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Get insights into key strategic issues, policy and business development as well as a fresh market outlook for the North Atlantic Fisheries. More than 70 prominent speakers will give you the latest updates.



*5 years*  
OF INSPIRING THE INDUSTRY

# SPEAKERS



GUUS PASTOOR, PRESIDENT  
AICPE BRUSSELS



ROLF DOMSTEIN, CHAIRMAN  
NORWEGIAN SEAFOOD EXPORT  
COUNCIL



TERJE MARTINUSSEN, CEO  
NORWEGIAN SEAFOOD EXPORT  
COUNCIL, NORWAY



ARNE MØGSTER, CEO  
AUSTEVOLL SEAFOOD



LARS LIABØ, CHAIRMAN  
KONTALI ANALYSE



IAIN MCSWEEN, CEO  
SCOTTISH FISHERMEN'S  
ORGANISATION, SCOTLAND



MARIT SOLBERG, MANAGING  
DIRECTOR MARINE HARVEST  
NORWAY



EGGERT GUDMUNDSSON, CEO  
HB GRANDI, ICELAND



HELGE SINGELSTAD, CEO  
LERØY SEAFOOD, NORWAY



GUNNAR DOMSTEIN, NORWAY  
PELAGIC, NORWAY



JAN HARALD HAUVIK, CEO  
SØLVTRANS HOLDING, NORWAY



YNGVE MYHRE, CEO  
AKER SEAFOOD ASA, NORWAY



GEIR ISAKSEN, CEO  
CERMAQ, NORWAY



PETER DILL, CEO DEUTSCHE  
SEE GMBH, GERMANY



LIBBY WOODHATCH, CEO  
SCOTTISH SEAFOOD



KOLBJØRN GISKEBØDEGAARD,  
SENIOR ANALYST NORDEA  
MARKETS, NORWAY



BJØRN MYRSETH, CEO  
MARINE FARMS, NORWAY



REGIN JAKOBSEN, CEO  
BAKKAUFROST, THE FAROES



KAREN GALLOWAY, MARKETING  
MANAGER SEAFISH, UK



KLAUS NIELSEN, CEO  
ESPersen, DENMARK



EGIL SUNDHEIM, DIRECTOR  
NORWEGIAN SEAFOOD EXPORT  
COUNCIL, NORWAY



COURTNEY HOUGH, GENERAL  
SECRETARY, EATIP SECRETARIAT  
BELGIUM



ELI AAMODT, VICE PRESIDENT  
NEW ENERGY AND NEW IDEAS  
R&D, STATOIL ASA, NORWAY



ÅSHILD NAKKEN,  
NORWEGIAN SEAFOOD EXPORT  
COUNCIL, CHINA



RAGNAR TVETERÅS, PROFESSOR  
UNIVERSITY OF STAVANGER,  
NORWAY



CHRIS BRITTON, CEO  
FINDUS GROUP, UK

## HEAR AND MEET THESE AND 40 OTHER TOP-LEVEL SPEAKERS

addressing a wide range of  
seafood industry relevant  
issues. See the interesting  
programme on the following  
pages.

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# PROGRAMME

## 3 MARCH

### 2010

**Conference theme:  
VISIONS FOR THE NORTH  
ATLANTIC FISHERIES IN 2015**

Big changes are coming in the fisheries and the seafood industries. What will they mean for your business?

The CFP reform, Iceland into the EU, consumer-driven changes, impending legislation, will all change the business landscape for seafood professionals. How will it all affect your business?

What is the outlook for markets and prices?

CONFERENCE CHAIR;  
• Guus Pastoor President, AIPCE, Brussels

CONFERENCE CO-CHAIR:  
• Rolf Domstein, Chairman Norwegian Seafood Export Council

1		NORTH ATLANTIC FISHERIES AND FISH FARMING TOWARDS 2015
09:00	<b>VISIONS FOR THE NORTH ATLANTIC FISHERIES AND FISH FARMING TOWARDS 2015</b> Main themes: New EU fisheries policy reform (CFP), eco-labelling, sustainability and resource management	<ul style="list-style-type: none"> <li>• North Atlantic Ministerial Session - the Policy Perspective               <ul style="list-style-type: none"> <li>- Opening: H.E. <b>Lisbeth Berg-Hansen</b>; Minister of Fisheries, Norway (tbc)</li> <li>- H.E. <b>Huw Irranca-Davies</b> MP; Minister for Marine and Natural Environment, UK (tbc)</li> <li>- H.E. <b>Eva Kjer Hansen</b>, Minister of Fisheries, Denmark (tbc)</li> <li>- EU Commission - DG Fish, Brussel (speaker tba)</li> </ul> </li> </ul>
10:30	<b>COFFEE BREAK</b>	
11:00	<b>THE NORTH ATLANTIC SEAFOOD INDUSTRY PERSPECTIVE</b>	<ul style="list-style-type: none"> <li>• The UK Perspective, <b>Iain McSween</b> CEO, Scottish Fishermen's Organisation and <b>Libby Woodhatch</b> CEO, Scottish Seafood " EU CFP, discards, sustainability"</li> <li>• The Dutch perspective, <b>Bart van Olphen</b> CEO, Fishes, Netherlands; "eco labelling"</li> <li>• The Norwegian Perspective, <b>Arne Mogster</b>, CEO Austevoll Seafood, Norway</li> <li>• Salmon supply and market outlook               <ul style="list-style-type: none"> <li>- <b>Lars Liabø</b> Chairman, Kontali Analyse, Norway</li> <li>- <b>Kolbjorn Giskeødegard</b>, Senior Analyst Nordea Markets, Norway</li> <li>- <b>Geir Isaksen</b> CEO, Cermaq, Norway</li> </ul> </li> </ul>
13:00	<b>LUNCH</b>	
2		SEAFOOD INDUSTRY CAPTAINS
14:00	<b>SEAFOOD INDUSTRY CAPTAINS - THE VIEW FROM THE BRIDGE</b>	<ul style="list-style-type: none"> <li>• Outlook for North Atlantic supply, trade and prices               <ul style="list-style-type: none"> <li>- <b>Marit Solberg</b>, MD Marine Harvest Norway</li> <li>- <b>Glenn Cooke</b>, CEO, Cooke Aquaculture, Canada (tbc)</li> <li>- <b>Eggert Gudmundsson</b> CEO, HG Grandi, Iceland</li> </ul> </li> </ul>
15:15	<b>COFFEE BREAK</b>	
15:45	<b>SEAFOOD INDUSTRY CAPTAINS - THE EUROPEAN MARKET OUTLOOK</b>	<ul style="list-style-type: none"> <li>- <b>Jerek Malek</b> CEO, Mopol, Poland</li> <li>- <b>Chris Britton</b> CEO, Findus, UK</li> <li>- <b>Peter Dill</b>, CEO Deutsche See, Germany</li> </ul>
16:45	<b>PANEL DISCUSSION -</b> Seafood Industry Captains, NGOs and investment fund Introduction: Private Equity Fund CEO - "why invest in seafood companies?" Views from NGOs - <b>Jason Clay</b> , World Wildlife Fund, USA	
17:15	<b>END OF CONFERENCE</b> 17.30 Buses depart for Oslo	
19:30	<b>CONFERENCE BUFFET DINNER AT THE HOTEL BRISTOL, OSLO</b>	

## 3

### MARELIFE SEMINAR - INNOVATION SESSION

- 14:00** **Chair: JOHN STEPHANIS, PRESIDENT FEAP (TBC)**  
 • Opening Address: H.E. **Huw Irranca-Davies** MP; Minister for Marine and Natural Environments, UK (to be invited).
- 14:15** **THE OCEAN**  
 • **Marine resources and environment - cross sector synergy to enhance innovation as seen by an oil and gas company.**  
 Eli Aamodt; Vice President, New Energy and New Ideas R&D, Statoil ASA Norway
- 14:40** • **The Virtual Marine Platform - Using marine data from commercial fleets to improve fishery efficiency and sustainability.**  
 Sytse Ybema, Sustainovate, The Netherlands and Myriax, Australia (tbc)
- 15:00** **Coffee break and networking**
- 15:30** **AQUACULTURE**  
 • **The existential issues of sustainable aquaculture.**  
 Ole Torrissen, Research Director, Institute of Marine Research, Bergen (tbc)
- 15:55** • **Opportunities and threats for shellfish farming in North Atlantic coastal waters**  
 (title and speaker tba)
- 16:15** **FOOD AND NON-FOOD USE OF MARINE LIFE**  
 • **Value added seafood**  
 Øivind Fylling Jensen, CEO Nofima (tbc).
- 16:35** • **Opportunities for food ingredients and non-food products derived from marine life**  
 (Title and speaker tba)
- 17:00** **END OF CONFERENCE**  
 Buses depart for Oslo
- 19:30** **CONFERENCE BUFFET DINNER RECEPTION AT HOTEL BRISTOL, OSLO**

**Theme:**  
**ENTERING A NEW ERA FOR SUSTAINABLE SEAFOOD PRODUCTION.**

**Organisers:**  
 European Aquaculture, Technology and Innovation Platform (EATIP) and MareLife.

**In cooperation with:**  
 Nofima, Institute of Marine Research and The Fishery and Aquaculture Research Fund

Programme subject to change.  
 For updates, go to [nor-seafood.com](http://nor-seafood.com)

#### MARELIFE / EATIP FACTS:

MareLife is an independent, cross-sector, science-based marine innovation network organized on a membership basis outstanding by covering all three major industrial bio marine fields: aquaculture, fisheries and marine by-products.

The European Aquaculture Technology and Innovation Platform (EATIP) is composed of companies, associations and federations, public authorities, institutions, universities and financial institutions that each have a professional interest in the sustainable development of European aquaculture.



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# PROGRAMME

## 4 MARCH

### 2010

4		WORLD SEAFOOD MARKETS - TRENDS AND OUTLOOK
09:00	<b>WORLD SEAFOOD MARKETS - TRENDS AND OUTLOOK</b> Chair: <b>Terje Martinussen</b> CEO, Co-Chair: <b>Egil Sundheim</b> Director, Norwegian Seafood Export Council (NSEC).	<ul style="list-style-type: none"> <li>Market Overview: European Seafood Demand trends – <b>Jean-Jacques Van den Heede</b>, Director, The Nielsen Co. UK</li> <li>France: Market overview – French Industry speaker tba</li> <li>Great Britain; Market overview – <b>Karen Galloway</b>, Seafish, Edinburgh</li> <li>Germany and Poland; Market overview – Metro Cash &amp; Carry, Poland (tbc)</li> <li>Spain: Market Overview, <b>Espen Hanson</b>, NSEC, Spain</li> </ul>
10:30	<b>COFFEE BREAK - NETWORKING AT NASF "CONFERENCE VILLAGE"</b>	
11:00	<b>WORLD SEAFOOD MARKETS - TRENDS AND OUTLOOK (continued)</b>	<ul style="list-style-type: none"> <li>Eastern Europe: Market overview; CEO <b>Vladimir Lienis</b>, Sala Sivis (tbc)</li> <li>USA: U.S. market developments; <b>Torunn Halhjem</b>, Trident Seafood, Seattle (tbc)</li> <li>Far East: Market overview: Company tba</li> <li>China: Market overview: <b>Åshild Nakken</b>, NSEC, China</li> </ul>
12:30	<b>PANEL DEBATE - Q&amp;A</b>	
13:00	<b>LUNCH AND NASF NETWORKING</b>	
5		OUTLOOK FOR THE NORTH ATLANTIC FISHERIES - RESOURCES, SUPPLY AND PRICES
14:00	<b>OUTLOOK FOR THE NORTH ATLANTIC FISHERIES - RESOURCES, SUPPLY AND PRICES</b> Chair: NSEC and Norway Fishing boat owners Association	<ul style="list-style-type: none"> <li>Introduction: Seafood demand and the financial Tsunami: <b>Amund Bråthen</b>, NSEC</li> <li>Sustainability issues: Professor <b>Jimmy Young</b>, Sterling University, UK</li> <li>White Fish Supply and Prices - Nordea and NSEC</li> <li>Pelagic Supply and prices - Nordea and NSEC</li> <li>Competing species in European markets: – Professor <b>Ragnar Tveterås</b>, University of Stavanger, Norway</li> </ul>
15:30	<b>Q&amp;A</b>	
16:00	<b>CONFERENCE CLOSE</b>	



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This session is organised by Norwegian Seafood Export Council - NSEC.



## 6

### MARELIFE SEMINAR - INNOVATIVE CASES

Chair: **Courtney Hough**, General Secretary, EATIP Brussels

**09:00-15:00**

**INNOVATIVE CASES (TEASERS AND NETWORKING LUNCH INCLUDED).**

Approximately 20-25 innovative cases, each of which 7 min, will be presented as teasers. Later in the session the cases will be given ample opportunities to interact with interested parties spanning from R&D to finance, customers and collaborative partners. The cases have been subject to selection by the committee approx one month ahead of the conference and they cover all marine sectors. This part of the program was very well received last conference and hence, we have decided to extend this part of the session.

**THE IDEA BEHIND THE INNOVATIVE CASES EVENT IS:**

To display the innovative power and opportunities in the seafood sector or the marine sector in general, connect the innovation providers with the manufacturers and the equity/finance segment and potentially foster alliances to further develop and implement the inventions and solutions.

The cases presented may either be business or science in nature, and may span from new ideas (protected) via early phase business to innovative solutions offered by established businesses. The cases must have the potential for solving challenges of the seafood industry. They may already have experienced commercial success or have such potential on their own or in collaboration with others. Both science/technology and business cases; ideas and inventions (protected), start ups and not-yet-commercialised innovations are candidates for presentation.

**SUBMISSION AND SELECTION OF INNOVATIVE CASES**

Please submit half page proposals to the workshop committee's mailbox: [post@marelife.no](mailto:post@marelife.no) within 31 January 2010. The workshop committee will select the best with good coverage across industrial fields. The committee will select the best in accordance with the set criteria, trying to ensure good coverage across all industrial fields and levels of the value chain.

<b>09:00 - 10:30</b>	<b>Up to 10 aquaculture cases</b>
<b>10:30 - 11:00</b>	<b>Break</b>
<b>11:00 - 12:00</b>	<b>Up to 8 value added seafood, processing and ingredient cases</b>
<b>12:00 - 12:45</b>	<b>Up to 6 ocean resource and ocean environment cases</b>
<b>12:45 - 15:00</b>	<b>Extended networking lunch</b>
<b>15:00</b>	<b>Summing up:</b> Innovation challenges to support smart and sustainable seafood production (title and speaker to be announced).
<b>16:00</b>	<b>Closing of the Conference</b>

Programme subject to change.  
For updates, go to [nor-seafood.com](http://nor-seafood.com)

## 7

### SEAFOOD FINANCE SEMINAR

**09:00 -16:00**

**CORPORATE FINANCE SEMINAR WITH PRESENTATIONS OF CEOs AND CFOs. MAIN PARTICIPATING COMPANIES TO INCLUDE (TENTATIVE LIST, TBC)**

**Marine Harvest**

- Challenge: The US market in a low dollar scenario
- Opportunity: Realizing economies of scale

**Marine Farms**

- Challenge: Developing new species
- Opportunity: Diversification as risk reduction

**Bakkafrost**

- Challenge: Future harvesting growth to meet demand
- Opportunity: Opportunities in the US market

**Cermaq**

- Challenge: Shortage of marine proteins
- Opportunity: When will feed prices increase?

**Norway Pelagic**

- Challenge: Capacity in a resource downturn
- Opportunity: The VAP potential

**Austevoll Seafood**

- Challenge: Operational focus in a conglomerate
- Opportunity: Fish meal prices; the sky is the limit?

**Aker Seafoods**

- Challenge: Fillet industry structure and constraints
- Opportunity: Increased supply and strong demand = win-win?

**Sølvtrans**

- Challenge: Global fleet structure and demand
- Opportunity: Growth and structuring potential

**SalMar**

- Challenge: Making money on VAP
- Opportunity: USA: Window of opportunity

**Lerøy**

- Challenge: Sea lice challenges
- Opportunity: Demand growth

**Grieg Seafood**

- Challenge: Branding products in a spot market industry
- Opportunity: Branding products potential in maturing markets

**Atlantic Codfarms**

- Challenge: Wild competition and cost base
- Opportunity: Potential for niche "247" suppliers of fresh cod

The Seafood Corporate Finance Seminar is organised and moderated by the 2 NASF partners from the Banking industry; Nordea and ABG Sundal Collier.