A DIFFERENT KIND OF SUSTAINABILITY

Healthy stocks are not enough

The entire value chain must be economically viable, from vessel and factory to customer.

BIOLOGICAL + ECONOMIC

SUSTAINABILITY

"Without economic viability throughout the value chain, there will be no industry left to sustain."



A STRUCTURAL SHIFT

From 60–70 plants to around 15

The decline is not a minor adjustment. It is a fundamental reshaping of the North Atlantic industry.



LATE 1980s

60–70

peeling plants

TODAY

≈15

plants remain

GREENLAND 11 plants → 4 today

Available raw material could realistically be processed by 2 plants.

POLAR SEAFOOD

Raw-material costs rise. Finished-product prices lag

Processors are squeezed between volatile supply, competing markets and rising operating costs.

01



RAW MATERIAL

Higher prices and variable availability

02



PROCESSING

Weak margins and limited reinvestment

03



MARKET

Finished-product prices have barely moved in nominal terms

OTHER OUTLETS Hand peeling uses ~20,000 t of cooked-at-sea prawns · China influences smaller sizes

THE OPPORTUNITY

Treat a premium product like one

Limited supply underlines the importance of economically viable processing throughout the value chain.

1. **Recognise the value** — Quality, processing expertise and reliable supply all have an economic cost.
2. **Choose customers** — Prioritise partners who value quality, continuity and security of supply.
3. **Fund the future** — Create room for investment, innovation and modern production.



A fantastic shrimp. A healthy stock. Happy consumers.

But who can afford to peel it?