

## **Norwegian export strategies and performance in the Spanish market for salted cod products**

### **1. Name of research leader and members:**

Professor Torbjørn Trondsen (project leader) researcher Terje Jørgensen, statistical support, master students

### **2. Project objectives:**

To identify key factors explaining differences in value adding between Norwegian and Icelandic export of salted cod to Spain

### **3. Research background**

It is observed a mismatch between the profile of the Norwegian saltfish supply and the consumer preferences in the growing market segments for salted fish in Spain dominated by Icelandic exporters. Iceland receives higher average prices for salted fish in the Spanish market compared to Norway.

### **4. Research questions and tasks:**

1. What are the Spanish perceptions of, and strategies towards, Norwegian salted cod and producers?
2. How do the Norwegian and Icelandic supply chains match and adapt to demand in Spanish salt fish market?
3. Describe differences in export prices and value adding margins in the Norwegian and Icelandic value chain for salted cod products.
4. How are the Norwegian and Icelandic producers' main value chain orientations toward production and markets?
5. Test explanations of differences in prices and value adding margins
6. Discuss resource management and allocation, structural fleet policy and business options influencing market adaptation and value adding.

### **5. Theories and methodologies:**

Fishmarketing value chain theories will be adapted to identify possible key factors influencing value chain differences. The following data of codfish companies and products will be collected and analysed.

1. Spanish import/export data from Eurostat and Chinese import/export data
2. Norwegian and Icelandic export and value adding data from Norwegian, Icelandic export statistics, account data from Bronnøysund and similar Icelandic register and trade statistics from Eurostat and Brazil
3. Data of Governmental resource regulations, fleet supply structure and first hand prices in Norway and Iceland supplied from the Directorate of Fisheries
4. Interaction data in the salted cod value chains by linking data from first hand sales, business register data from Brønnøysund register and Export data
5. Business orientation data of Norwegian and Icelandic saltfish processors and exporters will be collected through surveys

### **6. Relation to the tasks of the main project: 3.1, 4.1, 4.2, 4.3, 4.4, 4.5**

### **7. Time-schedule: January 2009-2011:**