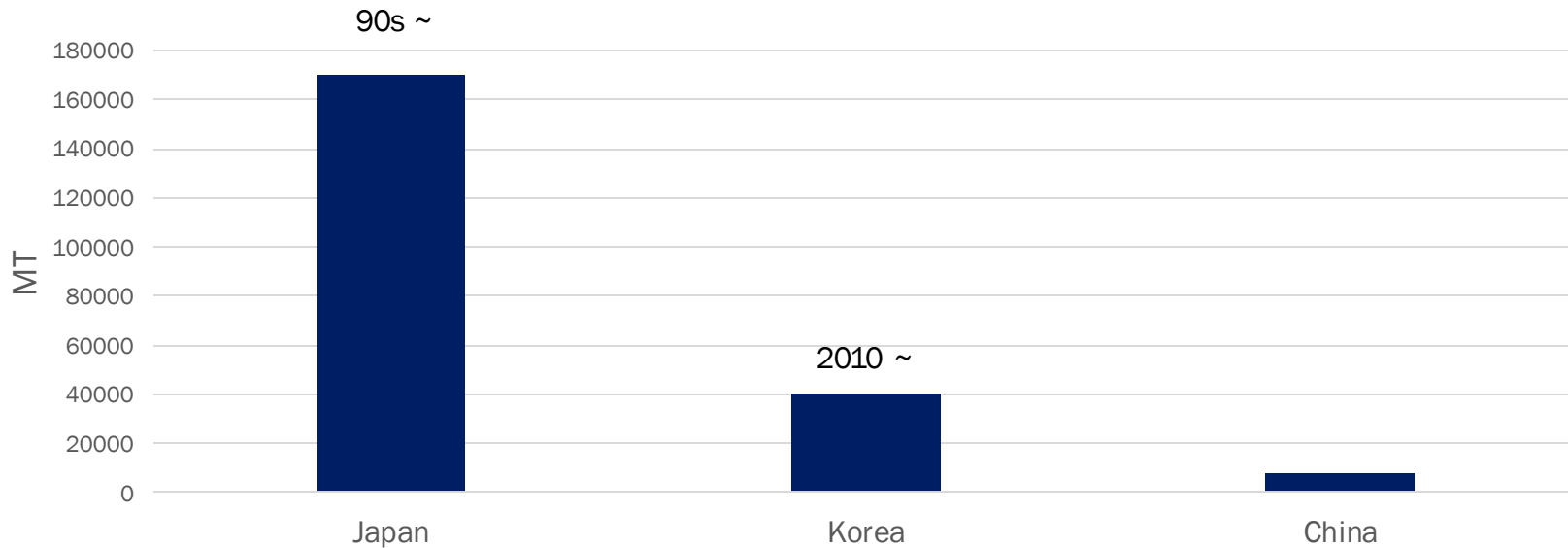


# Mackerel Products in Japan and Korea

NSC China, Market Advisor, Paul Tsai

# Norwegian Mackerel Consumption in the Markets (2018)



Source: Promar Consulting, NSC

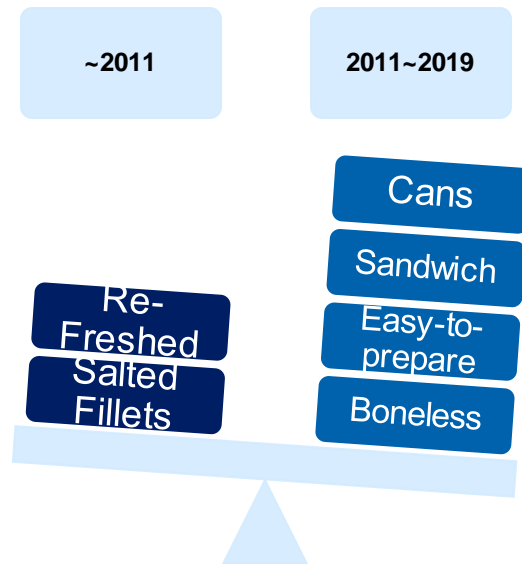
# Changes in the Japanese mackerel market

## Conventional Mackerel Products



Re-freshed Mackerel

Salted Mackerel

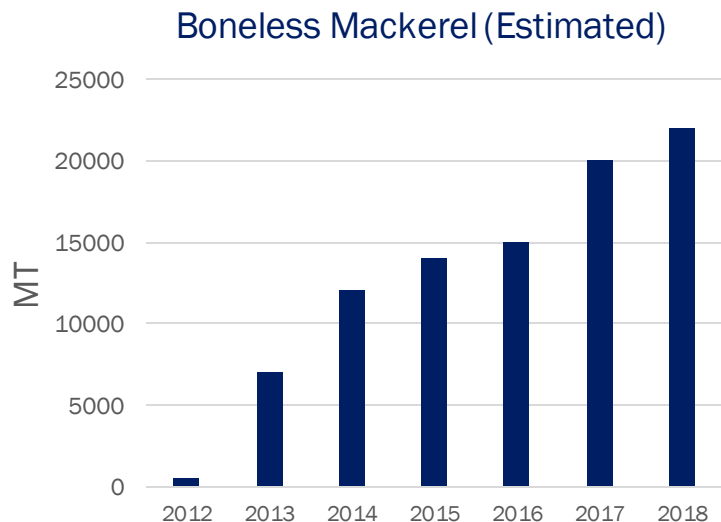


## Changes in the Japanese mackerel market



# 2011~ Boneless Mackerel

- Mostly processed using Norwegian Mackerel – consistency in quality and supply



Source: Promar Consulting, NSC

Herb and Lemon



Miso



Mirin (sweet rice wine)



Plain, Vacuum Packed

# 2012~ “Ready-to-eat” Mackerel

- The convenience store chain 7-11 has been aggressively pushing the ready-to-eat mackerel products.
- Heat in microwave or hot water (with package on).



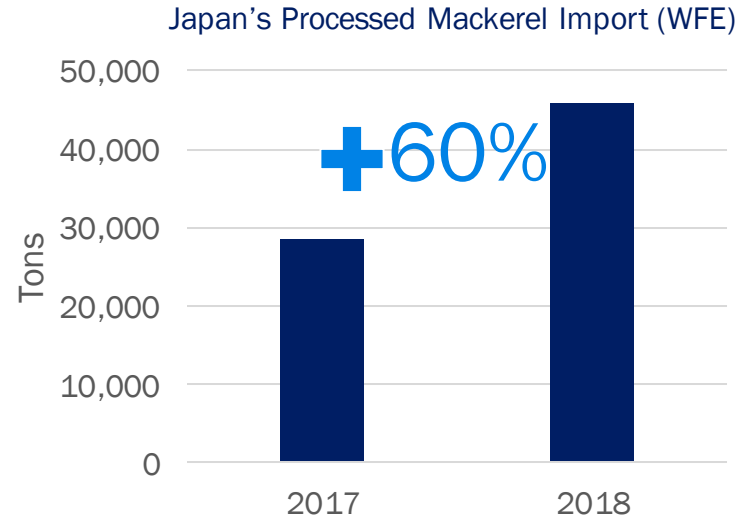
Salted and Grilled



Ponzu Sauce



Miso





## 2015~ Mackerel Sandwich

- Inspired by the Turkish traditional food.
- Trendy, exciting product that is especially popular among women in 20s and 30s.



Known as a trendy product



Sold in Costco



Each restaurant has its own recipe

## 2017~ Canned Mackerel

- Japan is having a mackerel boom in recent years thanks to its rich nutritional content.

In 2018 the sale of canned mackerel surpassed that of canned tuna, becoming the most consumed canned fish.



High-end Package

**+ 40-50%**



Convenience Store Product  
using Norwegian Mackerel



Popularized by one TV Program



# 2019~ “Salad Fish” Mackerel in Convenience Store

- All major convenience stores are selling “salad fish,” a rising product within the health boom in Japan.



Diet /Low calorie

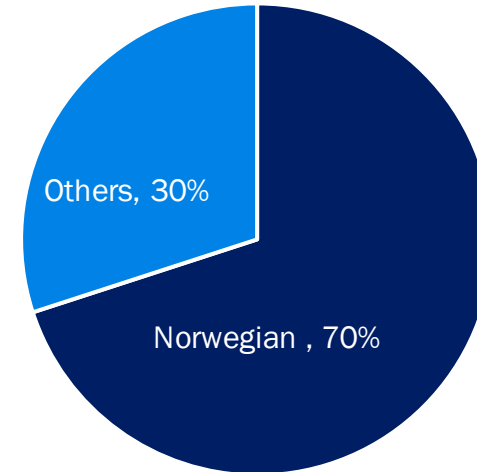
Meal  
Replacement

High Nutrition

# Norwegian Mackerel has a Place in Retail



Est. Mackerel Sales Breakdown in Retail



Source: Promar Consulting, NSC

## Convenience store - Growing Variety of Mackerel Products

- A lot of new SABA products have been launched throughout the year, ie. rice balls (*onigiri*).
- Also at Lawson Station, designated mackerel section has been established.



## Changes in the Korean Market





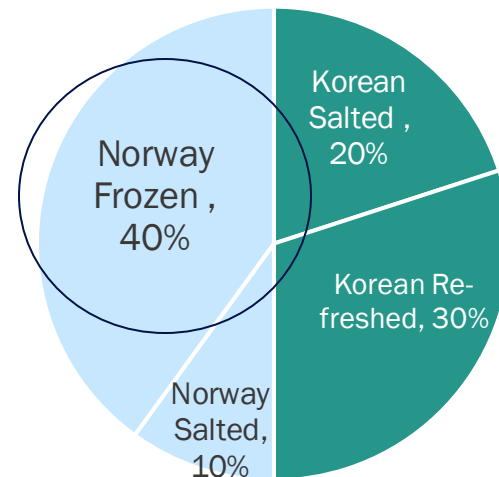
# 2013 ~ Emergence of Frozen Mackerel

## Frozen Norwegian Mackerel



Large packs (800 grams), Processed Fillets from Norway

## Est. Retail Sales 2018



Source: Promar Consulting

# Frozen Norwegian Mackerel in Every Major Retail Chain

- 1) Long storage
- 2) No smell
- 3) Not touching fresh fish





## 2016 ~ Boneless, More Companies Joined the Business

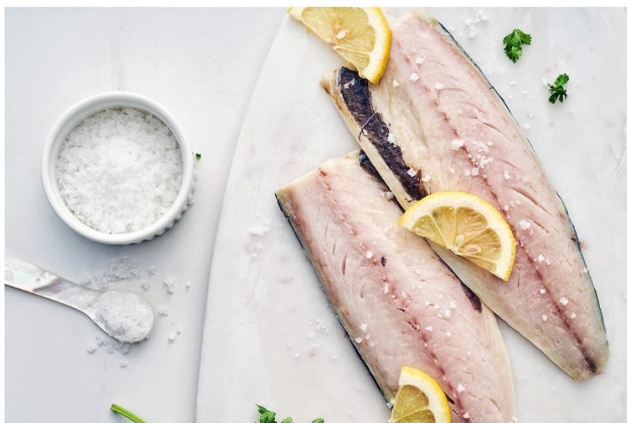
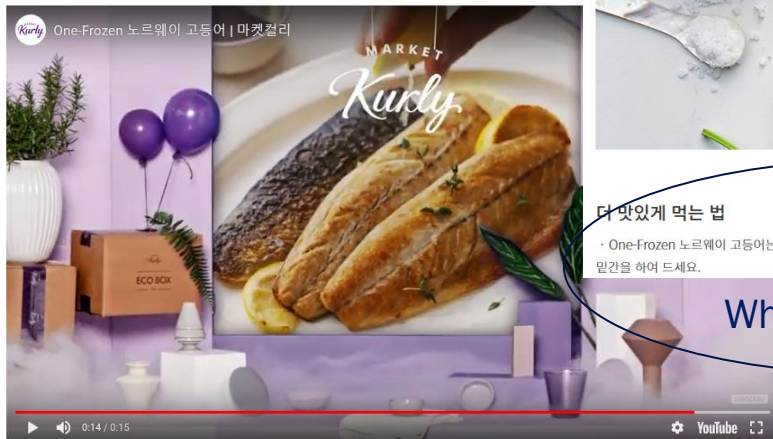


# 2018~ Premium Product Online

In Retail: Approx. 10% Online Sales

High quality photos  
and videos

영상으로 미리 만나는 노르웨이 고등어



# 2018 ~ Home Replacement Meal, Growing Strong

Smoked Mackerel



Marinated with Green Tea  
(Soy Sauce and Wasabi)



Instant Family Meal

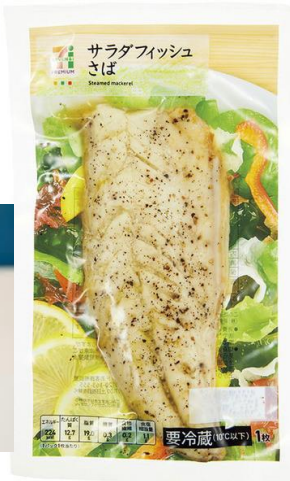


Photo Credit: Seoul News

Happy Children Happy Moms



# What will be the hit in China?!



# NORWEGIAN SEAFOOD COUNCIL

