Dear Delegates

WELCOME TO THE 11TH NASF CONFERENCE – DEDICATED TO THE GLOBAL SEAFOOD INDUSTRY

Continuing the main theme from last year; the 11th NASF in 2016 is focusing on global seafood trade and market access - Seafood in a new geopolitical role. We'll continue to explore seafood's geopolitical role - highlighting the ever increasing importance of our industry in the world's expanding food trade. Seafood products are among the most widely traded commodities in the world, totalling around USD 130 billion per year.

After 10 years NASF has become one of the most important meeting places for anyone involved in seafood trade and business. We have an outstanding - and expanded - program, featuring 110 speakers in 12 seminars over 3 days, delivering real value to our delegates. We welcome our new Norwegian Minister of Fisheries, Per Sandberg, who will give the opening speech on March 2nd. By attending NASF you will get insights into vital developments forming the future of the industry. The quality of our speakers are well defined in our NASF slogan “Be inspired by the Best!”

We continue our industry trade seminars on the Salmon, White Fish, and Pelagic sectors, along with the MSC supported Sustainability Seminar. We also focus on the retailing sector where a high level expert group along with 3 major EU retailers are discussing the outlook for seafood in the European retailing scene. Finance and capital markets remain a cornerstone of NASF where an ever increasing number of investors and investment funds are participating. Pareto Securities continues its large investor and capital markets seminar involving 15 of the major stock listed seafood company CEOs presenting their outlook. We also have a new seminar on Coldwater shrimps, snow crab etc set up by our new partner ICWPF.

This year a number of new NASF initiatives are being presented in partnership with the new Bergen based National Seafood Centre of Expertise headed by Mrs. Tanja Hoel. Together we have developed 2 ground breaking industry seminars - both taking place on Day Zero (March 1st):
- the NASF technical marine innovation workshop dedicated to “Zero Lice”
- the NASF Young Fish Leadership Summit, a new arena for developing a network for young aspiring future leaders of the global seafood industry.

We are proud to announce the 3rd National Delegation to NASF – this time from Germany. Some 35 German seafood industry delegates from 20 companies are here. See an overview of these firms inside this 11th NASF program. We welcome Germany to NASF this year.

We are honoured to have a 2nd United Nations agency in addition to FAO taking part in our arena, Vienna based UNIDO. Their Director General Li Yong will give the key note address at this year’s Opening on March 2nd - featuring UNIDO’s role and contribution to seafood industrial development in the developing world.

The NASF arena has become a renowned centre for developing business – we say simply: “Come and do business where business is.” We are once again seeing more than 700 seafood executives from 35 countries coming to Bergen and taking an active part in our proceedings.

Our enlarged program is the result of interaction with leading seafood industry companies, partners, and stakeholders worldwide. We thank them for their strategic guidance and help in setting the right agenda, maintaining NASF as a true world class event. On behalf of the North Atlantic Seafood Forum, Pareto Securities, FAO, our co-organisers, and our distinguished sponsors, we warmly welcome you to the 11th NASF.

Yours very truly

Jørgen J. Lund,
Managing Director,
North Atlantic Seafood Forum AS
Welcome, Jørgen J. Lund, Managing Director, North Atlantic Seafood Forum AS

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Overview of NASF Seafood Business ARENA

NASF Seminar Outline

NASF Programme 2016 - overview seminars & rooms

NASF 2016 Conference exhibition

Welcome, Pareto Securities Seafood Team, Norway

Welcome, Minister of Fisheries, Per Sandberg, Norway

Welcome, Director General Li Yong, Unido, Vienna

Welcome, Guus Pastoor, Chairman, European Seafood Federation (AIPCE), Brussels

Welcome, Marcus Coleman, CEO, Seafish, UK

North Atlantic Seafood Forum International Team

NASF Social Events

NASF 2016 Sponsors

NASF in partnership with Norway’s Aqua Nor and Nor-Fishing exhibitions

Germany National Delegation to 11th NASF 2016 - overview of companies

Welcome back to 12th NASF 2017, March 7-9 2017 (week 10)

NASF Programme per 22 February 2016

The programme has been compiled with the maximum care and attention. Nevertheless the organiser cannot be held responsible for any errors or omissions that may be present in the programme itself.
Welcome to 11th North Atlantic Seafood Forum March 3-5 2016
The World’s Largest Seafood Business Conference

The North Atlantic Seafood Forum is the world’s largest seafood business conference, and a leading executive meeting place for the seafood industry. In Bergen, March 1-3 2016, around 700 delegates from more than 35 countries and 350 companies will attend NASF.

NASF is a broad annual industry event covering all major facets of the seafood sectors. NASF focuses on the key network between cutting edge innovation, technology, research, policy, finance, trade and commercialisation. The 11th conference in 2016 is an excellent opportunity to meet and interact with the leading world seafood operators, and other key players, along with financial institutions from the world’s largest seafood capital market, all in the same venue. Around 110 speakers will present papers in 12 seminars over 3 days.

This is North Atlantic Seafood Forum (NASF)

- Get insights into vital developments forming the future of the industry
- Hear the latest in innovative and commercial developments
- Learn about the industry’s political and legislative direction
- Understand the financial and economic issues affecting the market
- Connect with leading seafood companies in the world

The NASF conference will provide new and invaluable insights and give you the fast-track to the global seafood markets.

- A pre-conference - sets focus on Marine innovations and Solutions and business development
- Opening session - “The View from the Bridge”; learn from politicians, industry captains and leading seafood companies
- Parallel sessions - for the latest update on industry challenges, supply and market outlook, prices, innovation and business, and sustainability issues
- Corporate Finance Seminar - meet 15 of the world’s leading stocklisted seafood firms, investors and financiers
- Major industry arena - for developing business and commercial opportunities

3 Days Full of Events

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<td>White Fish Industry Executive meeting</td>
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The Conference will provide you with new and invaluable insights into world seafood markets and premium seafood companies together with innovative solutions.

Social Events The NASF meeting place consists of many different arenas for meeting the delegates in an unstressed atmosphere.

Take part in the NASF social programme and use these networking opportunities.
<table>
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**KS= Kongesalen**
11TH NORTH ATLANTIC SEAFOOD FORUM  
MARCH 3-5 2016

DAY 1 & 2  
PROGRAM 2016

DAY 1 MARCH 2nd

1. OPENING
09.00 Conference Chair, Guus Pastoor, Chairman, European Seafood Federation, Brussels.

Main 10th NASF Conference Theme:
Seafood trade and food security on the global agenda - Seafood in a new geopolitical role.

2. GLOBAL POLICY AND TRADE SESSION
09.05 Seafood sector - our work towards increased production and competitiveness
Minister of Fisheries, Per Sandberg, Norway.


09.45 UNIDO’s role and contribution to seafood industrial developments in the developing world Director General Li Yong, UNIDO, Vienna.

10.10 Outlook for world seafood trade to 2030 – prospects and challenges Assistant Director General Arni Mathiesen, FAO, Rome.

10.30 Coffee Break and networking.

3. NASF EUROPEAN RETAIL PANEL
11.00 Seafood supply and demand trends in major European Retail markets. Panel to Moderated by Jonathan Banks, NASF Retail Director, UK.

Overview and market trends: Jean-Jacques Vandenheede, The Nielsen Company, Belgium, Panel: Julien Mahieu, Delhaize, Belgium, Hervé Streifer, Metro, Germany, Romain Fageot, Intermarché, France. Panel Discussion and Q&A.

12.30 Greetings from Germany – Welcome to 7 PM Cocktail Reception Germany National delegation to 11th NASF 2016 – Industry Steering Committee.

12.35 - 14.00: Lunch and networking at Conference hotel.

DAY ONE: PARALLEL SESSION 1 14.00 – 18.00

4. GLOBAL SALMON SUPPLY, MARKETS AND PRICES
½ day industry workshop - Expansion of global salmon trade and production.

14.00 Opening by Chair: Henning Lund, Pareto Securities, Norway.

14.05 Global Salmon Supply, Markets and Price Outlook Lars Liabø Chairman, Kontali, Norway.

14.30 Outlook for Chilean Salmon farming - seen from the top - Jose Ramon Gutiérrez, Chairman; MultiExport; Chile.

14.50 Outlook for global salmon demand and markets:

Outlook for global salmon demand
Ola Brattvoll, COO & Group Sales Director, Marine Harvest Group, Norway.

Outlook for Asian demand and markets
Klaus Høiebrekke, COO, Norway Royal Salmon, Norway.
15.30 Coffee Break and networking at Conference Village.


16.40 What can Cargill offer the salmon industry? Einar Wathne, President, Cargill Aqua Nutrition, USA and Norway.

17.00 Science, Innovation and Partnership; Perspectives from a Leading Global Animal Health Company Rick DeLuca, President MSD Animal Health, USA.

17.20 Salmon Industry Panel – Main theme: salmon output expansion – prospects and challenges Panelists from Norway, Chile, Iceland and Industry experts; Panel Debate and Q&A - Moderator Chair Henning Lund.

18.00 Seminar close.

DAY ONE: PARALLEL SESSION 2 14.00 – 18.00

5 NASF/MSC SUSTAINABILITY & COMMUNICATIONS SEMINAR

½ day industry workshop.

14.00 Opening Remarks - Seminar Chair; Prof. Dr. Horst Lang; Director Quality and Sustainability; Globus SB Warenhaus, Germany.

14.10 Keynote Address: Sustainability - the big picture. Jason Clay, Director WWF, USA.


14.50 Food service sector Mike Berthet, Director, M&J Seafood, UK.

15.10 Communicating with the consumer. Bart Van Olphen, Consultant, The Netherlands.

15.30 Coffee Break and networking.

16.00 The retail perspective – Hans-Jürgen Matern, Director Metro Group, Germany.


16.40 Panel debate: Are we communicating the right thing? Panel Discussion & Q&A Moderators: Chair Dr. Horst Lang and Jonathan Banks, NASF Retail Director.

17.50 Closing Remarks Seminar Chair Prof. Dr. Horst Lang.

18.00 Seminar close.

19.00 - 20.00 Germany at 11th NASF 2016 - 11th NASF cocktail reception Hosted by German Seafood Industry. At hotel Foyer Exhibition.

20.00 - 24.00 NASF Conference Dinner & Networking Reception at NASF hotel main conference hall.

DAY 2 MARCH 3RD

NASF WILD CATCH – FISHERIES DAY

08.30 Key-note adress Minister of Fisheries, Sigurdur Ingi Johannsson, Iceland.

6 NASF GLOBAL WHITE FISH SUMMIT

08.50 Opening by Chair: Thomas Farstad, CEO, Norway Seafoods, Norway.

08.55 Global white fish supply, market and price outlook Ragnar Nystoel, CEO, Kontali, Norway.

09.15 Outlook for white fish supplies. Outlook for North Atlantic white fish supply Arni Geir Palsson, CEO, Icelandic Group, Iceland.

09.35 Russian Alaska Pollock & Cod Supply and Markets – overview and outlook Andrey Teterkin, General Director, Russian Fishery, Russia.

09.55 U.S-Alaska Pollock supply Mike Breivik CEO, Glacier Fish Company, USA.

10.15 Hake supply and exports. Jonty Jankovich-Besan, CEO, I&J, South Africa.

10.30 Coffee Break and networking at conference hotel.

10.55 Outlook for farmed white fish supplies Outlook for Pangasius supply and exports Jose Gonzalez Vecino, Senior Scientist, EWOS Innovation, Norway & Vietnam.

11.10 Outlook for global white fish markets White fish demand outlook in Continental European Union (EU) markets. Frode Mikkelsen, Sales Director; Norway Seafoods, Norway.

11.30 UK white fish supply-demand outlook Jack-Robert Moller, Director, Norway Seafood Council, UK.

11.50 Market opportunities for cod in China. Sigmund Björgo; Director Norwegian Seafood Council, China.
12.10 Structural Changes in the white fish industry – what are the Economic, Social and Technological drivers heralding major changes? Panel Debate and Q&A Henning Lund, Analyst, Pareto Securities Norway, white fish suppliers, research institutions, service providers and other industry stakeholders. Moderated by Drew Cherry, Intrafish Media, USA & chair.

12.30 Lunch and networking at Conference hotel.

2ND (AFTERNOON) SESSION

13.30 – 17.30

7 NASF PELAGIC INDUSTRY SUMMIT

13.30 Opening.

Chair: Ian Gatt, Chair, Scottish Pelagic Fishermen’s Association, UK.

13.35 Outlook for global pelagic fisheries supply and demand, Gunn Strandheim Kontali, Norway.

13.50 Outlook for global pelagic industry supplies and pricing:

Outlook for the pelagic market place in the Northeast Atlantic – possible development Paul Oma CEO; Norway Sales Organization for Pelagic Fish, Bergen, Norway.

Outlook for Southern Africa Hermanus Kasper, Chairman, Atlantic Sea Products, Namibia.

Outlook for Peru Rossana Ortiz Rodriguez, CEO, Exalmar, Peru.

Impact of dynamics in China on the global fish meal and pelagics industries Gorjan Nikolik, Director Rabo Bank, the Netherlands.

15.10 Coffee Break at NASF conference village.

15.30 Outlook for global pelagic markets and pricing:

Market outlook for fish meal and fish oil; pricing and market trends: Dr. Enrico Bachis, Chief Analyst; IFFO, UK.

Outlook for global fish feed supply Jan Sverre Røsstad, Director, BioMar, Denmark.

Market trends and outlook for pelagic imports in Russia: Christen Mordal, CA Mordial Consulting, Norway.

Market Outlook for Poland and Baltics: Przemyslaw Cieslik, Director, Conifimax, Poland.

The pelagic sector; will commercial concentration continue and which are possible structural and regulatory consequences? Torben Foss, Director, PwC Seafood Centre, Norway.

17.00 Panel discussion - Q&A: Global pelagic supply/demand/pricing. Moderator: Chair Ian Gatt.

17.30 Seminar close.

DAY TWO: ALL-DAY SESSION
09.00-16.00

8 NASF PARETO CORPORATE SEAFOOD FINANCE SEMINAR

09.00 Opportunities and challenges in the salmon market going forward
CEO Alf Helge Aarskog, Marine Harvest, Norway

09.30 Trends and drivers of technology development in the salmon industry
CEO Trond Williiksen, AKVA Group, Norway

09.50 How to bring GSF performance above peers
CEO Andreas Kvame, Grieg Seafood, Norway

10.10 Project SeaDragon
COO Dallas Donovan, SeaFarms, Australia

10.30 COFFEE

10.55 Recent production trends in whitefish - driver for new opportunities
CEO Webbjorn Barstad, Havfisk, Norway

11.15 Will farmers in the North be able to control the sealice? CEO Charles Høstlund, Norway Royal Salmon, Norway

11.35 TBA
CEO Arne Møgster, Austevoll Seafood, Norway

12.00 LUNCH

13.00 Why we believe in a bright future for farming salmon in Chile
CEO Andres Lyon, Multiexport, Chile

13.25 The real value triggers for farming - and Benchmarks positioning
CEO Malcolm Pye, Benchmark, UK

13.45 TBA
CSO Anthony Ostrowsky, Sino Agro, China

14.05 COFFEE
**13.30** Good biology – the foundation under good farming result
CFO Gunnar Nielsen, Bakkafrost, Faroes islands

**13.55** Future potential for Trout
CEO Henning Beltestad, Lerøy Seafood Group, Norway

**15.20** Offshore possibilities and challenges
CEO Leif Inge Nordhammer,Salmar, Norway

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**Main Seminar Themes:**
- ICWPF Welcome to NASF - Introduction by Chair/NASF
- Overview of major cold water shrimps/shell fish players
- What are the size, value and profitability of this cold water shrimp/lobsters and king crab business?
- What is the growth potential?
- Outlook for North Atlantic supplies
- Outlook for US; European and Asian demands
- Retailers’ views on cold water shrimp lobsters and king crab market potential
- Global Markets and pricing outlook
- The way ahead

**Day Two: All-day workshop session 09.00-15.00**

**9 1st ICWPF/NASF Side event**
**Outlook for Cold Water Shrimps, Lobsters and Snow Crab Markets**

Industry workshop organized by International Cold Water Prawn Forum (ICWPF) - in cooperation with NASF.
Chair: Simon Jarding, Director, Royal Greenland, Denmark.
Coordinator: Jens Henrik Møller, Gemba Seafood Consulting, Denmark & ICWPF secretariat.Denmark & NASF Representative for Denmark, Sweden, Faroes Islands and Greenland.

Expand your business insight - on snow crab, lobster and shrimp – take part in North Atlantic Seafood Forums new event.

In 2016 International Cold Water Prawn Forum (ICWPF) with Gemba Seafood Consulting A/S as organizer will host a side event at NASF 2016. The side event will focus on snow crab, lobster and shrimp. The seminar will give you a deep insight into the new business opportunities snow crab, lobster and shrimp gives to the seafood sector.

**Main Seminar Themes:**
- ICWPF Welcome to NASF - Introduction by Chair/NASF
- Overview of major cold water shrimps/shell fish players
- What are the size, value and profitability of this cold water shrimp/lobsters and king crab business?
- What is the growth potential?
- Outlook for North Atlantic supplies
- Outlook for US; European and Asian demands
- Retailers’ views on cold water shrimp lobsters and king crab market potential
- Global Markets and pricing outlook
- The way ahead

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**Take part in North Atlantic Seafood Forum’s new event**

**EXPAND YOUR BUSINESS INSIGHT - ON SNOW CRAB, LOBSTER AND PRAWNS**

The International Cold Water Prawn Forum (ICWPF) will host a side event at NASF 2016 with Gemba Seafood Consulting A/S as organizer. This special business seminar will focus on snow crab, lobster and prawns, and will give you profound insight into the new business opportunities these species gives for the global seafood sector.

**Thursday March 3rd**
**09.00 – 15.00**

Moderator: Jens Henrik Møller, Gemba Seafood Consulting, Denmark

**09.00** Welcome by International Coldwater Prawn Forum
Chair Mr. Simon Jarding, Royal Greenland, Denmark

**SESSION 1:**
**Shellfish in the seafood market and what kind of consumers will we meet in the future?**

**09.10** Outlook: The Cold Water Prawn - how to handle the Prawns with focus on freshness and taste
Category Director, Lise Lotte Callesæe York, Royal Greenland, GR

**10.00** Outlook: The lobster case - the retail market in US and the potential for further developments in a high value market – how can these experiences be used in the European market?
Editor John Sackton, Seafood News, US

**10.25** Outlook: The Cold Water Prawn - how to handle the Prawns with focus on freshness and taste
Category Director, Lise Lotte Callesæe York, Royal Greenland, GR

**10.50** Q&A

**10.55** Coffee break, networking and business discussions

**SESSION 2:**
**What is the future production of shellfish to the market?**

**11.20** King Crab and Snow Crab in the east part of the North Atlantic – Production and supply
Senior Scientist, Dr. Philos. Mr. Sten Siltavuopio, Nofima, Norway
11.40 Lobsters and Snow Crab – Production and supply  
Editor Mr. John Sackton, Seafood News

12.10 Cold Water Prawns – Production and supply  
Dr. Mr. Carsten Hvingel, Institute of Marine Research, Norway

12.30 Q&A

12:40 Lunch & networking

SESSION 3:  
How we will expand the value of our business?

13.20 How we will develop a new high value industry on King Crab and Snow Crab  
Research Manager Marine Biotechnology, Mrs. Ragnhild Whitaker, Nofima, Norway

13.40 How we expand the creation of value in Snow Crab  
Sales Manager, Morten Jensen, Norway Seafood, Norway

14.00 How we will fill in the gap of knowledge on Cold Water Prawns and give it a new identity in consumers mind.  
Director, Jens Møller, Gemba, Denmark

14.20 Q&A

14.25 Panel discussion: How to create more value and utilize the opportunities for Lobster, Prawn and Crabs.  
Participants:  
• Jonathan Banks,  
• Ingvild Dahlen  
• Lise Lotte Callesæe York  
• John Sackton

14.45 End of conference  
Sum up – ICWPF chairman Mr. Simon Jarding, Denmark

14:50 Coffee and networking

Please note that it may be necessary to alter the content, speakers and timing of the program.

Conference Organizer in cooperation with North Atlantic Seafood Forum (NASF) and International Cold Water Prawn Forum (ICWPF):

Jens Möller/ jm@gemba.dk  
GEMBA Seafood Consulting A/S,  
Venligheidsvej 6,  
2970 Hørsholm, DK - Denmark  
www.gembaconsulting.dk Telephone: +45 4079 1011

DAY ZERO:  
TUESDAY MARCH 1TH

10 ZERO LICE-TIME FOR GLOBAL ACTION  
WORKSHOP  
09.00-15.00

North Atlantic Seafood Forum (NASF) together with Norwegian Centre of Expertise - Seafood Innovation Cluster and the Norwegian Seafood Research Fund (FHF) presents a historic and unprecedented opportunity to bring key salmon players, researchers and leading experts of the world together to embark on new paths to combat sea lice.

This day, 1st March, leading experts from Industry, Science and Regulators will share knowledge and best management practices to take global action for the first version of a Best Management Practice.

Join NASF on day Zero-ZERO LICE – TIME FOR GLOBAL ACTION - and contribute to change - and improving the sustainability of salmon farming worldwide!

09.00 Registration and coffee

10.00 Welcome by President of Nutrition and Chairman of NCE Seafood Innovation Cluster: Dr. Einar Wathne, EWOS Cargill

10.10 Opening remarks, by Moderator of the Day, Nofima  
Director of Aquaculture, Dr. Nils Haga, Nofima

10.20 SESSION1 – Challenges

The Cost impacts of lice  
Dr. Audun Iversen, Nofima

The combat Sea Lice-on a global scale  
Director of Fish Health and Welfare, Dr. Gordon Ritchie, Marine Harvest Regulations

Regulation-and best management practices  
Director Jens Chr. Holm, Directorate of Fisheries  
Director Stian Johnsen, Norwegian Food Authorities

The Norwegian Sea Lice Surveillance Program  
Director of Aquaculture, Dr. Geir Lasse Taranger, Institute of Marine Research

Sea lice resistance is a threat that must be monitored  
TBA, Norwegian University of Life Sciences (NMBU)

11.00 SESSION 2 – Biological Opportunities

The Sea Lice Research Center - new products and tools for parasite control  
Director Dr. Frank Nilsen, University of Bergen
13.20 How we will expand the value of our business?

SESSION 3:

12.40 Lunch & networking

12.30 www.gembaconsulting.dk Telephone: +45 4079 1011
2970 Hørsholm, DK - Denmark
Venlighedsvej 6,
GEMBA Seafood Consulting A/S,
Jens Möller/ jm@gemba.dk

Forum (ICWPF):
Seafood Forum (NASF) and International Cold Water Prawn
speakers and timing of the program.
Please note that it may be necessary to alter the content,
14:50 Coffee and networking

14.20 How we will fill in the gap of knowledge on
Q&A

14.25 How we expand the creation of value in Snow Crab
Q&A

14.45 Panel discussion: How to create more value and

15:00 End of conference

Thank you from the Seafood industry to Baader:
Baader’s investment in research and development has continuously
provided the industry with cutting-edge technology solutions
which have improved the industry production lines’ efficiency and
profitability. This enables companies to provide their customers with
great products at competitive prices. The industry views Baader’s
inputs as one of the keys to their business development, as they take
their business forward.

Thank you from Baader to the seafood processing community for
97 years of mutually beneficial cooperation and partnerships.

SESSION 3 – Technical opportunities

12:30 Workshop, round table discussions

14:30 Summing up
Ketil Rykhus, National Sea-Lice coordinator, The
Norwegian Seafood Federation

What’s next
Director Nils Haga, Nofima

15:00 Seminar close

Tanja Hoel, General Manager
Mobile: +47 92 80 13 15
E-mail: tanja@seafoodinnovation.no

12:00 Lunch

12:30 SESSION 3 – Technical opportunities

SFI CtrlAQUA – closed and semi-closed plants
Director Dr. Bendik Fyhn Terjesen, Nofima

SFI Exposed – going offshore
Director Dr. Arne Fredheim, Sintef Fisheries &
Aquaculture

Medical treatments
Director Dr. Brit Hjeltnes, Norwegian Veterinary
Institute

Operation sequences and possibilities
Director Dr. Anne Hageberg, Christian Michelsen
Research Centre

A needed shift from medical to non-medical sealice
control
R & D Director Kjell Maroni, The Norwegian Seafood
Research Fund

Cleaner fish, ballan wrasse-Effectiveness to
combate Sea-Lice
Dr. Herve Migaud, University of Sterling

Cleaner fish, lump fish- Effectiveness to combate
Sea-Lice
TBA, Lerøy Seafood Group

Feed as a weapon against lice?
TBA, EWOS/Cargill

Breeding & genetics – what can be done?
Genetics Manager, Dr. Borghild Hillestad,
Salmobreed

Co-organizer:

NCE Seafood Innovation Cluster

Facilitator:

Nofima

Norwegian Seafood Federation

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FAOSTAT 2016
NASF Young Leadership - Shaping the global seafood future

NASF Young Leadership is organized by North Atlantic Seafood Forum and Norwegian Centres of Expertise The Seafood Innovation Cluster. It is a new world initiative to establish a community of exceptional young individuals who share a commitment to shaping the future of the global seafood industry. Empowering young leadership facilitates the creation of innovative responses to global and regional challenges.

NASF Young Leadership Summit 2016 - Transitions for sustainable seafood growth

The aim of the Young Leadership Summit is to build skills and knowledge for a better understanding of the future seafood agenda. The Summit will initiate a new young leadership community - towards achieving a sustainable seafood future, and establish a global network for young seafood professionals.

Highlights programme 2016

Today’s fisheries and aquaculture sector is a multi-billion dollar industry that is a vital source of food and nutrition, employment, trade, economic wellbeing and recreation. The global population is expected to exceed 9 billion by 2050, and food producers must provide nutrition for the growing planet, in a climate friendly manner. Fisheries and aquaculture is an important solution to these difficult challenges. The Summit will feature keynote presentations, panel discussion and workshop, addressing strategies and emerging issues on the regional and global seafood business agenda.

- Seafood business outlook - Where are we headed?
- Blue Growth - The importance of oceans and seas on the new blue economy
- Global leadership - How to accelerate sustainable business transformation
- Sustainability and transparency - The digital openness revolution

Nominate a Young Global Leader

Only the very best candidates will be selected and all efforts are extended to create a truly representative and influential community. Reflecting the diversity of stakeholders, Young Leadership’s aim is to include leaders from politics, business, and academia across geographic regions. Nominees must be exceptional leaders under the age of 40. The candidates must have a recognized record of extraordinary achievement and a proven track record of substantial leadership experience. Typically, this means 5-15 years of outstanding professional work experience and a clear indication of playing a substantial leadership role for the rest of his or her career.

Practical information

Where: Radisson Blue Royal Hotel, Bryggen – Bergen, Norway
Time: 15:00-20:00 pm (CET)

Contact
The Seafood Innovation Cluster, Benedicte Skogen
Cell: + 47 90 62 99 56
E-mail: benedicte@seafoodinnovation.no

Follow us on:

Organizers:

Norwegian Centres of Expertise
Seafood Innovation Cluster
nor-seafood.com Seafoodinnovation.no

In collaboration with:
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<th>Time</th>
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<tr>
<td>15:00 – 15:15</td>
<td>Registration</td>
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<td>15:15 – 16:00</td>
<td>Networking and sushi</td>
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<tr>
<td>16:00 – 16:05</td>
<td>Welcome by Summit Chair</td>
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<td></td>
<td><em>Drew Cherry, Editorial Director, Intrafish Media / Rachel Mutter, Intrafish Media</em></td>
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<tr>
<td>16:05 – 16:30</td>
<td>Importance of human resource capital, know-how and competence in a fast expanding global seafood industry</td>
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<td><em>Alf-Helge Aarskog, CEO, Marine Harvest, Norway</em></td>
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<td>16:30 – 16:50</td>
<td>The challenges of producing sustainable and healthy food for a growing planet</td>
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<td><em>Mike Mitchell, NASF Sustainability Director, UK / former Technical &amp; CSR Director and Head of Seafood Sustainability at Young’s Seafood Ltd, UK</em></td>
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<td>16:50 – 17:10</td>
<td>Trends and outlook for managerial skill sets requirements in the global AgriFood sector / lessons learned for the seafood industries</td>
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<td><em>Greg Duersken, President, Kincannon Reed, USA</em></td>
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<td>17:10 – 17:30</td>
<td>Global leadership - How to accelerate sustainable business transformation</td>
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<td><em>Professor, Jan Kjetil Arnulf, Norwegian Business School, BI Shanghai, Norway and China</em></td>
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<td>17:30 – 18:00</td>
<td>Networking Break</td>
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<td>18:00 – 18:20</td>
<td>Seafood Business Outlook - The importance of oceans and seas on the new blue economy</td>
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<td><em>Madeleine Bjørnestad, Pareto Securities Corporate Finance</em></td>
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<td>18:20 – 18:50</td>
<td>Young Global Citizens - Perspectives on sustainability on community and the environment</td>
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<td><em>Conversation with moderator – Young leaders from 40under40, Mr. Usman Mushtaq from Eat/Norwegian Youth Delegate to United Nations General Assembly</em></td>
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<tr>
<td>18:50 – 19:10</td>
<td>Sustainability is transparency - The digital openness revolution</td>
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<td><em>Tore Andre Godager, Global Business Development Director, NHST Media Group</em></td>
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<td>19:10 – 19:50</td>
<td>Workshop - Creating a global community of Young Seafood Leaders</td>
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<td><em>Deloitte</em></td>
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<tr>
<td>19:50 – 20:00</td>
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**Moderator:**
*Drew Cherry, Editorial Director, Intrafish Media / Rachel Mutter, Intrafish Media*
The world’s oceans house a large variety of different types and diverse ecosystems from the tropics to the Arctic and Antarctica. Climate change has very different effects in these different types of marine ecosystems.

The northern Atlantic is among the most productive ocean areas globally. Over the past 30 years there has been a steady increase in temperature in the North Atlantic. This increase is not due to manmade climate change alone, but has until now been combined with long-period natural climate changes. The temperature rise in the Barents Sea since the early 1980s has been approximately 0.8 °C. It has resulted in displacement of species to the north, both zooplankton and fish.

The boreal (cold water) species of fish which constitute the majority of our commercial fish stocks have increased in the northern Norwegian Sea and in the Barents Sea. The stocks of cod and haddock in the Barents Sea are at record levels, and the pelagic fish stocks of mackerel, blue whiting and herring have increased.

However, while the climate models without doubt predict a warmer global climate, there can at the regional scale be strong natural climate fluctuations. There are findings of a 60–70 year natural climate variability cycle in the northeast Atlantic water. This climate variability may for the next quarter of a century hide the greenhouse gas heating, but we might during the second half of this century experience a rapid heating to temperatures never experienced before.

The IPCC (International Panel on Climate Change) has estimated the effect at the regional scale of the temperature increase on the planet. For the Barents Sea the temperature change is expected to be the double of the global average. The PARIS AGREEMENT decided to hold “the increase in the global average temperature to well below 2 °C above pre-industrial levels and to pursue efforts to limit the temperature increase to 1.5 °C above pre-industrial levels,...”.

For the Barents Sea a global temperature increase of 2 °C will result in a temperature rise in of 4 °C. In addition to the temperature change there will be partly unknown effects of ocean acidification.

In this session we will focus on the effects on fish stocks and their distribution of the changing temperatures in the Barents Sea and the Norwegian Sea.
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**DAY ZERO**
**TUESDAY MARCH 1ST**
**13:00 – 16:00**
CLIMATE CHANGE SESSION
North Atlantic warming – effects on fish stocks and their distribution
Session Chair: Einar Svendsen, Researcher, Institute of Marine Research
Welcome
Sissel Rogne, Managing Director (CEO), Institute of Marine Research
Climatic trends in the North Atlantic
Svein Sundby, Researcher, Institute of Marine Research
Changes in distribution of fish and marine organisms in The Barents Sea
Edda Johannesen, Researcher, Institute of Marine Research
Plenty of cod in the Barents Sea – an effect of climate or fisheries management?
Olav S. Kjesbu, Researcher, Institute of Marine Research
Spread, stock development and fishery of the snow crab in the Barents Sea
Jan H. Sundet, Researcher, Institute of Marine Research
Historical mackerel expansion and bluefin tuna comeback in the Norwegian Sea
Leif Nøttestad, Researcher, Institute of Marine Research
Recent exotic fish guests in Norwegian coastal waters
Otte Bjelland, Researcher, Institute of Marine Research
Climate Change Implications for Fisheries and Aquaculture
Tarub Bahri, Fishery Resource Officer, FAO
Discussion
Welcome to the 11th annual North Atlantic Seafood Forum (NASF). Pareto Securities has since its foundation focused on sectors where we believe that Norway has competitive advantages. As a consequence the seafood sector has been a key sector for Pareto Securities for years. On this basis, being a majority shareholder and organizer of NASF is a natural part of our high seafood ambitions.

Pareto Securities’ focus on key Norwegian sectors like seafood, oil & gas, oil service and shipping has proved to be successful. Today Pareto Securities employs more than 400 people and has 15 offices in 9 countries, including London, New York, Singapore, and Perth. The company is a fully integrated investment bank with a broad service specter including equity, bonds, project finance, derivatives, currency and fixed asset brokerage.

In the sectors where Norway has clear competitive advantages Pareto has a tradition for soliciting the opportunities where the value creation takes place. For the seafood sector this implies a local perspective, meeting decision makers along the Norwegian coast, and a global perspective, meeting decision makers abroad and on other continents. We strongly believe that the broad sector focus and the lack of geographical boundaries yield more internal sector competence and experience, and put us in a unique position to provide valuable advice to our clients.

At Pareto Securities we believe that we are still in an early stage of the development of the seafood sector.

- We believe that the growing population’s need for tasty, healthy and omega-3 rich food will continue to grow
- the aquaculture industry will have to increase its share with advanced solutions that will meet biological and economical requirements
- Norway and Norwegian players will play an important part of the seafood development in a global context

As a consequence, we are proud to be a shareholder and organiser of NASF. We are encouraged to see the broad group of decision makers taking the time to come to Bergen and join us at NASF and the fact that NASF, under the management of our dear colleague Jørgen Lund, has emerged to become the largest seafood business conference of its kind in the world.

Thank you for coming to Bergen and NASF 2016.

Best regards from the seafood team at Pareto Securities:

Petter Dragesund
Partner, Corporate Finance

Kristoffer Jordheim
Partner, Corporate Finance

Henning Lund
Partner, Equity research

Henrik Tangen
Partner, Corporate Finance

Carl-Emil K. Johannessen
Equity research

Jørgen J. Lund
NASF/Corporate Finance
We are proud to welcome you to the 11th North Atlantic Seafood Forum

A trusted advisor to the domestic and international seafood industry

Selected seafood clients past years

*Pareto seafood team clients at previous employer
Dear ladies and gentlemen

It is a great pleasure for me to welcome you all to the 11th edition of the North Atlantic Seafood Forum in Bergen, Norway. For centuries the city of Bergen has been closely linked to trading in seafood. Bergen has large companies within both aquaculture and pelagic fisheries as well as research institutions and governmental offices. What a perfect meeting place for key players in the seafood industry!

The seafood industry operates within a dynamic environment: both biological, environmental and market conditions are constantly changing. Therefore, it is important to seek inspiration and share new knowledge. I am pleased to see that the North Atlantic Seafood Forum attracts people from all over the world.

This year, a pre-conference seminar for NASF Young Leadership is also launched. By establishing a community for young individuals, I hope NASF is able to boost their commitment to shaping the future of the global seafood industry. We should support young leaders striving to deliver innovative responses to global and regional challenges.

I believe that this conference will continue to serve as a valuable meeting place for the seafood industry. I hope that it will facilitate discussions on how we can increase sustainable production and competitiveness in the seafood sector. In the future, it will be of the utmost importance to fulfil its tremendous potential. I wish you all a successful conference!

Yours sincerely,

Per Sandberg

Office address: Kongsens gate 8  Telephone: +47 22 24 90 90
Postal address: PO Box 8090 Dep, N-0032 Oslo, Norway
Org. no.: 912 860 680
Dear Delegates,

On behalf of the United Nations Industrial Development Organization (UNIDO), I have the pleasure of joining the organizers and partners of the seafood industry to welcome you to the eleventh North Atlantic Seafood Forum (NASF).

At UNIDO, we truly value the support of the development cooperation community, governments, global partners from the seafood industry, as well as civil society, to our vision and work in promoting and accelerating inclusive and sustainable industrial development (ISID). UNIDO’s goal of achieving ISID is explicitly recognized and anchored within the internationally agreed 2030 Agenda for Sustainable Development and associated Sustainable Development Goals.

As we witness steady growth of the world’s population, there is growing demand for quality seafood products. In this context, the impact on global seascapes and inland resources, vis-à-vis the need to sustain the wellbeing of diverse fisheries eco-systems, is crucial. Here, I would like to underline the importance and key role of the private sector in realizing the value added and wealth contribution of fishery production systems and sustaining the global common good of seafood resource endowments.

The NASF will provide a platform for sharing best practice and industry insights, and most important for advocating for investments that promote an inclusive and sustainable seafood industry. Within this framework, UNIDO will highlight the Organization’s initiatives and experiences in the field of seafood industrial developments in the developing world.

I would also like to take this opportunity to express appreciation to the organizers for hosting this important forum, and for their continued support and collaboration with UNIDO.

I wish you all a pleasant stay in Bergen and successful deliberations.

Yours sincerely,

LI Yong
Dear Delegates, Guests, Speakers,

Welcome to the North Atlantic Seafood Forum (NASF) 2016. Last year we celebrated the 10th anniversary of NASF, so we are now into the second decade of this event. It’s good to see the strong interest in the conference has continued to grow, adding value to the networking opportunities during these days, and broadening the scope of the discussions. One example of that is this year’s new participation of the United Nations Industrial Development Organization (UNIDO). Together with the already established cooperation of the FAO, this enables us to further investigate ways to connect public and private initiatives.

It is my firm belief that to move the seafood business further, by facing challenges and by seeking opportunities, this public-private cooperation is essential. It takes knowledge, authority and entrepreneurship to grow the business. Just some examples to state my case:

For the future, just think of the gap between the fish production today, and the future global demand as estimated by the FAO. To close this gap we will need to scale up global fish production. A large part of the gap will have to closed by boosting aquaculture. But we also have to make sure we exploit the seas in a responsible manner at the maximum sustainable yield.

We’ve seen parts of our business somehow associated with poor social and labor conditions in the media. Companies can set standards and have those checked, but it takes clear and enforced legislation in the country of origin to get this working.

In the EU we’ve seen a strong move towards better labeling of fish products to enable consumers to make well-informed choices. Product integrity and value chain integrity are clear issues for our business. Again, it takes balanced private and public actions to make this work.

Clearly there’s never a dull moment in the seafood business, and I hope this year’s event can provide you with new knowledge and ideas and strong networks.

I wish you all interesting discussions, and very pleasant stay in Bergen,

Yours sincerely,

Guus Pastoor,
AIPCE,
Chairman
Grimsby, UK 12 February 2016

Dear Delegates

Welcome to the 11th North Atlantic Seafood Forum (NASF) here in Bergen. Once again Seafish is delighted to be a part of this well established event along with the rest of the UK delegation. We enjoyed a significant participation in the 10th anniversary event last year and this year we’re delighted to be an active participant again. NASF has developed into the largest seafood business event in the world tackling the challenges of sustainability, food security and ever changing policy and regulation. It has provided an excellent platform to share knowledge and experience and many successful business relationships have been formed along the way.

The 11th NASF conference provides an opportunity once again for the seafood industry to talk about global progress in key topics and learn from each other on best practice in marketing and communicating this to the wider world. For us in the UK, it is a chance to showcase and share with you the successes of the UK seafood industry which plays a crucial part in our global supply chain.

This year we are jointly hosting a private luncheon with NASF for guests from the UN and FAO.

I wish you a pleasant stay in Bergen,

Yours truly

Marcus Coleman
Chief Executive, Seafish

supporting the seafood industry for a sustainable, profitable future

www.seafish.org
INTERNATIONAL TEAM
NORTH ATLANTIC SEAFOOD FORUM

NASF is proud to present our International Team. These national Representatives are all highly skilled consultants with a long background in the international seafood industry. As a group they represent a unique competence and market expertise network. We wish them every success with their NASF marketing endeavours.

**NASF International Directors**

NASF has appointed 3 well-known industry veterans representing more than 100 years of collective experiences as international directors, covering three vital business areas: Retailing, food service and sustainability.

**Jonathan Banks - NASF Retail Relations Director**

During his 30+ years in the Fast Moving Consumer Goods industry, Jonathan has held senior sales and marketing positions in multinational manufacturers and a retailer. In 2010 he left Nielsen, the world's largest market research group, where for the previous 7 years he was their European Business Insight Director. Jonathan specialises in tracking and predicting consumer behaviour and trends. By turning data into actionable insights, he helps manufacturers and retailers formulate winning strategies and tactics.

Tel: +44 (0)7764 635379 / Email: jonathan@jonathanbanks-associates.co.uk

**Mike Mitchell, NASF Sustainability Director**

Mike Mitchell is Technical & CSR Advisor to the UK’s largest seafood manufacturing business, Young’s Seafood Ltd. Considered to be one of UK’s most influential seafood executives, Mike has worked in the industry since 1981, in the areas of Technical management and Corporate Social Responsibility. During his time with Young’s, Mike has held a wide range of operational roles. In 2015, Mike formed his own business with focus in three fields: seafood sustainability, product integrity and social accountability in wild capture fisheries.

Tel: +447801146069       Email: m.mitchell124@btinternet.com

**Mike Berthet - NASF Food Service Director**

A qualified Chef who has over 30 years of experience in Fish and Seafood, Mike has had a successful career with the leading UK food service company M&J Seafood. He has had focus on sustainability issues to ensures the company’s passion and commitment to responsible sourcing is maintained. Mike has been working with the Industry, Governments, NGO’s and Fishermen to identify the drivers for consistent advancement of safe sustainable fishing and connecting the Food Service Industry seamlessly, end to end, to embrace the necessary changes for a ‘Perpetual Harvest’ that can feed this and future generations. As well as developing the direction and policies of both M&J Seafood and the wider UK Brakes Group, Mike is also a board member with Global Aquaculture Alliance (GAA). He also represents Food Service on a range of committees such as the Seafish Common Language Group and City and Guilds Hospitality and Advisory Group and ensures our passion and commitment to responsible sourcing is maintained.

Tel: + 44 7776 256942    Email: mikeberthet@btinternet.com

**International Representatives by Country/Region**

**David Russell - Representative for Namibia, Angola and South Africa**

Born in Kenya, David has a MSc. in Natural Resource Management from the University of Canterbury in New Zealand. Since 2000 he has operated as a fishing industry consultant, primarily in Namibia and other SADC region countries. He has 25 years’ experience in the fishing industry, with experience in areas such as: fisheries marketing, processing, and value chain analysis.

Tel: + 264 81 233 57 48 / E-mail: davelin@iway.na

**Tomasz Kulikowski - Representative for Poland and Baltic States**

Tomasz is editor-in-chief of the “Fish Industry Magazine”, the leading seafood magazine in Poland. He specialises in analysis of the fish market, consumer preferences, and advises on fish consumption and international trade statistics for national associations and international organizations. He is also Chairman of the Fish Market Development Association in Gdynia. With the appointment of the Minister of Agriculture and Rural Development, he is a member of the board of the Polish Fish Promotion Fund.

Tel: +48 501 623 816 / E-mail: mprfish@gmail.com
NASF International Team 2016

Alexander Wever - Representative for Germany, Austria and Switzerland
Alexander covers the German markets along with Austria and Switzerland. He has experience as Category and Division Manager at Globus Hyper Market Chain and Metro Cash&Carry Germany. He now runs his own business - AWF, Alexander Wever Fisch Consulting. Alexander is also Member of the Bremen Fish International Fair consulting committee since 2003.
Tel: +49 2381 3058647 / E-mail: alexander.wever@aw-fisch.de

Simon Dwyer - Representative for United Kingdom
Simon has worked closely with the seafood sector on a global basis and in particular, with the physical movement aspects within the supply chain, for over 20 years. Simon is based in Grimsby, UK. He is a member of the Humber Seafood Institute Board and Chairman of their Trade Corridor Group. Simon is a shareholder and Managing Director of Seafox Management Consultants Ltd.
Tel: +44 786501894 / E-mail: simon@seafox.no / Twitter: @simondwyer1 / www.seafox.no

Paul van der Heijden - Representative for the Netherlands and Belgium
Paul is a solution provider with a strong emphasis on sustainable- & system innovation. The technologies focus on reducing total costs of ownership while improving performance compared to conventional systems. MatureDevelopment BV, Voorburg, the Netherlands.
Tel: +31 858 78 67 72 / E-mail: info@maturedevelopment.com

Steinar Engeset - Representative for Canada
Steinar is an educated mechanical engineer from Sweden. He served in the Norwegian Air Force before starting a career in the shipping/fishing business and has been a part of developing both vessels and companies in the marine industry. From 1977-1987 he developed the Northern Shrimp industry and from 1987 to present has been a part owner in fishing companies. He has developed projects in sectors from the cruise industry, the fishing industry and offshore oil. Steinar held the Honorary Consul position in Nova Scotia for Norway from 1989 to 2013.
Tel: 902 468 7100 / E-mail: sengeset@nfsl.ca

Jens Henrik Møller - Representative for Denmark, Sweden, Faro Island and Greenland
Jens has worked in the seafood and food industry for more than 25 years. In GEMBA Jens advises customers within the seafood and maritime sector. GEMBA Seafood Consulting is today involved in innovation, sustainability, strategic development, and market analyses within the seafood and maritime sectors. Economic analysis and strategic development of ports have also been one of the major competencies of the consultancy. Jens is also the secretary of The International Cold Water Prawn Forum (ICWPF).
Tel: +45 4079 1011 / E-mail: jm@gemba.dk / www.gembaconsulting.dk

Kristjan Th. Davidsson - Representative for Iceland
Kristjan has a Master in Fisheries Science and a Fishing Captains degree. His professional experience ranges from Sales Manager of Seafood & Seafood Processing Technology to Management; Executive as CEO of Export, Fishing & Processing Companies and Non-Executive as Board Member/Chairman of fish farming, fishing, processing, exporting, technology, software, supplements & finance industry companies in Europe and S-America. He is CEO of his own investment & consulting company.
Tel: +354 - 618 8272 & 562 8272 / E-mail: kristjan@davidsson.is / www.davidsson.is

Jean-Noël Calon - Representative for France
Jean-Noël is a versatile professional with a +30 year professional experience in projects management, communications, public relations and economic development both in France and North America. In charge in Boulogne sur mer of France’s number one seafood cluster and on the biggest hubs in Northern Europe, he also belongs to NGO Blue Fish and is a militant of sustainable fishing in a sustainable environment.
Tel: 33 624 601796 / E-mail: jeannoelcalon@hotmail.com
SOCIAL EVENTS

The NASF meeting place consists of different arenas for meeting the delegates in an unstressed atmosphere. Take part in the social programme and use the networking opportunities in addition to the conference coffee-breaks and lunches.

TUESDAY 1 MARCH
City of Bergen, Speaker’s VIP Reception
By invitation only.
Haakon’s Hall, conference badges required.
20.00 - 22.00

WEDNESDAY 2 MARCH
Germany Delegation Cocktail Reception
Cocktails in the NASF Exhibition Area,
19.00 - 20.00

NASF Conference Delegate Buffet Dinner
The reception at the Conference hotel opens at 20.00
and lasts until 24.00. Buffet food and drinks will be
served. For registered conference delegates only.
Invitation cards and conference badges required.

THURSDAY 3 MARCH
Pelagic Industry Executive Meeting
By invitation only.
Hosted by the Norwegian Fishermen’s
Sales Organization for pelagic fish and NASF
18.00 - 23.00

White Fish Industry Executive Meeting
By invitation only.
Hosted by Nergaard, Norway Seafoods and NASF
16.00 - 23.00
NORTH ATLANTIC SEAFOOD FORUM
MAIN SPONSORS 2016

The NASF organisers and conference partners wish to thank our distinguished main sponsors for their support. Their interest and backing of the NASF conference is an indispensible incentive for the NASF organisers to further develop this unique NASF arena as a leading business meeting place for executives in the global seafood industry.
NASF IN PARTNERSHIP WITH AQUA NOR AND NOR-FISHING EXHIBITIONS

NASF is an international partner with Norway’s two major aquaculture and fisheries exhibitions

Nor-Fishing is one of the world’s leading fisheries technology exhibitions and has been held every other year for over 50 years. The exhibition features over 450 exhibitors from 25 countries and about 15,000 visitors from over 50 countries. The next exhibition will be held 16-19 August 2016.

Aqua Nor is the world’s largest aquaculture technology exhibition, featuring about 500 exhibitors from about 30 countries and 17,500 visitors from over 60 countries. The exhibition is held every other year in Trondheim, Norway. The next Aqua Nor will be held 22-25 August 2017.

For more information, visit our web site www.nor-fishing.no or contact:
- Mr. Ola Eriksen, Managing Director, Tel. +47 9220 3415, e-mail: ola@trondheimspektrum.no
- Mrs. Kari Steinsbø, Project Manager, Tel. +47 7356 8540, e-mail: kari@nor-fishing.no
- Mr. Erik Hempel, Communications Director, Tel. +47 9084 1124, e-mail: erik.hempel@hempelco.com
WELCOME TO AND FROM
THE GERMAN DELEGATION

North Atlantic Seafood Forum is holding its 11th annual conference in Bergen from 1st to 3rd March 2016. It is the world’s largest seafood business conference and a leading meeting place for seafood industry executives. Around 700 delegates from 35+ countries will attend the conference – in 2016 for the first time also a major „German Delegation“ will attend the event. The Hanseatic city of Bergen stands for a long seafood tradition as many of the German Hanseatic cities as Hamburg, Bremen, Lübeck where still seafood plays an important role.

Seafood executives from Germany have attended NASF each year and have been expert speakers on many occasions. The number of German delegates has been increasing year on year so it is now time to welcome a stronger „delegation“ to show-off the whole range of German seafood stakeholders.

Beside the official programme on Day 1 and Day 2 with the focus on Seafood Policy & Trade, Retail, Salmon, Whitefish, Pelagics and the MSC/NASF-Sustainability Seminar the German delegates will attend a „German Seminar“ on Day 0 in the afternoon from 15:30 until 17:30.

I would like to thank the members of the steering comittee of the „German Delegation“ who gave a lot of their time and valueable input to the organizers. Due to their committment and dedication, NASF will see in 2016, the highest number of German Delegates in its eleven year history.

Finally, the „German Delegation“ is pleased to host a cocktail reception on March 2 beginning at 19:00 in the conference hotel. You are welcome to join us as our guests to taste German white wines and German beer and to meet the German delegates and join old and new friends from the seafood industry.

My best wishes

Alexander Wever
NASF Representative in the German speaking countries
To introduce innovations, to identify forward-looking developments and to open up global market trends for the aqua and fish industry - Therefore stands the ‘North Atlantic Seafood Forum’ in the Hanseatic city of Bergen.

Every year we visit the NASF with our decision-makers to gain further know-how for our strategic orientation and our worldwide customer support. Exactly like the location of our headquarter Lübeck in Schleswig-Holstein, the Norwegian exhibition center enchanted with the forum all water and fish lovers once more.”

Since 2009 I enjoy to come to Bergen because more and more executives of the seafood community are attending NASF.

I like the direct contact and the first-hand information from the speeches, presentations and discussions that are very helpful for my own business.

The global dimension of seafood is nowhere as obvious as in Bergen.

Over the years we could develop new business connections that wouldn’t have been possible in another way.”

Hans-Jürgen Matern
Vice President Corporate Responsibility, Metro AG

Honorary Consul Kourosh Pourkian
Chairman of the Supervisory Board, Baader Group

Jürgen Pauly
Category Manager Seafood, Globus SB-Warenhaus Holding

Since a couple of years the NASF is on my agenda in early spring. In Bergen / Norway, I have a chance to meet and discuss with competent partners from all parts of the supply chain. Excellent speakers from Business are explaining status, challenges and perspectives of different parts of trading with fish.”

WELCOME FROM THE STEERING COMMITTEE

Das „Steering committee” der German Delegation (von links nach rechts): Hartwig Retzlaff (Deutsche See), Kourosh Pourkian (Baader Group), Andreas Maak (Laschinger), Jürgen Pauly (Globus SB-Warenhaus), Hans-Jürgen Matern (Metro), Alexander Wever (AWF Consulting/NASF)
All-Fish Trading Company mbH is located in Kronshagen/Kiel, Germany with sales offices in Berlin and Gronau. Established in 1995, we have been importing and distributing deep frozen fish and fish products. Since, All-Fish has become an accomplished supplier on the European market for deep frozen fish products. Our customers include fish and food services, wholesale traders, processing industry and increasingly grocery chains. In order to quickly serve these clients' needs, we stock a large and wide assortment of said products. All-Fish imports from many countries worldwide and closely co-operates with pre-selected and qualified producers, who continuously operate according to the finest possible, and legally required production standards concerning hygiene and product related postulates. The primary sources, depending on product, are southern Africa, Eastern Europe, Asia and New-Zealand. Apart from these activities we also import produce from the EU like Scandinavia, Ireland, Spain and the Benelux. This enables us to offer you a wide range of frozen fish products. As of 2003 All-Fish took a share in a fishing and processing enterprise in Namibia. With this integration we have secured an important resource. Sales of the majority of products have been conducted under the „SEAWORK“ brand for some years now. „SEAWORK“ is a registered trademark in Germany and eight other EU countries. „SEAWORK“ is also registered in the USA, Canada, South-Africa, Namibia, Australia and New Zealand. The name „SEAWORK“ also stands for the network, which has been set up by All-Fish in cooperation with companies from Spain, Namibia, New Zealand and the USA. The network is a means to react to the globalization of the fish industry. The partners are active in different areas, such as fishery, production and distribution. This cooperation of companies’ guarantees flexible and transparent cooperation, saves costs and enables us to monitor the product from moment it is caught, all the way to the customer. Each network partner of „SEAWORK“ remains independent and preserves its own identity, which are experiences and know-how shares.

Deutsche See GmbH, based in Bremerhaven, is the number one in marketing fish and seafood products in Germany. With more than 20 subsidiaries throughout the country, the company employs a staff of some 1,700 and supplies over 35,000 customers – from food retailers and gastronomy to caterers at a variety of corporate and social facilities.

The company is characterised by the worldwide purchasing of premium quality goods, careful, customer-specific production and refining at the Bremerhaven plant, an above-average quality management system and a logistics system that is unique in the market. Each of the subsidiaries sets a regional standard of excellence for the production and distribution of fish and seafood.

Sophisticated cooling-logistics allows Deutsche See to offer customers a delicious variety of products from oceans around the world. Deutsche See delivers optimal freshness on a daily basis, nationwide.

Deutsche See has also owned the BEECK delicatessen brand since November 2003.

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ALL-FISH / SEAWORK

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WECHSLER FEINFISCH GMBH

Wechsler Feinfisch GmbH is based in Erftstadt and has been producing smoked fish specialities since 1960. In its second generation as an owner-run traditional family business, we are the market leader in the premium sector and stand for excellent quality. Thanks to the combination of first-class craftsmanship and traditional smoking in stone ovens as well as innovative product and packaging ideas, we set the standards in the industry. Because our quality comes at a price, we deliver only to trading partners whose customers expect and enjoy buying premium products. Due to their excellent taste, long shelf life and quick turnover, our products are very profitable for our partners.

Our high demands on product quality and the microbiological and physical composition of the fish that we purchase form the basis of our contracts with our suppliers. Long-lasting, dependable and successful collaboration with reliable partners who can offer high-quality products and delivery is more important than a cheap wholesale price.

Our raw product producers for organic fish are also certified under the strict NATURLAND guidelines for environmentally friendly aquaculture. We usually work with fresh unfrozen fish from aquaculture. Eel, trout and organic trout are salted in low-concentrated brine. The fish are then smoked in stone ovens. The high temperature of hot smoking shortens the smoking time, improves the shelf life and protects the delicate vital substances. The unique taste of our products comes from the beechwood fire with added herbs and juniper berries as well as the smoke in the oven, which is only passed once over the fish. After smoking, the fish are filleted by hand so they are practically free of bones.

Before filleting, salmon and organic salmon are filleted, de-boned, salted and subsequently left for cold-smoking. All salmon specialities are mechanically “soft-cut”.

The subsequent packing by hand of all finished products ensures that only complete undamaged fillets or slices are sold. In 1999, we were the first to pack fish in MAP-packages in self-service food retailers. In addition, we offer various packaging sizes for trade, catering and consumers.

We deliver our smoked fish specialities to retailers every day. We normally deliver fresh products, but can also deliver frozen products on request.

AWF CONSULTING

AWF Consulting is a consulting company that specialises in the seafood sector with a focus on the German speaking countries. AWF Consulting was established in 2008 by Alexander Wever after more than 12 years of successful work in the seafood business with leading positions at NORDSEE, Globus and Metro Cash & Carry.

Since 2003 he is a permanent member of the advisory board of the fair “Fish International” in Bremen. Also he is publishing as a seafood journalist in the „Fischmagazin“ and he is representing the North Atlantic Seafood Forum in the German speaking markets – the biggest seafood business conference in the world – where he has been a speaker twice. Since 2015 AWF Consulting is also representing the German „Eel Initiative“ and Foodexport USA Northeast.

AWF Consulting offers different consulting services to all members of the seafood business no matter if they are producers, wholesalers, retailers or consumers:

- Development of calculation models and simulation models
- Public relations
- Country representations for associations and others
- Development of coaching- and training concepts
- Publication in professional journals
- Speeches / seminars / trainings
- Planning & execution of promotion activities
- Fresh fish counters (Tournus Equipement)
- Market analysis & Market research
- Development of sales concepts
- Optimization of turnover and profit
- Conception of seafood departments for wholesalers and retailers
- Search for alternative sources of supply
- Conception of seafood departments for wholesalers and retailers
- Search for alternative sources of supply
METRO CASH & CARRY

METRO Cash & Carry is the leading player in international self-service wholesale and the champion for independent business. We are committed to helping our customers succeed in every possible way. METRO Cash & Carry operates more than 750 stores in 26 countries around the world. Each store offers a product range of up to 20,000 food and 30,000 non-food products, satisfying all core and complementary customer needs.

With its competence in fresh fish METRO Cash & Carry offers a high-quality assortment of around 100 articles, which are permanently available at our stores. Due to a strong sourcing network and efficient logistics, further articles can be ordered specifically for our customer’s needs. Regular quality inspections guarantee the absolute freshness and premium quality of our assortment. Our employees advise and guide our customers with their competence and knowledge. Trading fresh fish also means taking responsibility in regards to the natural resources. METRO Cash & Carry is aware of its responsibilities and, therefore, has defined transparent rules and guidelines for its buying policy for fish. METRO supports the development of international standards and certificates in the fish industry.

NORWEGIAN SEAFOOD COUNCIL

With thousands of years of fishing tradition Norway is today the second largest seafood exporter in the world. Highest quality, stringent controls and exemplary sustainability are the pillars of success. The NSC, founded in 1991 from the Norwegian Ministry of Fisheries, has the task to communicate this uniqueness. Every year the NSC is realizing a variety of several activities within the sectors: informational work and public relations, analysis, market monitoring and marketing.

The NSC headquarter is based in Tromsø, 600 km north of the arctic circle and has offices in the 12 most important export markets for Norwegian fish and seafood. The NSC is financed by the industry with an export levy for all Norwegian seafood exports.

THE SIGN OF ORIGIN: NORGE – Fish from Norway
NORGE is the Norwegian word for Norway. The NORGE-sign you find on several Norwegian export products of fish and seafood. It guarantees the origin of fish and seafood from the cold clear waters of Norway.
Norfisk – fish delicacies for fish lovers! With traditional processing methods and a lot of know-how and manual labor we create a whole new culinary experience – the best of salmon! As a family business we, as Norfisk, guarantee for the high quality of our products. And high quality only comes from the best raw material. Most of our salmon we purchase from Norwegian aquacultures. Doing so, we trust in selected salmon farms to which we maintain long-standing business relations. To ensure the high quality of our products it is important to us to comply with certified standards. Fish from wildlife stock we only receive from fisheries that stick to the strict rules of sustainability. Together with our innovativeness and sensitivity for the needs of the clients this leads to a wide range of products. Under the brand name “Norfisk” our customers can choose between smoked salmon and marinated salmon, wild salmon, hot smoked salmon, salmon trout and organic salmon. Our range of goods is completed by trout, mackerel, sprats and halibut. With our branches in Berlin and Wismar we offer competent local contacts to our customers in Germany. But also across the German borders and to almost all European countries we deliver freshly processed fish products every day.

The BAADER Group with its headquarters in the hanseatic town Luebeck stands for high end food-know-how, Made in Germany. BAADER offers technical high performance machines and solutions for the industrial fish, meat, poultry, fruit and vegetable processing. The group of companies is family owned and is lead in third generation by the Chairwoman of the Board Petra Baader since 1995. The company Nordischer Maschinenbau Rud. Baader GmbH + Co. KG was founded by her grandfather Rudolph M. J. Baader in 1919. He revolutionized the fish processing, which until then was operated manually, by an ingenious machine which processed 2,700 fish per hour. In comparison, today’s high performance machines from BAADER can cut up to 24,000 fish per hour, depending upon the fish species. The successful company from Luebeck is considered as „Hidden Champion“ for fish processing machines and was included in the „Encyclopedia of German World Market Leaders“ in 2010.

Additionally BAADER has successfully turned toward the poultry processing. In 1997 the BAADER Group took over the US company Johnson Food Equipment as well as the Danish company LINCO Food Systems A/S in 2007. With this step the long-established company from Luebeck advanced to become the third largest provider of poultry processing machines.

That the brand BAADER stands for premium complete solutions and quality in all product phases is proven by the impressive export figures. More than 90 percent of all machines the BAADER Group delivers into foreign countries.

Now, after more than 96 years the company has at the more than 70 locations in the world above 1,100 employees, thereof over 500 in its headquarters in Luebeck (Schleswig-Holstein). Here the administration department, research and development department, the production including quality control as well as the company owned museum are located.

For the hanseatic city of Luebeck the BAADER Group is one of the most important employers and training companies of the region. The company has always been socially committed with its long-term and successful business policy and last but not least with its three-digit million turnover as taxpayer contributes to the success of the hanseatic city and the welfare of its citizens.

Norfisk – fish delicacies for fish lovers! With traditional processing methods and a lot of know-how and manual labor we create a whole new culinary experience – the best of salmon! As a family business we, as Norfisk, guarantee for the high quality of our products. And high quality only comes from the best raw material. Most of our salmon we purchase from Norwegian aquacultures. Doing so, we trust in selected salmon farms to which we maintain long-standing business relations. To ensure the high quality of our products it is important to us to comply with certified standards. Fish from wildlife stock we only receive from fisheries that stick to the strict rules of sustainability. Together with our innovativeness and sensitivity for the needs of the clients this leads to a wide range of products. Under the brand name “Norfisk” our customers can choose between smoked salmon and marinated salmon, wild salmon, hot smoked salmon, salmon trout and organic salmon. Our range of goods is completed by trout, mackerel, sprats and halibut. With our branches in Berlin and Wismar we offer competent local contacts to our customers in Germany. But also across the German borders and to almost all European countries we deliver freshly processed fish products every day.
Company LÜBBERT is a fish trading enterprise with its home in Bremerhaven, a big seaport and, so to say, right in the middle and heart of Europe. Bremerhaven may be considered to be Europe’s largest hub for the landing, processing, distribution and transshipping of mostly frozen, but also fresh fish, both, of a big variety of species. Being in business for more than 90 years, today, LÜBBERT engages in trading a lot of pelagic species, mainly herring and mackerel, and salmon as well as trout and eel, as well as caviar, Matjes, sauces and spreads.

FRIEDRICHS: The German premium brand for salmon and fine fish. Market leader with the highest quality requirements and environmental responsibility. The brand FRIEDRICHS stands for excellence in fish worldwide. The fish processing in our plant occurs mainly by hand, even today. The fish bones are removed by hand, we gently smoke our salmon for 12 hours and our Graved Salmon is marinated for 5 days, in our own unique process. During this process we benefit from the know-how of our employees, who have decades of experience. Therefore, even though there are larger companies on the market, we can still proudly call ourselves a traditional manufacturer.

Furthermore, Gottfried Friedrichs is committed to sustainable fishery and the protection of the environment. For example, we were the first company in Germany which was able to offer MSC certified smoked wild salmon from sustainable fishery in Alaska back in 2002. Nowadays, MSC certified products represent a major share in our product range. Our recipe for success is "Quality, Consumption and Accountability." With this attitude Gottfried Friedrichs has become the market leader in the category premium fishery products in Germany and is a Major Player on the European market. The product range includes smoked fish such as salmon, trout and eel, as well as caviar, Matjes, sauces and spreads.

LÜBBERT understands its function not only in finding markets for raw-material of fish and finding the appropriate product for its customers, but also, in advising its partners in how to best deal with the ever changing conditions of the market and, thus, how to cope with them curtailed to its individual situations.

4 years ago some senior staff of the company have acquired the shares of the company within an MBO-process in order to take the enterprise on into a sustainable future. Now, 4 years later, this concept has proved being successful. The development of the business has gained both pace and structural strength. Responsibilities between the operating shareholders are well fielded with Sven Braasch taking the role of the General Manager.

So, if in need of a good, competent and reliable partner look for LÜBBERT. We are passionate about FISH!

FRIEDRICH WILHELM LÜBBERT GMBH & CO. KG, Wittlingstraße 10, 27572 Bremerhaven, Germany

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FRIEDRICH WILHELM LÜBBERT GMBH & CO. KG

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Hendrik Hahn  +49 40/39 82 81 63  h.hahn@gottfried-friedrichs.de  www.gottfried-friedrichs.de
Laschinger Seafood GmbH was founded in 1985 in Bischofsmais in Germany. With the merger of Laschinger and Morpol S.A. in 2007 (salmon producer in Ustka/Poland) both companies have developed to the biggest salmon processor worldwide over the years. Laschinger was awarded “Top brand of the year” two times in a row. Further prizes followed soon, such as “SilverPack” and “DLG”. In 2013 Marine Harvest acquired shares from Morpol S.A. and this enabled Laschinger to offer a wider range of product categories. Laschinger has grown to a unique supplier that combines feed, farming and sales and offers its products so to speak from farm to fork.

A particular quality of Laschinger is, furthermore, the variety of products certified with ASC, MSC and Organic. Next to the existing assortment of marinated, cold and hot smoked salmon the company provides also fish species such as cod, saithe, hake and redfish in all possibilities. Laschinger is working permanently on new ideas and innovative products with the target to set trends. The newest range exists e.g. of breaded fillets, nuggets as well as appetizers and nutritional meals.

FischMagazin is the only professional seafood journal in German language. It covers topics all along the value chain: from farming to retail. FischMagazin is read intensively by almost all seafood industry specialists because it offers much more relevant information than association’s publications or general retail magazines.

FischMagazin in keywords
- Only professional seafood journal in Germany – published for almost 70 years
- Current news from the entire fish industry
- Market analysis from retailers and large-scale caterers
- Reports on EU rapid alert notifications, current prices for seafood commodities
- Extensive trade show reports, particularly on SEG/SPG (Brussels) Fish international (Bremen), Anuga (Cologne)
- Reports from the retail sector
- Portraits of wholesale companies, producers and industry
- Profound product knowledge

Main target groups
Wholesalers, retailers, supermarkets, fish industry, fisheries, central buying departments, caterers, importers, exporters, aquaculture technique producers and fish farms

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www.laschinger.de

FischMagazin
www.fischmagazin.de

FischMagazin in keywords
- Seasonal topics, Regular exporting country focuses
- 6 x special section „Aquaculture + pond farming“
- 6 x special section „Technology“

Main target groups
Wholesalers, retailers, supermarkets, fish industry, fisheries, central buying departments, caterers, importers, exporters, aquaculture technique producers and fish farms

FischMagazin
www.fischmagazin.de

SN-VERLAG MICHAEL STEINERT, An der Alster 21, 20099 Hamburg, Germany
Andre Nikolaus +49 40/2 48 45 40 andre.nikolaus@snfachpresse.de www.fischmagazin.de
Fine fish, processed by hand in the traditional manner – from the 1st Westerwald Salmon Smokery!

Small is beautiful, that’s Vidal. Among all the large companies which, in a single day, process the same volume that Vidal produces in one year, we have captured a small but very special market niche for ourselves. It is the time we take and the intensive manual work that set us apart and our quality apart.

We are also helped by our favourable location – directly on the A3 motorway near Montabaur – the ideal location for the supply of fine, fresh fish arriving several times a week in the Westerwald from the cold fjords of Norway, the storm-tossed coast of the Shetland Islands and from Ireland.

The Vidal motto of “we love what we do and we know what we’re doing” embodies the two prerequisites for the successful production of top quality products. Our passion and experience mean you taste the difference with Vidal’s smoked salmon specialties. There are no mass-produced goods here, only high-quality fish that is prepared using traditional, manual methods.

These include the classic process of dry salting by hand with natural, refined salts as well as the subsequent slow smoking process. With cold-smoked products such as classic smoked salmon, the smoking process with beech wood lasts between 10 and 12 hours at a temperature of around 22 °C. Hot-smoked products such as hot-smoked salmon, butterfish, eel and trout are kept in the smoker shorter, but at a higher temperature of 70 to 80 °C. "Gravlax", on the other hand, is cured by placing it in a special marinade of herbs and spices for at least 36 hours.

It is these time-consuming processing methods which give the fish its unique flavour and make it melt in one’s mouth, firm yet at the same time tender. This is how we create delicacies that can only be produced by a real smokery.

Globus is one of the leading retail chains in Germany, founded and family owned since 187 years. 31,000 people are working in 46 hypermarkets and 89 DIY-stores in Germany, 15 hypermarkets in Czech republic and 11 in Russia.

67 million people are buying year by year in our German hypermarkets.

Fish counters with wide assortments of fresh, smoked fish and delicatessen in all hypermarkets are USP’s. Strict HACCP rules and training are basics for our staff.

Direct buying from producers and fisheries are the basis of freshness and quality day-by-day. Strong and reliable partners are essential for our business.
Windrose GmbH is a young company based in Groß-Gerau, near Frankfurt (Germany), that manufactures and markets pre-packed fresh fish in the dynamically developing German market.

With its parent companies, within the PHW- and the Samherji-Group, Windrose GmbH combines the core competencies of the organisations, which means a guaranteed safeguarded access to raw materials on the one hand and an extensive distribution network on the other hand.

As a new company, Windrose GmbH is able to position itself according to the requirements of the German market. Moreover, we are able to draw on the experience of two company groups who have been successfully operating in the meat and fish industry for many years.

Windrose GmbH and its partners ensure the total control of a large section of the value-added chain, started with catching the fish, right up to the final customer products. This is what gives us our unique advantage where freshness is concerned.

Icefresh is a subsidiary company of the Icelandic Samherji hf, specialized in fresh fish. Our MSC, ASC, BIO and IFS certified production plant is based in Gross-Gerau, near Frankfurt. Our main products are fresh Cod, Redfish, Salmon, Saith, Catfish, Monkfish, Black halibut, Haddock, Trout and Arctic Charr.

Being supplied by our own vessels and plants from Norway and Iceland, Icefresh can guarantee top quality products and offer the highest possible flexibility for our customers.
Sustainable fishing – that is the main principle of Kutterfisch-Zentrale GmbH, with headquarters in Cuxhaven, Germany.

For us, that means taking responsibility for the sea habitat, with all its flora and fauna. We do not take more fish out of the sea than grow back there. We are convinced that there is common ground between economy and ecology in fishing, too. What’s more: we firmly believe that sustainable management of fish stocks is the decisive prerequisite for the future of deep-sea fishing.

Of course, at the core of our corporate strategy are our products and their sustainable production. For example, for years we have been using nets with meshes that are bigger than legally required and give other fish species and young fish better chances of escape. To make the sustainability transparent for our customers, we have had various fisheries certified by the MSC. We also produce in line with the IFS standard and have received the BIO seal.

By entering the MAP-business, whereby our fresh fish is sold throughout Germany by a leading discounter, we have now covered the entire value creation chain.

Providers of sustainably produced food products are especially reliant on the trust of their customers. That is why Kutterfisch puts its faith in absolute transparency. On our website, our customers not only find detailed information about our company, but can also track the entire history of when and where the fish they have bought was caught. We do not compromise in this area; we consistently maintain our plotted course: sustainably, responsibly and transparently.

Antje Blum’s Verlag GmbH was established in 1995 to publish a consumers magazine for fish mongers and retailers.

Today every year over 1 million „Fisch + Tipps” are given for free to the customers. Beside the consumer magazine 4 other fish-related publications have been implemented in the publisher’s programme.

1. Fish-information-cards for 150 species
2. The Fish-Book – an alphabetic book of facts
3. a Fish-Book for kids
4. FISCH! - a 100 page consumer journal – to be sold from the 6th April 2016
SEAFOOD IN GERMANY - the consumer side

Where do the Germans buy seafood?

- **Percentages in 2014**

<table>
<thead>
<tr>
<th>Supermarket/ Superstore</th>
<th>Discount</th>
<th>Fishmengers</th>
<th>Others</th>
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<td>Seafood total</td>
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</tr>
<tr>
<td>Others</td>
<td>39</td>
<td>60</td>
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</tr>
</tbody>
</table>

Source: GfK Panel Services, published by FAZ.

The most popular seafood products

- **Percentages**

  - Smoked fish: 12%
  - Fresh fish: 15%
  - Crustaceans and molluscs: 15%
  - Delicatessen: 29%
  - Frozen fish: 30%
  - Others: 6%

Source: GfK.

The top 5 fish species consumed in Germany

- **Share of the fish species in the consumption (%)**

  - Alaska Pollack: 22.9%
  - Salmon: 18.7%
  - Herring: 14.5%
  - Tuna: 12.5%
  - Trout: 5.6%

Source: FAZ.
15 FACTS AND FIGURES about the German seafood industry

1. The German Seafood Industry made a total turnover of 2.05 bn Euro in 2014. The Export Share was 22.7% - to be adequate with 466 mil Euro.

2. The share of seafood production at the total food production in Germany was 1.4% in 2014.

3. Production of selected seafood products in tons (product weight) in 2014:
   - Frozen fish and fish fillets: 221,623 tons
   - Prepared fish and seafood: 127,578 tons
   - Fish salads: 25,123 tons
   - Smoked fish: 23,666 tons
   - Read meals with fish: 14,432 tons
   - Fresh fish processing: 12,210 tons
   - Prepared crustaceans and shellfish: 8,013 tons

4. The Value of all seafood imports in 2014 was 4.2 bn Euro. Poland was the most important EU-supplier with a share of 16.1% followed by the Netherlands and Denmark. Outside the EU Norway and China were the most important partners. 47.6% of the imports came from EU-countries, 52.4% from countries outside the EU.

5. Top-5 EU-countries (share of total import to Germany in 2014):
   - Poland: 16.1%
   - The Netherlands: 10.0%
   - Denmark: 9.2%
   - United Kingdom: 2.3%
   - Lithuania: 1.9%

6. Top-5 outside-EU-countries (share of total import to Germany in 2014):
   - Norway: 11.2%
   - China: 8.8%
   - Vietnam: 4.4%
   - USA: 4.3%
   - Thailand: 2.5%

7. The German seafood import share was 88% of the supply. Only 12% of the supply came from German catches or German aquaculture.
The import volume was 950,000 tons with a value of 4.17 bn Euro. That was an increase of 2.7% compared to 2013.

The German seafood exports also increased by 2.1% to a volume of 591,000 tons – worth 1.98 bn Euro.

Seafish is still dominating the German market with 61.4%, followed by freshwater fish with 26.9% and crustaceans and shellfish with 11.7%.

1.13 mil tons of seafood (catch weight) were consumed in Germany in 2014. This means a per-capita consumption of about 14.0 kg (catch weight).

With this figure Germany is quite far under the global average consumption of nearly 20 kg.

Top 10 fish species (market share in %): I Alaska Pollock: 22.9% II Salmon: 18.7% III Herring: 14.5% IV Tuna/Skipjack: 12.5% V Trout: 5.5% VI Cod: 4.4% VII Pangasius/Catfish: 2.8% VIII Mackerel: 2.1% IX Saithe: 1.8% X Redfish: 1.4%

Alaska pollock is leading this statistic since over a decade, Salmon took over the second place from herring for the first time in 2016.

The German seafood industry was employing over 41,700 people in 2014:

A About 4,400 on catching vessels or in fish farms B About 6,500 in the processing industry C About 5,300 in the fish wholesale D About 19,600 in the retail departments and at fish mongers E About 6,000 in fish gastronomy
COME AND DO BUSINESS WHERE THE BUSINESS IS!
12TH NORTH ATLANTIC SEAFOOD FORUM
MARCH 7-9, 2017
BERGEN, NORWAY
COME AND DO BUSINESS WHERE THE BUSINESS IS

WELCOME BACK TO
THE WORLD’S LARGEST SEAFOOD BUSINESS CONFERENCE
12 YEARS OF INSPIRING THE INDUSTRY

NASF CONFERENCE IS HELD IN BERGEN - THE WORLD MARINE CAPITAL

nor-seafood.com
COME AND DO BUSINESS WHERE THE BUSINESS IS!

NORTH ATLANTIC SEAFOOD FORUM

ENJOY LIFE AT THE RADISSON BLU ROYAL HOTEL BRYGGEN, BERGEN

NASF CONFERENCE VENUE: RADISSON BLU ROYAL HOTEL BRYGGEN, BERGEN

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www.radissonblu.com

WELCOME BACK TO 12TH NASF MARCH 7-9, 2017

BACKED BY THE SEAFOOD INDUSTRY
To secure strategic guidance as well as to strengthen North Atlantic Seafood Forum’s international image and reputation as a world-class event, we have established good collaboration with and gained support from the industry’s key organisations and top companies. These include: Seafish, UK, The Norwegian Seafood Council, Norwegian Seafood Federation, the Norwegian Fishermen’s Sales Organisation for Pelagic Fish, the Norwegian Institute of Marine Research, PwC, SINTEF, Kontali, Marlife, MSC, FHF, ICVPF, EU Fish Processors Association (AIPCE), NCE (National Centre of Expertise) Seafood Innovation Cluster and a number of leading international seafood companies.

Organisers: NASF, Pareto Securities and NCE Seafood Innovation Cluster