

Snapshot
report

France seafood market report 2025



Photo: Norwegian Seafood Council



Photo: Norwegian Seafood Council

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“Of the 23% of household income spent on protein, seafood accounts for about 25% of this, representing 8% of the household budget over the course of a year in France, amounting to approximately €300 per year.”

The French senate approved Prime Minister Francois Bayrou’s budget on Thursday 6th February, ending the political and financial challenge which effectively toppled the previous government. The new budget seeks to reduce spend by €30bn and increase taxes by a further €20bn to reduce the public deficit to 5.4% of GDP in 2025. At the same time, the government cut interest rates by 0.25%, with inflation below the European Central Bank’s target rate of 2%. Consumer confidence grew by three points to ninety-two in January 2025 but remains below the long-term average of one hundred between 1987 & 2024. However, uncertainty continues to reflect in French purchase patterns.

Sales of all products in supermarkets declined in 2024 (by -1.1%), impacted by the poor performances of non-food and still wines after the Egalim 3 law came into effect in the middle of the year. Food products, PGC-FLS (produit de grande consommation / frais et libre service) and traditional fresh products performed slightly better but sales of expensive products in traditional stores such as butchery and seafood declined due largely to price inflation.

The largest store sizes (hypermarkets) are losing share to e-commerce and are impacting market performance as French consumers prefer e-commerce as a way of controlling budget for their food, drink & fast moving consumer goods (FMCG) purchases which is a response to current domestic (such as the change in constitutional government) and international economic uncertainty.

Whilst in May 2024, in terms of inflation (or deflation), total food and drink for 2024 ended down half a percentage point. Compared to the pre-inflation numbers of 2021, food and drink costs were 21% higher. The highest category inflation came from chilled fish at +4.9%, significantly ahead of other proteins. Outside of chilled meat, fish and protein and ready meals, soft drinks & water was up 1.8%.

French consumers are shopping in more stores looking for value and trading down from brands to private label

“French consumers are shopping in more stores, seeking value and trading down from branded products to private labels.”

(+0.4% vs previous year); the only demographic that shows growth are consumers over 65 years of age, who have higher disposable incomes.

Average market percentage spend on offer in the market is over 27%, higher than the last 2 years. E.Leclerc is the retailer with the highest spend on offer at 28.6%. However, most retailers are reducing spend on offer currently.

E-commerce food and drink spend is circa €22bn and grew by 8% in 2024, with specialists such as Amazon growing by nearly 16%.

Online shopper penetration is increasing with older shoppers, with over 65's up 16% vs 2023.

Data from Circana indicated that the PGC-FLS turnover reached €134bn for the full year 2024 which is circa 60% of food and drink sales in France, with value sales declining by 0.5% and volume sales declining by 0.9%.

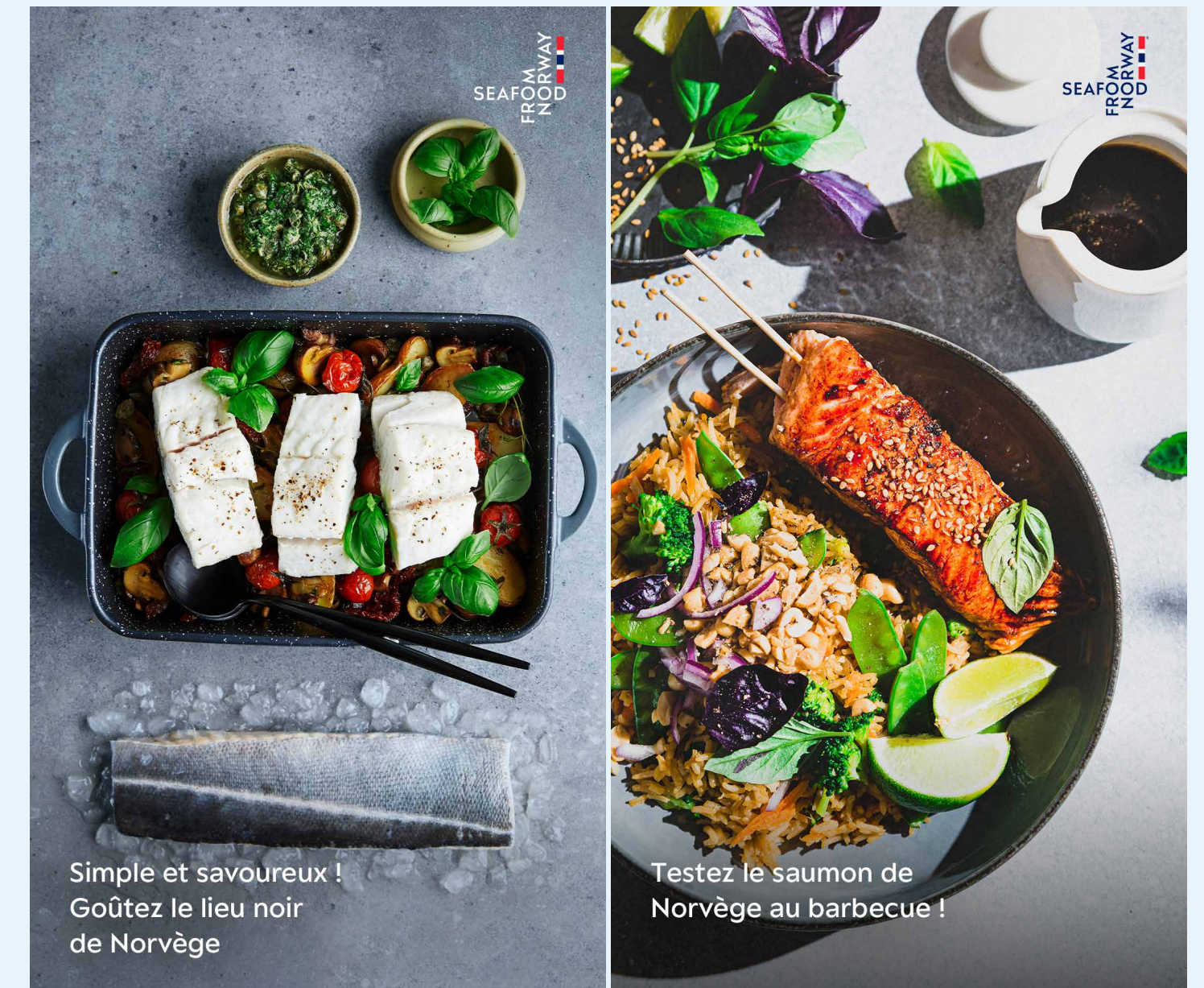
Private label grew by 0.4 percentage points in 2024 to 35.8%, with the fastest growth from premium priced private label (up by +5.8% value and +5.1% volume respectively).

The French government and food

According to the French government, official statistics from Insee (National Institute of Statistics and Economic Studies), 37% of household spend is on food and tobacco in France with food down 0.4% and tobacco up 0.9% vs 2023.

In a climate of uncertainty and with the current domestic and international situation, 55% of French consumers have stated they are reducing their out of home consumption.

The French government uses four main messages to promote healthy eating – these are: “For your health, eat at least 5 fruits and vegetables a day”, “For your health, practice regular physical activity“, “For your health, avoid eating too much fat, too much sugar, too much salt“ and “For your health, avoid snacking between meals”.



“The French government recommends two portions of fish per week including oily fish such as mackerel, herrings, sardines and/or salmon.”

French gastronomy

The French Mission for Heritage and Food Cultures (Mission française du patrimoine et des cultures alimentaires, MFPCA) defines the gastronomic meal of the French as “a ritualised social practice intended to celebrate important moments in life, such as births, weddings, anniversaries, successes and reunions”. It is the art of “eating well” and “drinking well” practiced in a spirit of conviviality.

In November 2010, UNESCO recognized a cultural specificity in France and their relationship with food, in the way they eat and cook.

“Food, cooking and gastronomy are synonymous with French culture.”

To celebrate the global recognition for French cuisine by UNESCO, the French celebrate their food at Fête de la Gastronomie in March every year - it is a food festival across the whole of France and every year several thousand events are organised throughout France to take part in the fête: including banquets, tastings, picnics, culinary workshops, and conferences with local

and famous dishes such as Beef Bourguignon and Tarte Normandie served.

The OECD (Organisation for Economic Co-operation and Development) rank the French as ‘world champions’ in terms of average time spent eating (just ahead of the Italians), with an average of at least 2 hours a day.

France is famous for many global icons of food such as the global fine dining awards system, ‘Michelin stars’ which was founded in France in 1926, which also has the highest number of star awarded restaurants in the world (639).

Another iconic global food institution is Le Cordon Bleu (‘The Blue Ribbon’) which is a world-famous French hospitality and culinary education institution can trace its origins back to 1930.

Famous French seafood dishes include La Bouillabaisse Marseillaise, Moules Marinieres and Breton Cotriade.



Photo: Norwegian Seafood Council

“37% of French consumers have been eating more meals at home, and 44% of French households cook most of their meals from scratch, only occasionally using pre-prepared ingredients.”

French shopper and consumer insights

According to a recent NIQ & GFK report, rising costs are high on the agenda of French consumers; French consumers also over-index vs Europe on immigration, climate change / the environment and happiness.

24% of French consumers seek quick solutions to food and assemble ready-to-eat foods, spending little time cooking – this group has grown by +6.1% since 2019.

Traditional Fresh products are defined by Kantar as products from fishmongers, butchers, cheese shops and fruit and vegetable sellers; as well as small stores and markets, these products can also be bought chilled in

Sources: The French Government, Circana, NIQ, Kantar, Insee, Agrimer and other Sources, 2024. (See slides for further information). Photo: Norwegian Seafood Council

supermarkets. These are around 37% of all fast moving consumer goods (FMCG) spend, and 60% of baskets contain a traditional fresh product, with over 60's being the key demographic.

51% of households are considered vulnerable (+11 % points since 2023) according to Kantar research, and it's clear household spend is struggling to recover – a number of economic factors are impacting this including high prices, low wage growth, and increased housing costs coupled with rising bills.

From July 2024, along with other laws introduced under the Egalim 3 law changes, supermarkets must inform French consumers about products whose quantity has decreased but which are sold at the same or a higher price. This only applies to stores over 400m2. Michel-Edouard Leclerc, the president of E.Leclerc has said that he thinks it is a hard regulation to implement – “It's going to be extremely difficult to have good information.”

Since 2018, the Egalim's laws have been designed to protect farmers and producers in the agricultural and food sector. The laws are designed to enable farmers to have a decent income by distributing value better, improve health and environmental production conditions, strengthen animal welfare, and promote healthy, safe and sustainable food for all.

Worth €8bn, 70% of French consumers see breakfast as important, and this influences snacking behaviour



with over 18% of French consumers snacking if they don't have breakfast. Furthermore, 43% are looking for healthier options and 33% more local options.

Fast Food is worth €10.39bn with the top 2 favourites being pizza and burgers, however there are clear differences with different generations, with the likes of tacos and sushi appealing to younger consumers.

The deconstruction of meals is accelerating, with 25% of French people opting for a snacking solution (includes: eating outside of usual meal times, eating on-the-go, fast food and traditional snacks such as crisps & biscuits) at dinner in 2024, compared to 11% in 2021.

Insights from Circana show that a significant number of French consumers are eating meals at home with only 3.7 meals per week eaten at the work-desk.

23% of French consumers bought their lunch at supermarkets and a further 18% from a bakery in 2024.

Nearly a quarter of French households prefer meals which are convenient or quick ('Vite-fait'), which has grown 6

“53% of French consumers are committed to ‘eating well’ as a proactive way of protecting their health, with a balanced diet being a priority.”

percentage points over the last 5 years – these tend to be younger families with little time.

49% of French consumers use a specialised local store at least once a week and this rises to 55% for consumers over 65 and 54% in urban areas, and 72% of French consumers want small local shops / businesses near them – especially in rural areas.

34% of French consumers claim they follow a flexitarian diet, and within this, 25-34-year-olds over-index, with 42% increasingly eating fruit and vegetables, and health being a key driver of choice. A further 11% follow a vegan or vegetarian diet. Health is a key motivator for these diet trends.

Plant-based seafood is becoming more common in France with 47% of French consumers claiming to occasionally or regularly eat the product.

Nearly half of French consumers are willing to pay more for food products which are good for the environment and 64% of respondents say they are willing to pay more for products that guarantee fair remuneration for small producers. Local & French-made is also important to French consumers.

Greenwashing is a cause for concern with the French – with this subject gaining the highest number of complaints made to French advertising standards agency in 2022. In France, 63% of French consumers want policymakers to increase standards for transparency on product certifications.

French consumers also take animal welfare seriously and the French government has introduced recommendations for manufacturers to follow accordingly. According to Kantar - 73% of French consumers favour animal products that respect animals.

In terms of Seafood labelling, research from Oceana across France, Spain and Belgium found that 60% of processed seafood products in France which display partial or complete information, voluntarily provided information on species, origin or fishing gear (but only 5% show fishing gear).

“French consumers appreciate labelling; information which is important on pack includes: list of ingredients, place of manufacture and health notifications such as NutriScore.”



Fish and seafood trends in France

According to Kantar, total Seafood is worth €8.3bn in France and is declining in volume by 1% (MAT to P1 2025 vs P1 2024). This has been impacted by declining frequency and also both average weight of purchase and trip volumes which are falling. Total Fish species is worth €6.3bn and is declining faster than seafood overall for similar reasons.

Quality and freshness are important to French consumers when it comes to buying fish, although price can be a barrier.

57% of French consumers eat fish weekly. 60% of this is either bought fresh from fishmongers or from their local supermarket, with older male consumers a key demographic for fish, whilst with shellfish / crustaceans its younger male consumers.

66% of those who eat seafood regularly choose salmon and 61% choose smoked salmon as a species to consume.

Salmon consumers are likely to be older, wealthier consumers, although smoked salmon is bought across all ages more.

Farmed salmon in France is mainly imported (from Norway and Scotland), however proposals are being assessed to increase local production, with 3 new farms planned with investments of between €150-275m which will be in addition to current supply.

“Salmon is the largest species of fish consumed worth €1.64bn, with a 20% value share and an 11% volume share in France, and is the only top 9 fish species in growth.”

(Includes: cod, tuna, prawns, pollock, scallop, sardine, mackerel & other).

Most trout (91%) sold in France is smoked / produced in France and compared to smoked salmon, trout is perceived more as an everyday product, with 68% of French people saying they consume it without any occasion, compared to 59% for smoked salmon.

Over a fifth of seafood value sales comes from traditional specialists – markets, fishmongers and other stores.

Fishmongers are facing inflation challenges, but by adapting and focusing marketing spend on ‘fresh’ and ‘local’, the sector is improving with 83 new seafood businesses created in 2023.

28% of French consumers who eat seafood more than once a month choose Saithe as a species, with an average per capita volume of 0.7kg per person.

Total sushi / surimi / maki market was valued at €152m in 2023 with 15% of French households regularly consuming sushi, with 18–25-year-olds over-indexing in consumption.

Increasing in popularity as an alternative protein, around 60% of French consumers have tried Seaweed. France & Spain are the biggest markets for crab in Europe, accounting for circa 60% of volumes; King Crab has largely been imported into France since the early 2000’s; Its high price per kg (circa €100 plus) means it is served mainly in Michelin starred restaurants. However, there are some products ending up in high-end retail.

French Out of Home Market Insights

In 2024, France had 180,000 restaurants with a 2023 turnover of €120bn with more than 50% of these located in an urban environment.

This includes 8,953 Fast Food restaurants with a turnover of €10.39bn.

In 2023, 38% of new restaurants were traditional whilst 62% were fast food, which is growing faster.

More than three-quarters (77%) of respondents to NielsenIQ’s Homescan survey on French consumers said they were concerned about out of home price increases, and some of them have reduced their outings to restaurants and bars.

The seafood category in restaurants was worth €1.5bn in 2021 with three quarters of products sold being fresh, and most of the rest being frozen. The sector is under pressure on pricing which is leading to menu changes.

“From the latest NIQ Curren Goodden Associates (CGA) data, looking at December 2024, French consumers are eating and drinking out less frequently vs last year, with all days of the week down vs 2023, apart from Tuesday’s.”

The French economy (Q4 2024 – Q1 2025).

Budget: the French senate approved Prime Minister Francois Bayrou’s budget on Thursday 6th February, ending the political and financial challenge which effectively toppled the previous government. The new budget seeks to reduce spend by €30bn and increase taxes by a further €20bn to reduce the public deficit to 5.4% of Gross Domestic Product (GDP) in 2025. These measures are further expected to increase uncertainty with French consumers.¹

Interest rates: at the same time, the French Prime Minister urged the European Central Bank (ECB) to further cut interest rates to allow European economies to grow faster and compete with the likes of the USA and China. On the same day of the budget, the ECB cut the headline interest rate by twenty-five points allowing the Banque De France to cut interest rates from 3% to 2.75%.²

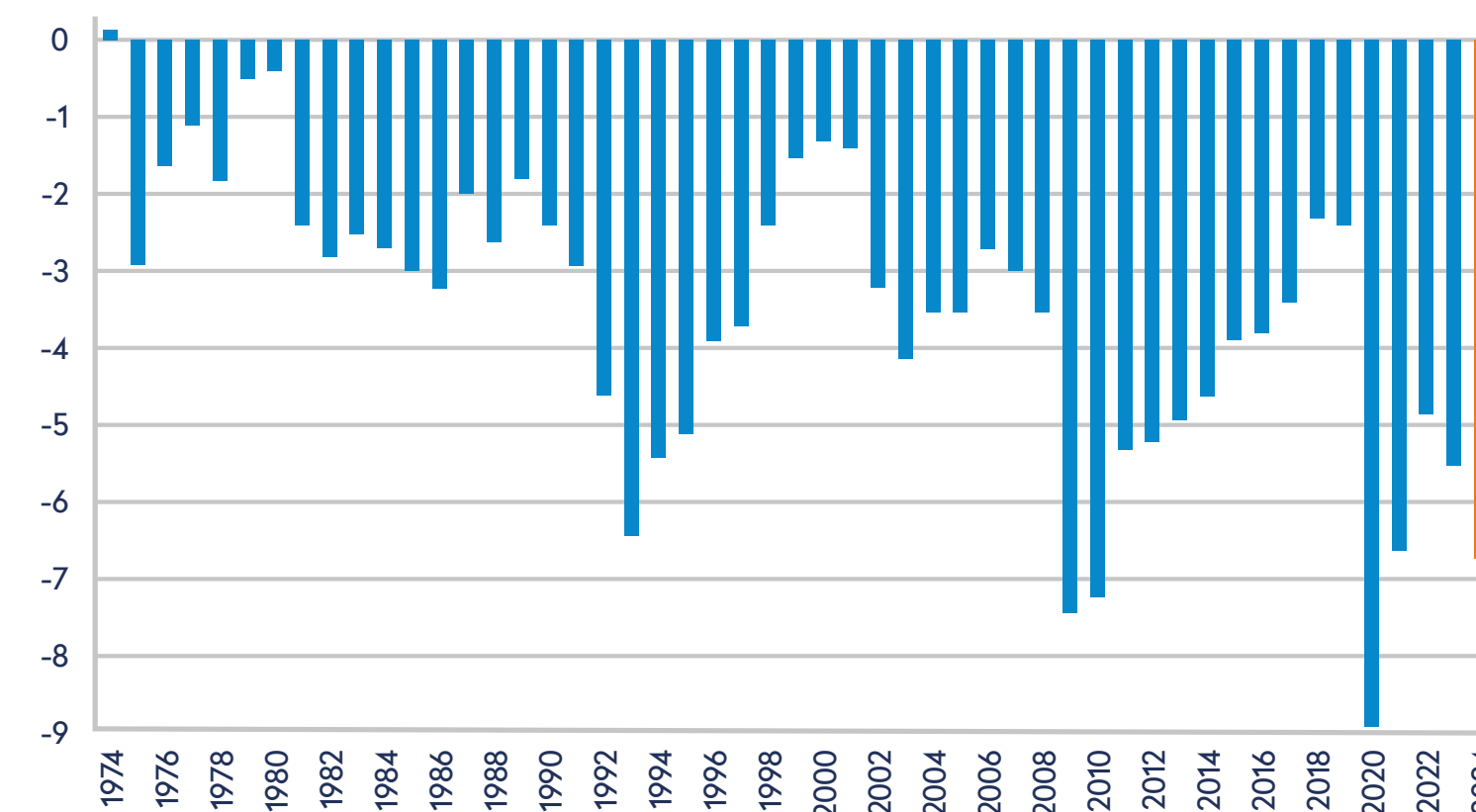
Inflation: French inflation came in below the ECB’s 2% target, a relief for French policymakers contending with budget deficit challenges. Prices in France still increased at a steady rate at the start of the year, according to The National Institute of Statistics and Economic Studies (INSEE) on Friday 31st January 2025. The nation’s harmonised inflation rate, adjusted for comparison with other Eurozone countries, came in at 1.8% year-on-year in January.³

Economy: growth strengthened in Q3 2024, at +0.4% Q3 vs Q2 (after +0.2% in Q2 vs Q1, 2024), due mainly to the favourable impact of the Olympics, offsetting a decline in business performance (-1.2% Q3 vs Q2 2024) and household investment (-0.6% Q3 vs Q2 2024). Disinflation is now clear and will continue in 2025 (1.1% on average compared to 2.3% in 2024 according to the harmonised index), which has not yet led to an acceleration in the growth of household consumption (apart from during the Olympics).⁴

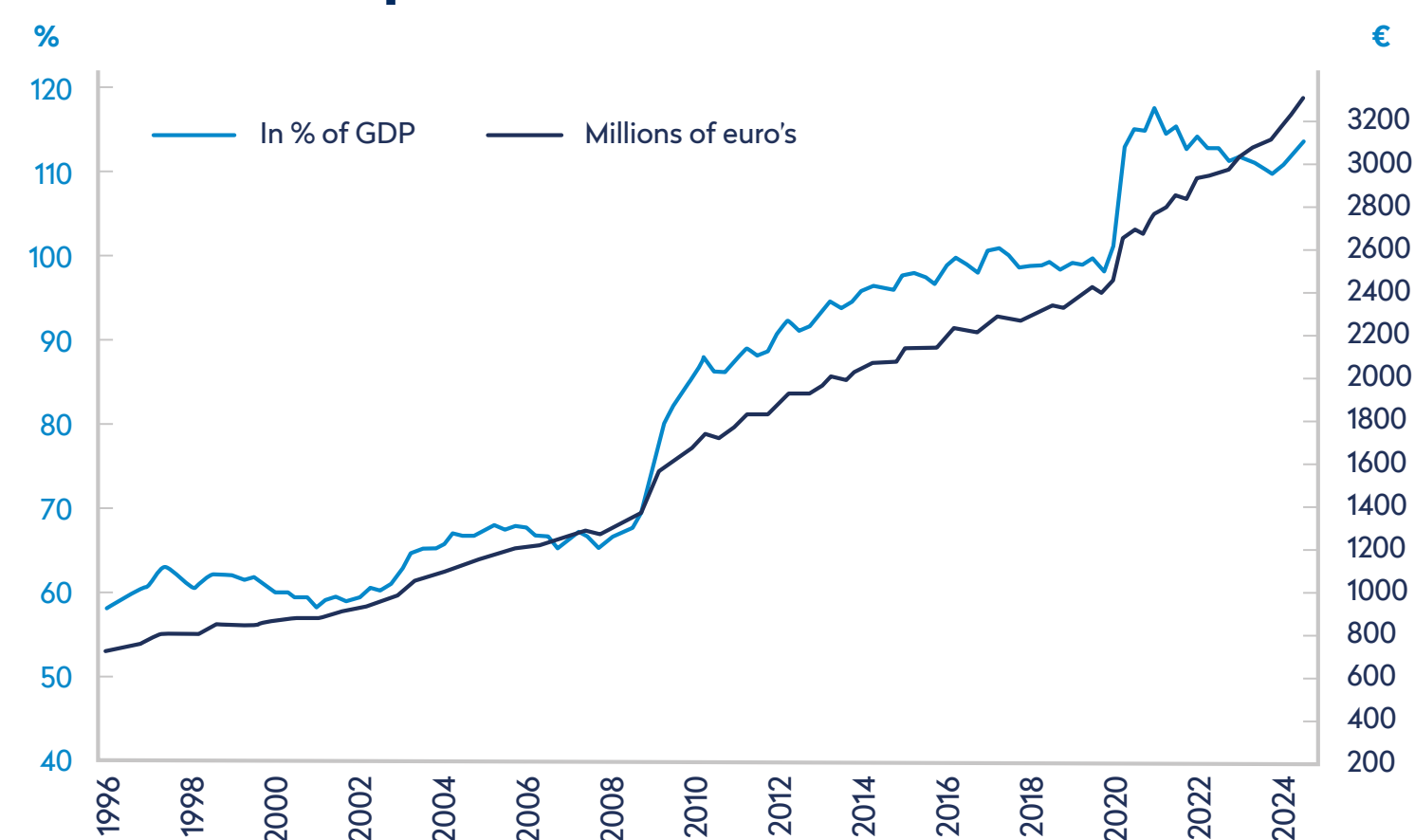
In 2025, growth is expected to slow to 0.8% (from 1.1% in 2023 and 2024), due to a deterioration in the labour market plus political uncertainty.⁴ However lower interest rates & more flexible bank spending policies led to a more positive French housing market which is finally starting to stabilise.³

Consumer confidence grew by three points to 92 in January 2025 but remains below the long-term average of one hundred between 1987 & 2024. However, uncertainty continues to reflect in French purchase patterns, as consumers buy less and trade down to private label with total spending falling by 0.9% in 2024 as prices are high vs. 2019, and French consumers are not perceiving current FMCG deflation.⁵

France: In 2024, the public deficit will be around 6.7% of GDP and will near historic levels²



France: New historical record for French public debt²

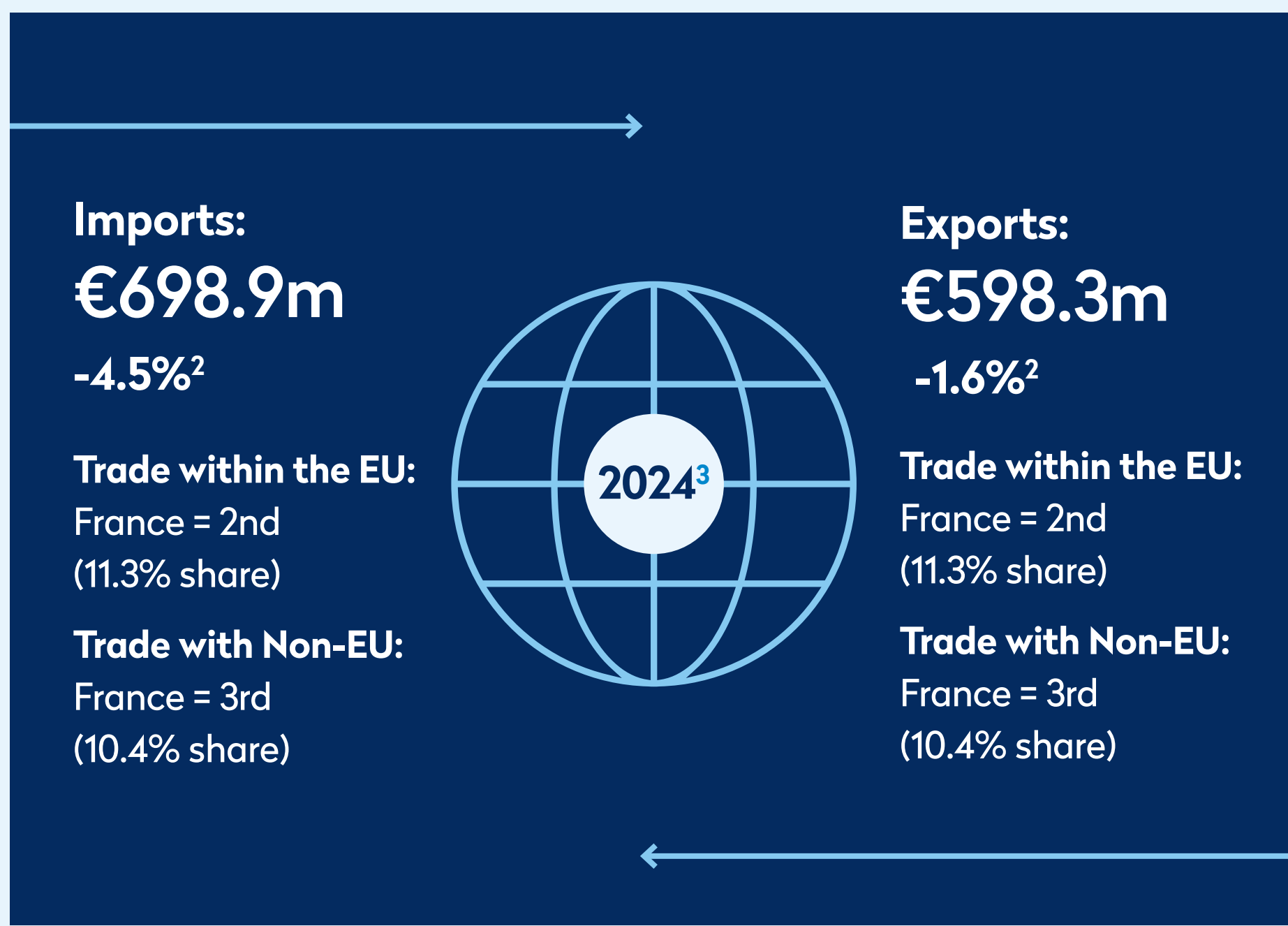
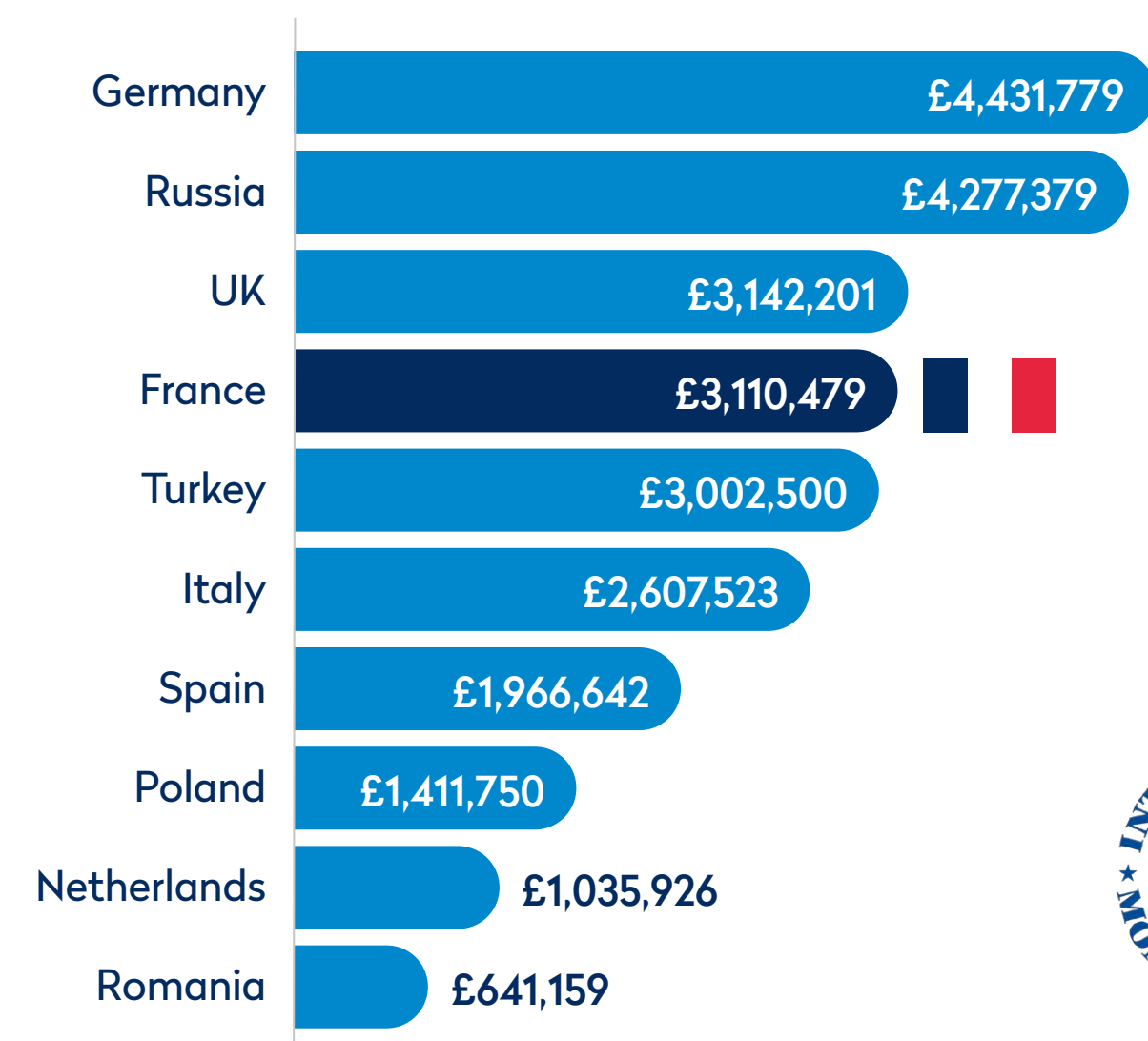


Sources 1: Les Echos 11/02/25, 2: Reuters 01/02/25, 3: INSEE 31/01/25, 4: Banque De France 27/01/25, 5: Kantar 30/01/25. Growth, debt... 2024 was a "messed up year" for France, 2025 is likely to be a "worse year".

FRANCE IN NUMBERS

France is the 2nd largest economy in the European Union and leads Europe in key protein categories such as beef.

Europe - GDP - £ millions – March 2025¹



France is the fourth biggest economy in Europe and the 2nd largest economy in the European Union after Germany.^{1&3}

It leads the world and Europe in key food and drink categories such as beef.⁴

Whilst the minority government in France under Francois Bayrou has started 2024 with a caretaker budget with ambitions to cut the deficit on spending, political pressures from the socialist party and the far right will continue to weigh on the economy in 2025.

Imports and exports declined in 2024.²

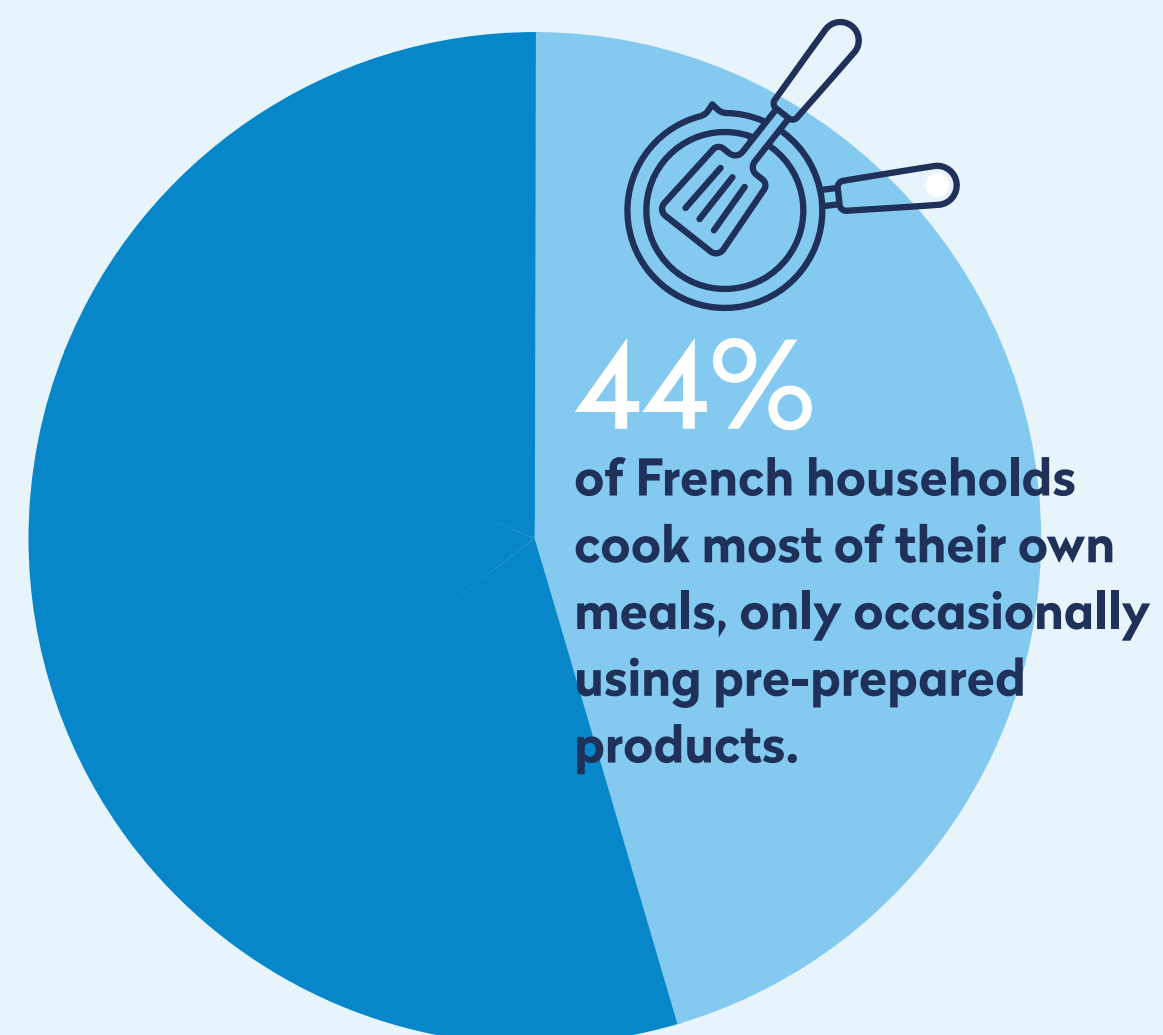
Where does France rank in terms of food & drink categories⁴:

- Europe's leading exporter of beef
- World's leading exporter of wines & spirits
- The 3rd largest pig herd in Europe
- Europe's leading producer of oysters
- Europe's leading producer of cereals
- World's 2nd largest producer of sugar beet

FRENCH ATTITUDES TO CUISINE

Many French consumers cook, especially as consumers are at home more, and the demand for 'homemade' is rising...

% of French consumers¹



23.8% of French consumers who are seeking quick solutions to food and assemble ready to eat foods, spending little time cooking. These have grown by +6.1% since 2019¹

Attitudes to food and cuisine

Taste and product quality are key drivers for French consumers.⁴

French consumers also like to try new dishes (1 in every 2 consumers stated that this is the case).⁴

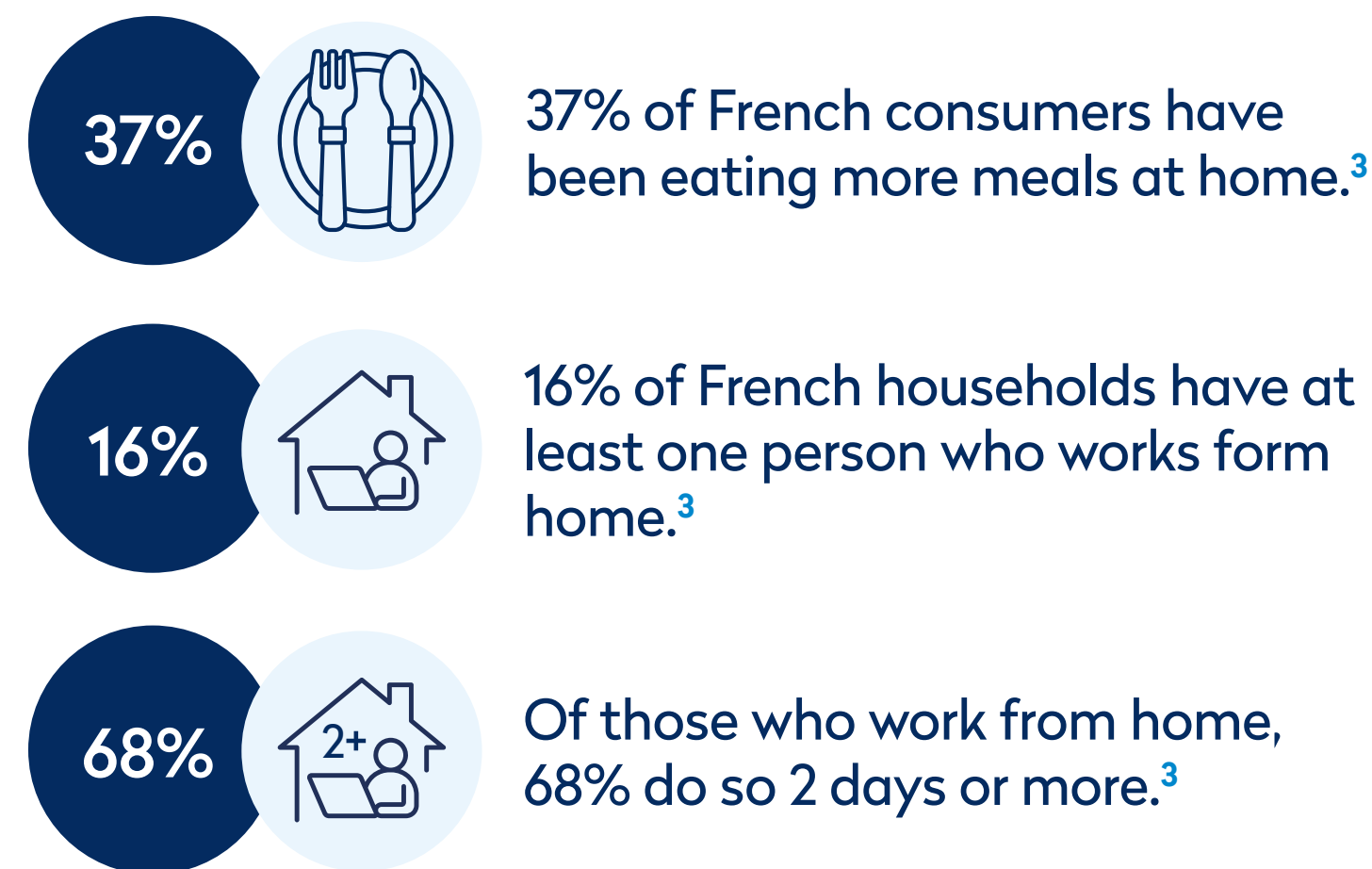
47% of households have at least one member of the household who is a flexitarian; plant-based food is of interest to a large proportion of French consumers with the belief that it is because plant-based is healthier.⁴

There has been a rise in the desire for 'homemade' from French consumers – this is something traditional and specialist stores have been increasingly catering for.⁴

76.3% of French people believe that “learning about flavours from elsewhere is a way of travelling and discovering other cultures” – world cuisines are enjoyed in France with Asian flavours (particularly Japanese), Tex-Mex, Indian and Middle Eastern all popular.⁵



More French consumers are eating food at home, partly influenced by cost-of-living challenges which is impacting food.



70% of French consumers see breakfast as important and this influences snacking behaviour with over 18% snacking if they don't have breakfast.

(snacking includes: eating outside of usual meal times, eating on-the-go, fast food and traditional snacks such as crisps & biscuits).

The importance of breakfast



70% of French consumers consider breakfast the most important meal of the day.

What are French consumers looking for?

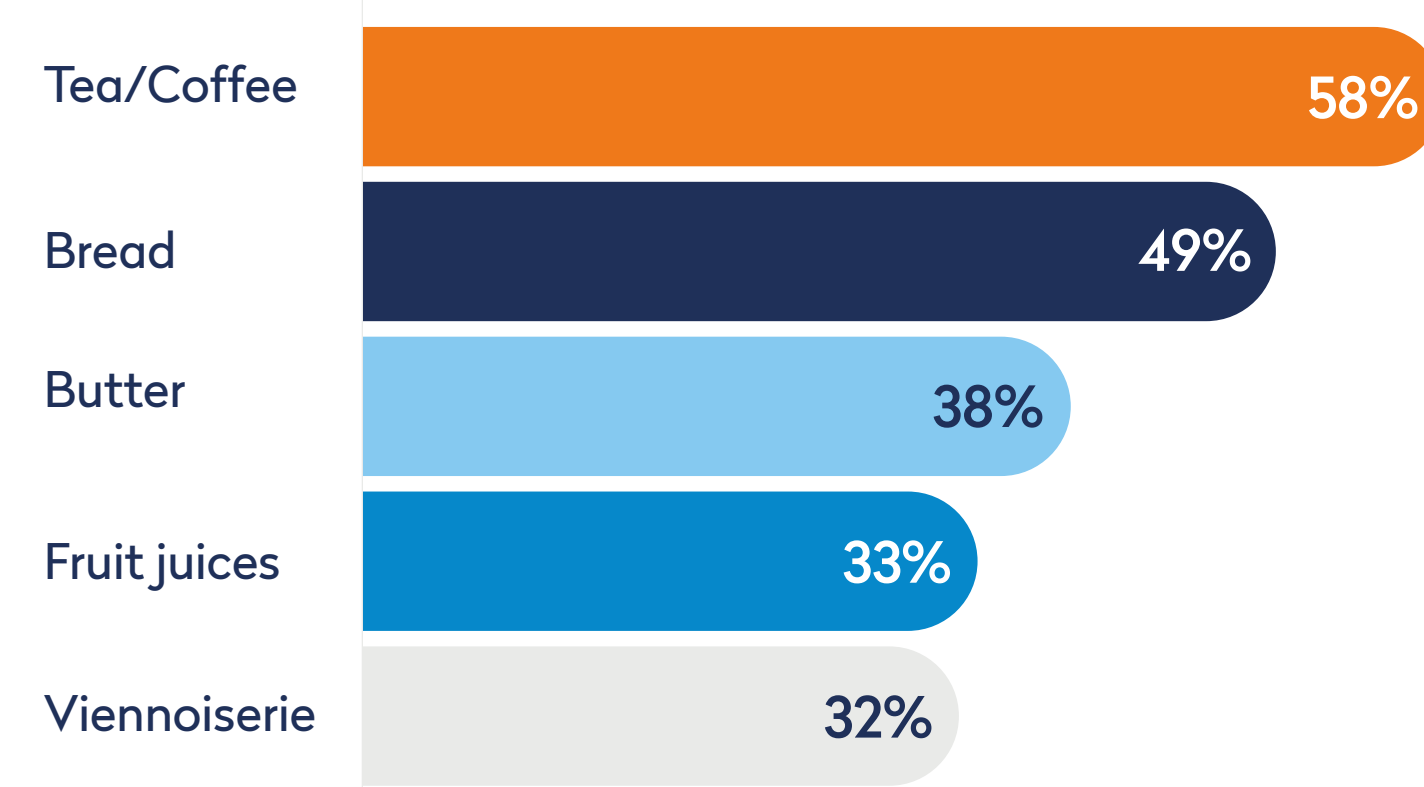


Breakfast – % by age group

Unsurprisingly, with less time, less younger consumers have breakfast whilst conversely the opposite is the case with those over the age of 55.

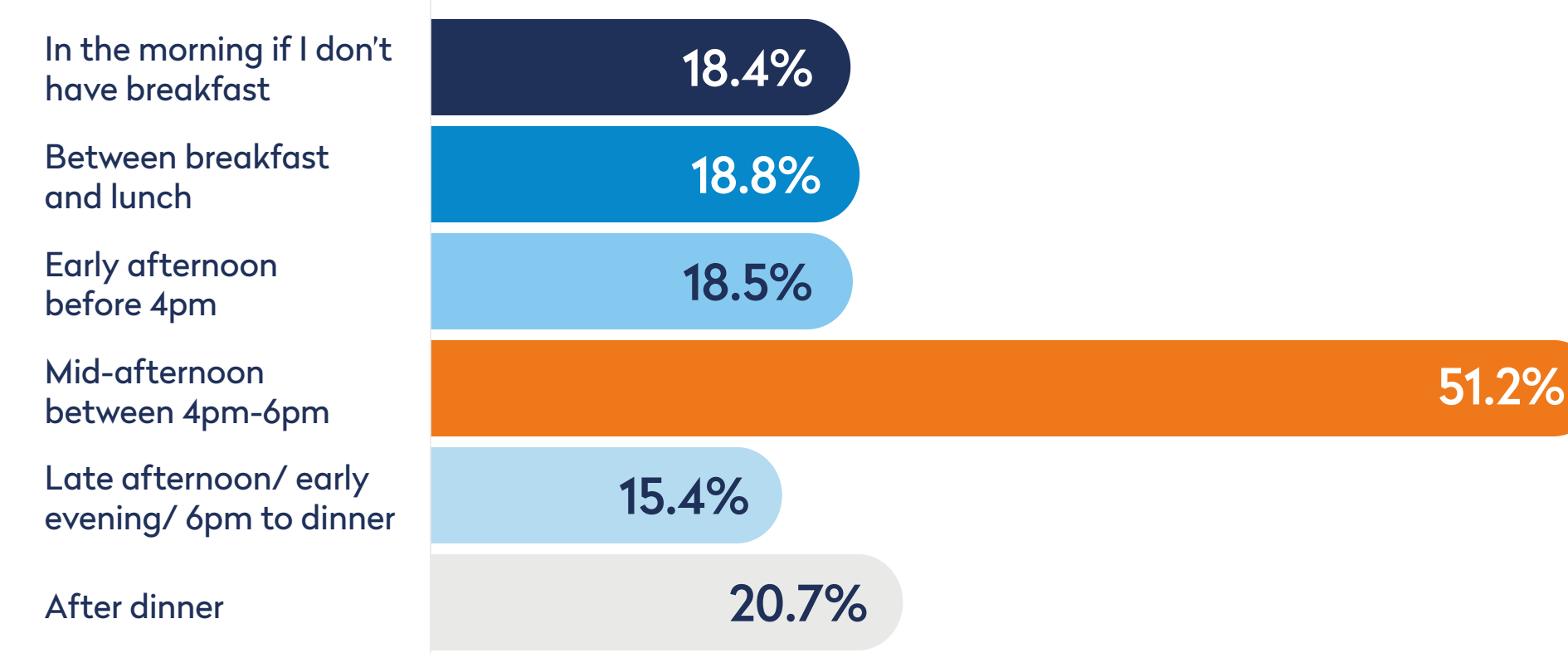


Staples of French breakfast



Hot drinks and bread are the key ingredients of French Consumers' breakfasts.

When do French consumers snack?



Breakfast influences snacking, with 70% of French consumers placing importance on breakfast, more French consumers snack in the afternoon between 4 and 6pm.

HEALTHY EATING

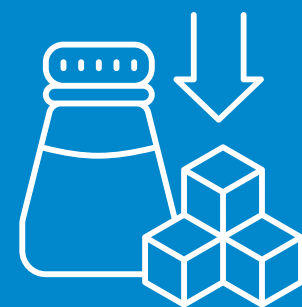
53% of French consumers want to eat more healthily.



53%

of French consumers are committed to 'eating well' as a pro-active way of protecting their health.¹

What does this mean...¹



77%

believes this means limiting salt, fat and sugar.



72.5%

of households buy vitamins as a way of being pro-active.



35%

actively seek foods which have nutritional benefits that help reduce health risks.

Nutri-Score



95% Awareness

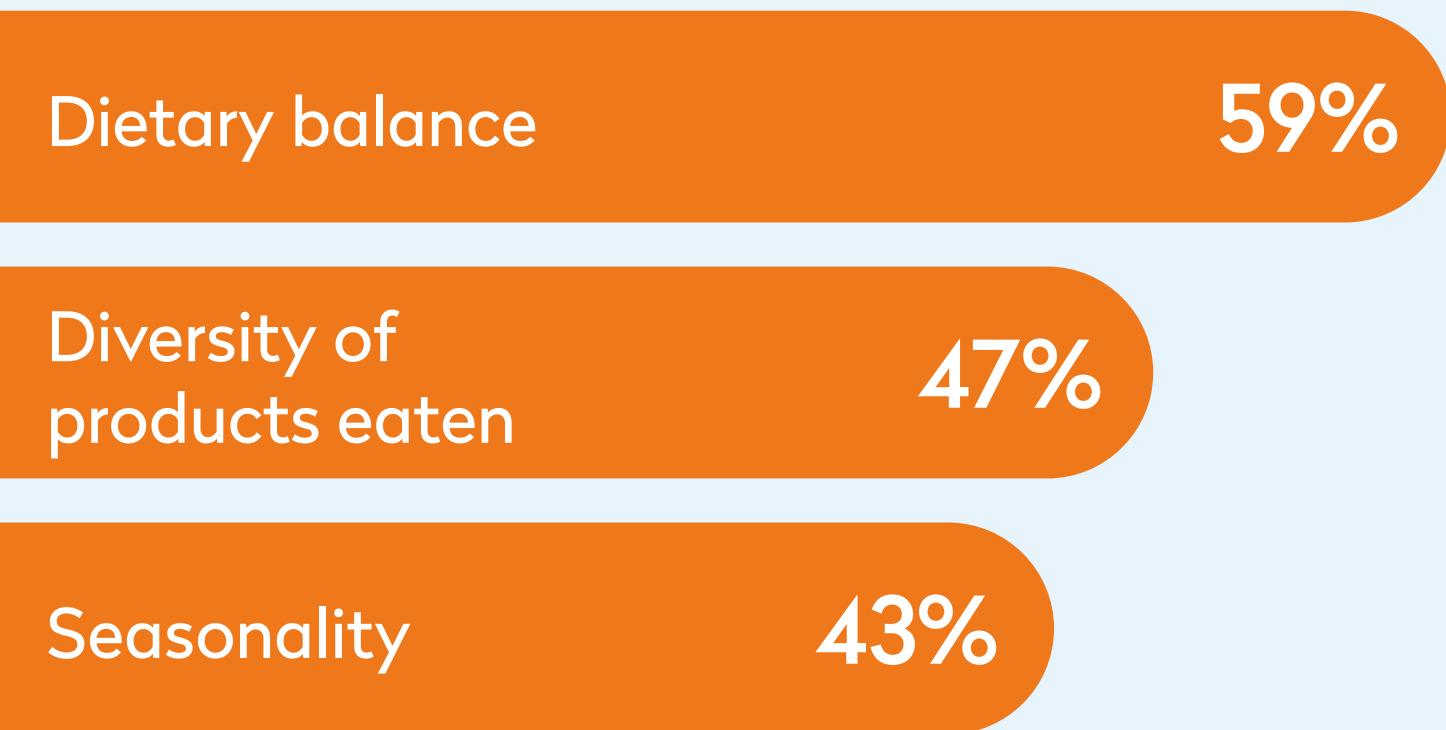
56% Influences purchase decisions

95% Used to help maintain a healthy diet

Nutri-Score & French consumers¹

- ✓ As with other European countries, France has used the Nutri-Score system since 2017.
- ✓ This is a front-of-pack label that informs about the nutritional quality of a product, in a simplified and complementary way with the mandatory nutritional statement (as stated in the INCO Regulations).
- ✓ Based on a five-color nutritional scale: from dark green to dark orange.
- ✓ Associated with letters, from A to E, to optimise the logo accessibility and understanding by the consumer.

French priorities in terms of food: % of French consumers²

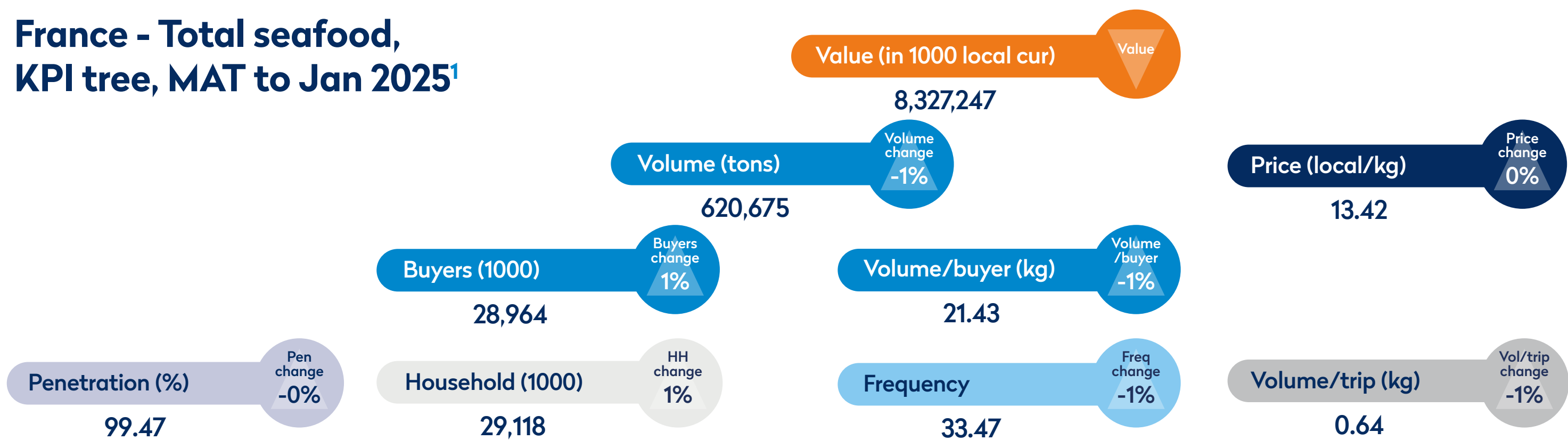


Sources: 1: Kantar Usage, Healthy Eating November 2024, 2: Proteines France Qual Research July 2024.

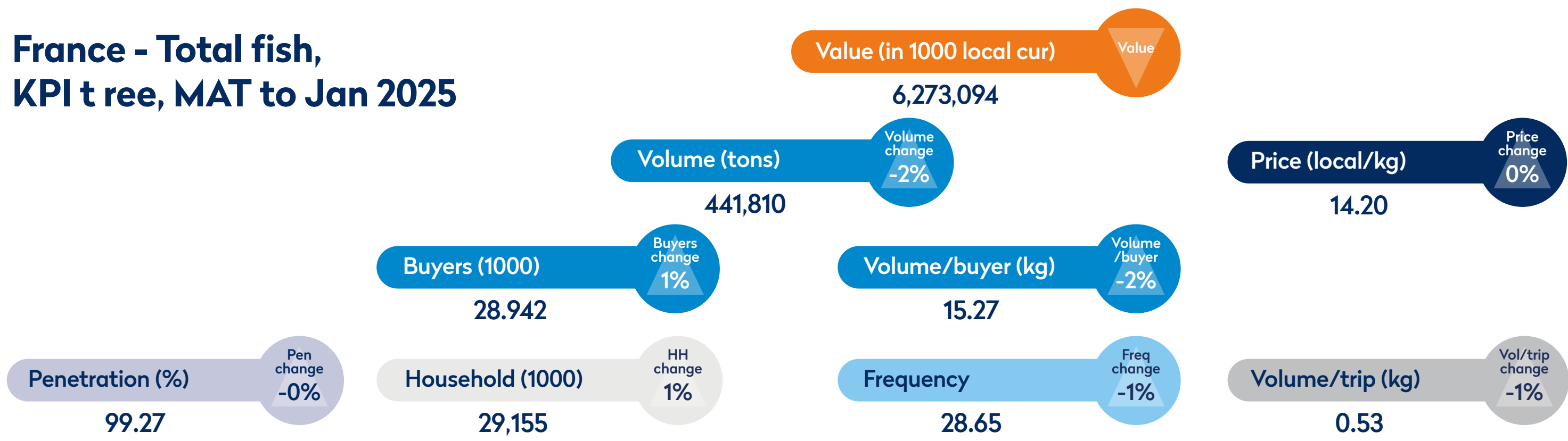
SEAFOOD AND FISH MARKET SIZE AND PERFORMANCE

Total seafood is worth €8.3bn euros in France and is declining in volume due to consumers buying less seafood and buying less often.

France - Total seafood, KPI tree, MAT to Jan 2025¹



France - Total fish, KPI tree, MAT to Jan 2025



- Total seafood is worth €8.3bn euros in France and is declining in volume by 1% (MAT to P1 2025 vs P1 2024).
- Declining frequency and both average weight of purchase and trip volumes are the reasons behind this volume decline.
- Total fish species is worth €6.3bn euros and is declining faster than seafood overall for similar reasons.

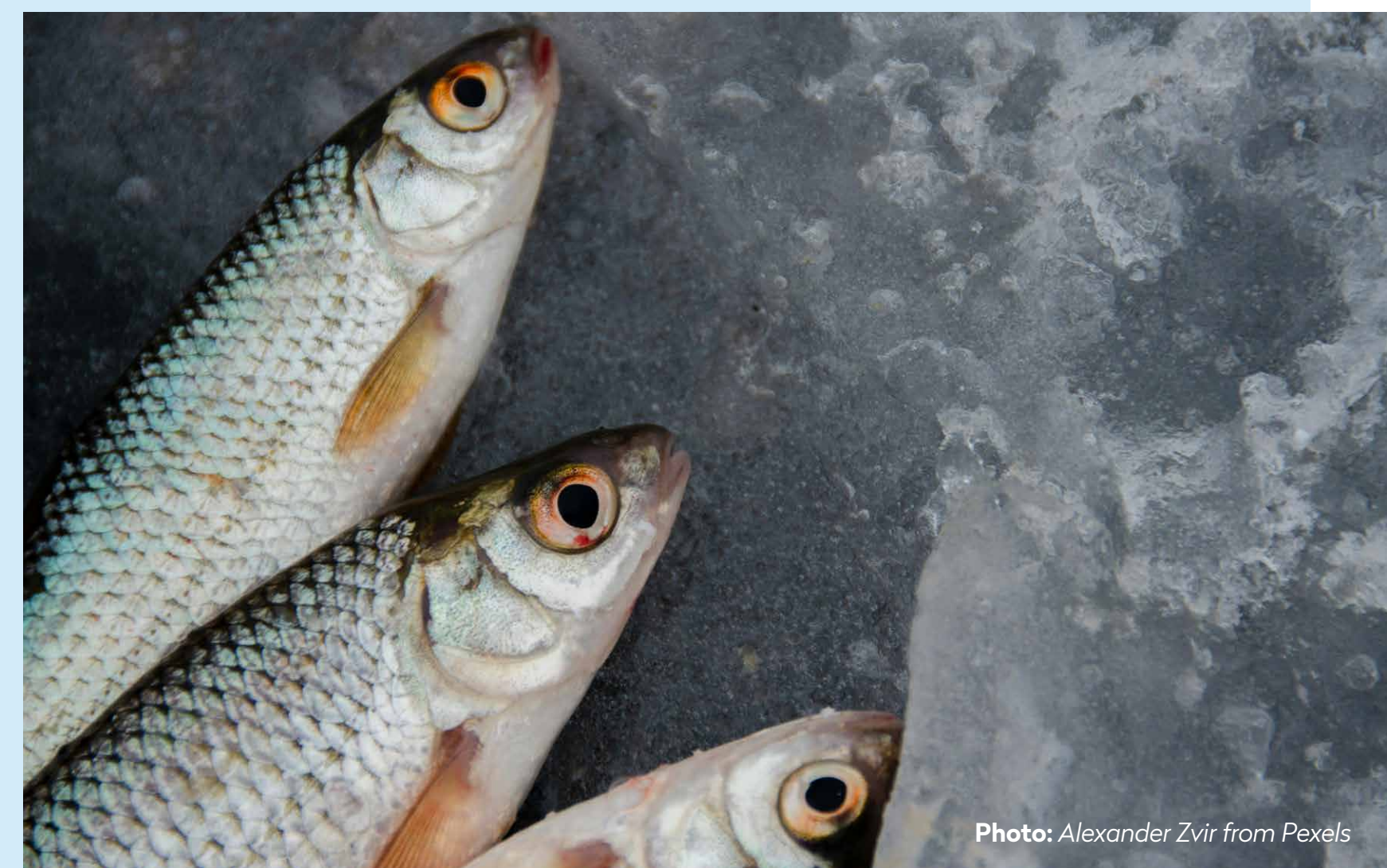
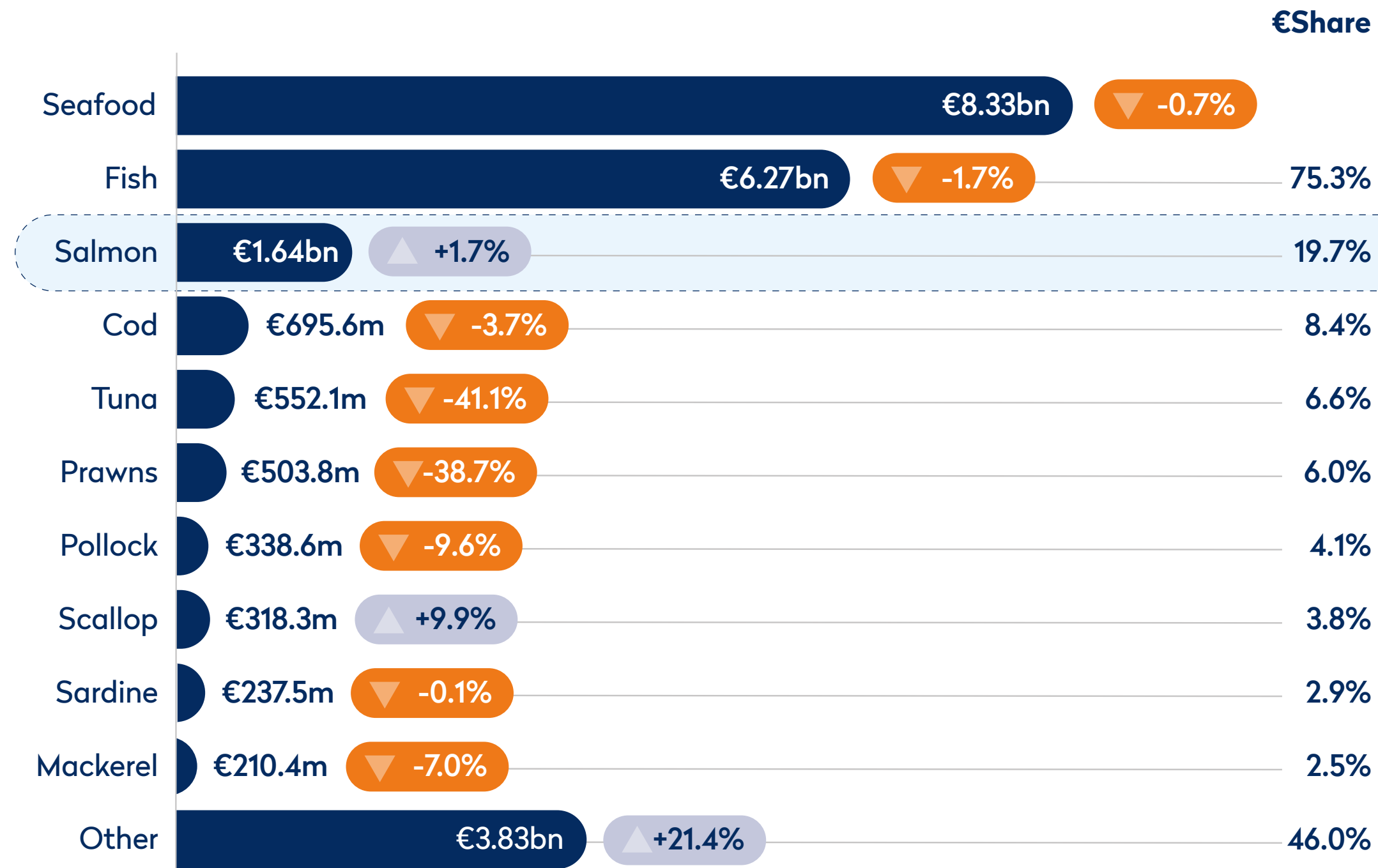


Photo: Alexander Zvir from Pexels

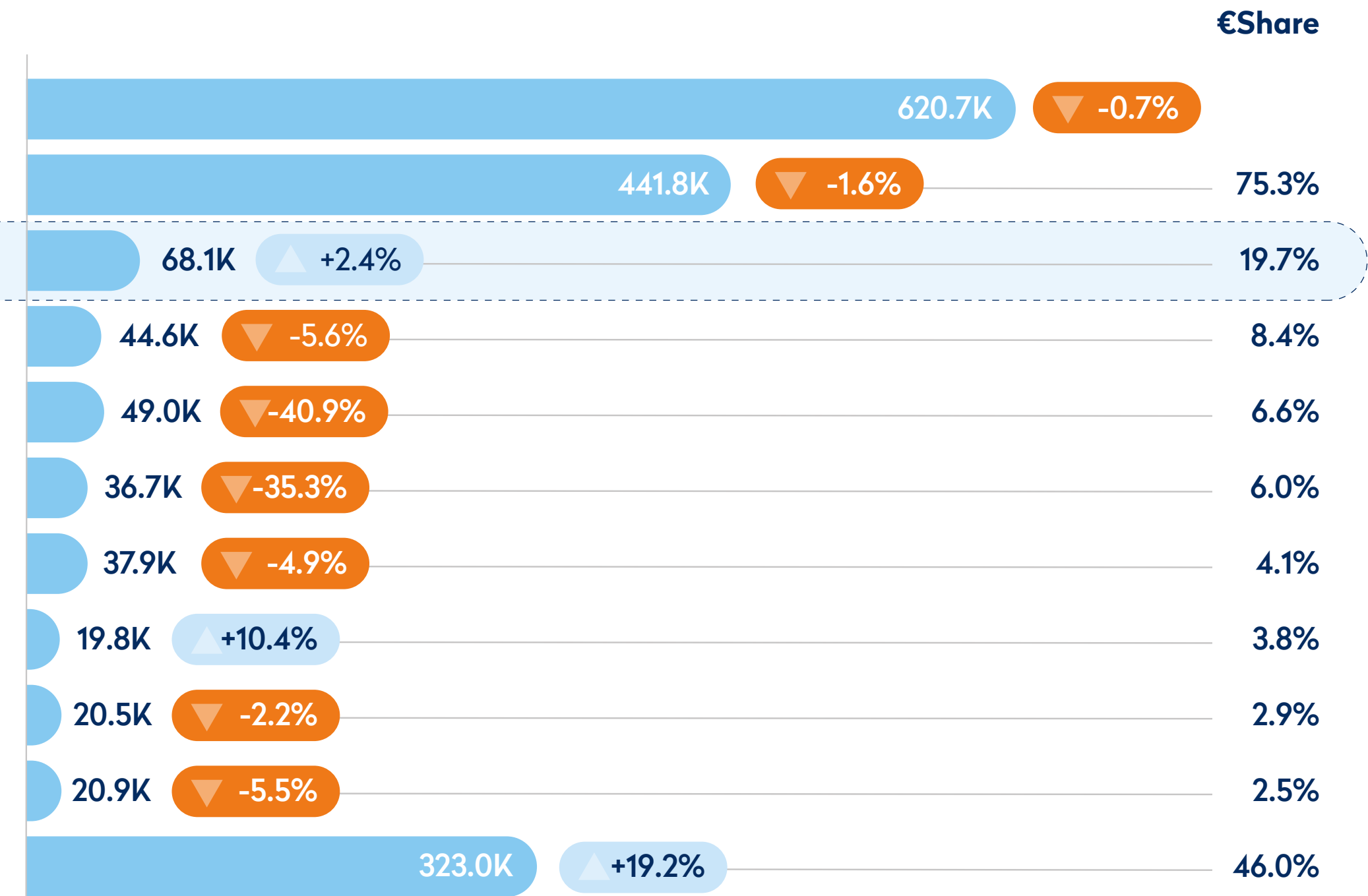
SEAFOOD AND FISH SPECIES SALES, YEAR ON YEAR PERFORMANCE & SHARE

Salmon is the largest species consumed, with a 20% value share and an 11% volume share in France and is the only top 9 fish species in growth (includes some out of home food-to-go & QSR).

France - Total value sales (€)-
Lat value MAT to Jan 2025 vs last year



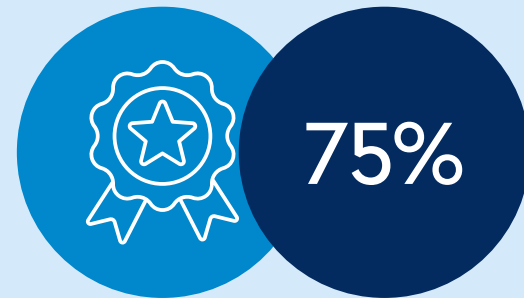
France - Total volume sales (tonnes) -
Lat value MAT to Jan 2025 vs last year



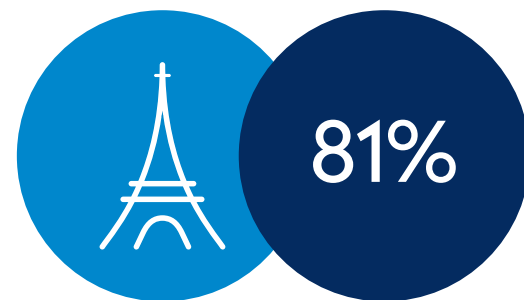
WHAT'S IMPORTANT TO FRENCH SEAFOOD CONSUMERS?

Quality and freshness are important to French consumers when it comes to buying fish, although price can be a barrier...

IMPACTING PURCHASING DECISIONS POSITIVELY



Quality and freshness is important to French consumers when buying fish and seafood and 75% believe their local fishmonger delivers good quality!

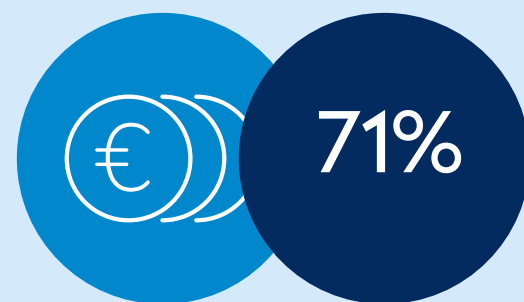


81% of French people think French seafood is better quality.



'How to cook seafood' knowledge is strong in France with only 12% claiming lack of knowledge as a barrier.

PURCHASE BARRIERS¹



71% of French people do not consume more seafood because of price!



Prices have soared 30% in 3 years according to Insee...



Some fish and seafood species cost more from French boats vs international, and this limits the volumes shoppers' purchase.



Other factors influencing fish purchases²

65+ YRS

Consumers aged over 65 consume more than younger consumers.

59%

59% of French consumers consider the origin important with fish and seafood.

45%

45% of consumers visit a fishmonger several times a month or more.

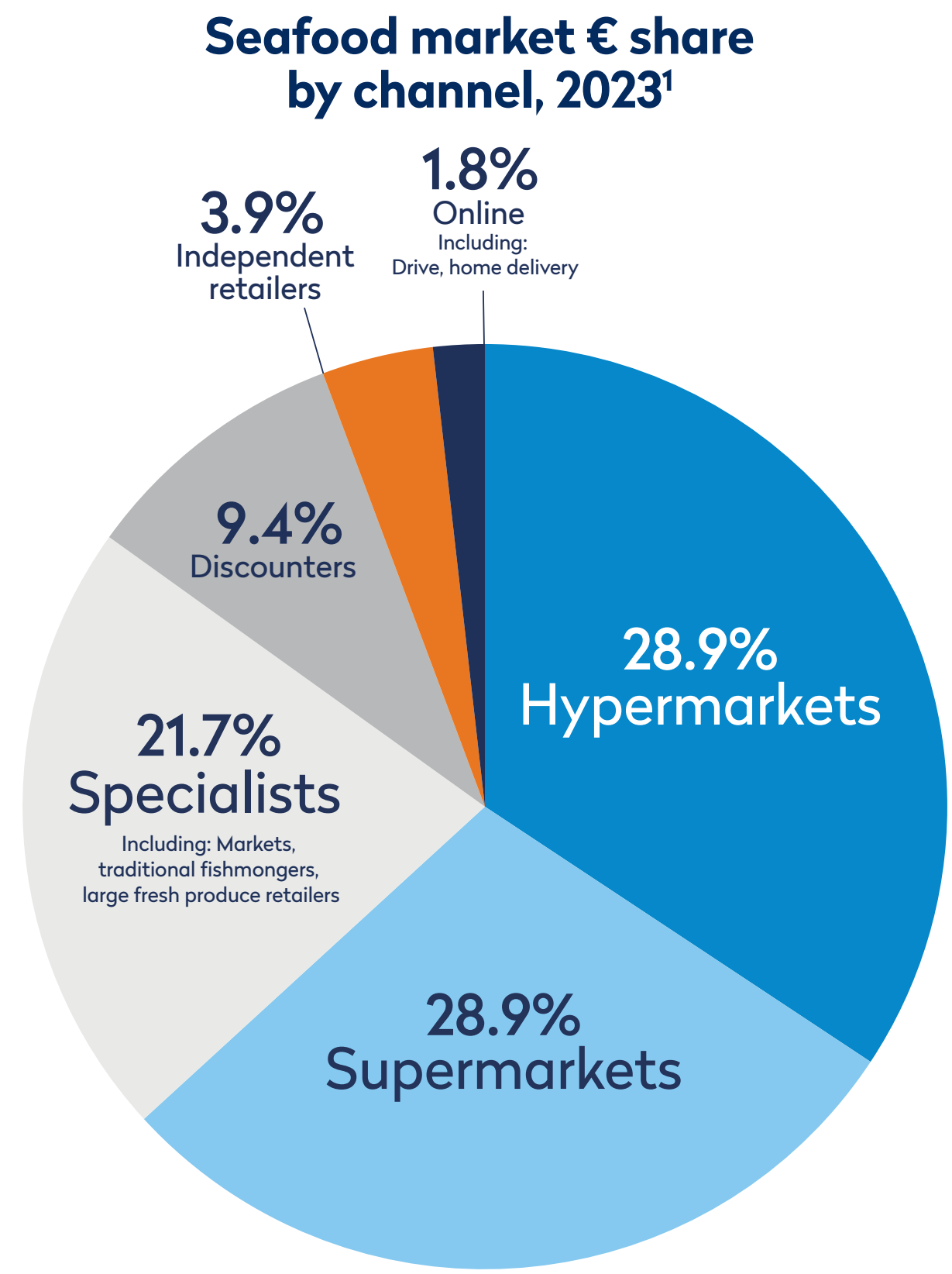
FISHMONGERS – KEY STATISTICS

Over a fifth of value in seafood comes from traditional specialists – markets, fishmongers and other stores.

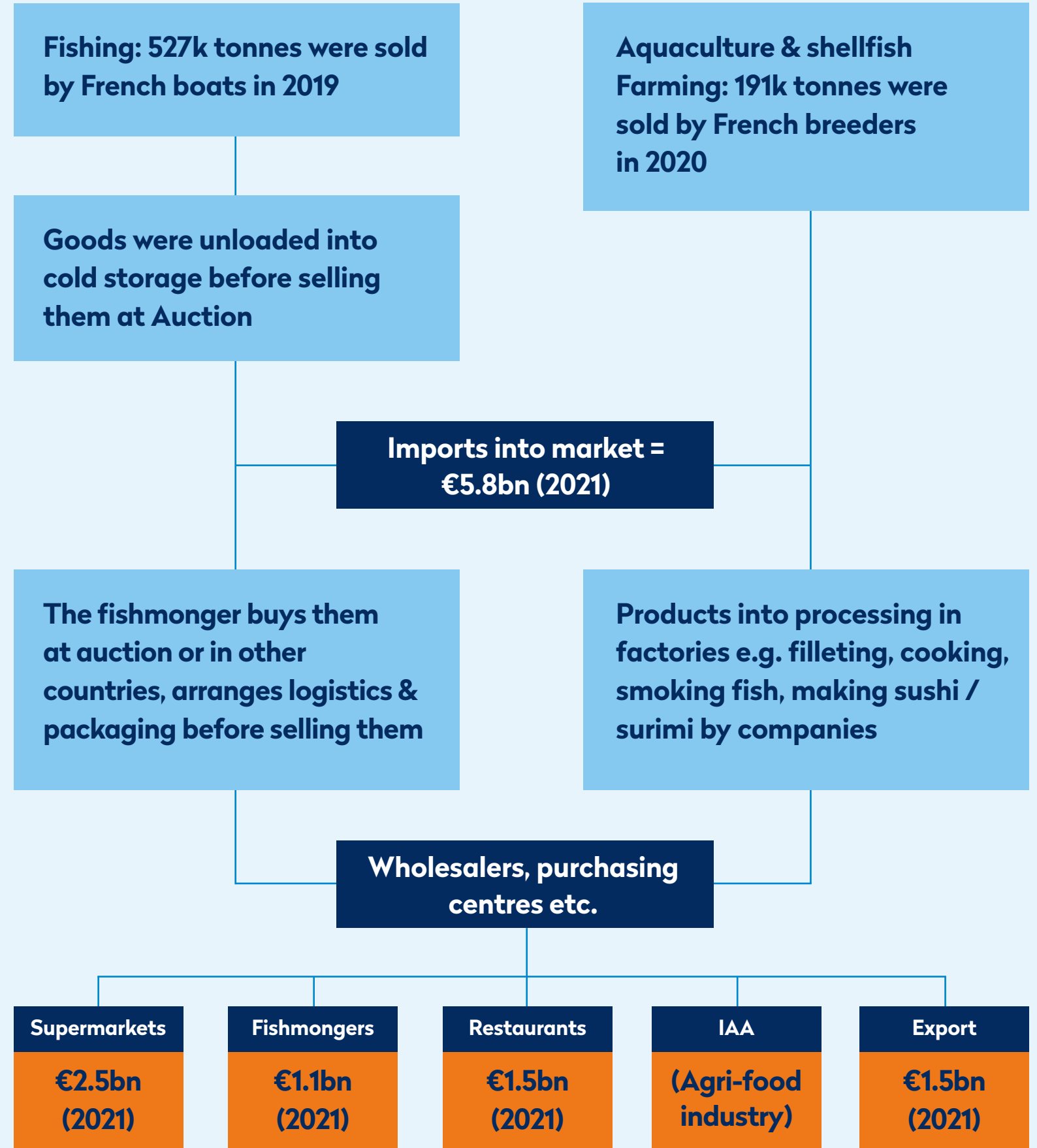
- In 2023, Kantar put the market share of specialists in seafood at just under 22%.
- Over 63% of value sales is generated through the large-scale retail trade.
- At the same time, Kantar indicated that 90% of French households buy seafood on average 13.8 times per year.

Seafood penetration:
89.7%

Seafood frequency:
13.8



The fresh seafood product sector – OPEF²



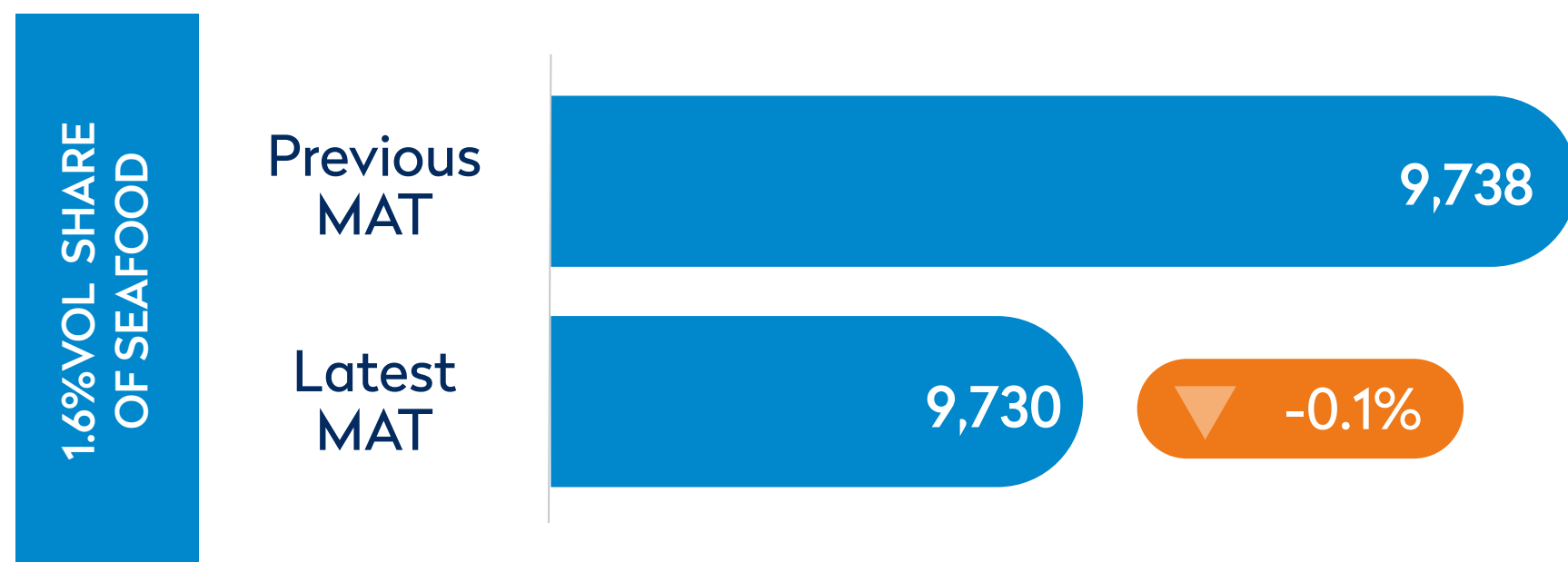
SAITHE

28% of French consumers choose saithe as a species to regularly consume.

Saithe € sales MAT to Jan 2025¹



Saithe vol. sales, MAT to Jan 2025¹



- In 2022, 88% of saithe landings in France comes from Norwegian waters. Iceland exported 20% of its saithe catch to France also in 2022.
- In 2024, nearly 30% of French consumers still choose the species and c.25% of households.
- Average per capita consumption of the fish was 0.69 kg / person in 2022 in France.

Skrei expertise is well-established among distributors and high-end chefs, but limited knowledge exists among retailer fish section staff.



Photo: Norwegian Seafood Council

In summary¹

- The knowledge of the story and the qualities of the Skrei is extremely high among distributors, wholesalers, and chefs in high-end/bistronic restaurants. However, this is not the case among retail fish section staff, who mostly recognise the name but have very limited further knowledge.
- The product's seasonal factor is a key driver for its success. Chefs will ALWAYS feature the name Skrei on their menu during the season.
- The increasing price of Skrei has significantly reduced purchases in the retail sector. However, in the restaurant industry—particularly in

establishments where the average spending per guest exceeds €50—price sensitivity is lower. In this sector, respondents consider a €4 price difference between regular cod and Skrei acceptable.

- With rising prices, the market seems to be self-regulating in terms of supply and demand. We believe that in 2025, the restaurant sector will account for a relatively larger share of the total volume compared to previous years.
- There is growing scepticism regarding the authenticity of Skrei: due to limited product branding (no gill tags, no branding on cases and hardly any on stickers), variable quality, delivery of fillets, and the distribution of products through wholesalers outside France, even though it is not possible to buy directly from Norway.
- The substitute for Skrei will mostly be ordinary cod, especially in retail, while the chefs maintain that "there is no real alternative to Skrei".



- Wholesalers, chefs, and fishmongers begin requesting Skrei as early as November, eagerly anticipating the start of the season.
- Skrei has a strong, positive image, known for its superior quality.
- Chefs value Skrei for its story and seasonality, eagerly working with it and prominently featuring its name on their menus.
- Supermarkets offering Skrei are typically large stores (over 2,500 m²) that cater to customers with a strong culinary culture and high budgets.
- Supermarket fish sections are introduced to Skrei through central purchasing offices and primarily buy it whole. They share the chefs' appreciation for its qualities but have less detailed knowledge.
- Both chefs and fish section managers note that few consumers, whether in shops or restaurants, are familiar with Skrei.
- Gourmet and semi-gourmet restaurants, along with fine brasseries catering to high-end clientele, are willing to pay a premium for Skrei.
- However, the current geopolitical situation is impacting spending habits, with people becoming more cautious with their money.

SUSHI AND SURIMI IN FRANCE

15% of French households regularly consume sushi, with 18–25-year-olds over-indexing in consumption.

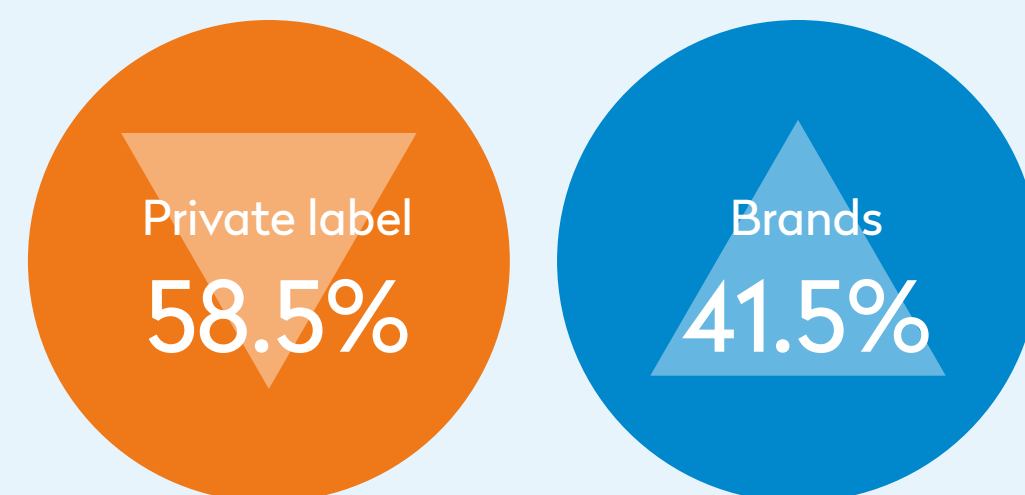
France – Total Asian foods, 2023¹



France – Total sushi sales, 2023²

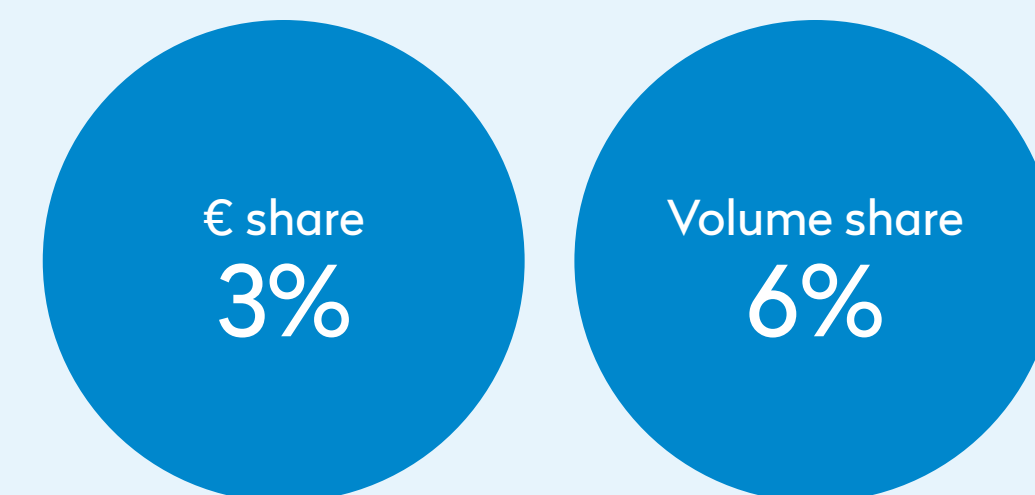


Asian foods – share¹



Arrows denote share movement vs previous year

Chilled seafood deli – sushi share, 2023²



Sushi & surimi in France

- In 2023, the sushi / surimi category was worth €152m; and 2024 insights show that 15% of French households buy the product regularly.²
- However, 2024 insights shows that this is far behind other convenience (or ‘snack’) foods in France, with 49% eating pizza regularly and 34% eating burgers regularly for example.³
- Both higher costs and lack of innovation have impacted consumption.
- Asian foods are also popular with French consumers (the total Asian food category was worth €440m in 2023¹) and sushi is now facing competition from cheaper Asian specialities such as bao buns, ramen and pad thai.³
- A key demographic for sushi is gen Z, with 22% of 18-25 years olds over-indexing vs the national average. These customers are key to the long-term success of the category.³

New product: Fresh Mood plant based sushi

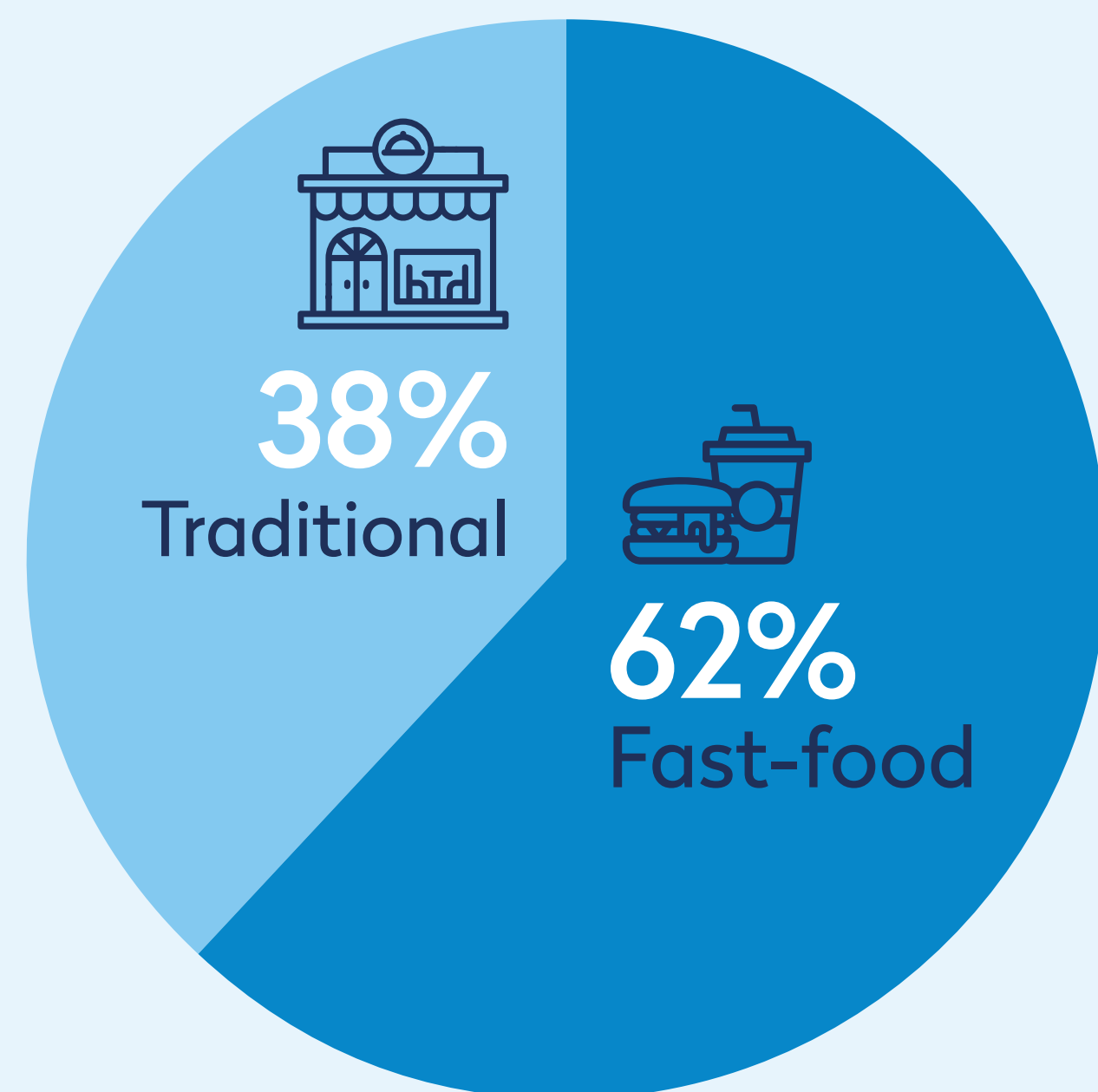
A third of French people say they are flexitarians. To cater for them, the first sushi box based on a plant-based alternative to salmon is born. This product is 100% plant-based and made in France, in the Loir-et-Cher. It is the result of a collaboration between Foodiz, whose Freshmood brand is dedicated to sushi and “Asian snacking” and Ocean Kiss in Bordeaux.



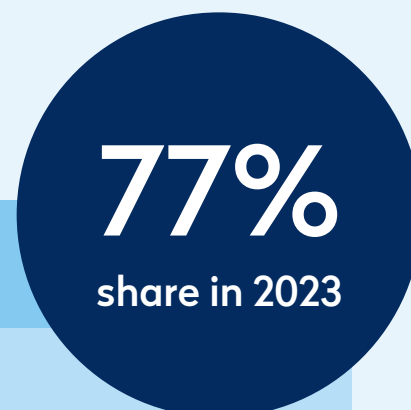
OUT OF HOME: 2023 NEW RESTAURANT TRENDS

In 2023, the 2 main restaurant types have different propositions, with fast-food the fastest growing type.

Total France – new restaurants 2023

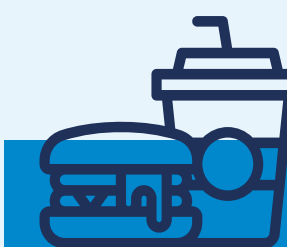


Traditional

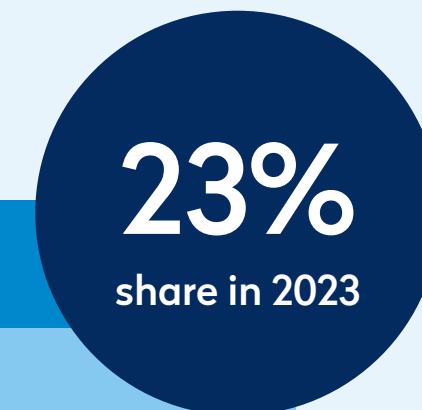


- The traditional restaurant is run by a 51-year-old man.
- It is located in an average-sized town of less than 100,000 inhabitants.
- Serves 2 sittings per day at lunchtime and in the evening, almost 6 days out of 7.
- Nearly 6 out of 10 traditional restaurateurs have increased their prices to cope with inflation & nearly half of them have modified their menus to generate an acceptable margin.

- Independent or franchised, the restaurateur delivers a culinary experience on site, with products partially or completely made on site.
- Only 10% offer a takeaway service.
- The search for 'homemade' products from restaurants is growing.



Fast food



- Fast-food restaurants are setting up in smaller, and therefore cheaper, areas.
- They target city centres and students, or even tourist neighbourhoods.
- Nearly one in two French people go to a fast-food restaurant at least once a month. The advantages are speed, price and proximity.
- The diversity of the offer is significant between world cuisines such as sushi, pizza, burgers.

- A growing sector, food is offered at the counter and consumed on site, taken away or delivered to the home. Many independent players persist in the face of the large established players in France.
- 90% offer a takeaway service.
- 45% of French people frequent a fast-food chain at least once a month, attracted by speed, price and proximity.

The Seafood category in restaurants was worth €1.5bn in 2021 with three quarters of products sold being fresh. The sector is under pressure on pricing which is leading to menu changes.

Key trends: Seafood in restaurants

- Wholesale fish and seafood prices have continued to increase in 2024, putting pressure on restaurants which serve the product.³
- This meant that France’s dependence on fish imports increased over the periods from January to July 2024, particularly for salmon and cod – partly influenced by this.³
- Working from home has also had an impact – this combined with cost-of-living challenges has made French customers cautious with spend at lunch-time for example, by skipping starters and desserts or by controlling spend on drinks.³
- With younger consumers, Sushi restaurants continue to perform with this type of restaurant having a circa 5% share of the channel and despite inflation challenges on salmon and other species, brands such as Sushi Daily and Sushi Shop have managed to hold their turnover.⁴
- There is also an emergence of seafood in the trendy street food sector, with brands such as Lobsta in Nice – which is franchising its operations and is targeting 60 establishments by 2030.⁵

Trading down in seafood, out of home

- As a result of price pressures, some restaurants are switching from local favourites such as John Dory, Turbot or Brill to cheaper cod, scallops or pollock for example.³
- Restaurateurs have also started to take more expensive species off the menu and replace this with farmed seafood, e.g., Lobster.³ Customers have even turned away from the most expensive dishes. Thus, due to the inflation of the past years, “the middle class has completely shifted and rarely eats lobster anymore,” Sales Director – regional wholesaler.³

**Total seafood in restaurants:
€1.5bn**

% of products in commercial restaurants, 2021²



Seafood volume % share by channel 2022²



Catering: Schools, canteens, hospitals, prisons

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