ICELAND SEAFOOD

KONUR ERU LÍKA Í SJÁVARÚTVEGI

Sala og markaðssetning á íslenskum makríl

EIMSKIP ICELAND SEAFOOD BRIM Íslandsbanki TM iTUB Hvíta húsið HAMPIÐJAN SJÁVARÚTVEGSRÁÐSTEFNAN 2022

Friðleifur Friðleifsson
Deildarstjóri
Iceland Seafood ehf

BS í líffræði frá HÍ
Hóf störf hjá Íslenskum Sjávarafurðum 1995
- **Vöruþróunarsetur ÍS**
- **Söludeild ÍS**
- **Framkv.stjóri IS UK**
- **Deildarstjóri sjófrystra- og uppsjávarafurða IS**

© Vemaps.com

Strong roots

Iceland Seafood International is proud of its strong heritage and history and continues to build on that foundation, to be a respected industry leader

1932

The Union of Icelandic Fish Producers (SÍF)
Founded in 1932 forexport of salted fish products

1935

The Herring Board
Founded in 1935 for the export of salted herring from Iceland

1957

Samband of Iceland
establishes a seafood division for export of frozen seafood

1999

Armengol
Spanish company Purchased in 1999

1999

Merger: SÍF and Iceland Seafood Plc.
Including the Herring Board, under the name SIF Plc.

2004

SÍF Plc founds Iceland Seafood International
in order to take over all export and sales of marine products

2008

Tros
The first company in exporting fresh fish from Iceland became a part of Iceland Seafood

2010

IS Barraclough
Acquired in 2010 and marks the beginning of value added operations in the UK

2012

Havelok
Founded as a joint venture, today is a leading seafood supplier to UK foodservice

2016

First North listing
Iceland Seafood listed on the First North Iceland market

2018

Oceanpath
Purchased in 2018, Oceanpath is the largest seafood provider in the Irish retail market

2018

Solo Seafood
Purchased in 2018, creating a strong integrated company in the Southern European market

2019

Main Market listing
Iceland Seafood International lists its shares on the Nasdaq Iceland Main Market

2020

Elba Seafood
Purchased in 2020, Elba is a great addition to well positioned S-European operation

2020

Iceland Seafood UK
Merge of our two UK companies Havelok Ltd and Iceland SeafoodBarraclough in one

2020

Carr & Sons
Acquisition of the Irish company specialized in high quality smoked salmon production

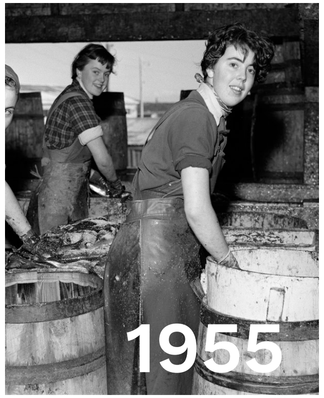
2021

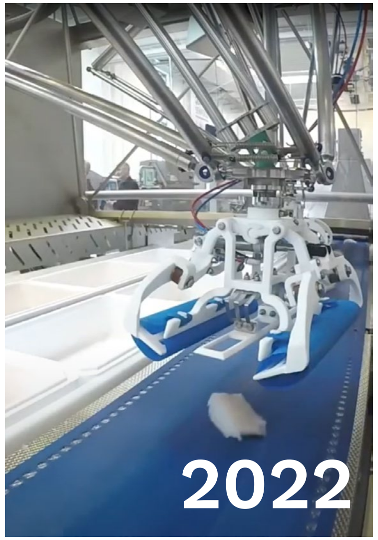
Ahumados Dominguez
Iceland Seafood signes a Letter of Intent (“LOI”) to acquire 80% of the share capital of the company.

1932-2022

90 years together

Iceland Seafood International is proud of its strong heritage and history and continues to build on that foundation, to be a respected industry leader.





Iceland Seafood in numbers

Global value-added Seafood producer and sales and marketing company

449m+
€ Annual revenues in 2021

12.5m
Normalised PBT 2021

32.8%
Equity ratio at year end 2021

11
Businesses in 7 countries

5.000+
Customers across 45 countries

1.0m+
Meals sold every day during 2021

7
value added factories

945+
employees

100.000
MT of products sold in 2021

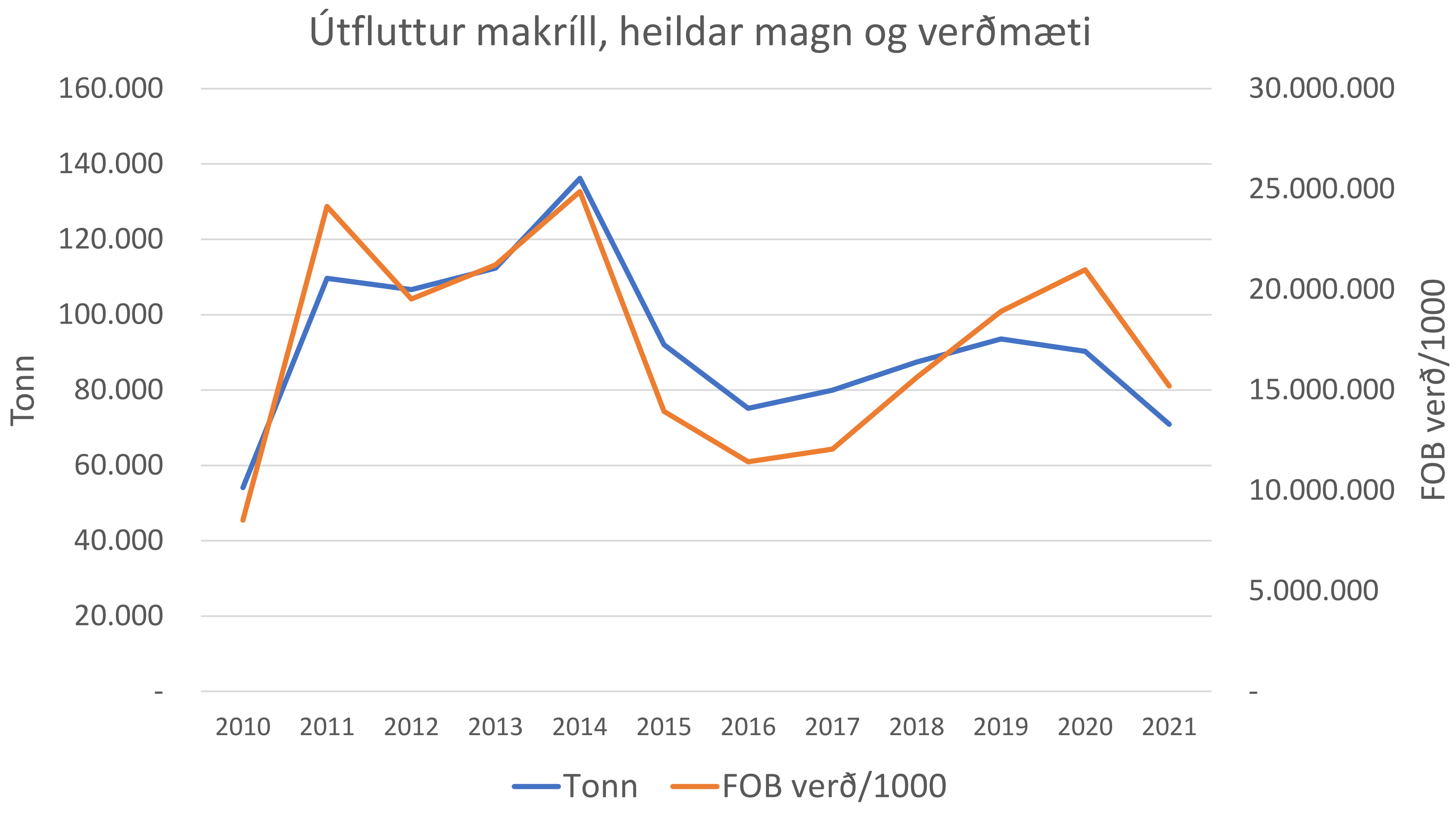
Makríll

- Saga
- Nútíð
- Næsta ár (varla hægt að hugsa lengra ☺).

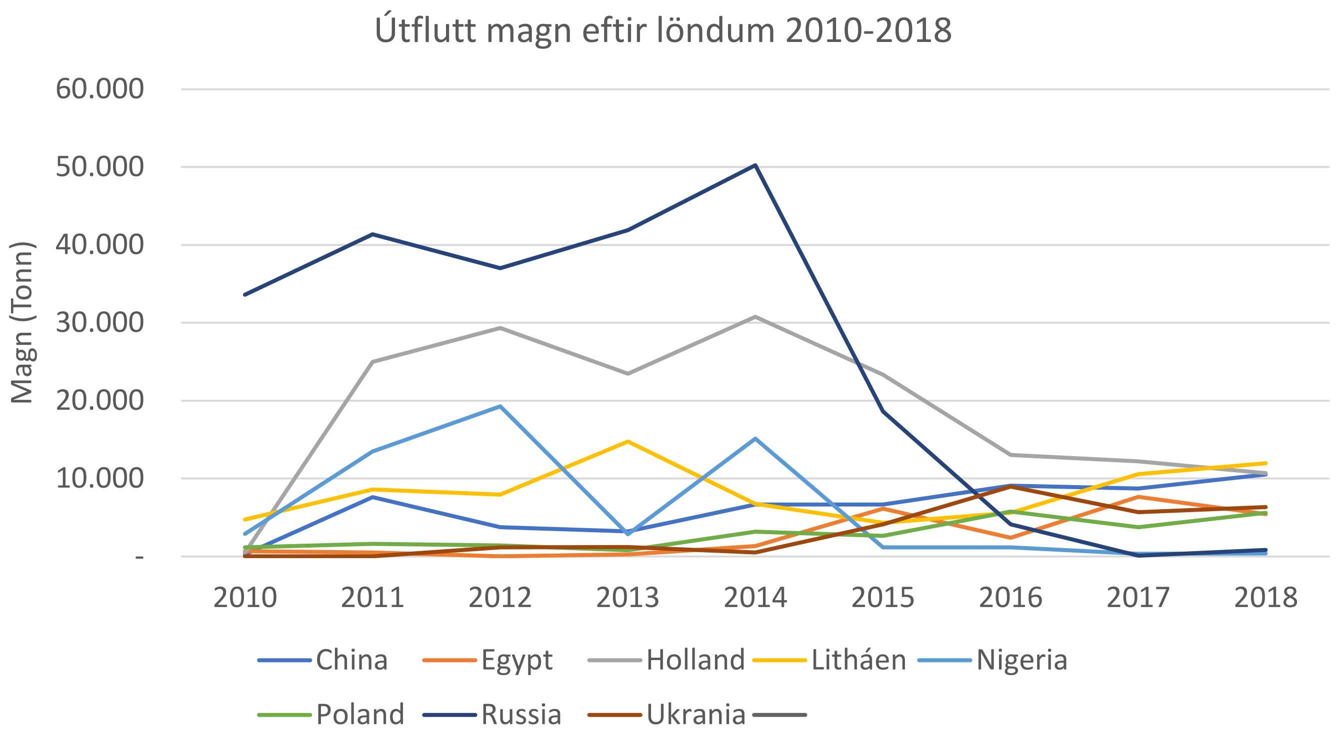
Makríl kvóti 2011-2022

Ár	Aflamark Ísland TAC	Afli Íslendinga	Aflamark allra þjóða TAC	Afli alls	Hlutdeild Íslendinga
2011	154.825	159.263	959.000	946.661	16,4%
2012	145.227	149.282	927.000	892.353	16,3%
2013	123.182	151.235	906.000	931.732	13,2%
2014	167.826	172.960	1.392.000	1.393.000	12,0%
2015	172.964	169.333	1.229.000	1.208.990	14,3%
2016	147.824	170.374	1.057.000	1.094.066	13,5%
2017	168.464	167.366	1.173.000	1.155.944	14,6%
2018	134.772	168.331	998.000	1.026.437	13,1%
2019	140.240	128.077	864.000	840.021	16,7%
2020	152.141	151.534	1.090.879	1.039.513	14,6%
2021	140.627	132.126	1.199.103	1.081.540	13,0%
2022	148.242		1.131.416		

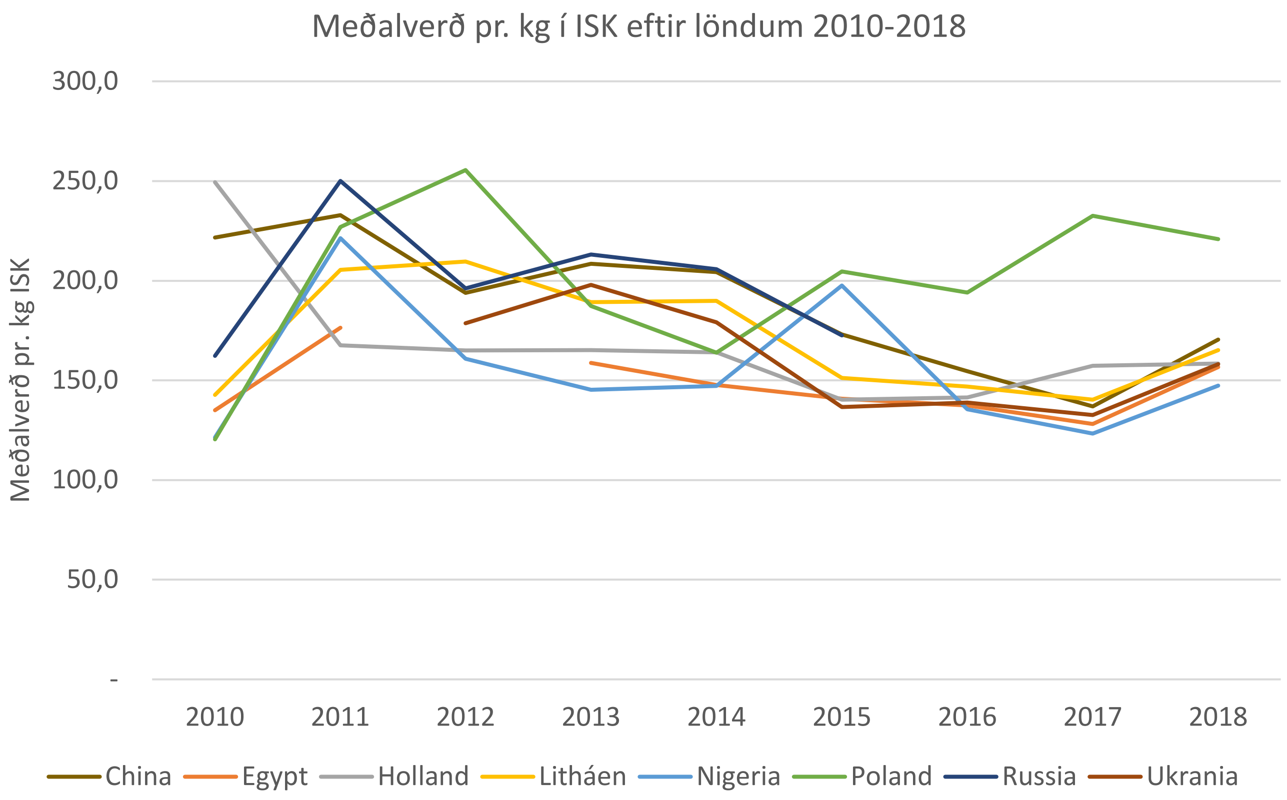
Heimild: Hafrannsóknarstofnun



Heimild: Hagstofa Íslands



Heimild: Hagstofa Íslands



Heimild: Hagstofa Íslands

INNFLUTNINGUR RÚSSA Á MAKRÍL 2014

Ísland	48.153 tonn	51,36%
Írland	11.450 tonn	12,21%
Bretland	10.754 tonn	11,47%
Færeyjar	9.354 tonn	9,98%
Noregur	6.645 tonn	7,09%

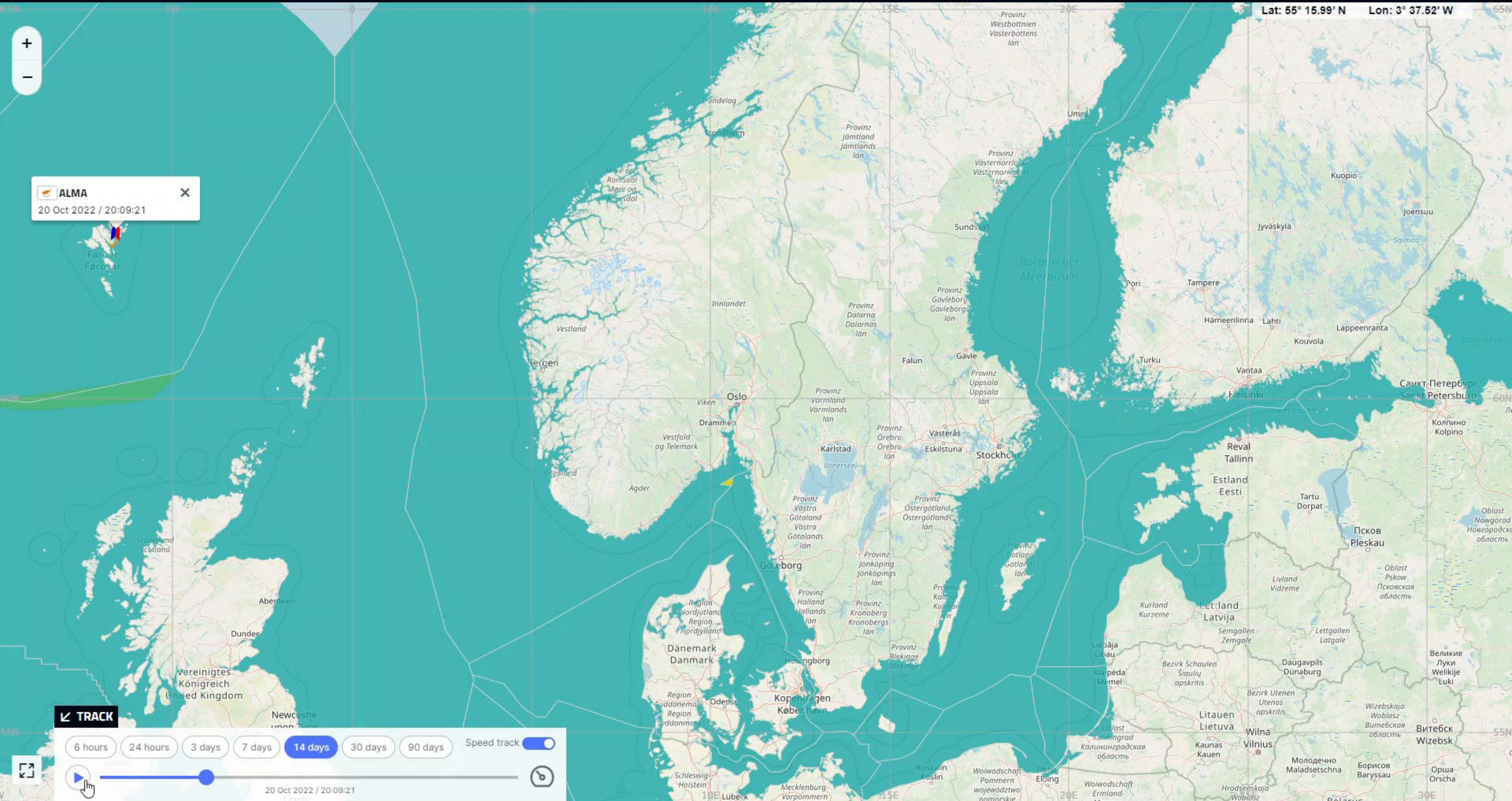
FISHFACTS

Search...

MY ACCOUNT

Lat: 55° 15.99' N   Lon: 3° 37.52' W

ALMA
20 Oct 2022 / 20:09:21



TRACK

6 hours | 24 hours | 3 days | 7 days | 14 days | 30 days | 90 days

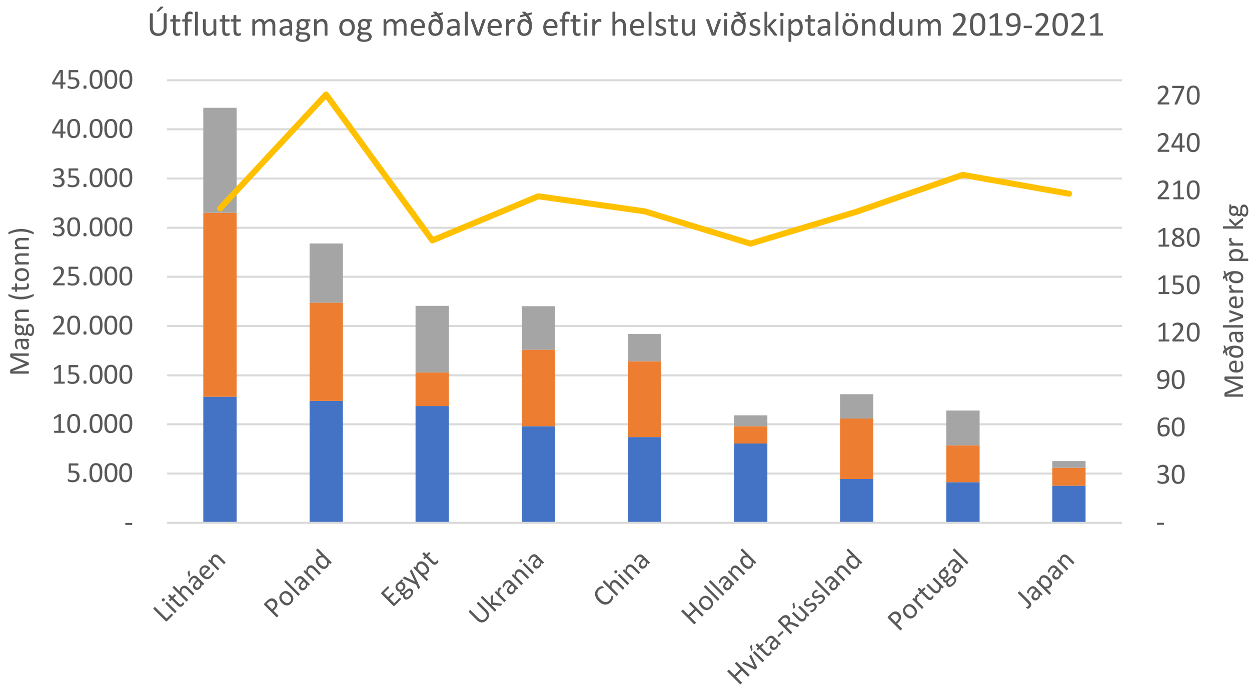
Speed track

20 Oct 2022 / 20:09:21

LADA

WHEN ONE DOOR CLOSES

ANOTHER ONE OPENS

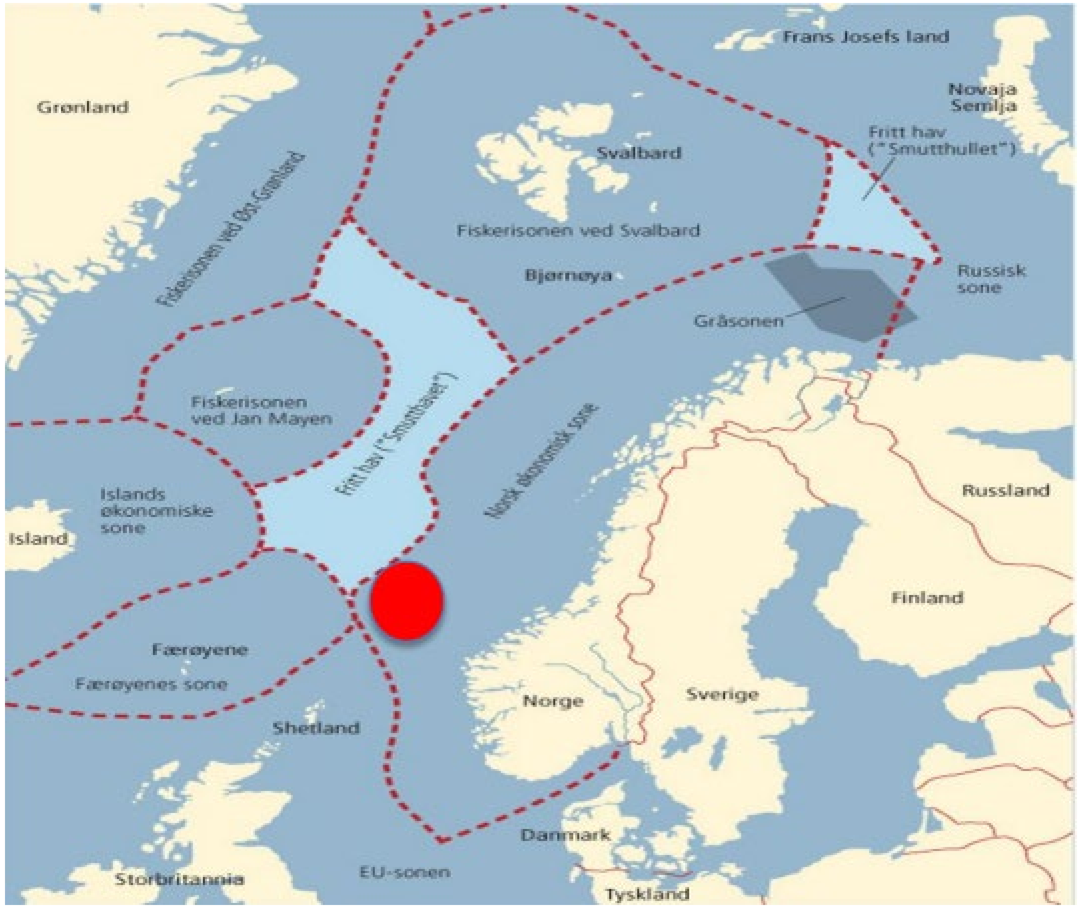


Heimild: Hagstofa Íslands

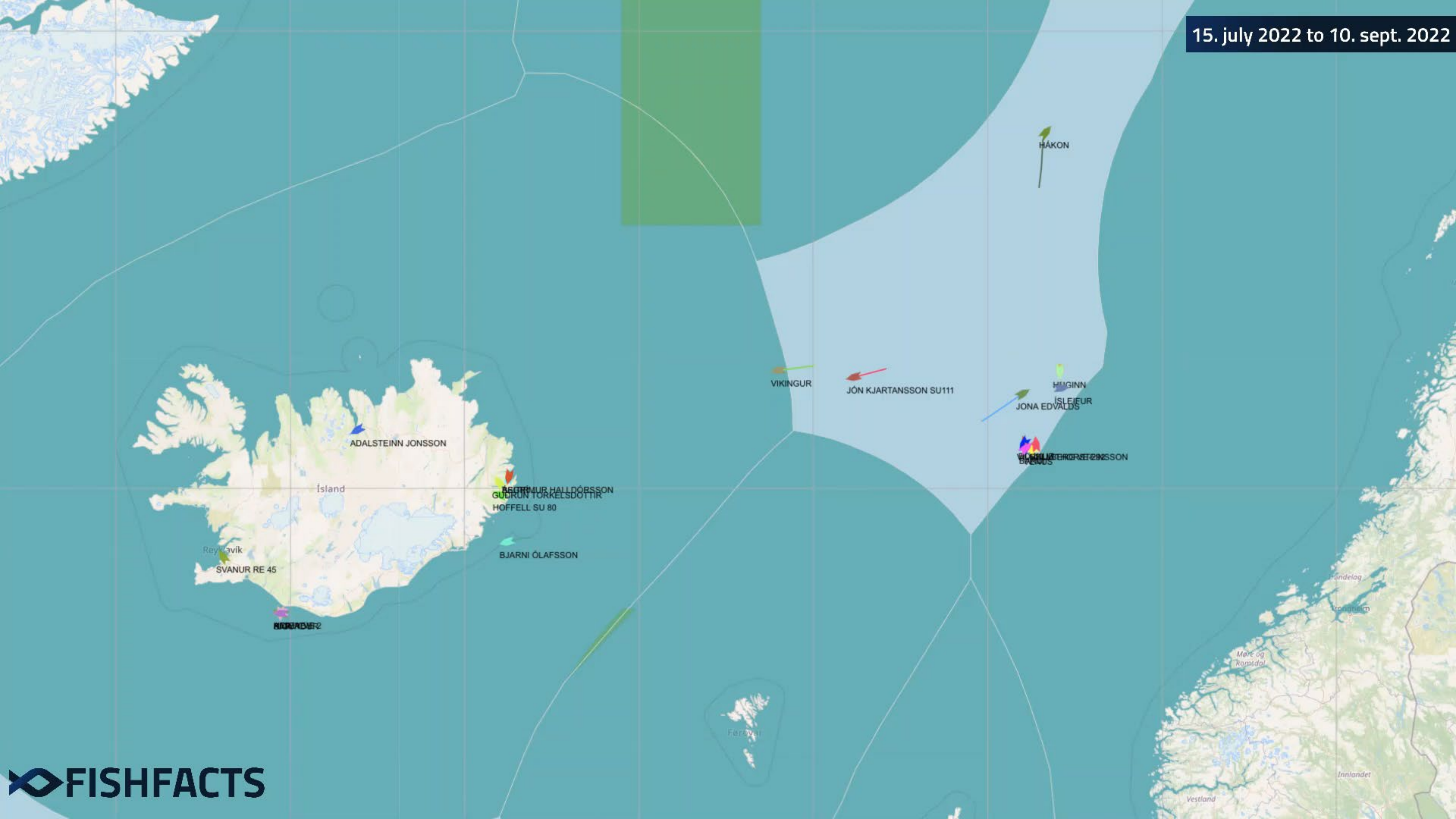
Hvar veiddum við makrílinn 2022 ?

Land	Kvóti	Veiðar til 25.sept	Veitt utan lögsögu	%	Afgangs kvóti
Noregur	284.539	234.000	600	3%	50.500
Bretland	206.894	92.000			114.900
EU	185.543	125.200			60.300
FRO*(EST)	133.604	100.500	68.700	63%	28.100
Ísland	132.462	129.400	94.500	72%	3.100
Rússland	133.332	125.000	113.000	90%	8.300
Grænland	51.670	18.000	18.000	100%	33.700
Samtals	1.128.044	824.100	294.800	36%	298.900

Heimild: Gunnar Domstein, Pelagic Fish Forum 2022

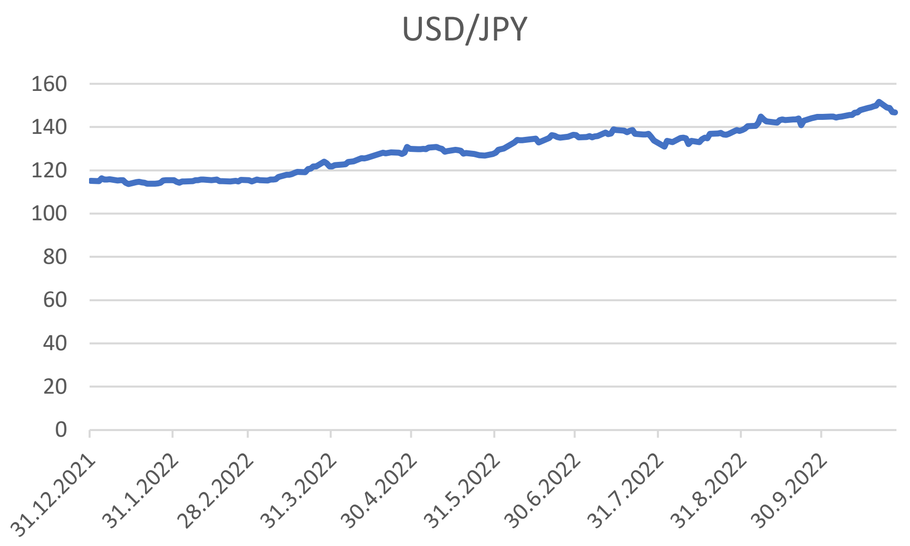


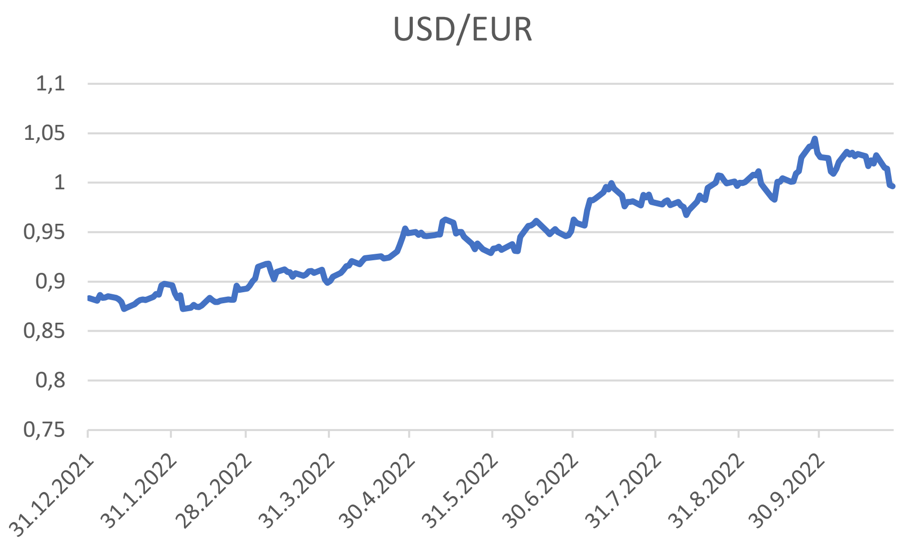
Heimild: Gunnar Domstein, Pelagic Fish Forum 2022

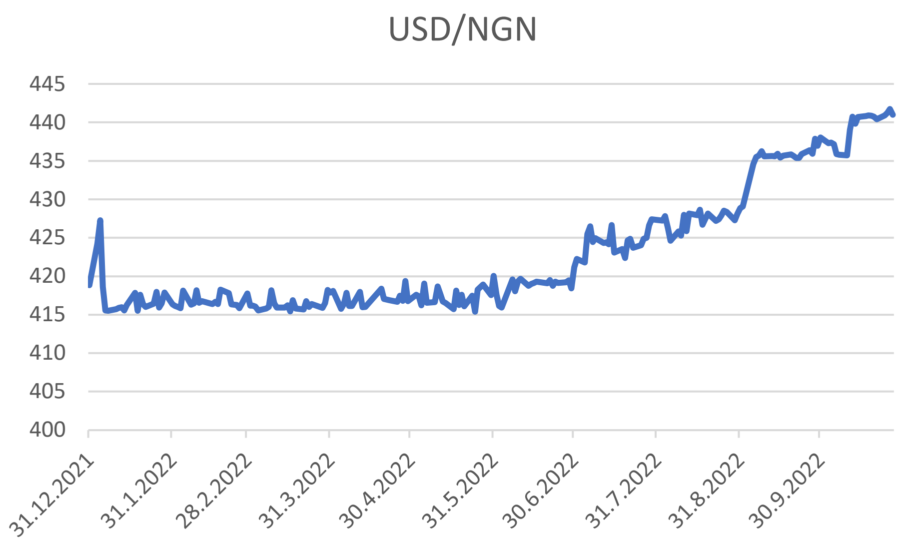


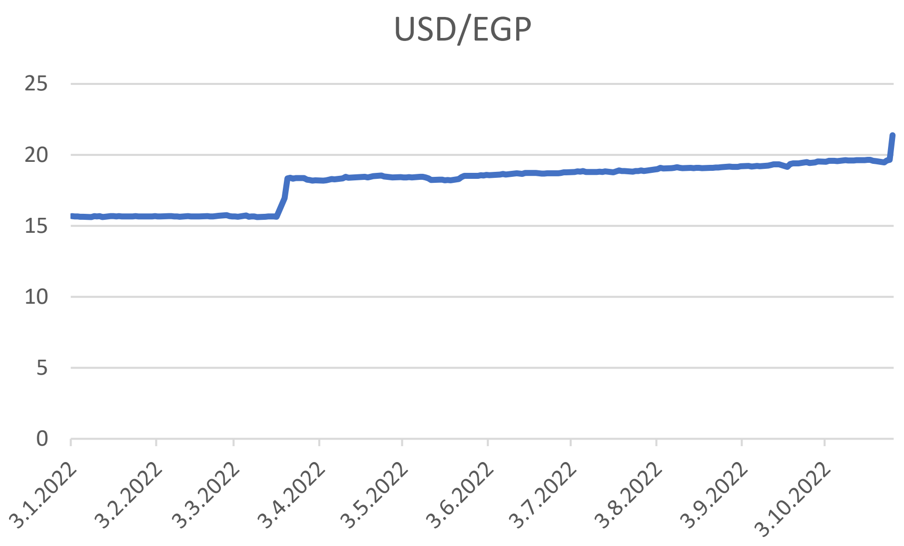
15. july 2022 to 10. sept. 2022
HÁKON
VIKINGUR
JÓN KJARTANSSON SU111
ÍSLEIFUR
JONA EDVALDS
ADALSTEINN JONSSON
Ísland
HOFFELL SU 80
BJARNI ÓLAFSSON
SVANUR RE 45
FISHFACTS

Gengi USD vs. , JPY , NGN, EUR, EGP. Árið 2022 (jan – okt)





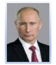




Heimild: Seðlabanki Íslands og XE.com






Heimsúrvalið í veseni ? 

Úkraína

- Beinn útflutningur 2021 ca. 3.5 mö. (20K TN)
- Óbeinn útflutningur 2021 ca. 7.0 mö. (41K TN)

⇒ Total sala á Úkraínu ca. 10 mö.

Helstu tegundir eru makríll, síld, loðna og karfi.

Íbúar 44 milljónir (54% konur)

Rússland 144 mill

Hvítarússland 10 mill

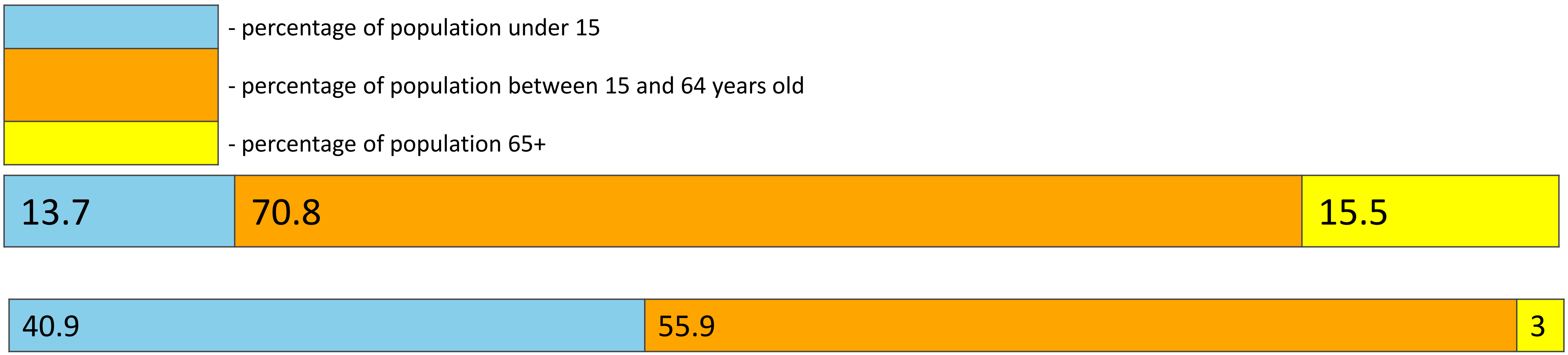
Georgía 4 mill

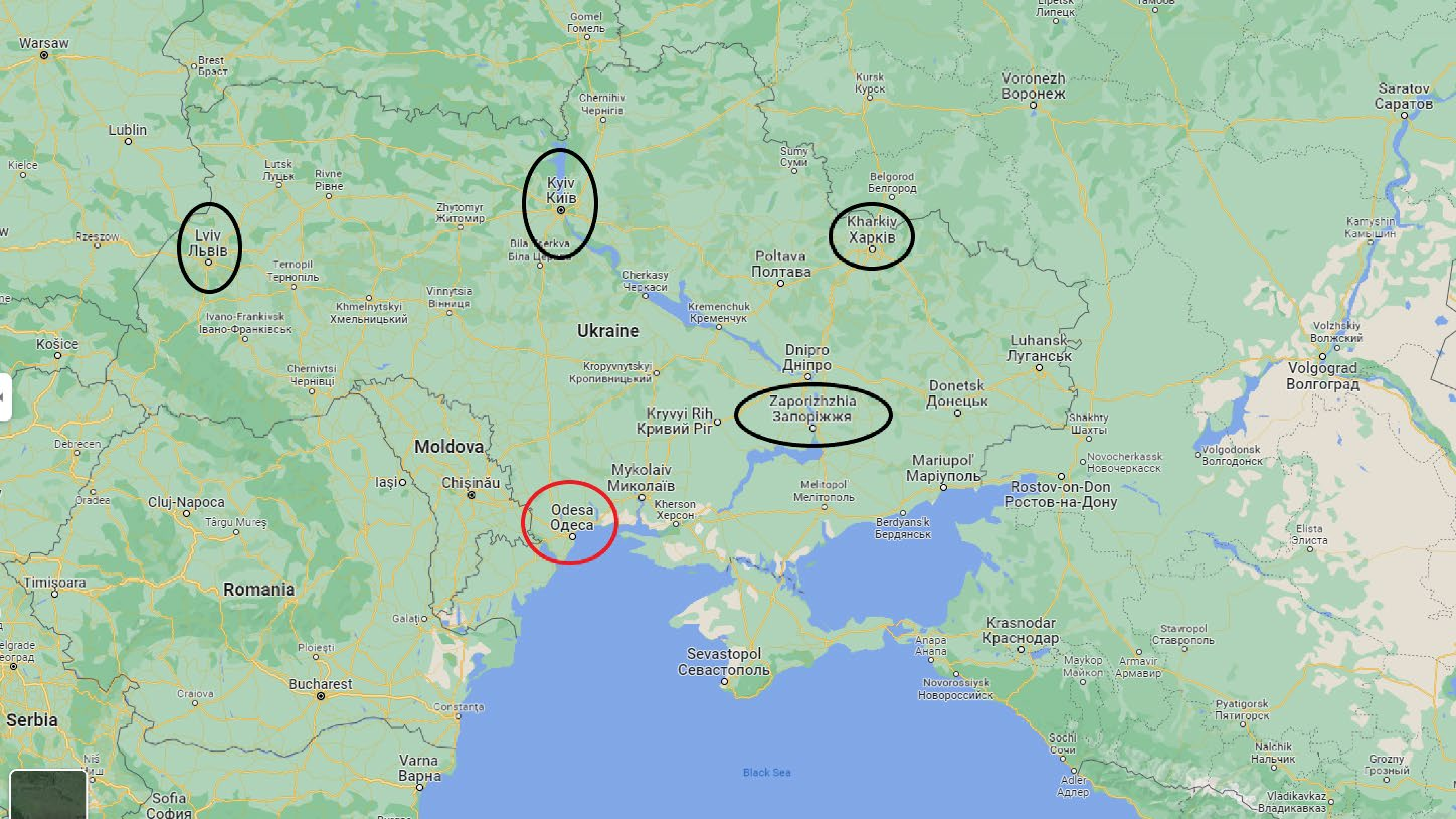
Kazakstan 20 mill

Azerbaijan 10 mill

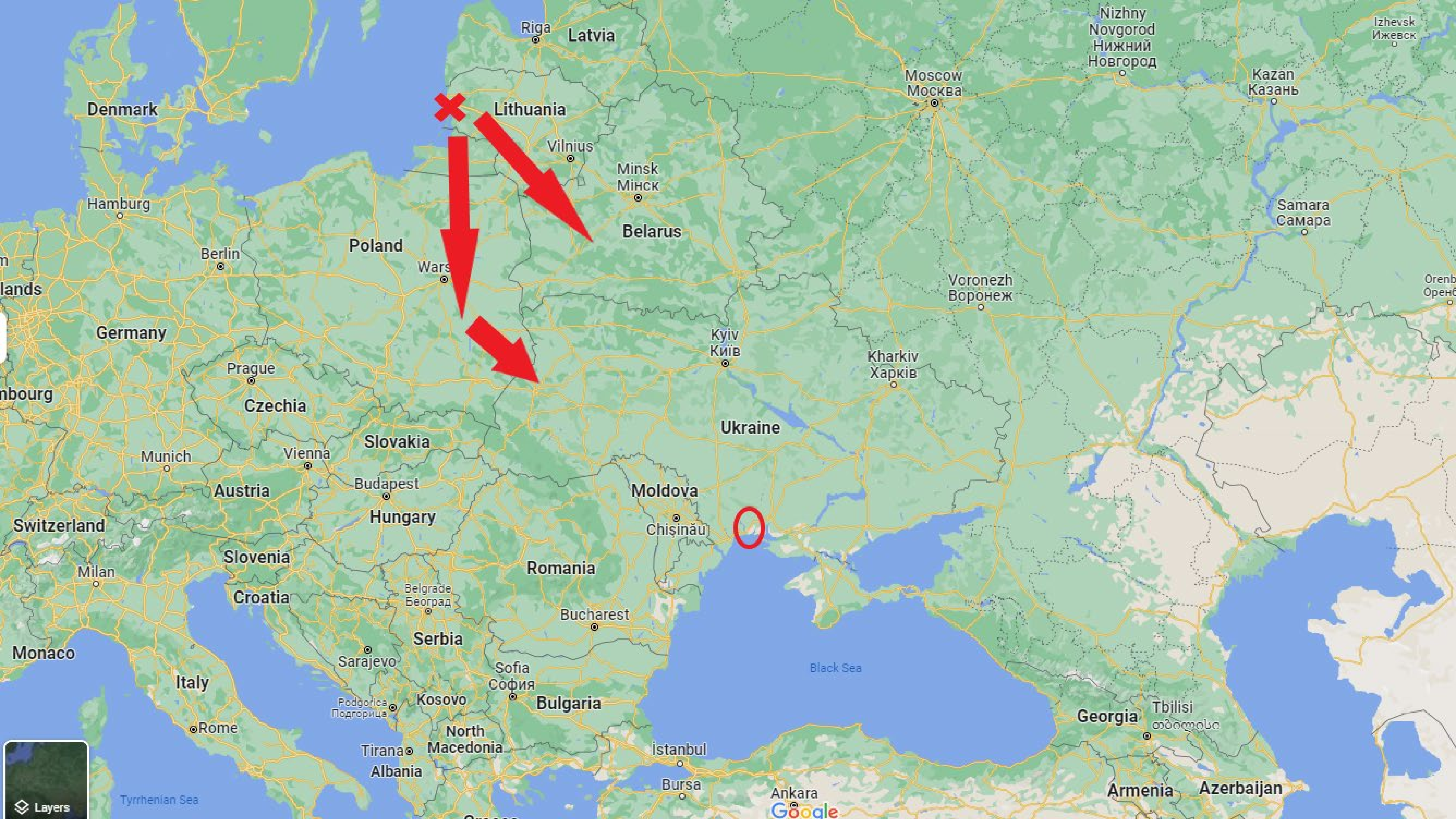
Ukraine age structure

As of the beginning of 2022 according to our estimates Ukraine had the following population age distribution:





Warsaw
Brest
Брэст
Gomel
Гомель
Lublin
Kielce
Lutsk
Луцьк
Rivne
Рівне
Chernihiv
Чернігів
Kursk
Курск
Voronezh
Воронеж
Saratov
Саратов
Sumy
Суми
Belgorod
Белгород
Kyiv
Київ
Zhytomyr
Житомир
Lviv
Львів
Rzeszow
Bila Tserkva
Біла Церква
Kharkiv
Харків
Kamyshin
Камышин
Ternopil
Тернопіль
Poltava
Полтава
Cherkasy
Черкаси
Vinnytsia
Вінниця
Khmelnytskyi
Хмельницький
Ivano-Frankivsk
Івано-Франківськ
Kremenchuk
Кременчук
Ukraine
Košice
Volzhskiy
Волжский
Luhansk
Луганськ
Dnipro
Дніпро
Chernivtsi
Чернівці
Kropyvnytskyi
Кропивницький
Volgograd
Волгоград
Donetsk
Донецьк
Zaporizhzhia
Запоріжжя
Kryvyi Rih
Кривий Ріг
Shakhty
Шахты
Debrecen
Moldova
Mariupol'
Маріуполь
Novocherkassk
Новочеркасск
Volgodonsk
Волгодонск
Mykolaiv
Миколаїв
Iași
Chișinău
Melitopol'
Мелітополь
Rostov-on-Don
Ростов-на-Дону
Oradea
Cluj-Napoca
Kherson
Херсон
Odesa
Одеса
Târgu Mureș
Berdyans'k
Бердянськ
Elista
Элиста
Timișoara
Romania
Galați
Krasnodar
Краснодар
Stavropol
Ставрополь
Anapa
Анапа
Sevastopol
Севастополь
Maykop
Майкоп
Armavir
Армавир
Ploiești
Novorossiysk
Новороссийск
Bucharest
Craiova
Constanța
Pyatigorsk
Пятигорск
Serbia
Sochi
Сочи
Nalchik
Нальчик
Niš
Black Sea
Grozny
Грозный
Varna
Варна
Adler
Адлер
Sofia
София
Vladikavkaz
Владикавказ


Riga
Latvia
Nizhny Novgorod
Нижний Новгород
Izhevsk
Ижевск
Moscow
Москва
Kazan
Казань
Denmark
Lithuania
Vilnius
Minsk
Мінск
Hamburg
Samara
Самара
Belarus
Poland
Berlin
Warsaw
Voronezh
Воронеж
Germany
Kyiv
Київ
Kharkiv
Харків
Prague
Czechia
Ukraine
Slovakia
Munich
Vienna
Austria
Budapest
Moldova
Hungary
Switzerland
Chișinău
Slovenia
Romania
Milan
Croatia
Belgrade
Београд
Bucharest
Serbia
Monaco
Black Sea
Sarajevo
Sofia
София
Italy
Bulgaria
Podgorica
Подгорица
Kosovo
Georgia
Tbilisi
Rome
North Macedonia
Tirana
Istanbul
Albania
Bursa
Ankara
Armenia
Azerbaijan
Tyrrhenian Sea
Layers
Google

UFC
Universal Fish Company

FOZZY GROUP
група компаній

ЛОГІСТИКА

Сільпо
Le Silpo
FOZZY
фора
THRASH! ТРАШ!


АКЦІЯ


NOVUS
СБЕРБАНК
доброго дня | аптека



Салака б/к
12 05
Скумбрія
сол. з/г
27 52

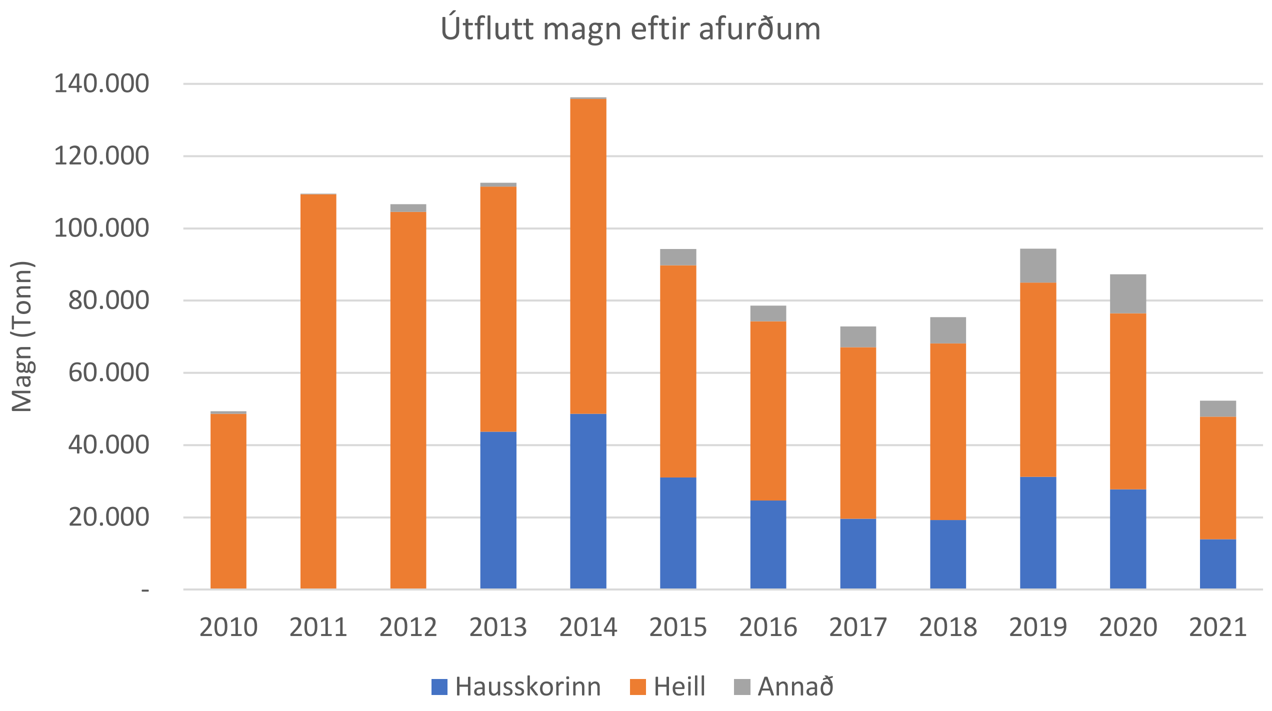

NORVEN
СКУМБРІЯ
ФІЛЕ В РОЗСОЛІ
Norven Скумбрія у олії (термоформа) 250г
83 50
61607816


Скумбрія х/к
з головою
27 05
UFC
Скумбрія х/к с/г.
27 85

Veladis

НАТУРАЛЬНО • КОРИСНО • СМАЧНО

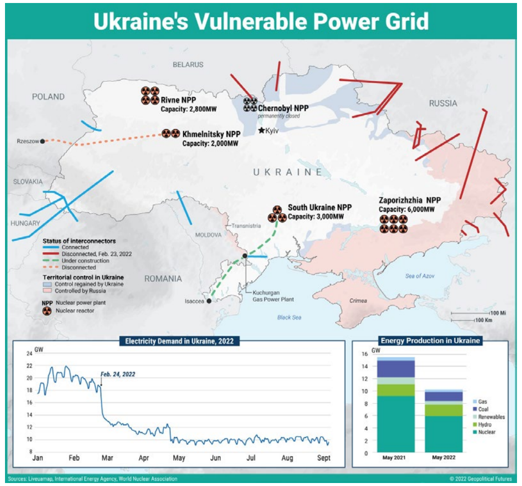

ISLANDIA



Heimild: Hagstofa Íslands


Þung staða 2023

- Allar frystigeymslur í Klaipeda / Pólland eru fullar.
- Frystigeymslur hjá framleiðendum nánast fullar.
- Ótti við að flytja vöru inn á Úkraínska markaðinn frá Klaipeda eða Póllandi er mikill.
- Kaupendur mæta með 1 og 1 trukk í stað 10.
- Allir vilja geyma sem minnst.



Nýir markaðir

- Það er búið að finna öll lönd í heiminum ef þið voruð að spá í því.
- Staðan okkar núna er samt betri en 2014. Við erum með markaði sem geta vaxið en líklega í gegnum verð.
- Fleiri framleiðsluform, meira HG, meira flakað meira jafnvel IQF.
- Aðgangur að EU markaði , tollfrelsi.
- Mjöl ?