

# Leading the world in aquaculture

**Irish Organic Salmon Export Opportunities and impediments.**



**marineharvest**  
excellence in seafood

# Our Organic Salmon – what can we offer?

## Consistent Supply – 52 weeks of the year:

- Strong and continued investment in infrastructure to ensure we are able to continually supply our customers.

## Authentic Provenance – Irish and Organic:

- Ireland is producing the best organic quality salmon from some of the most pristine wild waters along its coast.

## Product format to suit our needs:

- Control of the entire value chain from breeding to processing allow us to offer a product in the format which best suits the needs of your business, from whole fish, fillets and portions, either fresh or frozen.

## Experienced Exporter:

- With over 80% of our Irish Organic Salmon being exported across the globe, our team can assure delivery of our products.



# Marine Harvest Ireland – Key Facts

- Established in 1979 by local people with its head office based in Donegal.
- Ireland's leading producer of Premium Irish and Irish Organic Salmon.
- Currently produce 10,000 tonnes Salmon.
  - 60% Organic Salmon
  - 40% Premium Eco-label Salmon
- Hold ISO 9001, ISO 14001, BRC, EU Organic, Global Gap, Naturland and BioSuisse certifications.
- First salmon farmer to receive prestigious Irish Food Writers Guild award for our organic salmon.



# Marine Harvest Ireland – Brand Essence

## Business to Business Brand Essence:

### Creative

- Innovation
- Bring new ideas for marketing & packaging

### Professional

- Routines and structures
- Approachability
- Ethical and for the good of all

### Food Partner

- Profitability
- Shared expertise
- Trust based relationship



## Our 4 P's

**Planet:** *Working in harmony with our environment to produce the finest salmon to meet the taste requirements of discerning customers.*

**People:** *Dynamic team committed to working in partnership with our customers, to add value to their business, building long term beneficial relationships.*

**Product:** *Range of innovative food solutions developed in line with customer & market insight.*

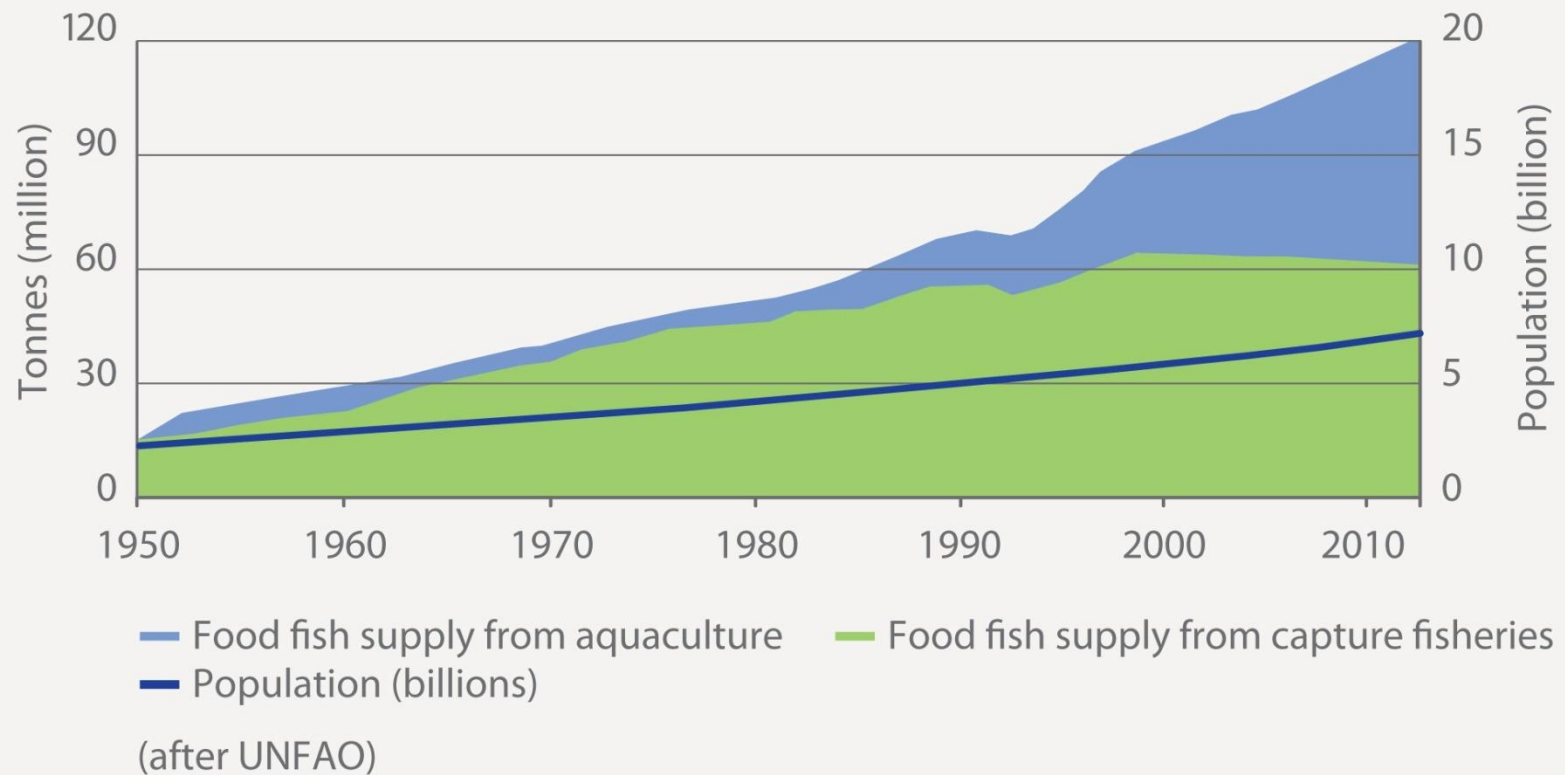
**Profit:** *Focused upon gaining the best return for our product to ensure sustainable long term position in the market.*





# Only aquaculture can grow fish harvests

## Fish use (million tonnes)



# Who is buying our Irish Organic Salmon?



**marineharvest**  
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**100% CERTIFIED ORGANIC SALMON**

**AB ASSOCIATION FOR BIOLOGICAL PRODUCTION**

**éire 55c**

*A speciality from Marine Harvest Ireland*

Our organic salmon thrive in the wild pristine waters along Ireland's exposed westerly coastline. Clare Island is where we first started to produce organic salmon back in 1995. It is the knowledge and expertise of our team that have allowed us to develop a reputation for producing the finest quality organic salmon in the world.

*It would be great to see you at the show, why not drop us an email to set up a meeting:*

**Boston Seafood Show:**  
14th, 15th and 16th March 2010  
Booth 211

**Brussels Seafood Show:**  
21th, 28th and 29th April 2010  
Hall 5, Stand 545

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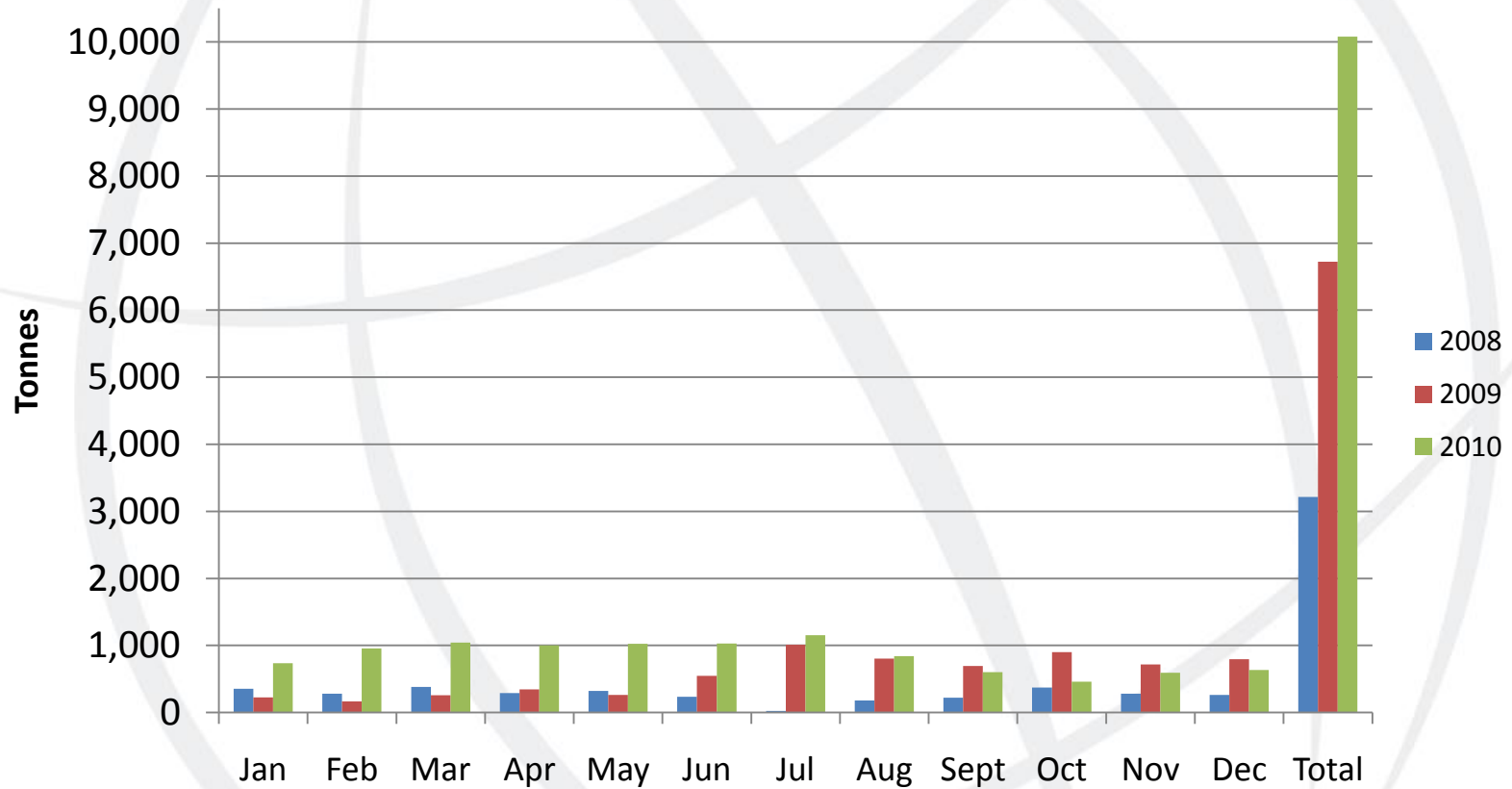
**100% IRISH**

**IE-ORG-04 Irish Aquaculture**

ORGANIC	2007	2008	2009	2010
Ireland	15%	19%	10%	7%
France	5	24	37	39
Belgium	11	11	12	10
Switz.	7	10	8	7
Germany	25	14	16	11
UK	23	11	3	14
Poland	0	0	1	1
USA	13	11	10	10
Japan	1	0	3	1

# Organic Growth:

## Organic Salmon Sales



# EU Organic Aquaculture Production



- In 2008, an estimated 123 certified organic aquaculture producers were in operation in Europe, which accounts for almost half the world's production of 50,000 tonnes in 2008.
- The top five member states in production terms are the UK, Ireland, Hungary, Greece & France. **Salmon is the top species.**
- Market growth is particularly strong in France, Germany and the UK. Some €17m seafood is sold under the organic label in France where the market grew by 220% between 2007 & 2008. \*



# Potential Organic Salmon Sales Growth

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- Potential Organic salmon sales growth is limited due to lack of fish.
- Significant potential for growth in existing European markets - at least 50% more in one to two years
- Huge untapped market in BRIC countries.

## Why no fish?

- Development of Irish organic aquaculture seriously hampered by the on going licencing delay saga..
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# Organic Fish Sales Potential – Co-Packing



**Picard** – Leading French frozen speciality retailer.

Product format: 2 X 100g Frozen organic portions, in sous vide film.

Initial Order: 25 tonnes. – Equates to 58 Tonnes of Raw Material.

Product Launch September 2010.

## Carrefour: France

Product format: 2 X 100g Frozen organic portions, in sous vide film.

Initial Order: 15 tonnes: Equates to 35 Tonnes of raw material.

Product Launch September 2010.



**Total Raw Material for initial order: 92 tonnes**