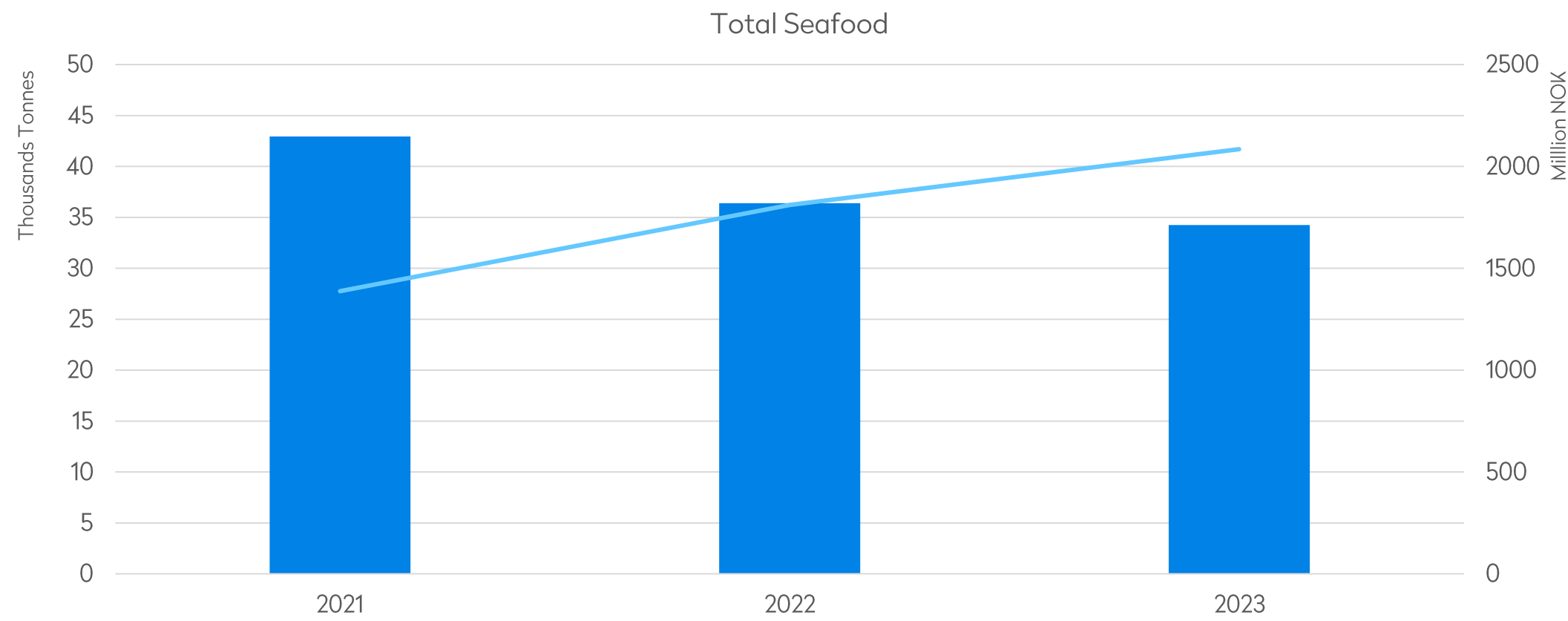




South-East Asia, 2023

Asbjørn Warvik Rørtveit, Director, South-East Asia, Norwegian Seafood Council

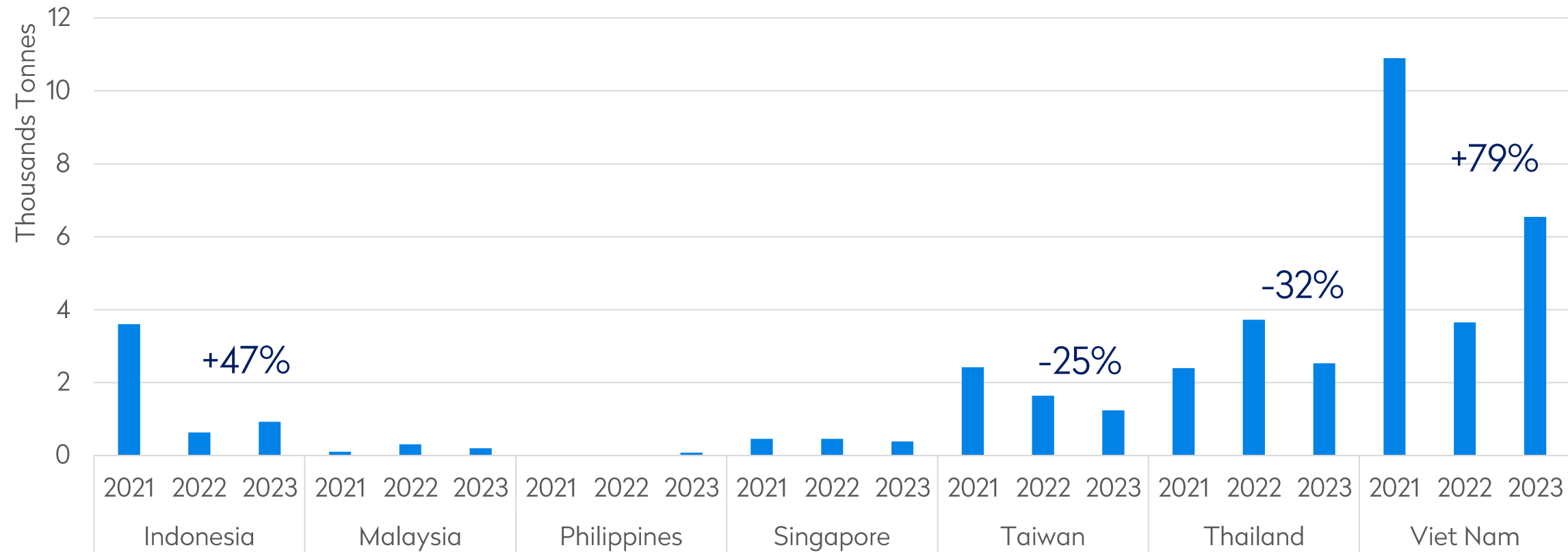
Total seafood export to South-East Asia January – March 2023, Volume -6%, Value +15%



Mackerel to South-East Asia January – March 2023

Volume +14%, Value +23%,

Volume Tonnes



Thailand

	THAILAND												
	Volume in tons			Value in 1000-NOK			Change 2023/2022				Year to date		
	2021	2022	2023	2021	2022	2023	Volume	Value	Price 2023	Change price 2023/2022	Volume		
January	901	1 334	827	13 560	24 441	16 023	-38 %	-34 %	19,37	6 %	YTD 2022	YTD 2023	Change YTD
February	917	835	855	14 445	16 348	17 513	2 %	7 %	20,49	5 %	3 720	2 528	-32 %
March	577	1 552	846	9 205	30 177	18 540	-46 %	-39 %	21,92	13 %	Value		
April	396	699		5 994	13 248						YTD 2022	YTD 2023	Change YTD
May	668	1 040		10 302	20 419						70 967	52 075	-27 %
June	198	714		2 889	14 240						Price		
July	175	482		3 108	8 740						YTD 2022	YTD 2023	Change YTD
August	655	756		10 268	14 291						19,07	20,60	8 %
September	1 624	982		23 704	17 833								
October	1 542	1 021		23 680	20 227								
November	1 006	745		17 298	14 192								
December	1 054	1 428		20 307	27 192								

Taiwan

	TAIWAN												
	Volume in tons			Value in 1000-NOK			Change 2023/2022				Year to date		
	2021	2022	2023	2021	2022	2023	Volume	Value	Price 2023	Change price 2023/2022	Volume		
January	1 234	714	374	18 881	14 732	7 076	-48 %	-52 %	18,94	-8 %	YTD 2022	YTD 2023	Change YTD
February	570	586	697	9 031	11 779	15 030	19 %	28 %	21,57	7 %	1 637	1 234	-25 %
March	613	337	164	9 403	6 731	3 383	-51 %	-50 %	20,63	3 %	Value		
April	611	310		9 889	5 931						YTD 2022	YTD 2023	Change YTD
May	326	332		5 570	6 164						33 243	25 489	-23 %
June	226	248		4 068	5 208						Price		
July	271	432		5 264	9 284						YTD 2022	YTD 2023	Change YTD
August	1 684	1 392		25 863	26 511						20,31	20,65	2 %
September	2 809	3 469		42 283	64 650								
October	2 756	3 257		47 984	69 658								
November	1 868	966		36 477	20 732								
December	816	580		16 918	12 354								

Vietnam

	VIETNAM												
	Volume in tons			Value in 1000-NOK			Change 2023/2022				Year to date		
	2021	2022	2023	2 021	2022	2023	Volume	Value	Price 2023	Change price 2023/2022	Volume		
January	4 518	1 524	2 657	67 226	25 674	50 182	74 %	95 %	18,89	12 %	YTD 2022	YTD 2023	Change YTD
February	3 763	759	2 532	57 227	13 190	50 362	234 %	282 %	19,89	14 %	3 647	6 545	79 %
March	2 617	1 364	1 356	39 199	22 620	26 926	-1 %	19 %	19,86	20 %	Value		
April	2 630	1 942		38 301	31 198						YTD 2022	YTD 2023	Change YTD
May	1 519	1 684		21 823	27 773						61 484	127 469	107 %
June	2 267	749		33 415	12 245						Price		
July	1 246	1 042		19 311	17 164						YTD 2022	YTD 2023	Change YTD
August	1 872	2 110		26 709	36 203						16,86	19,48	16 %
September	4 031	5 447		55 675	95 122								
October	4 265	5 193		62 429	97 821								
November	1 531	1 135		21 380	21 469								
December	1 802	2 855		30 384	54 363								

Indonesia

	INDONESIA												
	Volume in tons			Value in 1000-NOK			Change 2023/2022				Year to date		
	2021	2022	2023	2 021	2022	2023	Volume	Value	Price 2023	Change p	Volume		
January	812	262	358	12 175	5 566	6 959	37 %	25 %	19,43	-9 %	YTD 2022	YTD 2023	Change YTD
February	1 396	366	462	21 558	7 325	10 162	26 %	39 %	22,01	10 %	628	924	47 %
March	1 395		104	20 643		2 166			20,83		Value		
April											YTD 2022	YTD 2023	Change YTD
May											12 891	19 287	50 %
June											Price		
July	367			5 562							YTD 2022	YTD 2023	Change YTD
August	523			8 494							20,53	20,88	2 %
September	523	246		8 262	4 051								
October	489	338		7 401	7 295								
November		1 174			22 570								
December	418	392		7 919	7 538								

2022

Mackerel

Thailand

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Market activities 2022

Mackerel



Point of sales activity
0.4 MN NOK

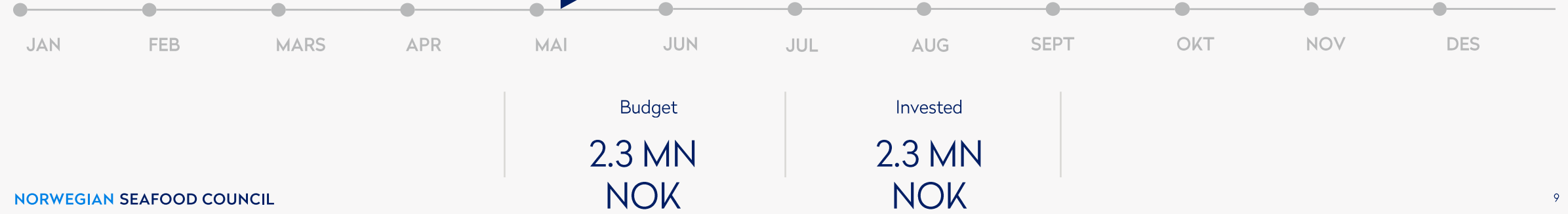


PR/Reputation mgmt.
0.6 MN NOK

B2B activity
1.1 MN NOK



Digital campaign
1.6 MN NOK



2022 Mackerel Taiwan

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Market activities 2022

Mackerel



挪威鯖魚

凜冽潔淨的環境孕育出風靡世界的美味
全球需求屢創新高，是家用及餐飲業者的心頭好

挪威鯖魚一向以高品質著稱，由配製先進的漁船在北海、挪威海以及新格羅瓦海峽附近的海域，用聲納精準定位魚群存在，以重網捕撈後再透過電子稱平台來進行第一手的稱重。捕撈季節從每年的五月到十一月，尤其集中在九月到十一月，因為此時的鯖魚脂肪含量最高，因此肉質特別清甜鮮美。

層層監管 / 品質保證
挪威的漁業受到挪威食品安全局、挪威國家營養暨海洋食品研究所、挪威漁業理事會以及挪威加工漁業部的監管。明確規範漁業中運送相關的每個角色應遵守的指令規定以及責任義務，以確保生產鏈中的各個階段都能讓消費者安心滿意。確保每條餐桌上的鯖魚不但美味而且是最頂級最安全的品質。

永續發展
挪威和國際研究機構致力於漁業的可持續發展，每年會針對大西洋海域商業計劃的漁業量提供永續發展的建議。挪威、瑞典和丹麥的國家之間會進行配額協商，挪威加工漁業部就會根據協商結果為挪威漁民進行分配，並發放許可證給相關產業人士，並監督其遵守配額分配。漁業經營與監管，以及針對不同魚類的相關規定，讓魚類資源永遠不虞匱乏。

行銷全球
挪威海產推廣協會代表挪威的漁業業者，在全球主要市場推廣真實傳揚挪威海鮮的產地商標，教育全球消費者認同產品包裝上的商標貼紙，以確保消費者買到最鮮美的挪威海鮮。

NORWEGIAN SEAFOOD COUNCIL
挪威海產推廣協會
<http://nsc.seafood.no>
挪威海產推廣協會
www.seafoodfromnorway.tw



Point of sales activity
1.5 MN NOK



Marketing Plan 2023





Budget South-East Asia 2023

27,5 MNOK

Media	Budget
Thailand <ul style="list-style-type: none">• Salmon 10 MNOK• Pelagic 3 MNOK• Fjord Trout 2 MNOK	15 MNOK
Taiwan <ul style="list-style-type: none">• Pelagic 3,5 MNOK• Salmon 2,5 MNOK	6 MNOK
Vietnam <ul style="list-style-type: none">• Salmon 2 MNOK• Shellfish 1 MNOK• Whitefish 0,5 MNOK	3,5 MNOK
Malaysia <ul style="list-style-type: none">• Fjord Trout 3 MNOK	3 MNOK

THAIFEX – ANUGA 2023, 23.-27. MAI



SEAFOOD EXPO – SINGAPORE 11-13 SEPTEMBER 2023

- Seafood From Norway Stand/Seafood Lounge 54 sqm
- Seafood Reception at The Norwegian Ambassadors residence 11. September
- Seafood Seminar at the Expo venue Afternoon 12 September.
- Seafood BBQ, Evening 12 September



Vietfood, Hanoi 9-11 November 2023,



NSC x Makro 2023



Campaign using Yaya





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PRE-POST CAMPAIGN EFFECTS – BEHAVIOUR CHANGE – TOTAL SAMPLE

Did the campaign manage to impact the main brand KPIs related to short term choice?

Norwegian salmon continues improving its position and increasing the distance from Japanese salmon. The position of Norwegian salmon after the Yaya campaign is in significant positive dynamics, while Japanese salmon remains stable and even demonstrates signs of a downtrend. Norwegian salmon enjoys a leading position in terms of all KPIs.

Main KPIs	NORWEGIAN salmon  Diff	JAPANESE salmon  Diff	NEW ZEALAND salmon  Diff	ALASKA / USA salmon  Diff
Aided Awareness	<div><div>88</div><div>84</div><div>81</div></div> <div>+4</div> <div>+4</div>	<div><div>81</div><div>82</div><div>77</div></div> <div>-1</div> <div>+5</div>	<div><div>54</div><div>56</div><div>52</div></div> <div>-2</div> <div>+4</div>	<div><div>44</div><div>45</div><div>42</div></div> <div>-1</div> <div>+3</div>
Top of Mind Unaided Awareness	<div><div>64</div><div>60</div><div>57</div></div> <div>+4</div> <div>+3</div>	<div><div>22</div><div>24</div><div>24</div></div> <div>-2</div> <div>0</div>	<div><div>3</div><div>3</div><div>3</div></div> <div>0</div> <div>-1</div>	<div><div>2</div><div>0</div><div>0</div></div> <div>+2</div> <div>0</div>
Total Unaided Awareness	<div><div>72</div><div>68</div><div>63</div></div> <div>+4</div> <div>+5</div>	<div><div>51</div><div>48</div><div>49</div></div> <div>+3</div> <div>0</div>	<div><div>12</div><div>7</div><div>10</div></div> <div>+5</div> <div>-2</div>	<div><div>16</div><div>1</div><div>1</div></div> <div>*+15</div> <div>0</div>
Purchase Intent (Top 2 Box)	<div><div>83</div><div>79</div><div>76</div></div> <div>+4</div> <div>+3</div>	<div><div>77</div><div>76</div><div>70</div></div> <div>+1</div> <div>+6</div>	<div><div>48</div><div>49</div><div>46</div></div> <div>-1</div> <div>+3</div>	<div><div>40</div><div>40</div><div>36</div></div> <div>0</div> <div>+4</div>
First choice	<div><div>63</div><div>56</div><div>54</div></div> <div>+7</div> <div>+3</div>	<div><div>25</div><div>27</div><div>26</div></div> <div>-2</div> <div>+1</div>	<div><div>4</div><div>4</div><div>6</div></div> <div>0</div> <div>-2</div>	<div><div>1</div><div>3</div><div>4</div></div> <div>-2</div> <div>-1</div>

Post – W3 Post – W2 Pre – W1

* changed the coding logic for Alaska/USA, added codes for the USA only

INFLUENCER PERFORMANCE – IMAGE & BRAND FIT

What is the image perception of the influencer, and how well do the influencer and brand fit?

Yaya has a strong fit for Seafood from Norway brand, and the audience has a powerful image perception of her. First of all, they believe Yaya is conscious about nature, relatable to Norway, trustworthy, and likable.



Image of Influencer		
CONSCIOUS ABOUT NATURE	<div></div>	82
RELATABLE TO NORWAY	<div></div>	80
TRUSTWORTHY	<div></div>	78
LIKEABLE	<div></div>	77
authentic	<div></div>	76
relatable to Norwegian Seafood	<div></div>	76
conscious about the origin of food (seafood)	<div></div>	76
conscious about sustainable food production	<div></div>	72
conscious about what to eat	<div></div>	71
inspiring	<div></div>	70

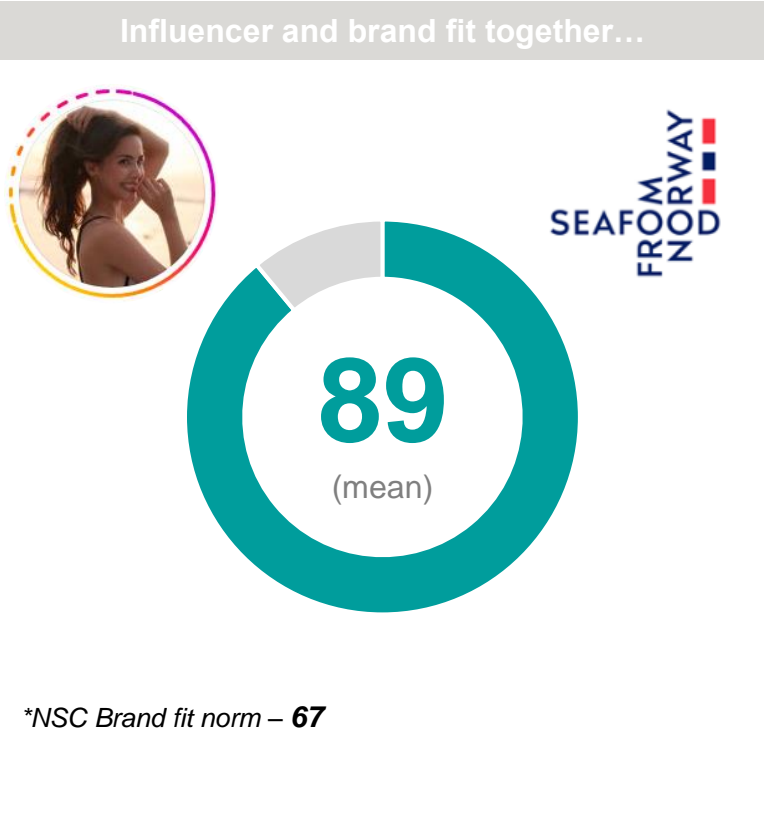


Image of Influencer: How much do you agree that {Yaya} ...is? Brand Fit Influencer: Please rate how much {Yaya} and {Seafood from Norway} fit together.
Base: Aware of influencer n=726



PEOPLE MATTER

SEAFOOD
FROM
NORWAY



Boost sales mechanic

Event Description: A promotion highlighting Norwegian Salmon and Mackerel by incorporating SFN origin mark. Support in store decoration in all or selected stores. Boost sales by motivate the HORECA customers with limited premiums redemption and point collection campaign.

Period (tentative): Q2 – Q3

Target Group: B2B

Desired Outcome: Recognition of SFN origin mark, Salmon and Mackerel origin, and increase in sale

Promotion giveaway:

1. Tea towels
2. Shopping bags

PR support: Promotional release

Media support: Online activity – drive to offline /online campaign





Tasting Booths Co-campaign with Makro

Partner with Makro to create tasting booths of Norwegian Salmon or Mackerel menu.

Period: March (Weekends)

Location: Main branches in Bangkok where there are people with spending power (Near villages) or even in the main city branches like Chiang Mai and Pattaya

Target Group: B2C

PR support: Press release – business and lifestyle publications

Media support: Online activity – drive to offline /online campaign

Mackerel and Salmon Academy

Event Description: Organize 3 – 4 Mackerel and Salmon academy for Makro operation teams

Period: Q2-Q4

Target Group: B2B / Makro staff

Desired Outcome: Recognition of SFN origin mark, Mackerel and Salmon origin, and increase in sale





2023 Taiwan Campaign

Presented by BMA Global Services
Feb. 17, 2023

Salmon

- To Maintain SFN trademark awareness, and consideration
- To engage both retail and foodservice partners



Mackerel

- To engage retailer, importers, and producers/processors.
- To use B2B activities and targeted B2C ones to highlight differentiators and create preference



Media Campaign - Branding

- Digital media, SoMe and Web-site banners
- TV Product placement
- Food Taipei
- OOH Digital Screens



Media Campaign - Event

- SoMe & Micro Influencers
 - Period: Mackerel in August and September
 - Platform: FB, IG, YouTube and Line
 - 30 -40 micro influencers to develop posts and share photos.



Press Briefing

- Date: between mid to end of May, coordinating all parties' schedule
- Objectives:
 - To announce collaboration with Carrefour, and THL (sole agent of McCormick and Lee Kum Kee in Taiwan).
- A local press release with quotes from NSC, Carrefour



In-Store Event



In-store Event

- Period: Aug. to Sept. for mackerel
- Each purchase over NT\$100 will entitle a BBQ sauce packet. The quantity needed is 70K.
- Roadshow/sampling: 4 major districts. Create an opportunity for store managers to show their cooking techniques and interact with the consumers.
- POSM: Event posters distributed to all stores, mackerel videos will continue to be played at the fish booths.



Seafood Academy

- Two sessions:
 - One leveraging Carrefour's annual store manager training to be more efficient and cost effective.
 - One open for major importers' customers.



Seafood Seminar

- Period: November
- We have importers and retailers as our major targets.



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