

# En supermakt på havbruk – klarer vi å opprettholde det etter 2030?

Lofotseminaret 2026

Nordea

Kolbjørn Giskeødegård  
Nordea | Corporate Finance  
Global sector coordinator Aquaculture/Seafood  
[kg@nordea.com](mailto:kg@nordea.com)  
+47 900 44215

# Agenda

- Bakteppe:
  - Hvordan ble Norge en global supermakt på laks?
  
- Status medio 2020 tallet:
  - Produksjon og vekst
  - Reguleringer
  - Politisk risiko
  
- Hva vil skjer fra 2030 og utover
  - Nye områder for oppdrett
  - Reguleringer
  - Finansiering
  - Mindset/Gründerkultur
  
- Konklusjon

# Historie

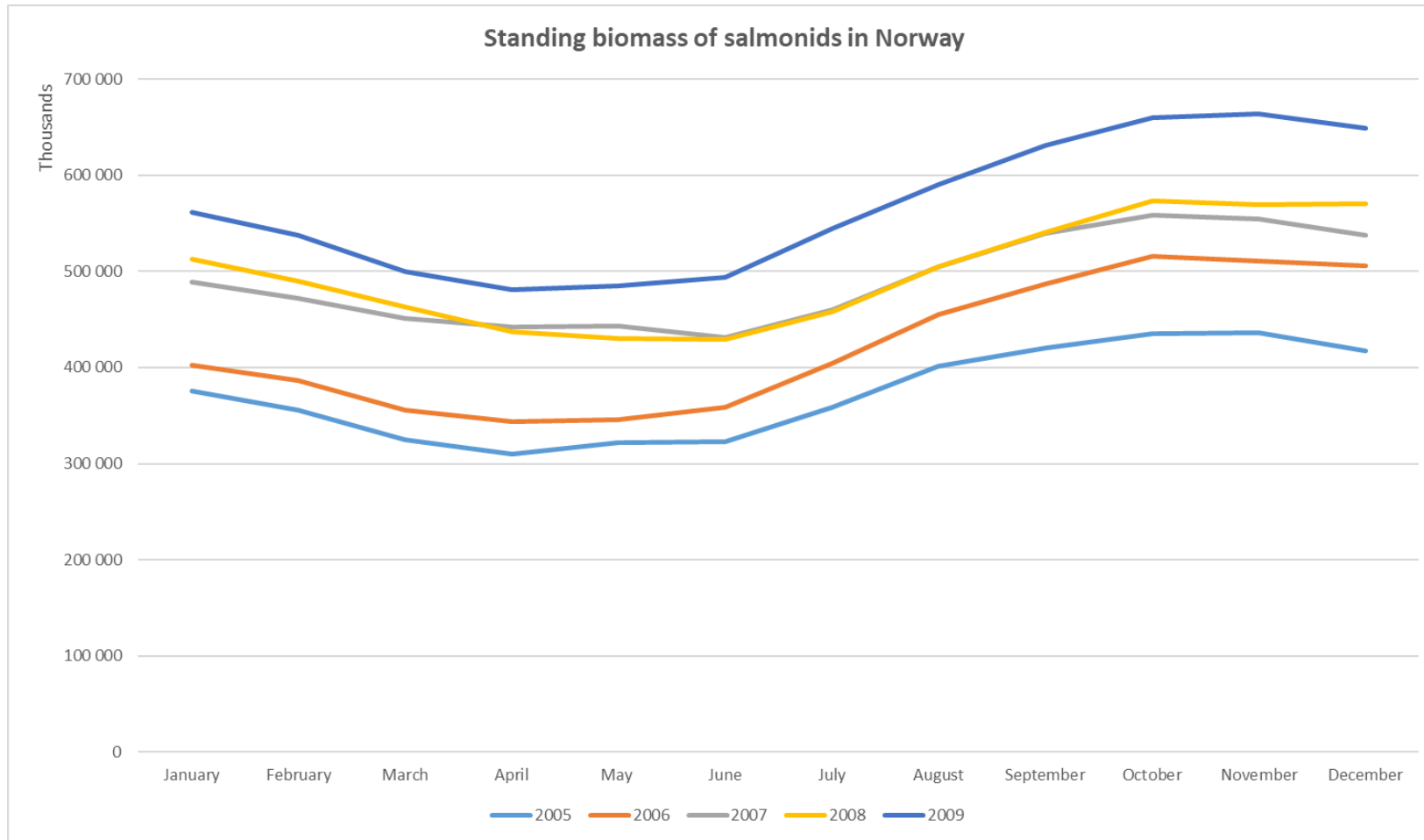
- Tradisjonelt har fiskeri kombinert med småskala jordbruk (sauer, kyr osv.) vært «overlevelsesmodell» på kysten.
- Fra slutten av 1950-tallet og fremover førte nedgangen i store fiskerier til at mange kystsamfunn havnet i krise, noe som førte til urbanisering og nedgang i viktige kystsamfunn
- Fiske av villaks var et lukrativt sesongbasert fiske, og noen pionerer prøvde seg med både landbasert og sjøbasert oppdrett allerede fra slutten av 1950-tallet
- På 1970- og inn i 1980-årene utviklet industrien seg som en for tidlig syklisk industri med enorme overskudd etterfulgt av betydelig nedgang.
- I 1985 ble akvakulturloven etablert, og dermed et reguleringsrammeverk med lisenser.
- Ideen i begynnelsen var at dette skulle følge den «norske modellen», som en ekstra inntekt for bønder. Ett oppdrettsselskap, én lisens.



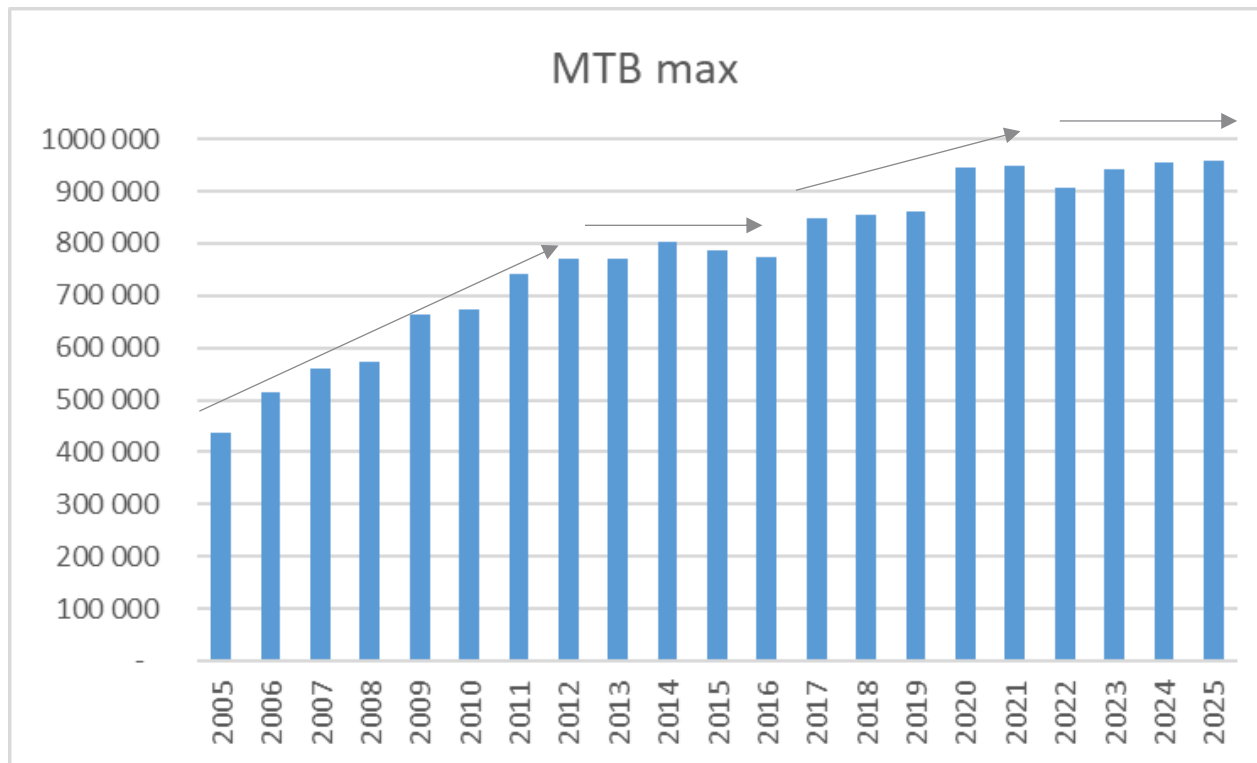
# Historie

- Dette ble organisert av et salgsmonopol (FOS) modellert etter fiskerinæringen.
- I 1991 sto industrien overfor en situasjon med massiv overproduksjon, priskollaps og risiko for konkurs
- FOS gikk konkurs, og mange oppdretter ble dratt med.
- I etterkant åpnet dette for nye aktører i bransjen, blant annet en bilselger som flyttet tilbake til Frøya fra Trondheim
- Reguleringer for eierskap ble liberalisert, og omsetning av laks var ikke lenger underlagt et innkjøpsmonopol.
- I 2005 ble dagens regime for produksjonskontroll, MTB, etablert, og siden da har norsk produksjon økt fra 600 000 tonn til 1,7 millioner tonn
- Norge har blitt en supermakt, men kan det opprettholdes?

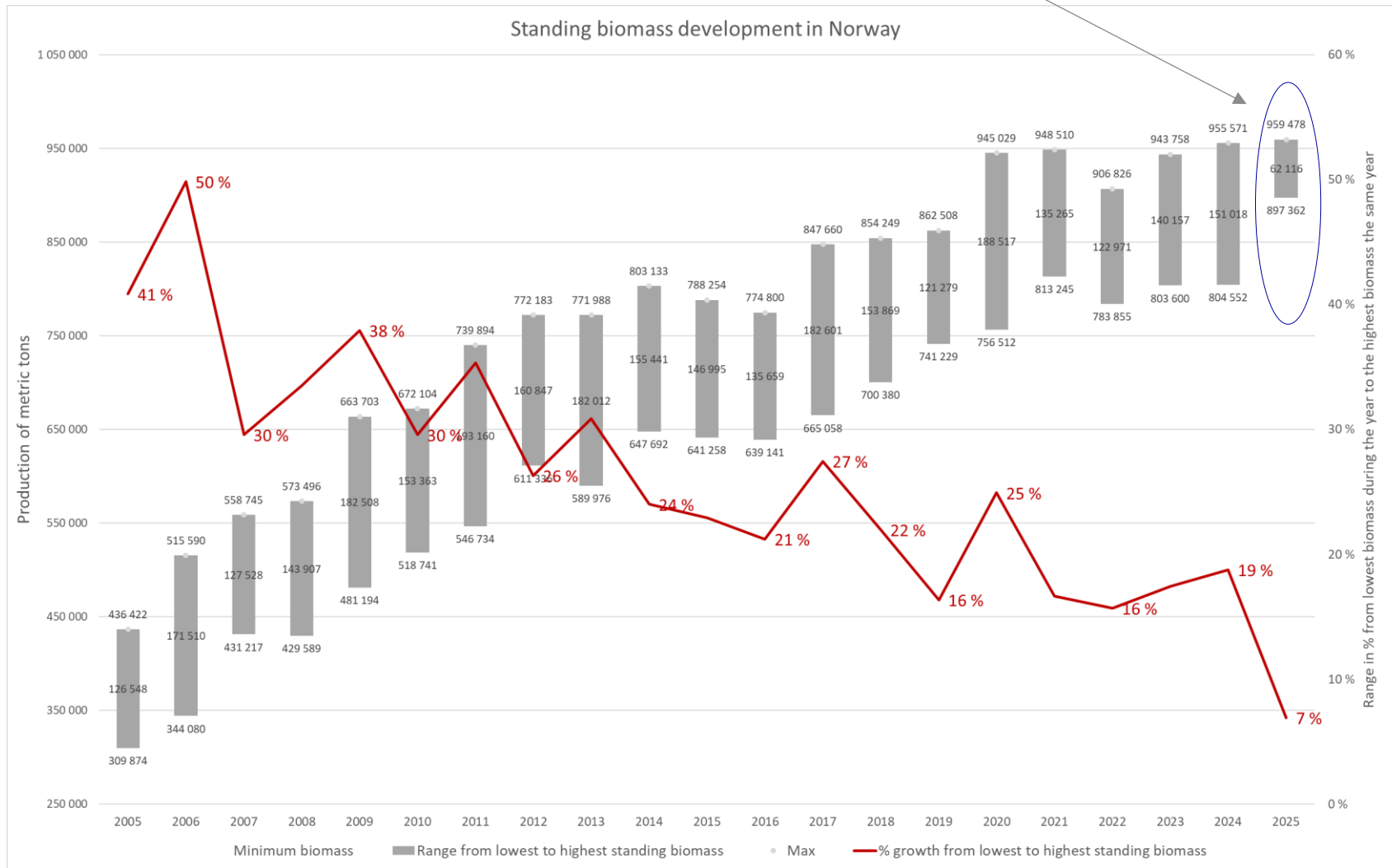
# Utfordring: Vekst – flying start etter overgang til MTB



# Utfordring: Den sterke veksten flater ut, men sprangvis utvikling

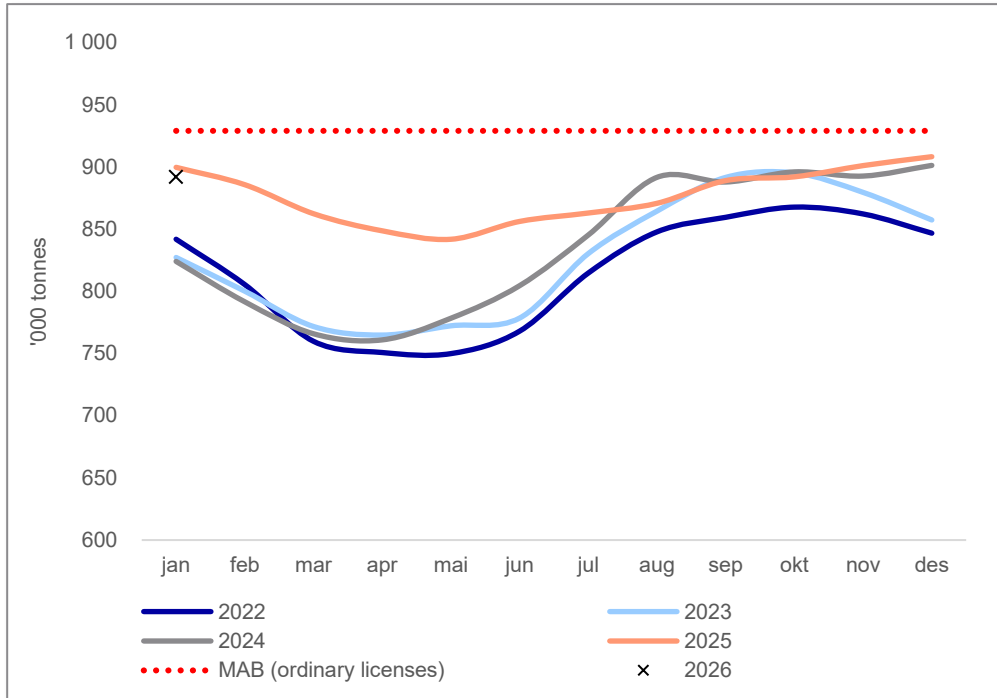


# Utfordring: Den sterke veksten flater ut, men “mind the gap”!

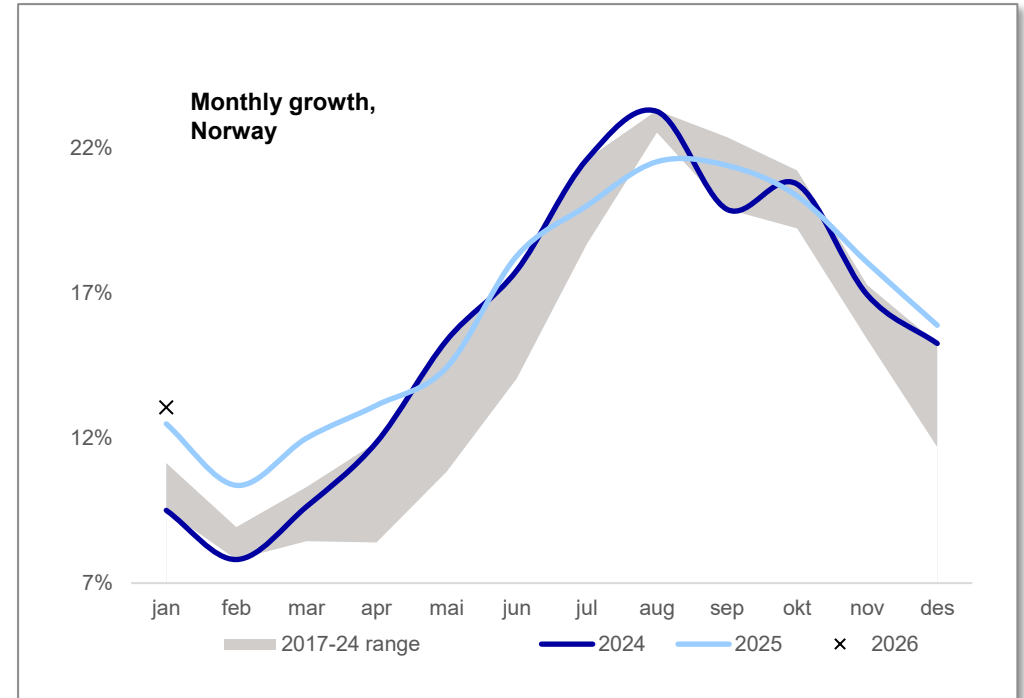


# Gapet lukkes, vekstpotensialet på sjø blir marginalt, men fortsatt oppside i bedre biologi

Norwegian biomass flat y/y, with lower number of fish and higher avg. weights



Monthly growth



Source: The Norwegian Directorate of Fisheries and Nordea

# Fremover mot og etter 2030

- Vekst i sjø vil være lav, hovedsakelig drevet av optimalisering av MTB (bl.a. mer storsmolt).
- Landbasert utbygging og drift er i gang, men der vi også ser at prosessene har vært tidkrevende.
- Lukket i sjø er en vertikal som foreløpig er mest anvendt til storsmolt og som kan bli en viktig innsatsfaktor for rask oppskalering av:
  - Havbruk til Havs er under utredning og mulig oppstart i løpet av 2027
  - Men som landbasert er det betydelige investeringskostnader og lang ledetid



Statsminister Jonas Gahr Støre. Foto: Arbeiderpartiet

## Støre varsler utdeling av oppdrettskonsesjoner til havs i 2027

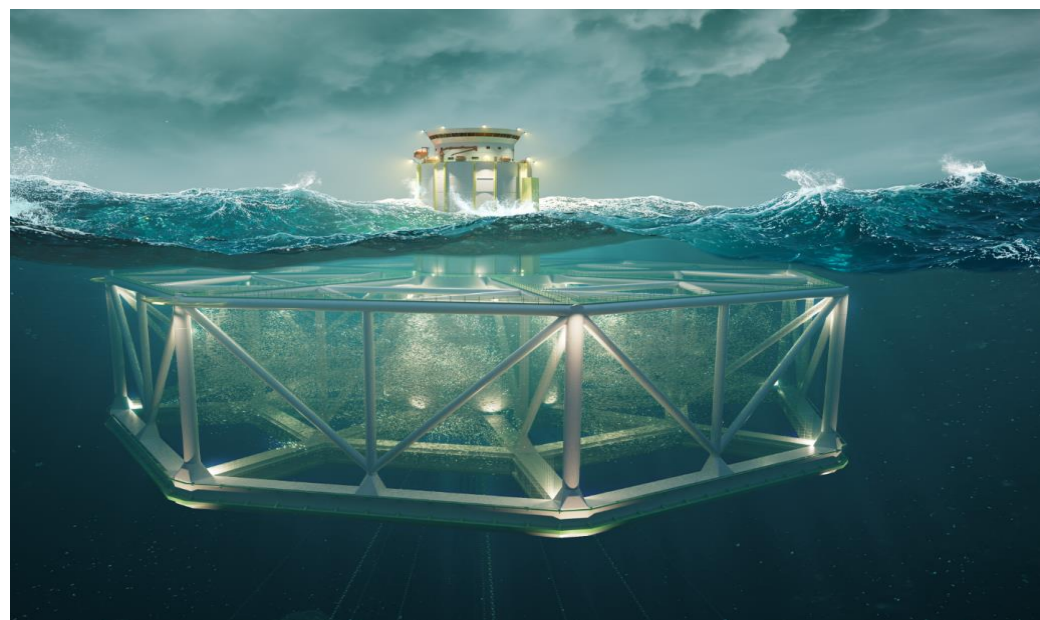
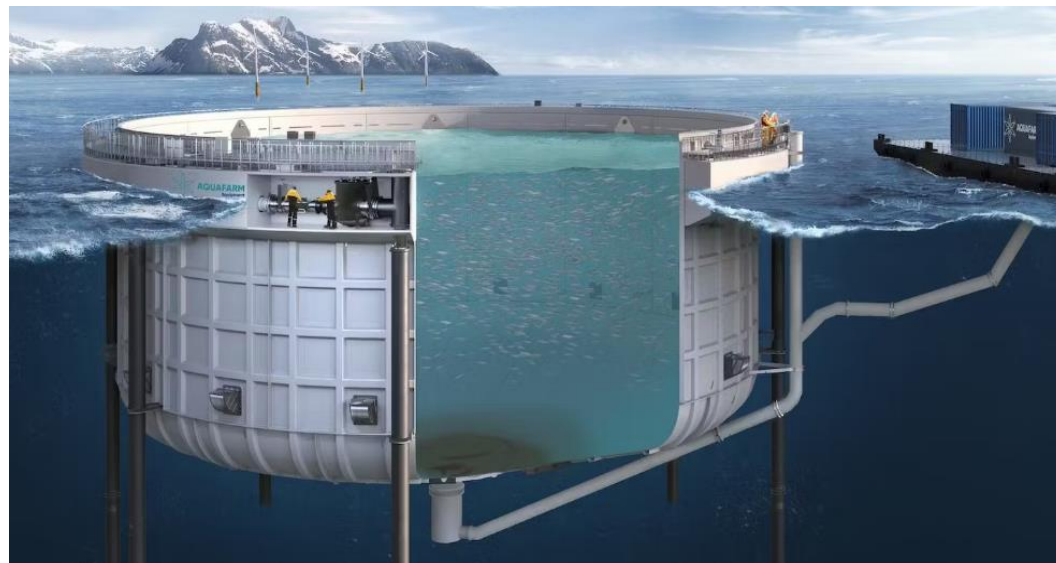
Nyheter av redaksjonen · 2 juni 2026

Nå har regjeringen konkludert.

Statsminister Jonas Gahr Støre (Ap) var tirsdag på besøk i Sandnessjøen. Her holdt han tale under åpningen av den 25. utgaven av Energi- og havromskonferansen.



# Fremtidig vekst



# Oppsummering

- Veksten i sjøbasert oppdrett som har gjort Norge til global supermakt på «high value Aquaculture» stopper
- Norge har globalt lederskap i de meste av Akvakultur verdikjeden.
- Krever store investeringer, og enda mer fremover,
- Noen kritiske suksessfaktorer:
  - Ha med banker og investorer (EK og gjeld)
  - Gründermiljøer og clustre for innovasjon og nytenking
  - Ta vare på og foredle unik kompetanse og know-how
  - Ha myndigheter og forvaltning som spiller på lag
    - Siste 5 års massive polarisering («ta de rike») er svært ødeleggende
    - Forenkle, forenkle, forenkle
    - Største trussel er redsel for å si ja, mindre nedside i å si nei.
- Maximizing HVHV<sub>aq</sub>
  - Hvilke norske miljøer og kapitalkilder kan bidra til å bevare norsk globalt hegemoni innen «High Volume, High Value Aqua Culture»?

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