

Continued increasing utilization of marine residual raw material

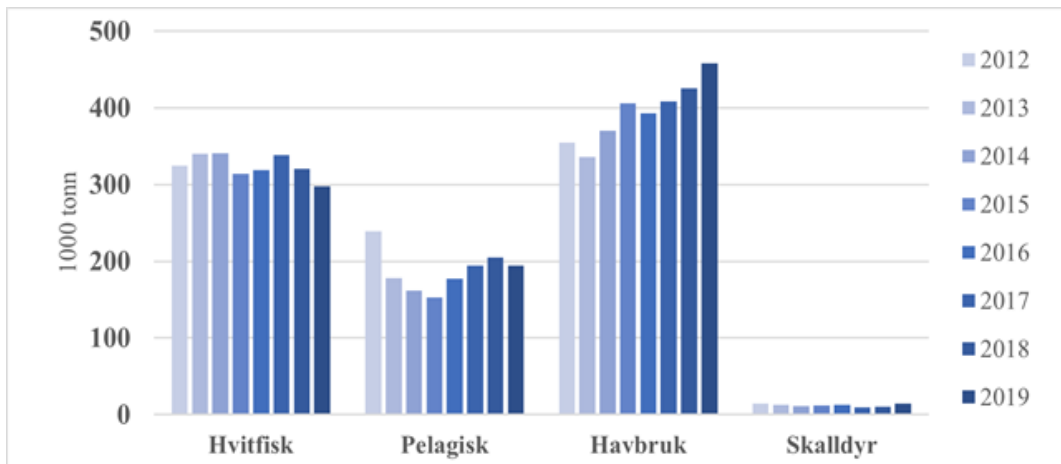
Norway fished and produced as much as 3.55 million tonnes of fish and shellfish in 2019. Of this, approx. 964,000 tonnes of residual raw material, after purification and processing, of which 84% was utilized.

Marine residual raw material constitutes an important value-creating resource in the Norwegian fisheries and aquaculture industry, and most of it is brought ashore and taken care of in a good way. Residual raw materials already contribute to significant value creation in the industry, but the potential for increased utilization and value creation is certainly present. The potential for the whitefish industry in particular is great, which has been made visible in several reports, projects and reports to the Storting.

FHF has implemented annual analyzes since 2012. The analysis will give business actors and other actors a good overview of product flows and opportunities for activity that can increase profitability in the industry, and be a stimulating factor for this.

Increased utilization of marine residual raw material

Available residual raw materials from the fisheries are largely controlled by quotas, where the whitefish and pelagic sectors saw a decline from 2018 to 2019. Productions in the aquaculture sector continued to increase for the fourth year in a row, which helped maintain the total available residual raw materials.



Hvitfisk= Bottomfish | PELagisk= Pelagic | Havbruk=Aquaculture | Skalldyr=Shellfish

Figure 1: Development in available residual raw materials by sector from 2012 to 2019 (Source: Norwegian Directorate of Fisheries, Statistics Norway, Norwegian Seafood Council, Sales Associations, Kontali Analysis and SINTEF)

The overall utilization rate of marine residual raw material increased from 83% to 84% from 2018 to 2019. The reason for this was that the whitefish sector increased its utilization rate from 60% to 61% and that the aquaculture sector had a strong increase in the share of available residual raw material. In this year's calculations, an adjustment was also made to the proportion of free blood from salmon and trout, from 2.6% to 2.0%, which contributes to increasing the utilization rate. This is based on input from relevant players in the aquaculture industry, where a weighted average between dry soaking by gravity and soaking in water is the argument.

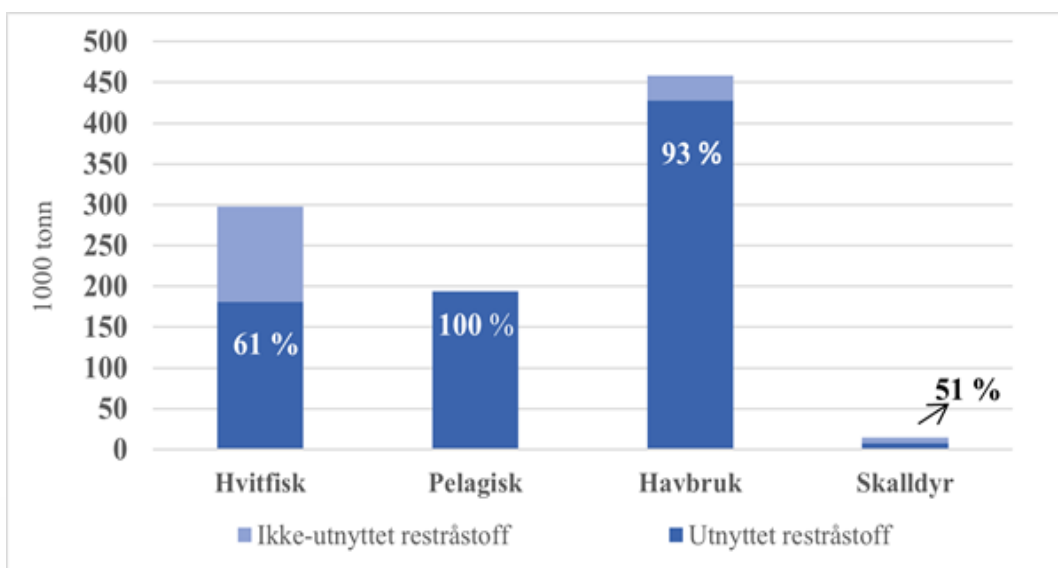


Figure 2: Utilization rate of residual raw materials by sector in 2019 (Source: Kontali Analysis and SINTEF)

Increasing volume for human consumption

In 2019, approx. 44% of the total residual raw material used for silage as the first step in the processing of the end products fish feed, livestock feed and biogas / energy. Large volumes of fish feed are also produced via a growing industry based on the processing of fresh residual raw material for the extraction of salmon oil and protein hydrolyzate.

At the same time as approx. 70% of the volume of residual raw material goes to different types of feed, there is an increasing volume used for products for human consumption. In the last three years, the volume for human consumption has increased by 20%, and is now close to 60,000 tonnes of product weight. This is due to an increasing focus on sustainability and the circular economy, which has driven more intensive R&D work for the development of high-value products from all seafood sectors, including shellfish.

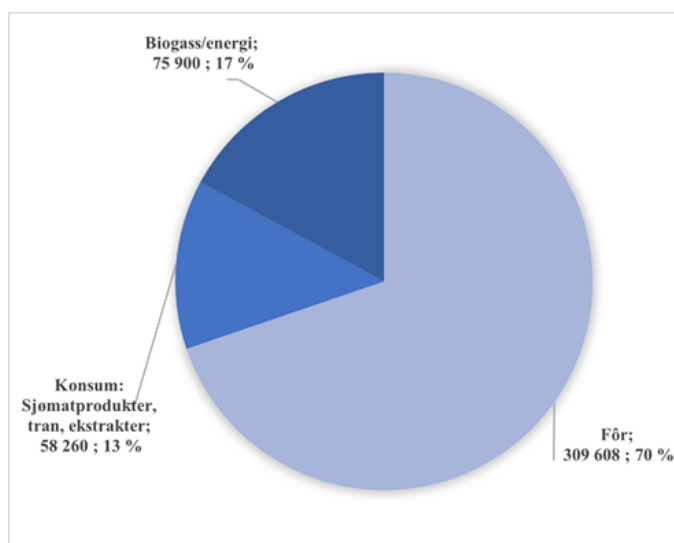


Figure 3: Main market areas, product weight in tonnes, in 2019 (Source: Companies, SINTEF)

Continued volume to utilize

Approximately 155,000 tonnes of residual raw material, mainly from the whitefish sector (75%) was not utilized in 2019. This is mainly due to gutting or processing on board the sea-going vessels where residual raw material is not brought ashore. The largest proportions of unutilized residual raw material in 2019 were heads, sroe and liver from the whitefish sector, and free blood from the aquaculture industry.

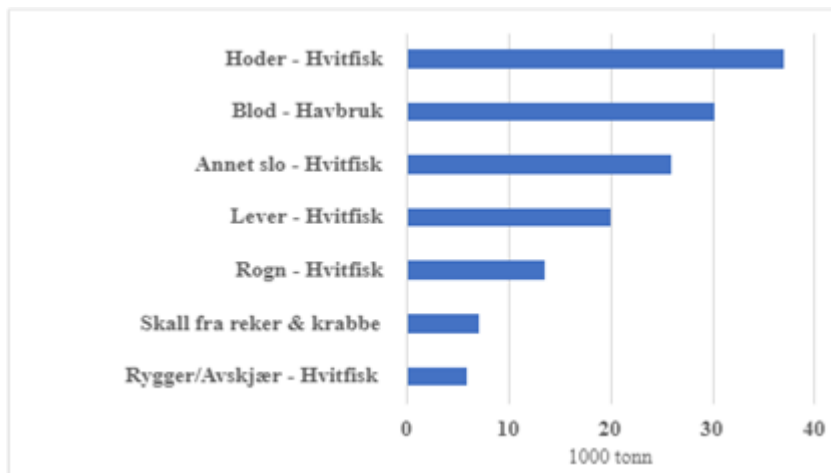


Figure 4: Unused residual raw material by fraction and sector in 2019 (Source: Kontali Analysis and SINTEF).

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