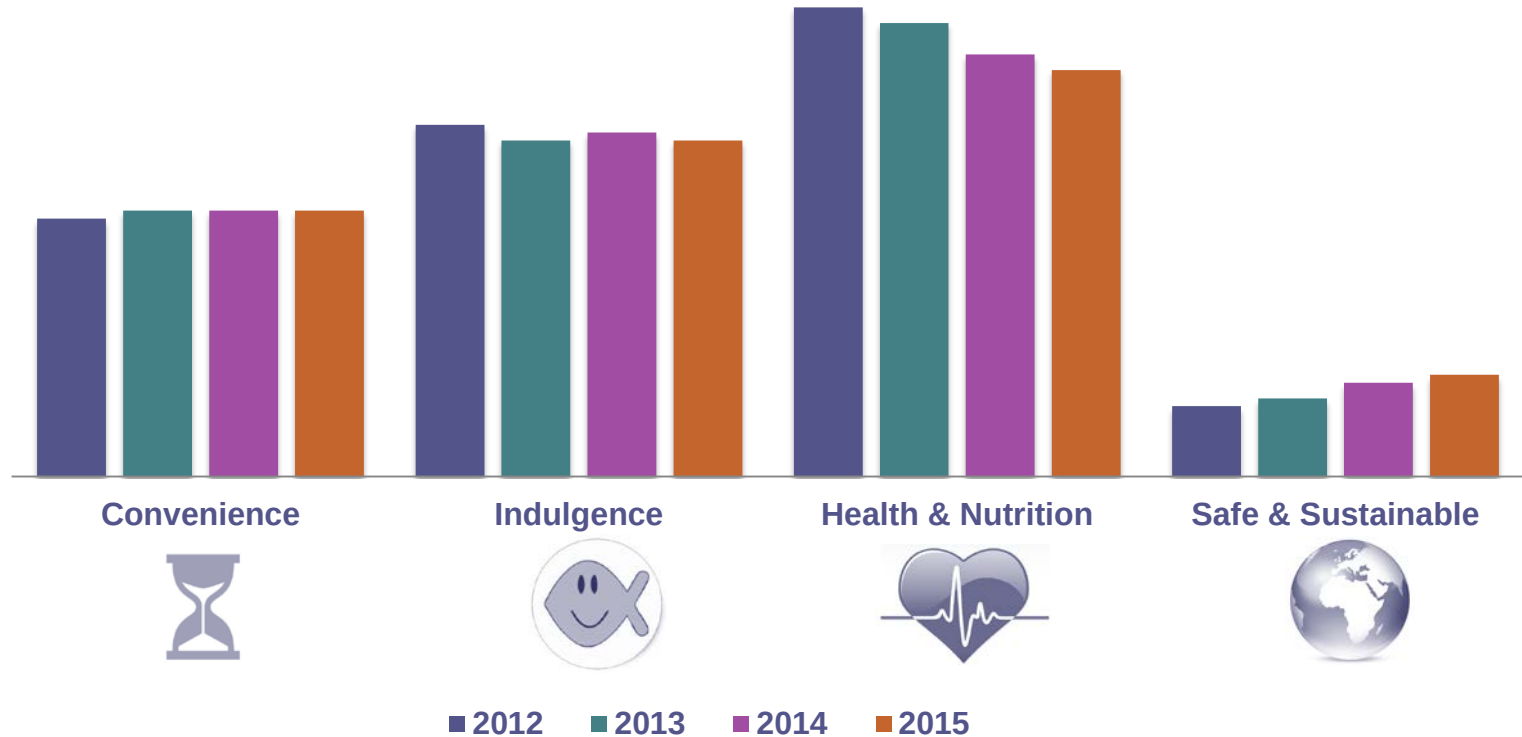
PER CAPITA CONSUMPTION



HOUSEHOLD EXPENDITURE VS MEAT



SEAFOOD CONSUMPTION: MAIN DRIVERS



SEAFOOD CONSUMPTION: RESEARCH



DRIVERS

- HEALTHY
- MENU VARIETY
- SUSTAINABLE



BARRIERS

- PERCEPTION (FRESHNESS, BONES)
- COOKING SKILLS
- EXPENSIVE
- NOT FOR EVERYBODY



TRIGGERS

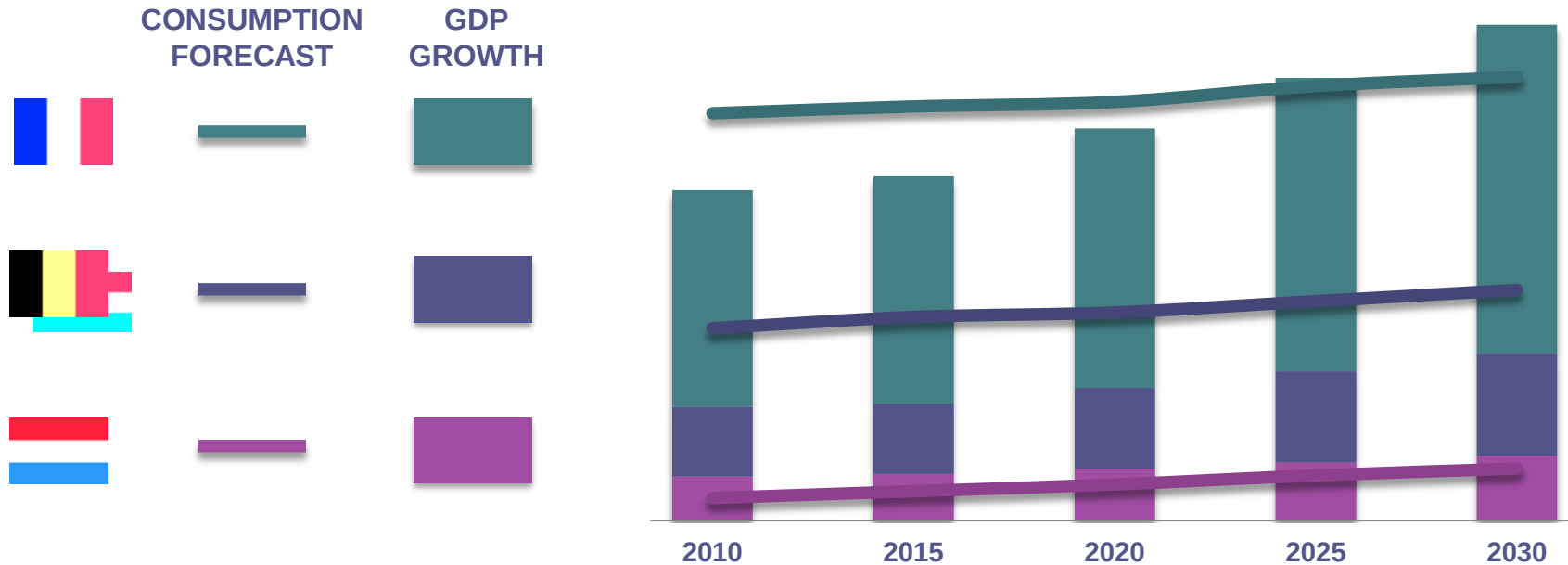
- IMPULS BUYING
- SUPREME QUALITY
- TRANSPARANCY
- CATEGORY ACCESSABILITY
- OFFER FOR EVERY MOMENT
- VARIETY
- INSPIRATION

FRANCE & BENELUX WHITEFISH MARKET

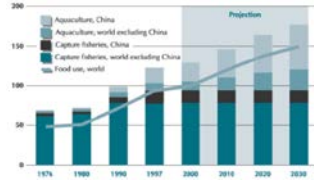
FUTURE OPPORTUNITIES



SEAFOOD CONSUMPTION: FUTURE POTENTIAL



WHITEFISH: OPPORTUNITIES



CHOOSE





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Leading The Blue Revolution