

THE PROTEIN MARKET IN ITALY

How is Norwegian seafood performing in the competition among protein sources?

Anastasiia Chernykh

*Head of Brand and Communications Research
Ipsos Norway*

NORWEGIAN
SEAFOOD
COUNCIL



About Ipsos

#1



Most innovative insights & analytics company in the world in the GRIT report 2025

Since **1975**
90 markets
20,000+ colleagues

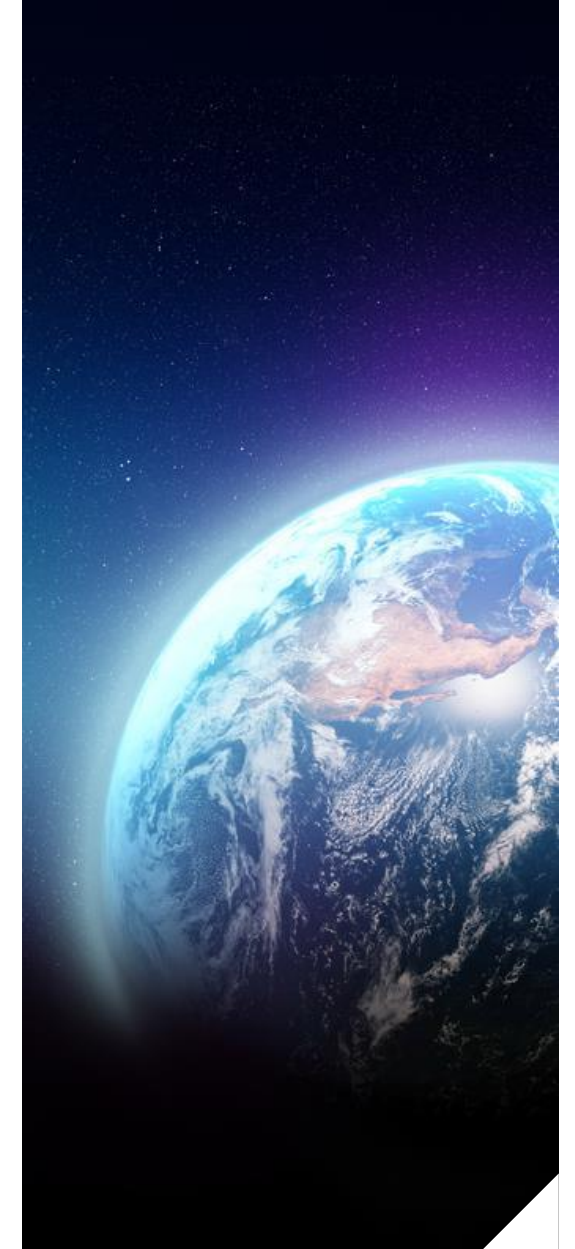


Mission: Deliver reliable information for a true understanding of **Society**, **Markets** and **People** to help the world make better decisions



6 years

of partnership between the **Norwegian Seafood Council** and **Ipsos**



Research Design

Target Audience
National profile of monthly protein consumers in Italy



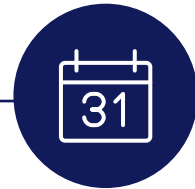
Sample Size
1,000 respondents



Data Collection Method
Online interviews conducted through the Ipsos proprietary panel



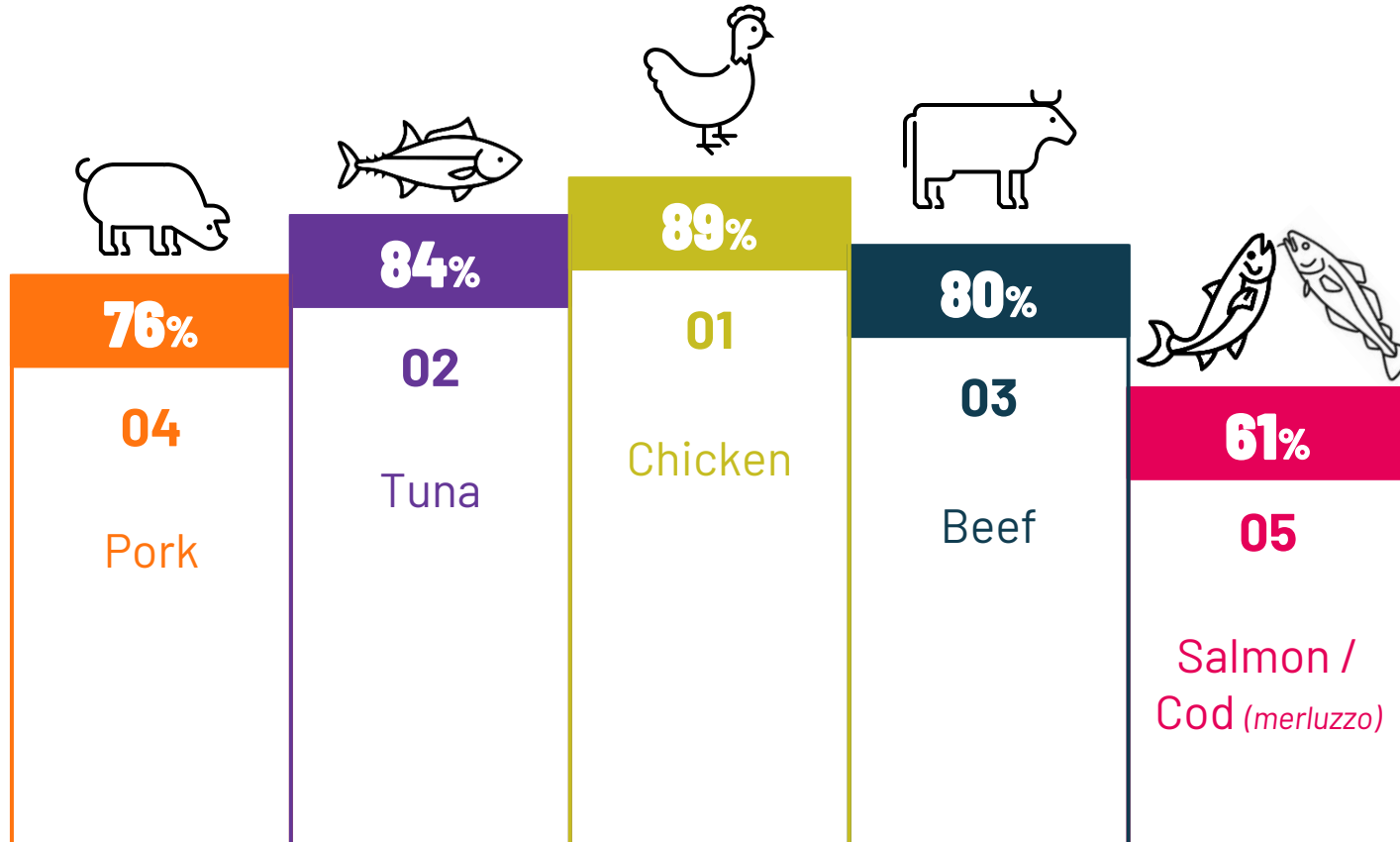
Fieldwork Period
20/11/2025 - 01/12/2025



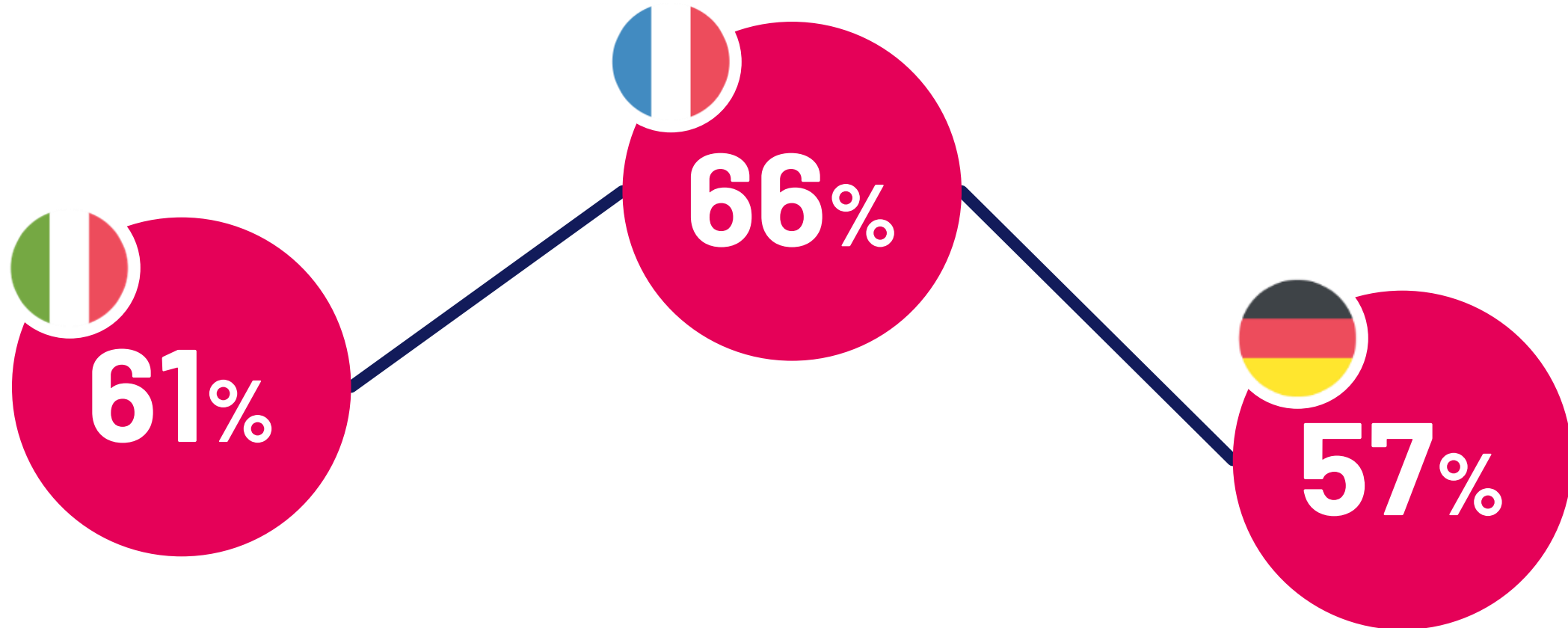


**Italy's Protein
Preferences:
Salmon and Cod
Share the No. 5 Spot**

Salmon Reaches 61% of Protein Consumers Each Month

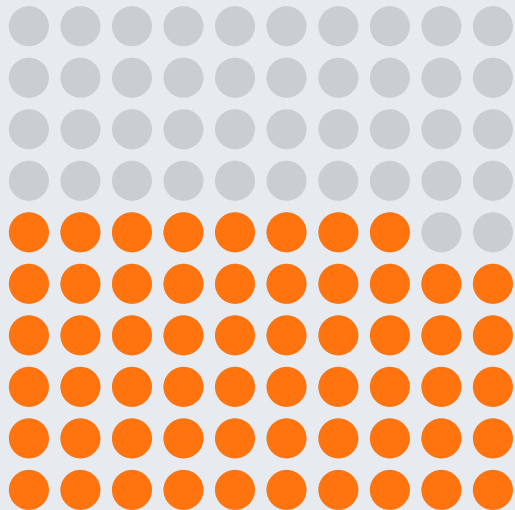


Compared To Italy, Monthly **Salmon** Consumption Is Higher In France And Lower In Germany



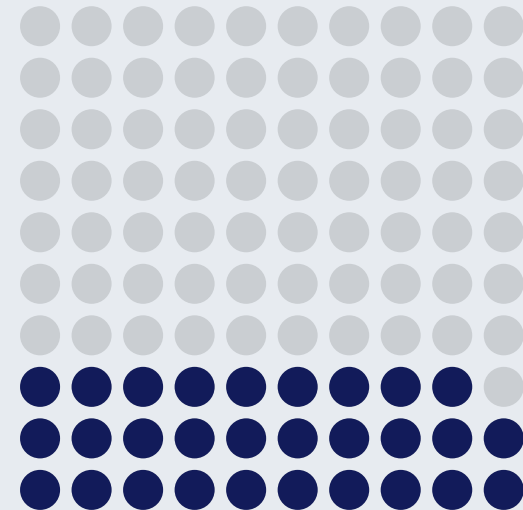
But the Competition Is Tough: Meat Still Dominates Spontaneous Associations When Consumers Think About Protein

58% meat

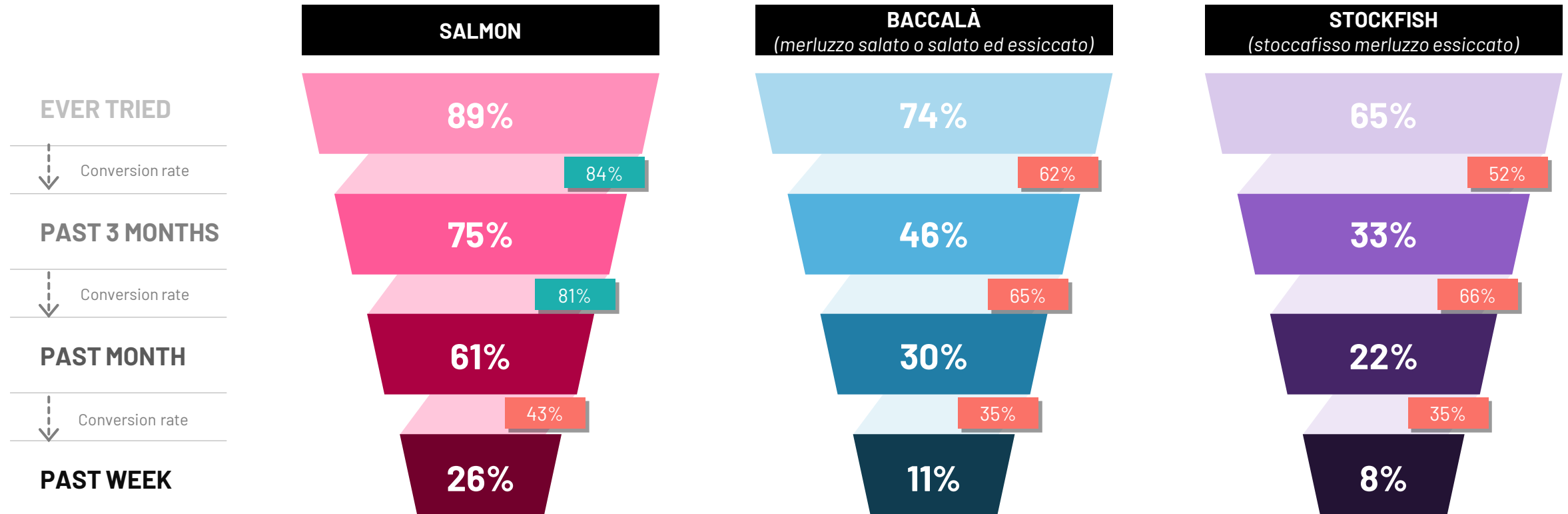


VS

29% fish



Salmon Is a Popular Monthly Protein, Held Back from Higher Frequency by Perceived High Price



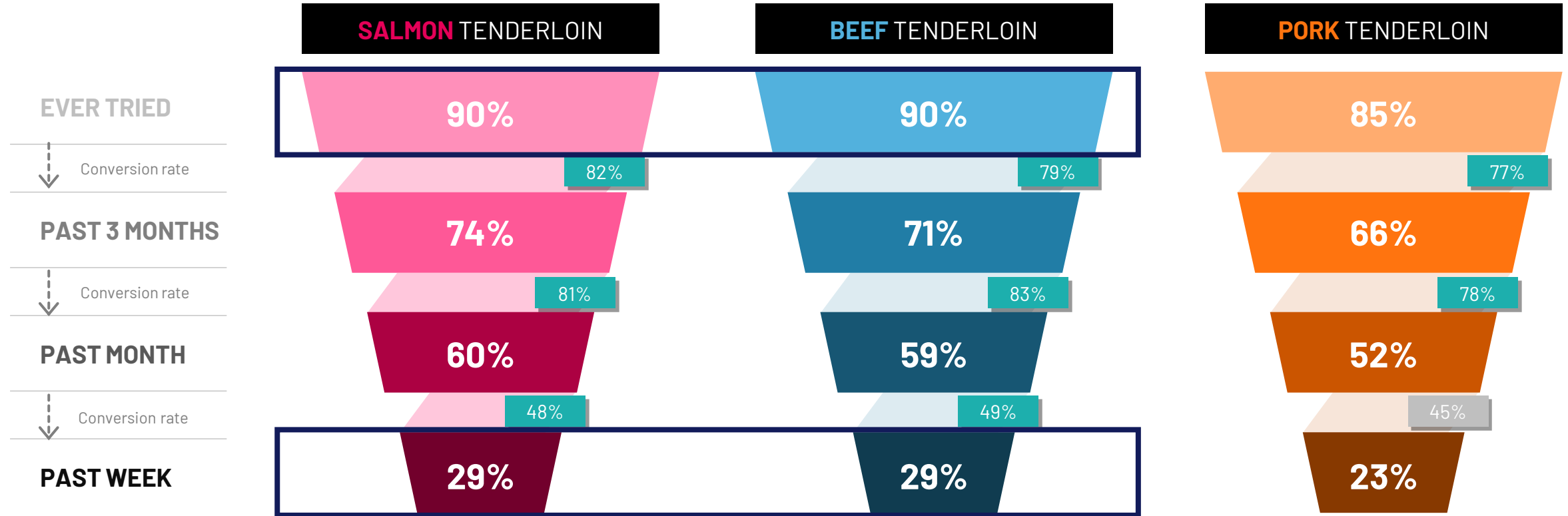
*The average conversion rates in the category are 75% for past 3 months, 77% for past month and 49% for past week.

■ ■ = higher/lower average conversion levels in the country (sig. testing to reference group @ 95% CL)



Salmon Tenderloin Faces **Stiff** **Competition** from Beef in the Premium Segment

Salmon and Beef Tenderloin Show Identical Trial and Weekly Consumption



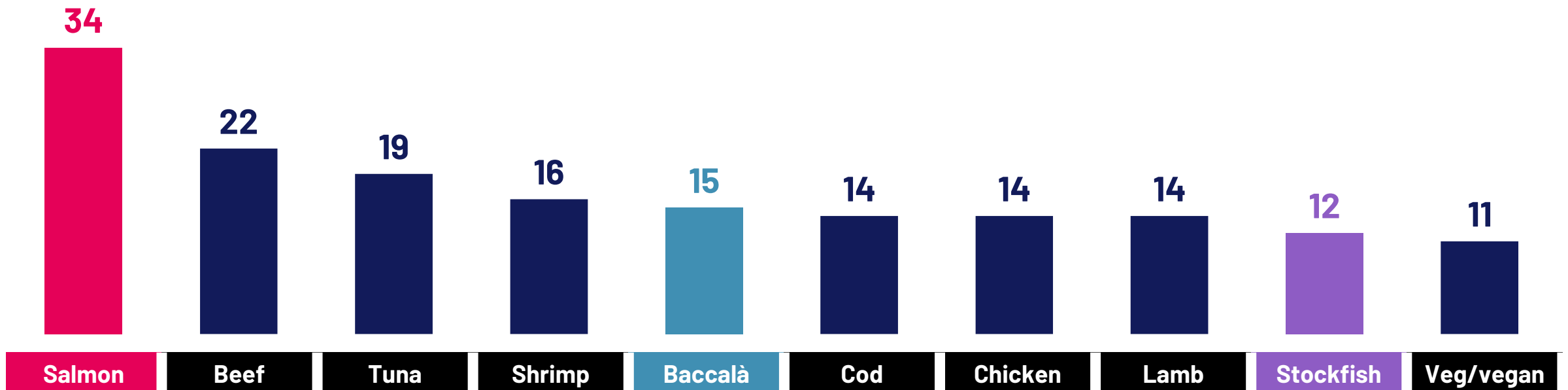
*The average conversion rates in the category are 56% for past 3 months, 68% for past month and 41% for past week.

■ ■ = higher/lower average conversion levels in the country (sig. testing to reference group @ 95% CL)

Salmon Leads the Way on Price Justification



Is Worth Paying a Premium For, % agree

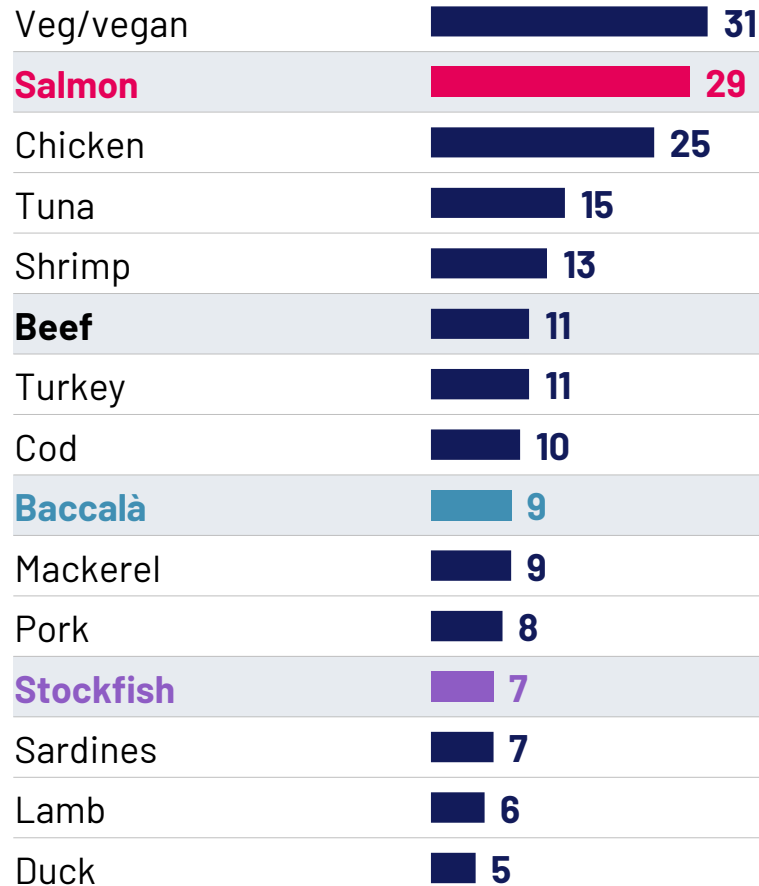


*The slide features the TOP 10 proteins ranked by their price justification

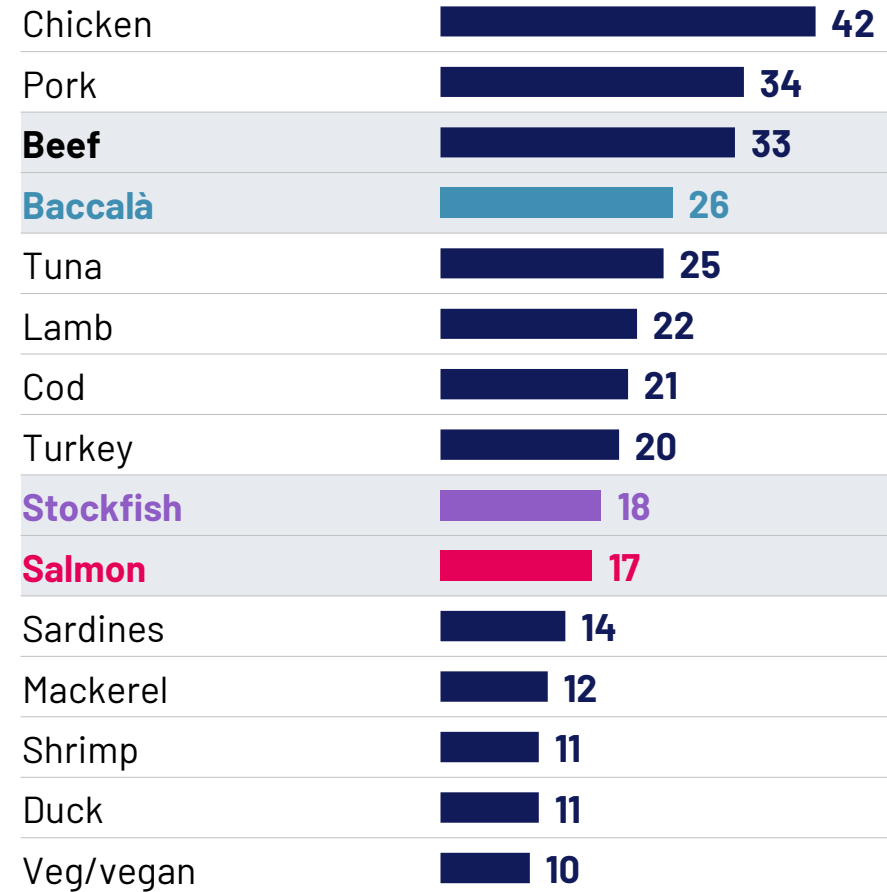
But Price Justification Is Driven by Different Factors



Is Trendy and Popular Right Now, % agree



Has Rich Tradition or Heritage, % agree





Do Proteins Attract Different Consumers Based on Perception?

Standout Demographic Groups by Protein Type, *Monthly or More Frequent Consumers*

Salmon

Single adults (18–34 y.o.)

Higher income

North–West skew

Baccalà

Established families
(kids 13–18 y.o.)

Audience Skews Toward Men

Southern regions



Beef

Single adults (18–34 y.o.) AND

Young families (kids 0–12 y.o.)

Audience Skews Toward Men

Stockfish

Established families
(kids 13–18 y.o.)

Audience Skews Toward Men

Southern regions

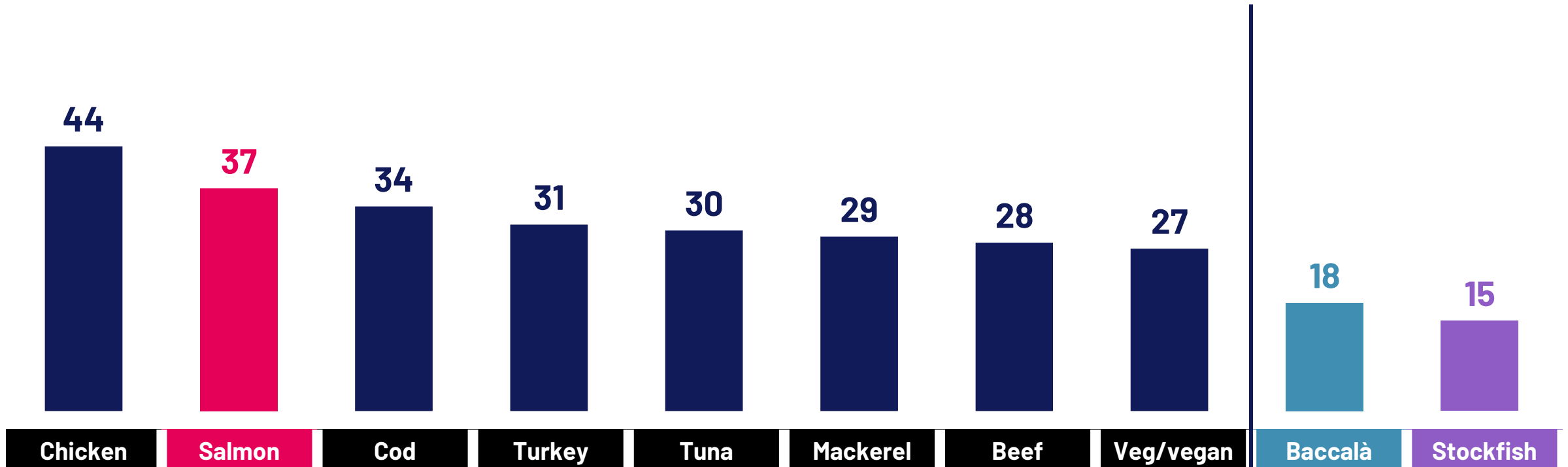


Why Italians Choose Protein: **Hunger,** **Health, and Indulgence**

Salmon Strongly Delivers on Healthy Protein Needs



Is a Healthy and Nutritious Protein Source, % agree

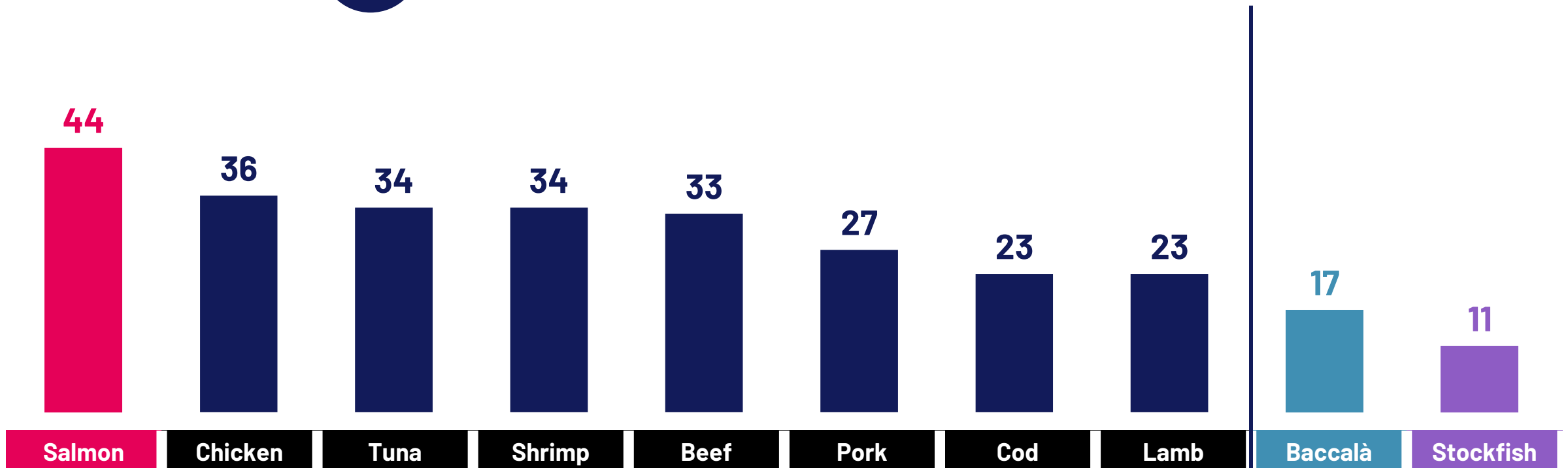


*The slide features the TOP 7 proteins by perceived healthiness + Baccalà and Stockfish

But Above All, Salmon Delivers on Taste



Tastes delicious, % agree



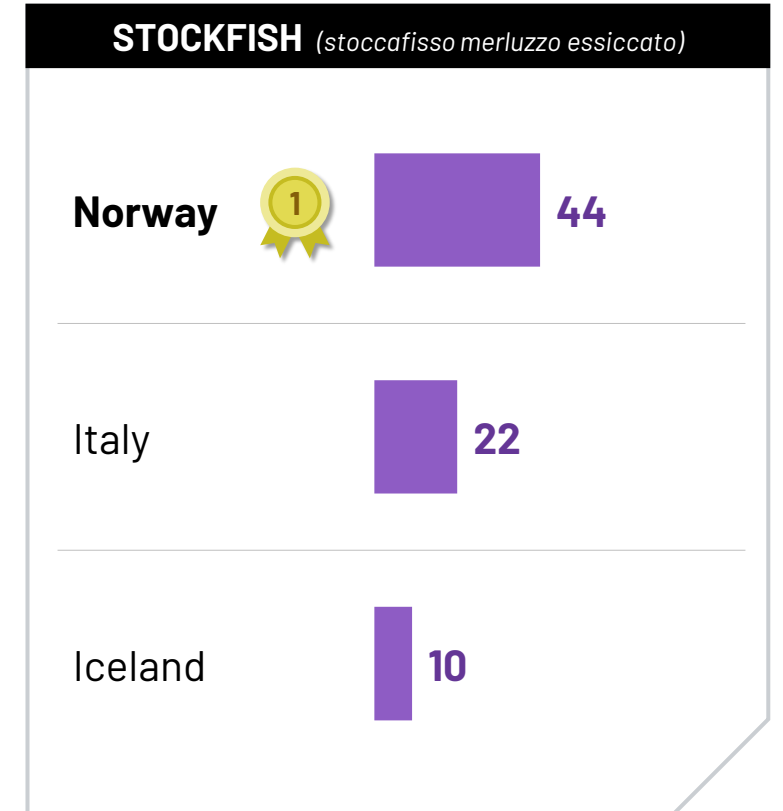
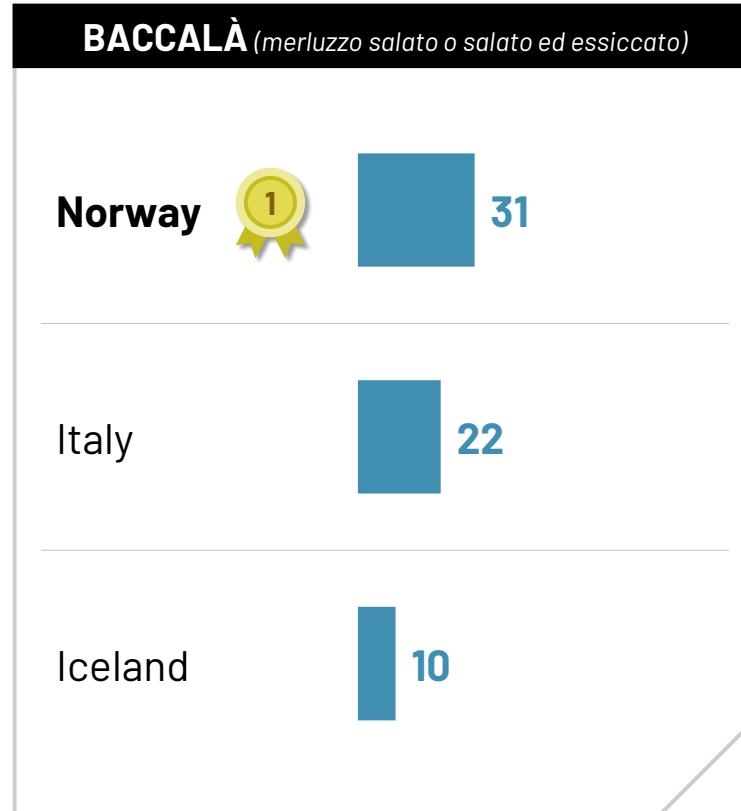
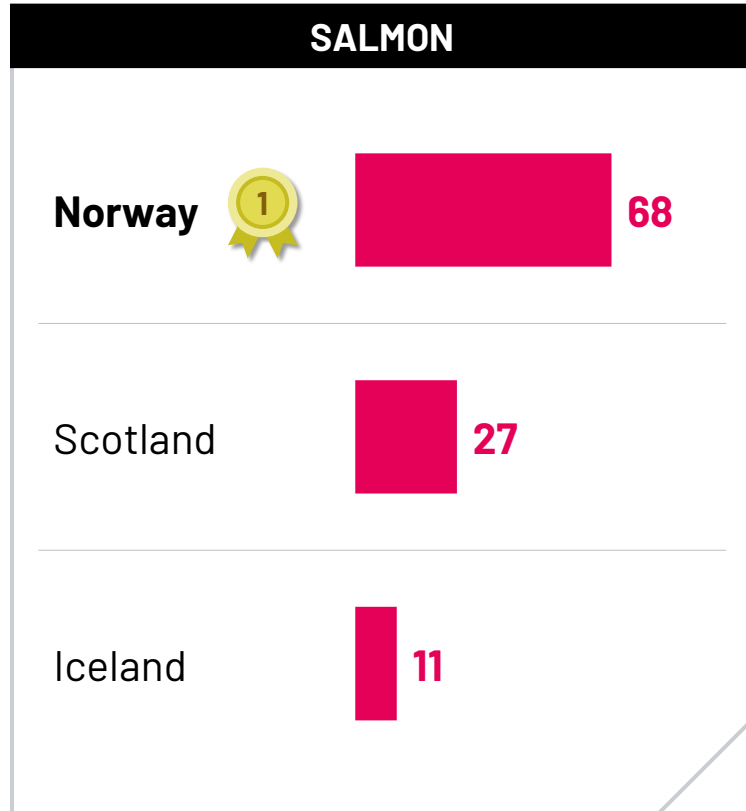
*The slide features the TOP 7 proteins by perceived tastiness + Baccalà and Stockfish



Origin Matters

Which Countries of Origin Do Consumers **Believe** They Are Eating?

Consumers commonly believe the salmon, baccalà, and stockfish they consume come from Norway, reflecting effective origin marketing



Key Takeaways: **Salmon**

Salmon is a **Top 5** Protein by Monthly Consumption

Salmon Is Positioned as a **Premium** Protein

Salmon Shows Strong **Price Justification**

Great **Taste** and **Health** Perception Fuel Consumption

Norwegian-Origin Salmon Leads the Category

Salmon's **Trendy** and **Modern** Appeal Resonates Well with **Younger** Italians

How Can Salmon **Expand Beyond Young Affluent Consumers** While Strengthening Its Role in **Everyday Italian Meals**?

Make Salmon an Everyday Feel-Good Treat – not just for special occasions

Own the Health-Taste Edge – nutritious and delicious

Keep It Simple – quick recipes, easy prep, total versatility

Make It Italian – fit salmon into familiar local dishes

Key Takeaways: **Baccalà** and **Stockfish**

Baccalà Has **High Trial**, but **Limited Repeat Consumption**

Baccalà Consumption Is Led by **Established Families** in **Southern Italy**, with Higher **Male Involvement**

Stockfish Remains **Niche**, with **Low Trial** and **Occasional Consumption**

Stockfish Consumption Is Led by **Established Families** in **Southern Italy**, with Higher **Male Involvement**

How Can Baccalà and Stockfish **Unlock More Frequent Consumption Beyond Their Core Southern Family Base?**

Modernize Tradition – keep heritage alive while making it relevant for younger generations

Healthy & Sustainable by Nature – overcome taste and effort barriers

Make It Easy – convenient, ready-to-cook solutions

Bring People Together – perfect for shared, social meals

**GRAZIE
MILLE!**

