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Snapshot report

France seafood market report 2025

Photo: Gabriel Bush for Norwegian Seafood Council.

KEY INSIGHTS

France & seafood

Photo: *Mathias Reding / Pexels.*

As the second-largest economy in the EU, France places great cultural importance on food and drink. According to Circana, turnover in the Produit de Grande Consommation / Frais et Libre Service (PGC-FLS) sector reached €134 billion in 2024, accounting for approximately 60% of total food and drink sales in the country. However, the sector saw a slight decline, with value sales down 0.5% and volume sales down 0.9% year-on-year.

As in other European markets, economic uncertainty is reshaping French shopping behaviour. Hypermarkets are losing share to E-Commerce, as consumers seek greater budget control. At the same time, shoppers are visiting more stores, buying fewer items per trip, and prioritising value.

Consumption habits have shifted too: 37% of French consumers are eating more meals at home, and 44% of households cook mostly from scratch. Older consumers (65+), who typically have higher disposable incomes and greater cooking confidence, are a key demographic behind this trend.

Seafood plays an important role in French diets. Kantar reports fish and seafood sales total €8.4bn, with value flat at -0.1% and volume edging up by +0.3%. About 16% of these sales occur in traditional channels like fishmongers.

Photo: *Norwegian Seafood Council.*

Seafood accounts for around 25% of household protein spend—roughly 8% of the total household budget, or €300 annually per household. Quality and freshness are top priorities, but price sensitivity is increasing as consumers cook at home more often and face higher seafood prices.

Salmon is the leading fish species in France, with a 20% value share and 11% volume share. Saithe is also popular, regularly chosen by 28% of seafood consumers. Overall, 67% of French consumers eat fish or seafood at least once a week, and nearly half recognise Norway as a key country of origin.


Photo: *Norwegian Seafood Council.*

Sigrid Louise Philippart
France Director
Norwegian Seafood Council

“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.”

Economic overview

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. 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 and 2024. However, uncertainty continues to reflect in French purchase patterns.

Grocery market overview

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 and 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 and water were up 1.8%.

Sources: *The French Government, Kantar, Insee, Agrimer and other Sources, 2024 (See slides for further information).*

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

Image: *sergeyryzhov / iStock.*

French consumers are shopping in more stores looking for value and trading down from brands to private label (+0.4% vs previous year). The only demographic that shows purchase volume 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 two years. E.Leclerc is the retailer with the highest spend on offer at 28.6%. However, most retailers are actually reducing spend on offer currently.

E-Commerce food and drink spend is circa approximately €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 65s up 16% vs 2023.

Data from Circana indicated that the PGC-FLS turnover reached €134bn in retail 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).

PGC-FLS stands for Produit de Grande Consommation / Frais et Libre Service, which refers to fast-moving consumer goods (FMCG) **in French supermarkets.**

Produit de Grande Consommation (PGC) includes everyday consumer products such as packaged food, beverages, personal care items, household essentials, and other non-durable goods that are regularly purchased.

Frais et Libre Service (**FLS**) refers to fresh and self-service products (i.e., over counters such as fish counters), so this includes perishable items like dairy, fresh produce, meat, seafood, and other refrigerated or ready-to-eat foods that consumers pick themselves without the need for direct assistance. So it can also include added value items.

Together, PGC-FLS represents the total FMCG market in France, encompassing both packaged and fresh products available for self-service in supermarkets.

Sources: *The French Government, Kantar, Insee, Agrimer and other Sources, 2024 (See slides for further information).*

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

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 five 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”.

Photo: *Norwegian Seafood Council.*

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

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.

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 Bourgignon 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 that can trace its origins back to 1930.

"37% of French consumers have been eating more meals at home in the year to July 2024, and 44% of French households cook most of their meals from scratch, only occasionally using pre-prepared ingredients."

Seafood in French gastronomy

Seafood plays a central role in French gastronomy, shaped by the country's extensive 5,500km coastline - the third longest in Europe. This food type has played a role in shaping France. Historically, it was a luxury reserved for the aristocracy and clergy. Under Louis XIV, Versailles hosted lavish seafood feasts with oysters, lobsters, and Seine-sourced fish. These traditions still shape seafood preparation today.

Key culinary traditions include:

Regional specialities: Brittany and Normandy are famous for oysters, mussels, and lobster; the Mediterranean coast for sea bass, anchovies, and squid.

La Bouillabaisse Marseillaise: originating in Marseille, the dish is based on rockfish soup. Once a poor fisherman's meal, now a prized delicacy. Traditionally, only local rockfish are used, and strict rules govern the croutons and sauce.

Local fish markets: French cuisine emphasizes fresh, high-quality seafood, often sourced from local fish markets. One example is Boulogne-sur-Mer – one of Europe's largest markets which auctions over 70 species daily and is a major hub for processing and trade with significant activity in smoking and freezing.

Other classic dishes: include Coquilles Saint-Jacques (scallops in a creamy sauce), Sole Meunière (pan-fried sole with butter and lemon), Breton Cotriade (a rich fish stew from the Brittany region) and Moules Marinières (mussels cooked in white wine and garlic).

Finally, it is important to consider the dish, with the renowned French love of the vine (wine) – wine is essential in French dining. As chef Auguste Escoffier said, "Fish without wine is like egg without salt."

French shopper and consumer insights

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

24% of French consumers seek quick solutions for 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 supermarkets. These are around 37% of all fast-moving consumer goods (FMCG) spend, and 60% of baskets contain a traditional fresh product, with the over 60s being the key age 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

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

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 400m[2]. 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 two 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.

Photo: *Norwegian Seafood Council.*

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 six percentage points over the last five 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.

> "53% of French consumers are committed to 'eating well' as a proactive way of protecting their health, with a balanced diet being a priority."

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 and 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

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

Photo: Norwegian Seafood Council.

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).

Fish and seafood trends in France

According to Kantar, total seafood is worth €8.4bn in France. Average price has decreased by 1/2 a percentage point, which has led to an increase in buyers and buying more often. Total fish species is worth €6.3bn. Volume growth is not as high (1/4 percentage points) due to declines in frequency and volume per buyer.

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

"French consumers value on-pack labelling, especially information such as the list of ingredients, place of manufacture, and health indicators like Nutri-Score."

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 three new farms planned with investments of between €150-275m which will be in addition to current supply.

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 and 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 2000s; Its high price per kg (approximately €100 plus) means it is served mainly in Michelin starred restaurants. However, there are some products ending up in high-end retail.

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

“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 nine fish species in growth.”

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

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 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 Tuesdays.”

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 price increases in food and drink venues such as restaurants and bars.

Sources: *The French Government, Circana, NIQ, CGA, Kantar, Insee, Agrimer and other Sources, 2024. (See slides for further information).*

ECONOMIC REVIEW

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]

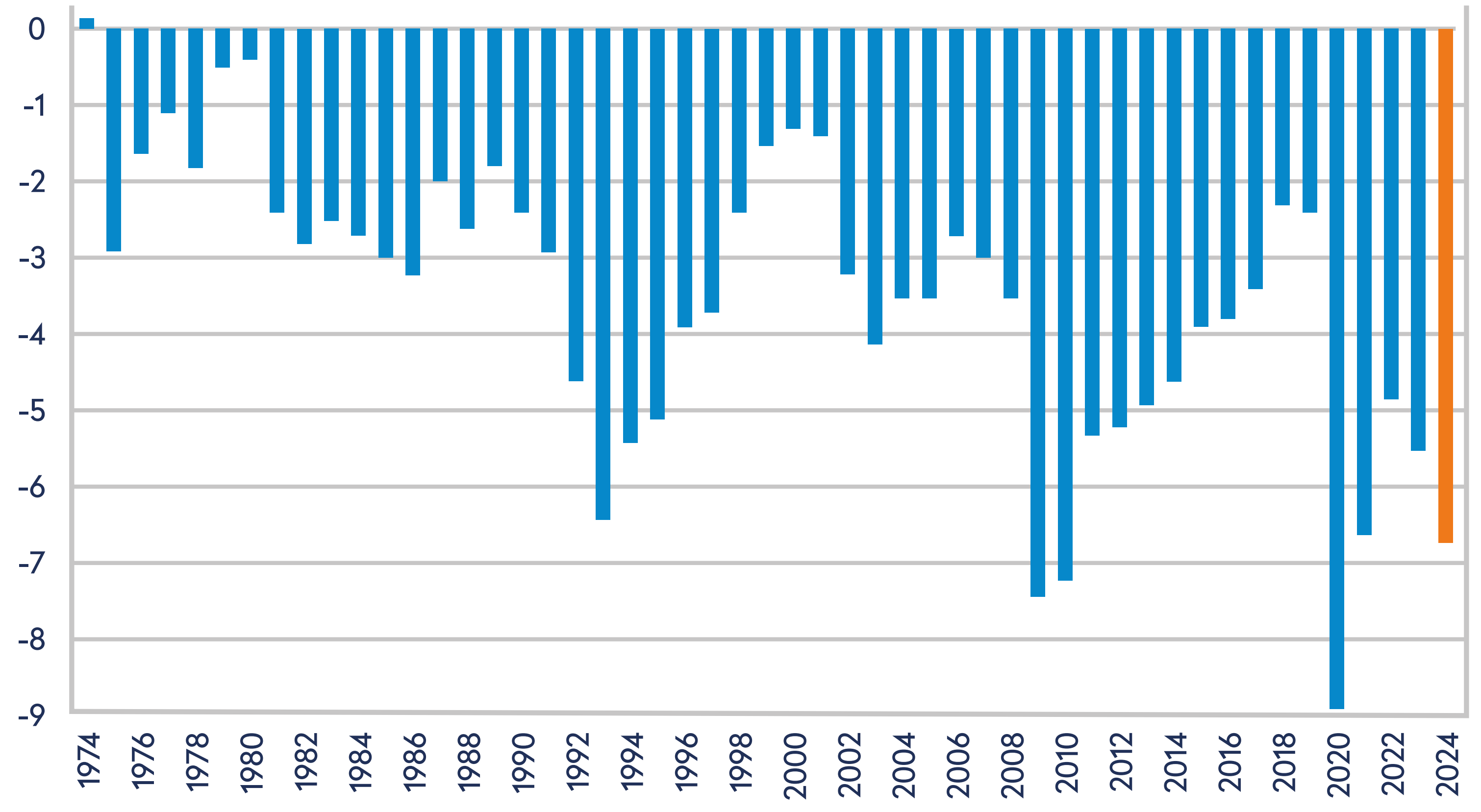
Inflation: French inflation came in below the ECB's 2% target, a relief for French policymakers contending with budget deficit challenges. Prices in France still increased at a steady rate at the start of the year, according to The National Institute of Statistics and Economic Studies (Insee) on Friday 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]

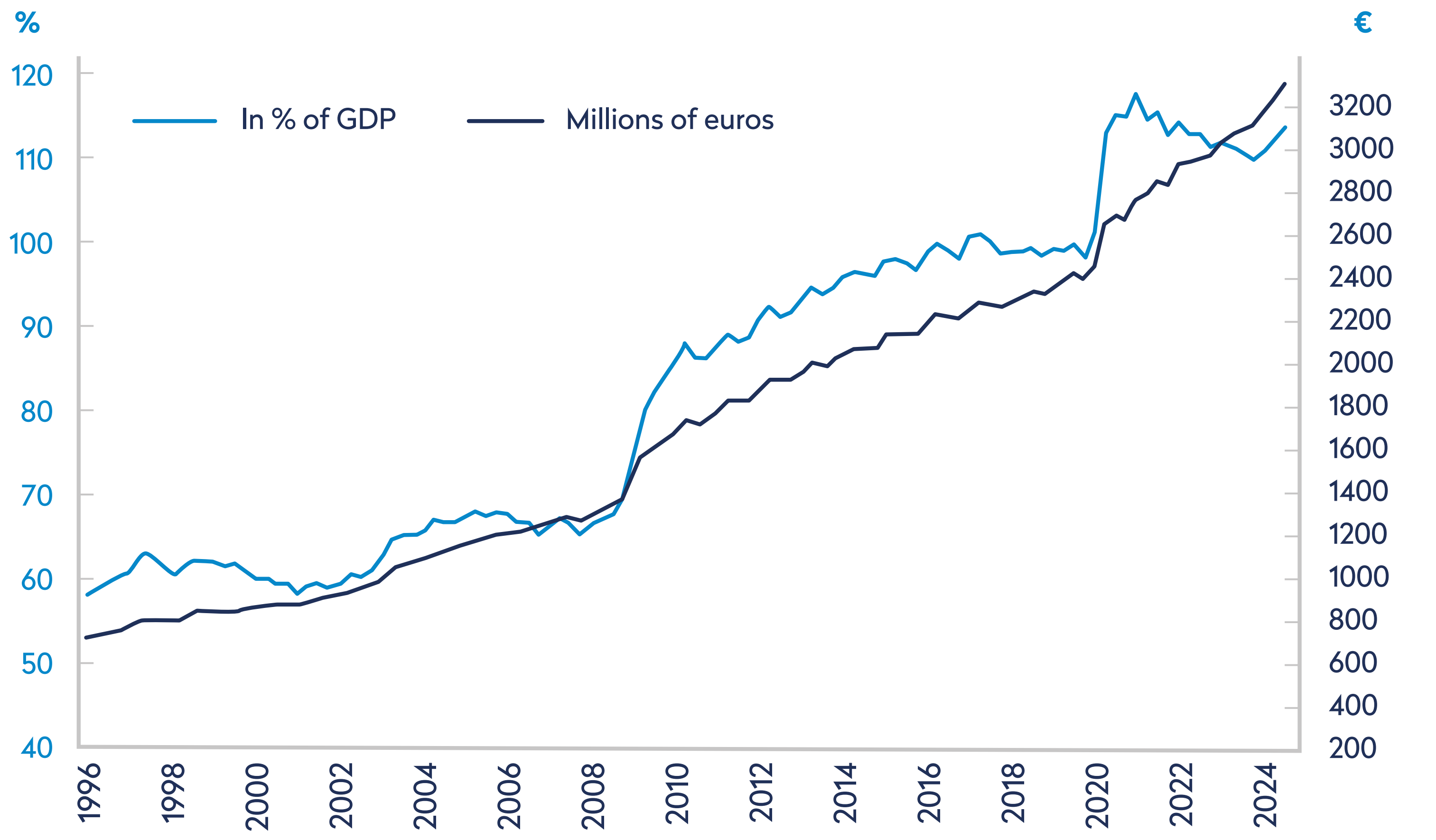
In 2025, growth is expected to slow to 0.8% (from 1.1% in 2023 and 2024), due to a deterioration in the labour market plus political uncertainty.[4] However lower interest rates and more flexible bank spending policies led to a more positive French housing market which is finally starting to stabilise.[3]

Consumer confidence grew by three points to 92 in January 2025 but remains below the long-term average of one hundred between 1987 and 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 levels[2]



France: New historical record for French public debt[2]

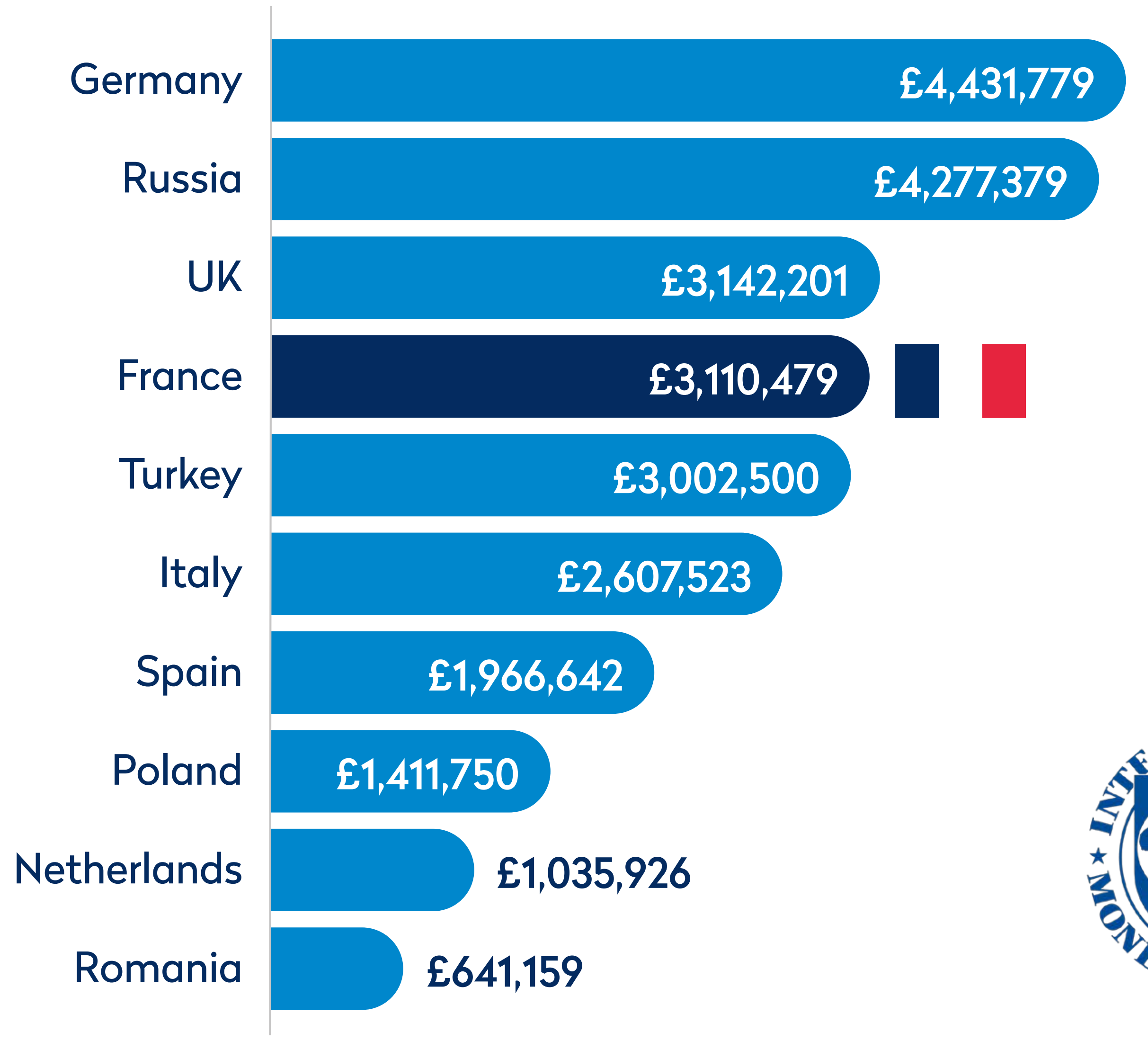


Sources 1: *Les Echos 11/02/25,* **2:** *Reuters 01/02/25,* **3:** *INSEE 31/01/25,* **4:** *Banque De France 27/01/25,* **5:** *Kantar 30/01/25.*
Growth, debt... 2024 was a "messed up year" for France, 2025 is likely to be a "worse year".

FRANCE IN NUMBERS

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

Europe - GDP - £ millions – March 2025[1]



Imports:
€698.9m
-4.5%[2]

Trade within the EU:
France = 2nd
(11.3% share)

Trade with Non-EU:
France = 3rd
(10.4% share)

2024[3]

Exports:
€598.3m
-1.6%[2]

Trade within the EU:
France = 4th
(7.9% share)

Trade with Non-EU:
France = 3rd
(10.6% share)

France is the fourth biggest economy in Europe and the second 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 categories[4]:

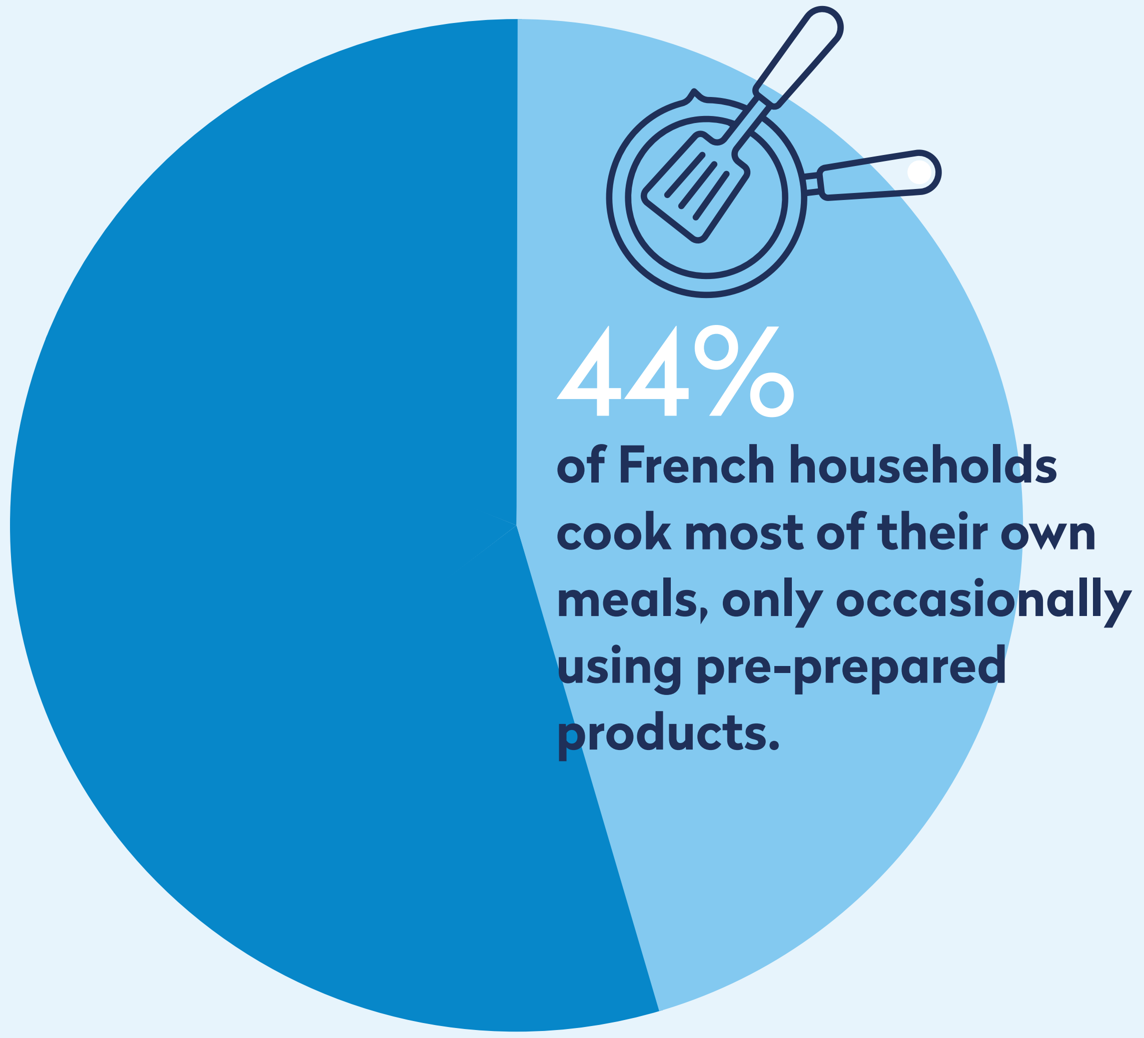
- Europe's leading exporter of beef
- World's leading exporter of wines & spirits
- The 3rd largest pig herd in Europe
- Europe's leading producer of oysters
- Europe's leading producer of cereals
- World's 2nd largest producer of sugar beet

Source 1: *IMF – Top 10 Economies in Europe (continent), March 2025,* **2:** *Customs and indirect duties – public statistics – 07/02/25,* **3:** *Eurostat 2024 4 Ministry of Agriculture & Food Sovereignty 2025.*

FRENCH ATTITUDES TO CUISINE

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

% of French consumers[1]



23.8% of French consumers who are seeking quick solutions to food and assemble ready to eat foods, spend little time cooking. These have grown by +6.1% since 2019[1]

Attitudes to food and cuisine

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

French consumers also like to try new dishes (one in every two 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]

Photo: *Norwegian Seafood Council.*

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

37% — 37% of French consumers have been eating more meals at home.[3]

16% — 16% of French households have at least one person who works form home.[3]

68% — Of those who work from home, 68% do so two days or more.[3]

Sources: 1: *NIQ Homescan , MAT to July 2024,* **2:** *Circana, Liquid Data, July 2024,* **3:** *Kantar LinkQ data Dec 2023,* **4:** *Kantar Household Consumption Trends September 2024,* **5:** *Kantar Usage, April 2024.*

The growing trend in convenience and snacking in France is having an impact on the seafood category, especially among younger consumers.

The growing trend in convenience and snacking in France is having an impact on the seafood category, especially among younger consumers. French consumers are increasingly choosing smoked fish, seafood spreads, and marinated options for quick and convenient eating. Brands are innovating with ready-to-eat seafood formats, like tuna bites, salmon jerky, and seafood tapas.

- In France, the seafood spreads market is forecast to grow +3.5% in 2025 (Mintel), driven by the expanding delicatessen segment.
- Demand for ready-to-eat seafood, such as fish-based poke bowls and sushi (Kantar), is growing strongly. People are looking for quick and convenient meals, and poke bowls are a perfect fit for that. With an increasingly fast-paced lifestyle, consumers want meals that combine health and convenience. Carrefour and Auchan have expanded their ready-to-eat seafood offerings - for example, Carrefour is linking this to sustainable fishing practices such as MSC labelled convenient products. These retailers now offer a range of fish salads and ready meals, which meets the demand for convenient and balanced meals.
- Another example is seafood brand Delpierre who is introducing innovative convenience / snacking meals such as pan-fried cod (MSC) with grilled vegetables (€6.99 for 350 g) or a less salty smoked salmon, ideal for hot use (€4.79 for 100 g), reflecting evolving consumer preferences.
- The Pom Bistro brand (Cité Gourmande) is launching five recipes based on ASC or MSC-certified seafood. On the menu: mussels with Normandy crème fraîche and a hint of cider (PMC: €4.49 for 380 g); shrimps with Normandy butter, garlic and parsley (€6.99, 300 g); seafood cocktail with shellfish sauce (€6.99 for 400 g); cod from France, tomatoes and extra virgin olive oil (€8.99, 320 g) and Norwegian salmon, béarnaise sauce (€8.99, 320 g). The sauces are homemade, the recipes are clean label and the products are cooked in Bayeux. The reuse is done in a pan or in the microwave. These have been listed in the frozen sections of Leclerc, Intermarché, Auchan and Système U.
- Events in 2024 such as the Olympics have also had an impact, with event organisers looking for "quick and high-quality solutions such as crab claws, blue lobster, scallops (frozen due to no longer being in season) or shrimps with an impeccable texture." Carrefour also as a premium partner of the games supported this objective featuring seafood in its television campaigns through the games, with gilthead bream at three euros each.

Image: *Norwegian Seafood Council.*

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 consumers[1]

- 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-colour 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 consumers[2]

Dietary balance	59%
Diversity of products eaten	47%
Seasonality	43%

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

SEAFOOD AND FISH MARKET SIZE AND PERFORMANCE

Total seafood average price in France has decreased by ½ a percentage point, which has led to an increase in buyers and buyers buying more which has had a positive effect of +1.1% growth in volume.

- Total seafood is worth €8.4bn euros in France and is in growth by 0.5% (MAT to end of Q2 (June 2025) vs previous year).
- For total seafood, average price has fallen by over half a percentage point which has had a positive impact on volumes – both in terms of penetration (increased numbers of shoppers) and volume per trip – i.e shoppers buying more.
- Total fish (as part of total seafood) has seen a slight price decrease, but overall frequency has still declined, which has led to less of a volume growth vs total seafood.

Photo: *Alexander Zvir from Pexels.*

France - total seafood

Worth €8.4bn and in growth by 0.5%[1]

Value (in 1000 local cur)	8,437,677	Value +0.5%
Volume (tons)	628,401	Volume change +1.1%
Price (local/kg)	13.43	Price change -0.56%
Buyers (1000)	29,039	Buyers change +0.5%
Volume/buyer (kg)	21.64	Volume /buyer +0.5%
Penetration (%)	99.47	Pen change -0.1%
Household (1000)	29,194	HH change +0.6%
Frequency	33.61	Freq change 0%
Volume/trip (kg)	0.64	Vol/trip change 0%

France - total fish

Worth €6.4bn and in growth by 0.15%[1]

Whilst price is down with total fish, volume growth is not as high (1/4 percentage point), due to declines in frequency and volume per buyer.

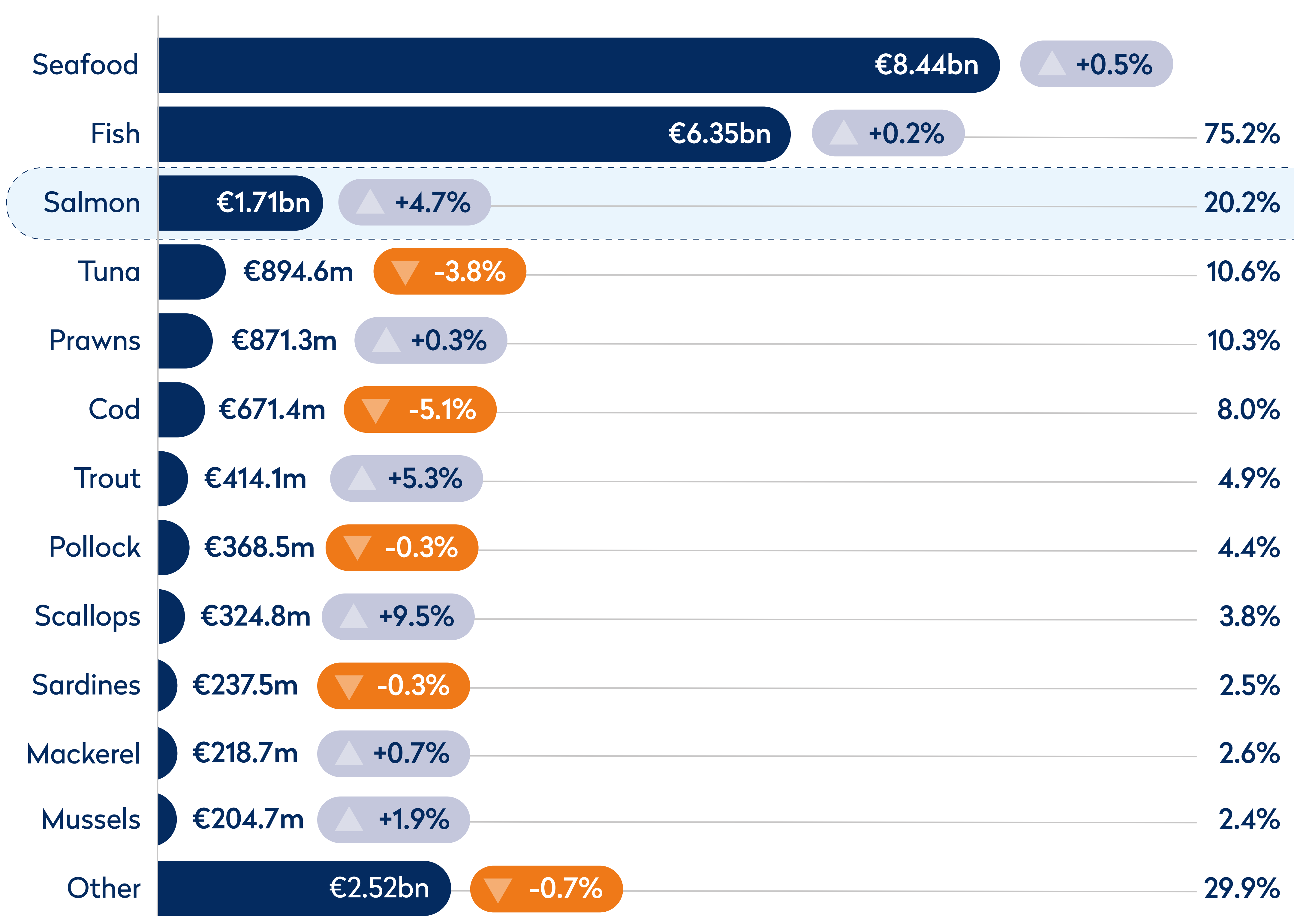
Value (in 1000 local cur)	6,345,270	Value +0.15%
Volume (tons)	446,219	Volume change +0.25%
Price (local/kg)	14.22	Price change -0.09%
Buyers (1000)	28.956	Buyers change +0.51%
Volume/buyer (kg)	15.41	Volume /buyer -0.26%
Penetration (%)	99.15	Pen change -0.16%
Household (1000)	29,205	HH change +0.67%
Frequency	28.84	Freq change -0.48%
Volume/trip (kg)	0.53	Vol/trip change 0%

Source 1: *Kantar Latest MAT to end of Q2 (June 2025) vs previous year.*

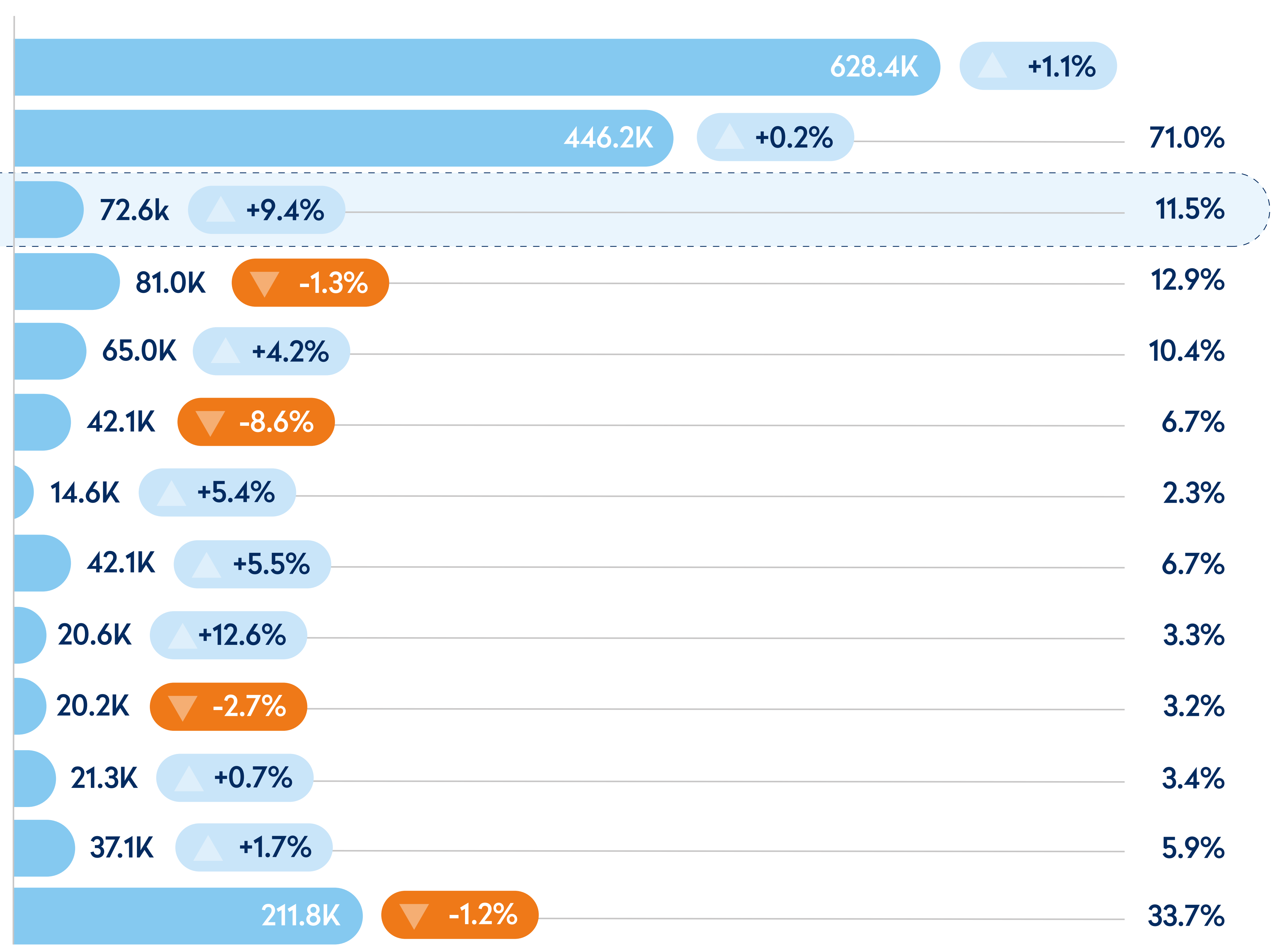
SEAFOOD AND FISH SPECIES SALES, YEAR ON YEAR PERFORMANCE & SHARE

Salmon is the largest species in terms of value (tuna in volume terms) with a 20% value share and an 11% volume share in France. Six of the top ten species are in value and volume growth.

France - total value sales (€) - Lat value MAT to Jun 2025 vs last year



France - total volume sales (tonnes) - Lat value MAT to Jun 2025 vs last year



Source 1: *Kantar FMCG Panel, MAT to June 2025.*

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

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

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

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

PURCHASE BARRIERS[1]

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

30% Prices have soared 30% in three 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 purchases[2]

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.

Source 1: *IFOP Research, Total France – Fish consumption, June 2024,* **2:** *CGAD, Les enterprises alimentaires de proximite August 2024.*

FISHMONGERS – KEY STATISTICS

Around 16% of value in seafood comes from traditional specialists – markets, fishmongers and other stores.

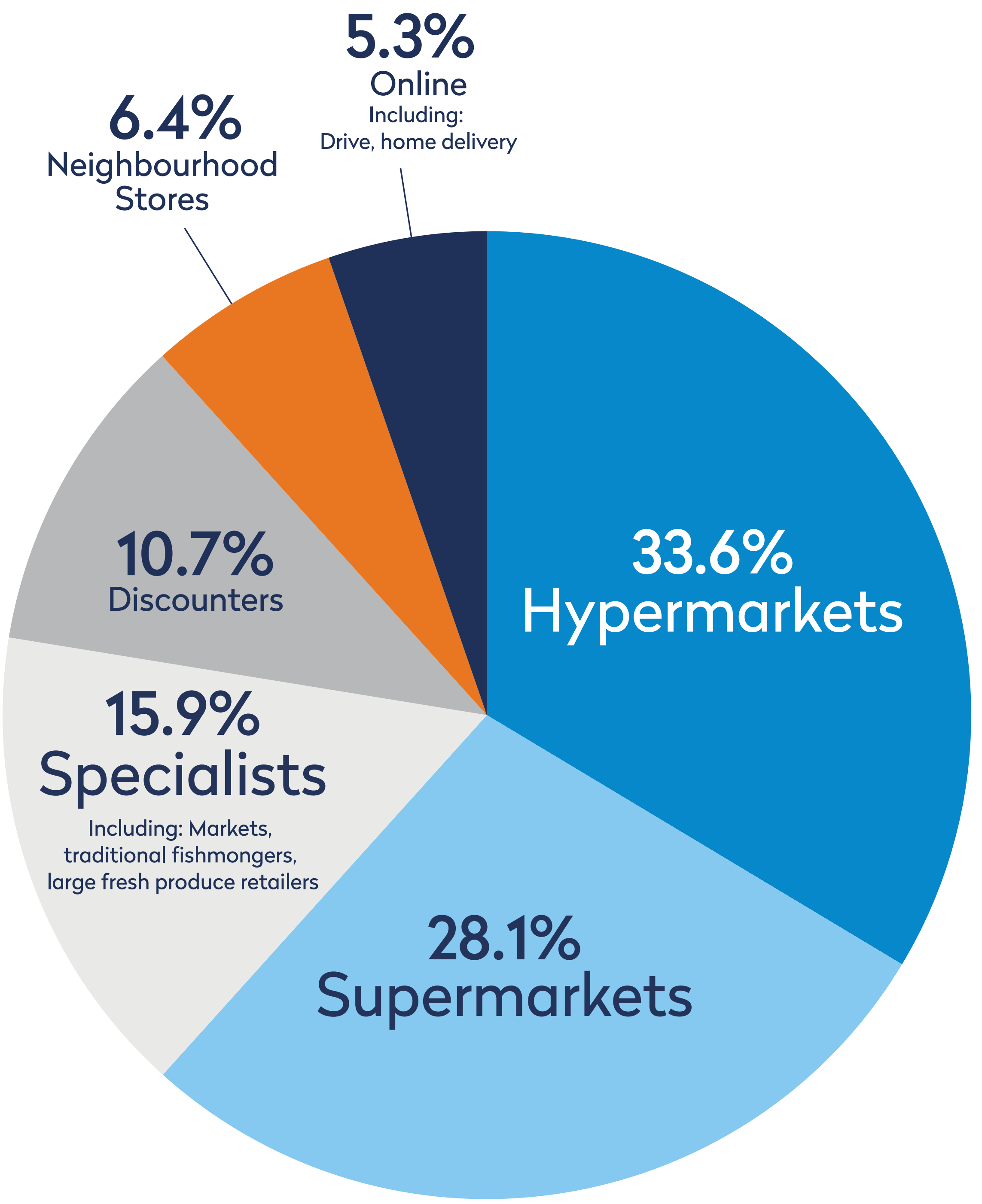
In 2024, Kantar put the market share of specialists in seafood at just under 16%.

- Over 72% of value sales is generated through the large-scale retail trade.
- At the same time, Kantar indicated that 87% of French households buy seafood on average 7.6 times per year.

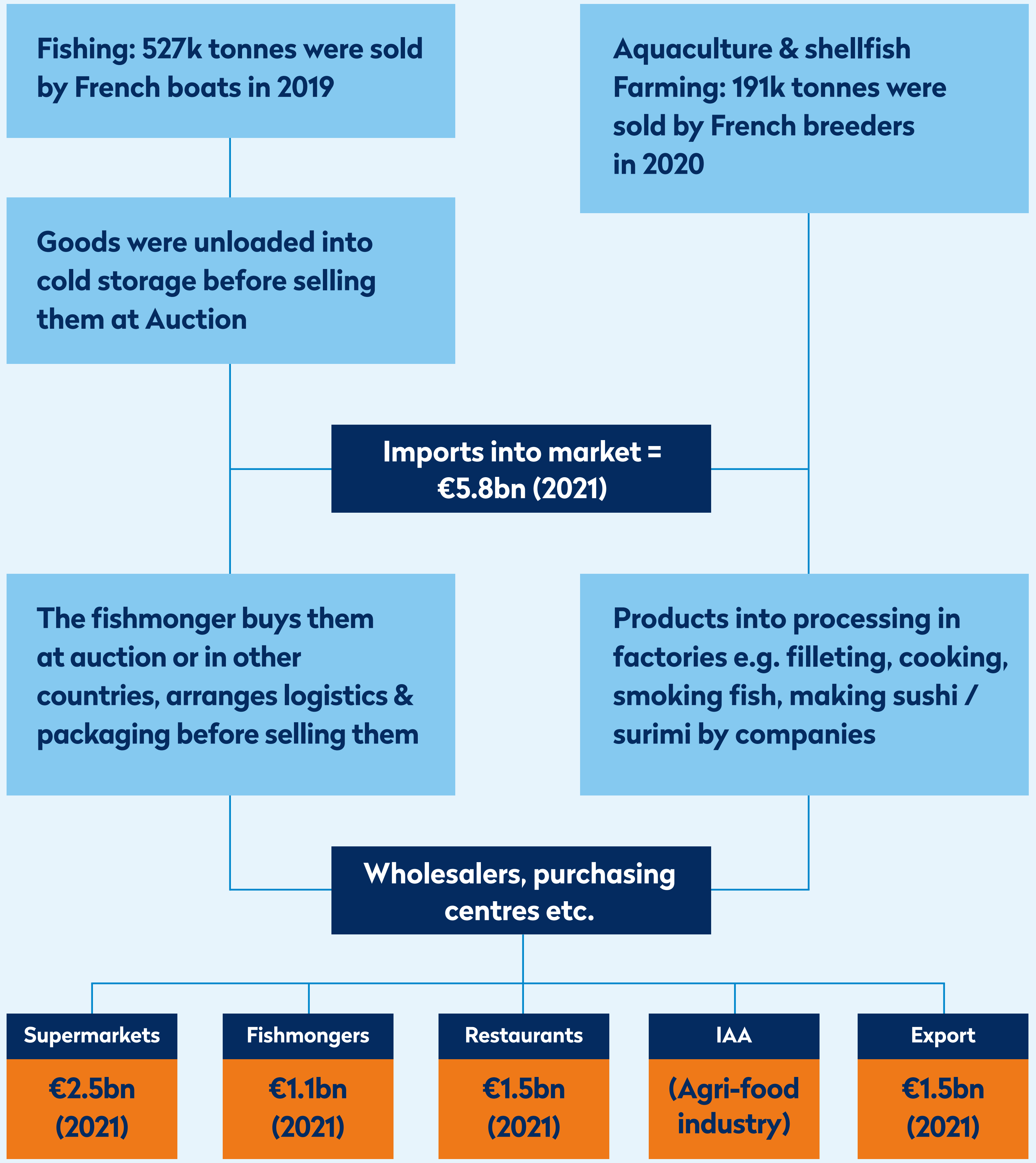
Seafood penetration: 87.14%

Seafood frequency: 7.63

Seafood market € share by channel, 2024[1]



The fresh seafood product sector – OPEF[2]



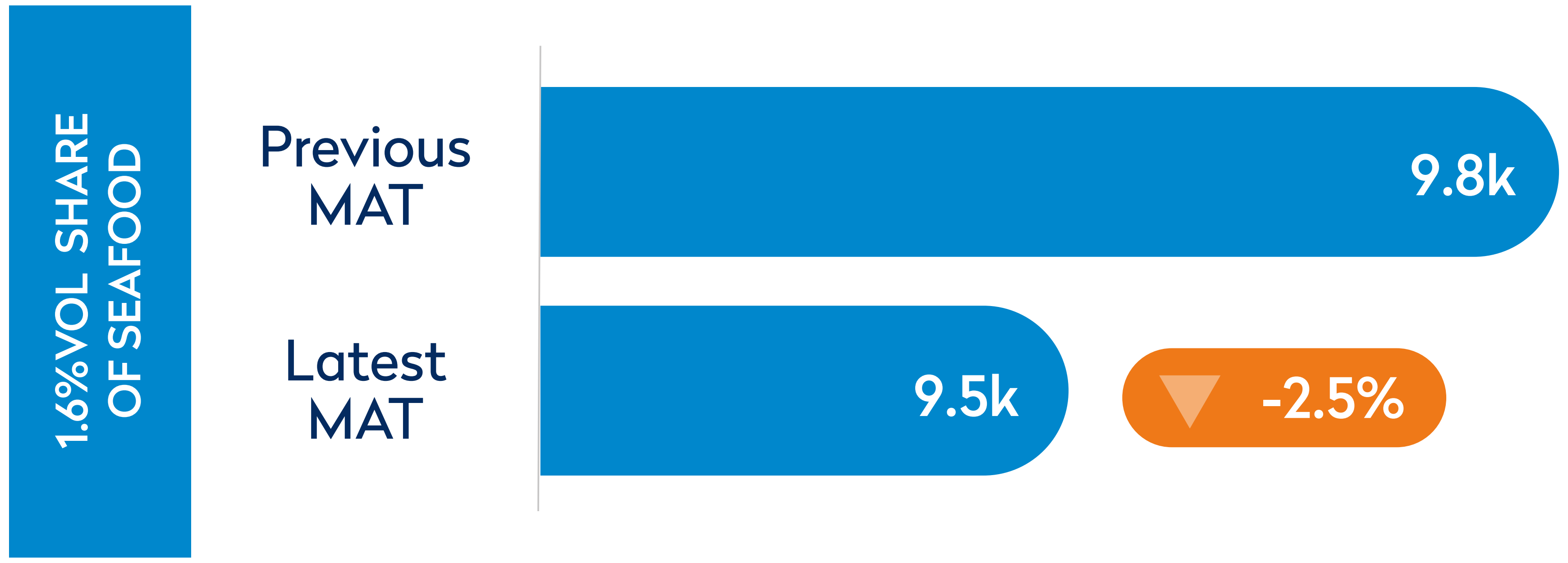
Source 1: *Kantar, FMCG Panel, All Channels 2023,* **2:** *OPEF (Organization of the Fishmongers and Scalers of France), XERFI, Research October 2024.*

SAITHE

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

Saithe € sales MAT to April 2025 vs last year[1]

Saithe € sales MAT to April 2025 vs last year[1]



In 2022, 88% of saithe landings in France came from Norwegian waters.[3] Iceland also exported 20% of its saithe catch to France in 2022.[4]

- In 2024, nearly 30% of French consumers still choose the species.
- Average per capita consumption of the fish was 0.69 kg / person in 2022 in France.[5]

Source 1: *Kantar FMCG Panel MAT to April 2025 vs Previous Year,* **2:** *Kantar FMCG Panel – Total France 2023,* **3:** *Pavillion France & France Fishing,* **4:** *Statistics Iceland 2022 5 France Agrimer 2022.*

SKREI MARKET INSIGHTS

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 summary[1]

- The knowledge of the story and the qualities of the skrei is extremely high among distributors, wholesalers, and chefs in high-end/bistronomic 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.

Source 1: *A mini survey of the French market, Saveur de Norvege 2025.*

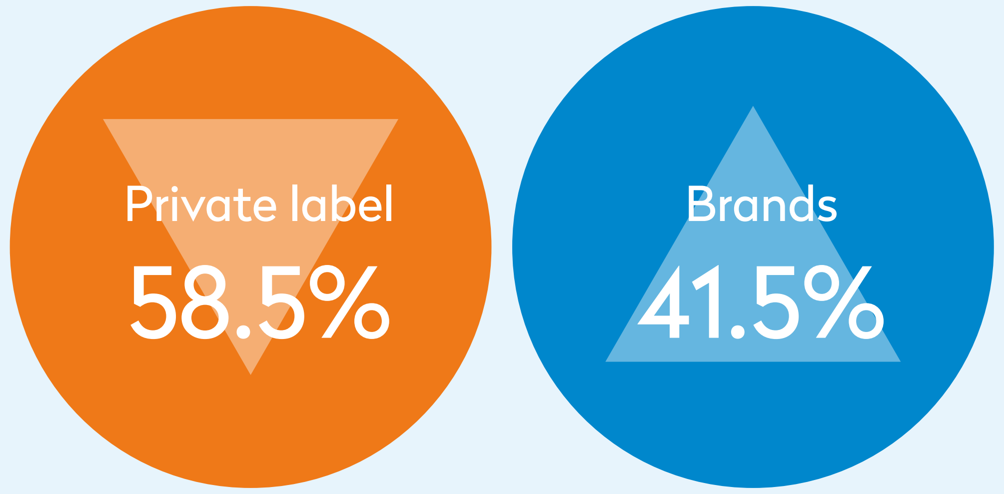
SUSHI AND SURIMI IN FRANCE

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

France – total Asian foods, 2023[1]

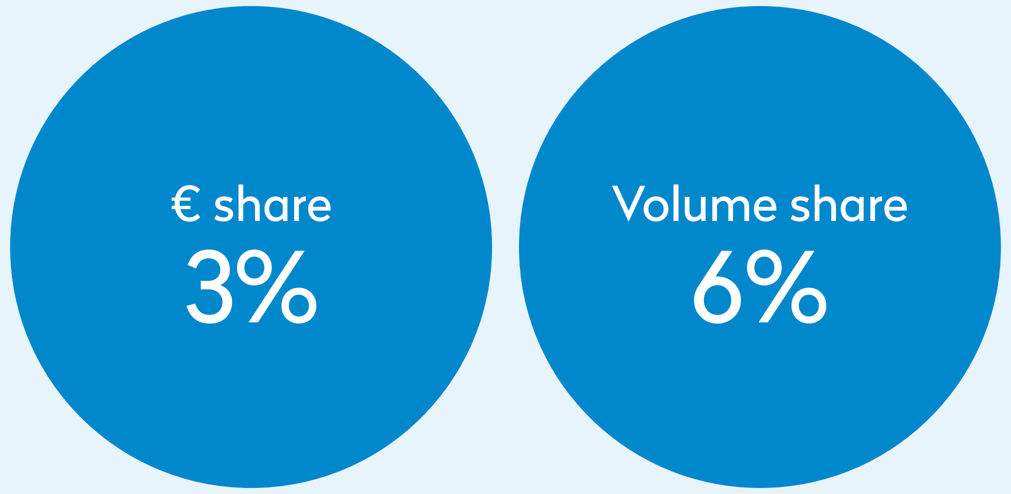
France – total sushi sales, 2023[2]

Asian foods – share[1]



Arrows denote share movement vs previous year

Chilled seafood deli – sushi share, 2023[2]



Sushi and 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 2023[1]) 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 sush

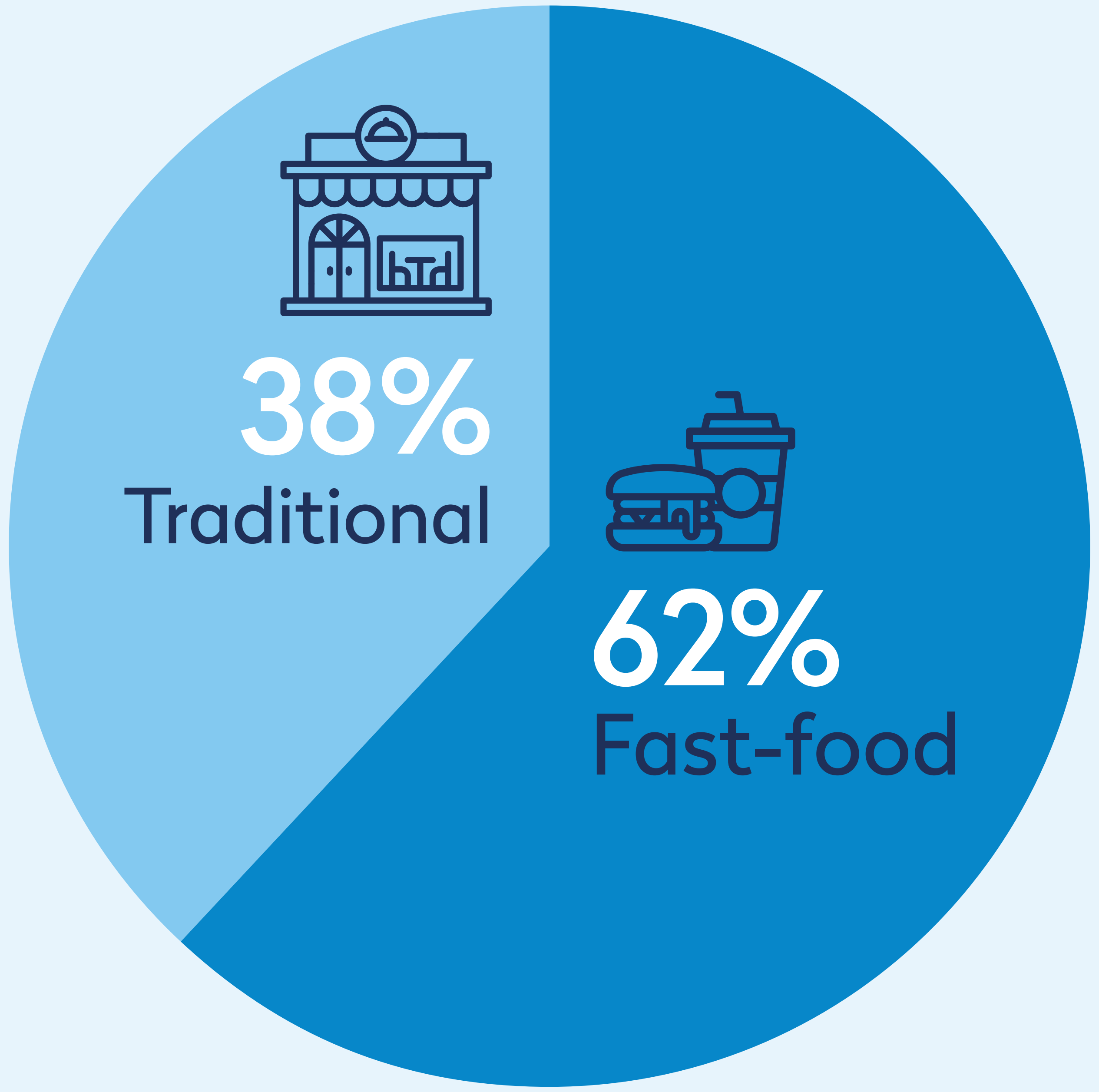
A third of French people say they are flexitarians. To cater for them, the first sushi box based on a plant-based alternative to salmon is born. This product is 100% plant-based and made in France, in the Loir-et-Cher. It is the result of a collaboration between Foodiz, whose Fresh Mood brand is dedicated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

Source 1: *Circana, Liquid Data MAT to Sept 2023,* **2:** *Agrimer / Kantar FMCG Panel 2023,* **3:** *Data from Gira Foodservice and Circana Jan 2024.*

OUT OF HOME: 2023 NEW RESTAURANT TRENDS

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

Total France – new restaurants 2023



Traditional

77%
share in 2023

Average prices
+11.1%
in 2023

- 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 two sittings per day at lunchtime and in the evening, almost six days out of seven.
- Nearly six out of ten traditional restaurateurs have increased their prices to cope with inflation and 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

23%
share in 2023

Average prices
+1.74%
in 2023

- 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.

Source: *At Propulse du Crédit Agricole & Insee 2023.*

OUT OF HOME: SEAFOOD CATEGORY INSIGHTS

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 period 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 approximately 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]

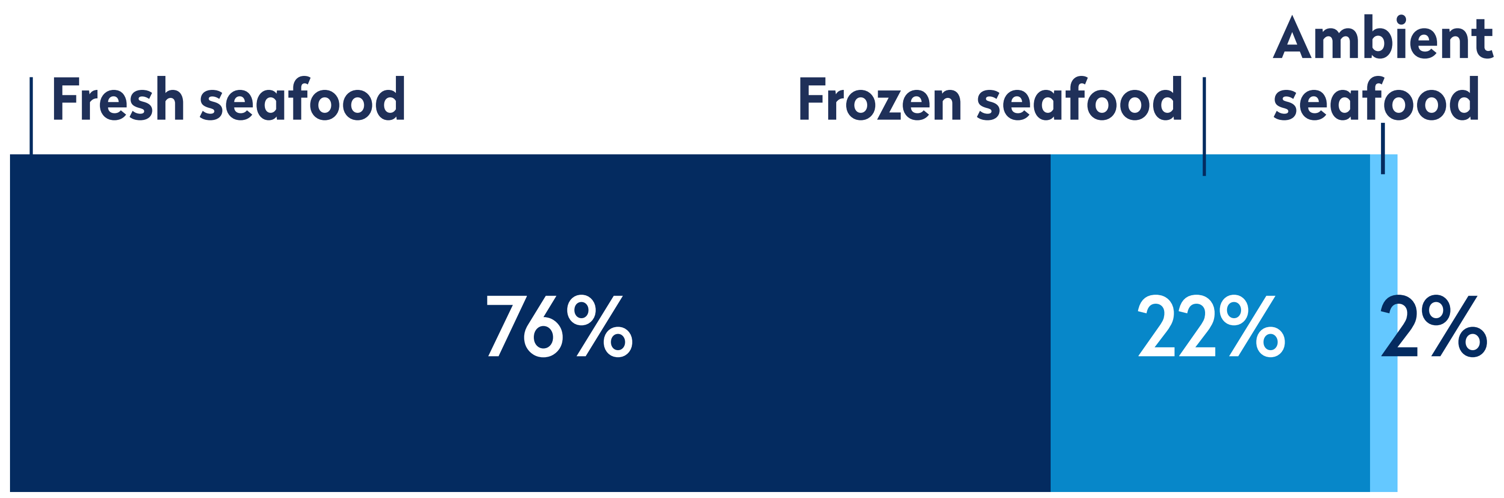
Trading down in seafood, out of home

- 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]

Photo: *Julia Khalimova / Pexels.*

Total seafood in restaurants: €1.5bn

% of products in commercial restaurants, 2021[2]



Seafood volume % share by channel 2022[2]

Catering: Schools, canteens, hospitals, prisons

Source 1: *Insee, 2021,* **2:** *Euromonitor International – Total France 2022,* **3:** *PDM, Feb 2025,* **4:** *Snacking.fr 2024,* **5:** *lexpress-franchise, October 2023.*

Seafood & French consumer behaviour on seafood

(Ipsos report)

Image: *Norwegian Seafood Council.*

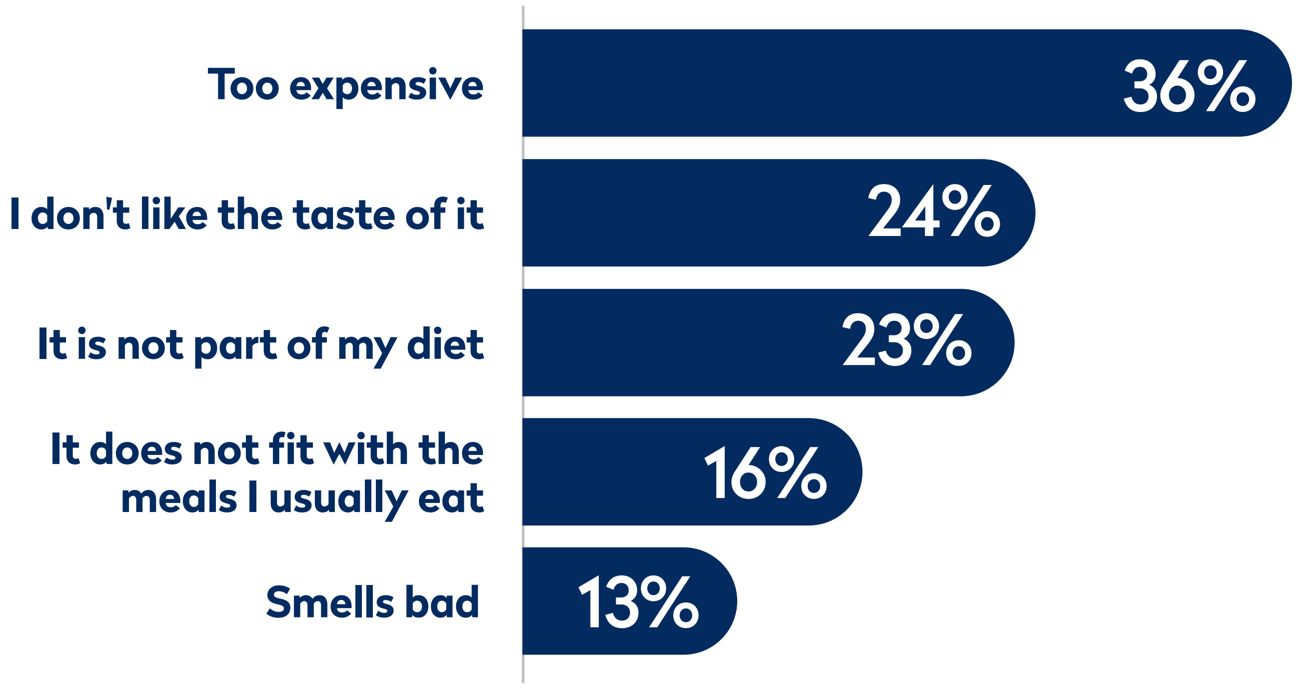
Eating more at home and keeping an eye on costs are shaping French consumers approach to rising fish / seafood prices.

2024 fish and seafood attitudes and behaviour with French consumers:

- **In both in or out-of-home,** 63% of French consumers eat fish and / or seafood once a week or more, this rises to 67% at home, 13% out of home and 7% as a takeaway / delivery.[1]
- **Managing household budgets:** 28% of respondents eat at restaurants less and have more meal occasions at home to manage increasing costs – although only 11% are buying cheaper alternatives vs 16% in 2023.[3]
- **For heavy consumer of fish / seafood,** the behaviours they over index vs the total to manage rising costs includes 30% comparing costs / price matching, 12% reducing volume average weight of purchase (pack size), and 9% stocking up on promotion.[4]
- **48% of French consumers are willing to pay more** for fish and seafood products that are sustainable (vs 44% in 2023) and over a third mainly buy seafood products with recyclable packaging.[5]
- **Quality is important for French consumers** - 42% said it's least acceptable that brands keep the same price, while reducing volume or size of products. 44% said it's least acceptable that brands reduce quality of ingredients to bring prices down.[6]
- **45% agree and 6% strongly agree that it's fair for brands to increase prices** since they also face rising costs.[7]

Photo: *Norwegian Seafood Council.*

Top five barriers to increased seafood consumption in France - % who stated (multiple answers)[2]



French consumers are adjusting household habits to counter rising costs but also exhibit some acceptance and willingness to pay more for seafood products amidst inflationary pressures. Brands have some flexibility to tweak product sizes/quality or raise prices without majority of consumers push back. Sustainability positioning also retains appeal and pricing power amongst shoppers.

See appendix for sample size and Questions.

French consumers love salmon – 77% eating it at least once a month, with fresh the favourite type and searing / browning the favourite method of preparation.

2024 French consumers and salmon

- **Salmon is loved by the French:** 27% of French consumers eat salmon at home once a week or more often and 77% eat salmon at home at least once a month.[1]
- **This is sightly higher in women vs men** (79% vs 77%).[1]
- **58% prefer fresh salmon** (35–49-year-olds over-index with fresh salmon), 20% prefer smoked salmon, and 18% prefer and use frozen salmon.[4]
- **Family affair:** 41% of French consumers eat salmon with their families or their partners – again with the (35–49-year-old age demographic over-indexing).[5]
- **Key motivations:** 56% seek a sense of enjoyment, 38% want to maintain a healthy diet, and 36% want something everyone enjoys.[6]

- **When it comes to brands vs retailer private label products,** the answer with the highest percentage was "I buy branded as well as unbranded products or private label brands" (e.g. the stores own brands) – 39% of French consumers stated this, with a third mainly or exclusively buying brands.[8]

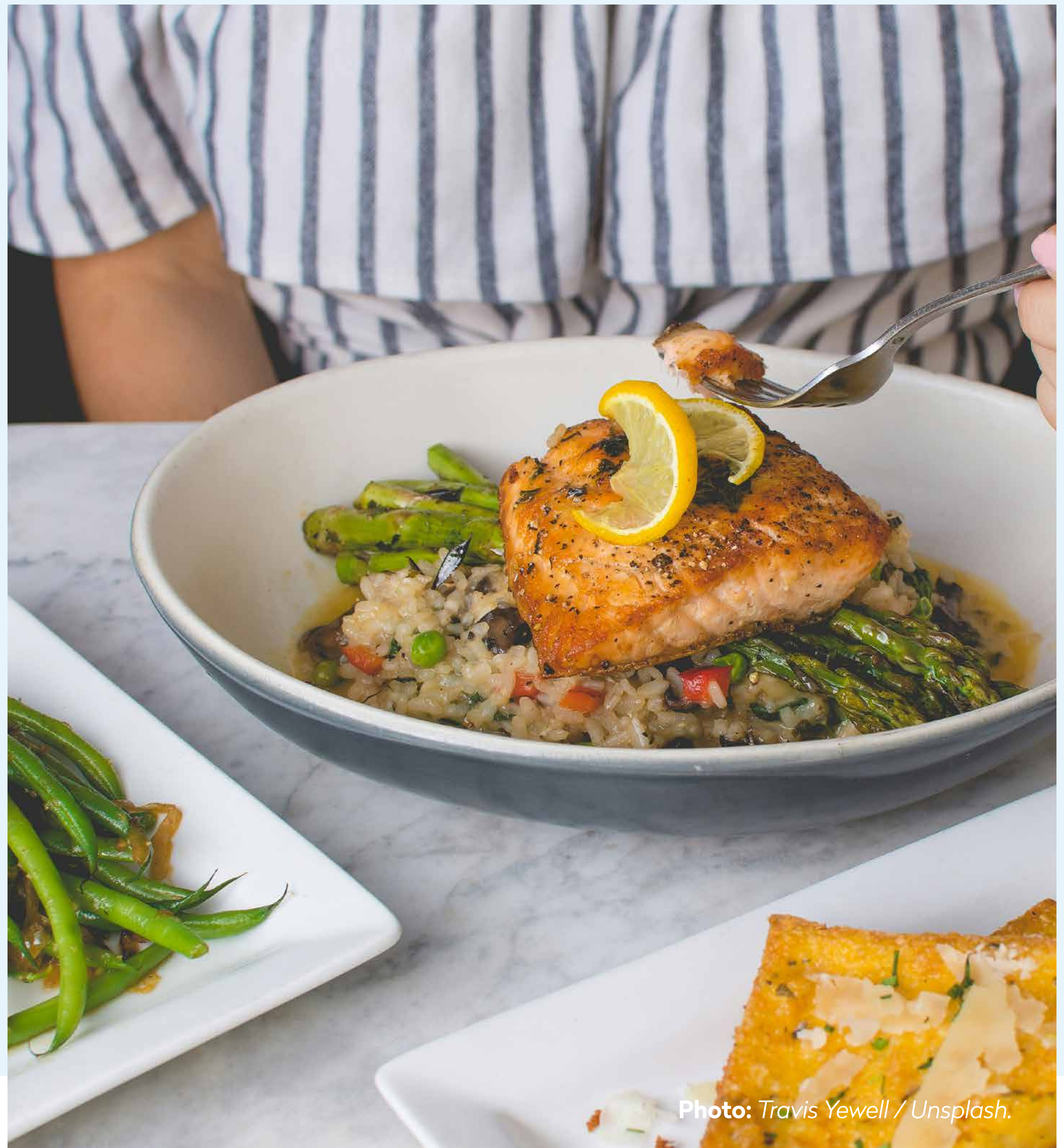
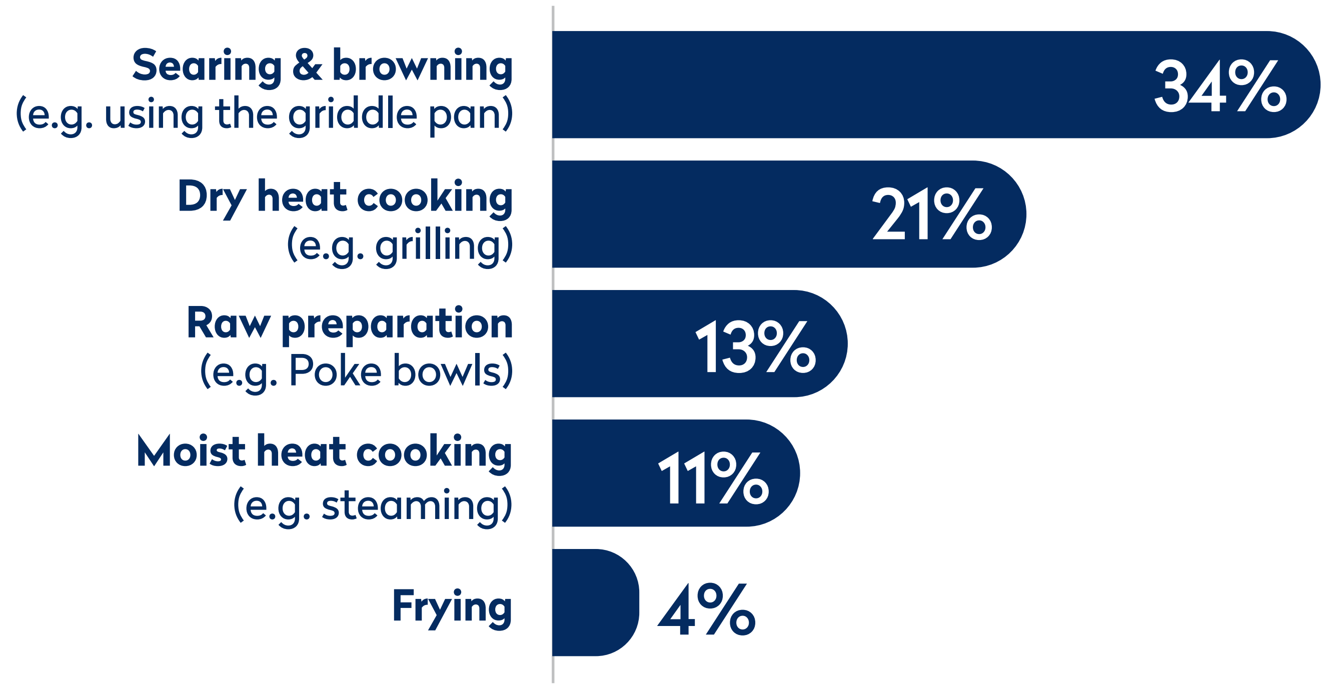


Photo: *Travis Yewell / Unsplash.*

Top five methods for preparing salmon to consumer (single answer)[2]



41%
of French consumers mentioned Norway in relation to origin (2nd Scotland with 20% of French consumers mentioning the country)[3]

70%
of salmon purchases are planned before entering the store, 30% were impulse.[7]

See appendix for sample size and Questions.

Like salmon, cod is popular with French consumers, with many buying fresh cod and eating healthy being part of the decision.

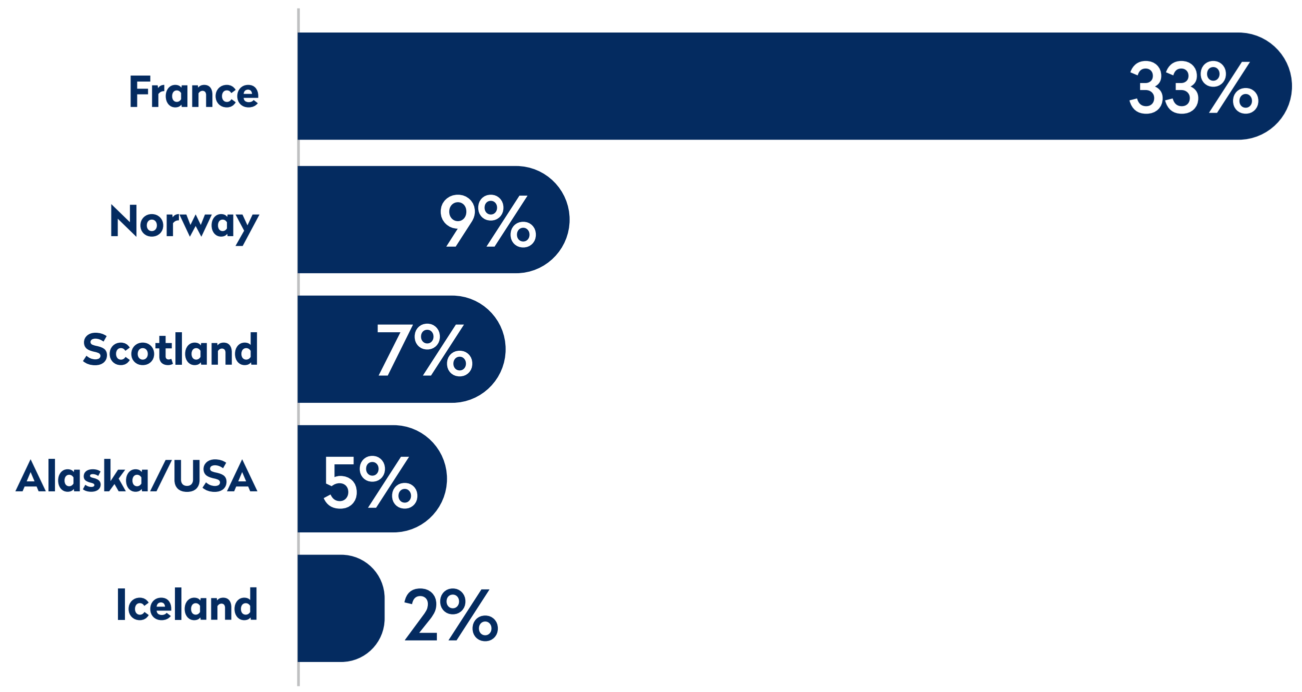
2024 French consumers understanding cod consumption

- **Consumption frequency:** 32% eat cod once a week or more often and 83% eat it at least once a month.[1]

Photo: *Norwegian Seafood Council.*

- **Fresh is king for the French:** 60% prefer fresh cod, with a third liking frozen cod, despite growth in convenience / snacking in France, only 6% use processed or prepared (such as ready meals, fish fingers etc.).[3]
- **60% of French consumers eat cod when relaxing** or doing nothing special at home, so it's seen very much as an everyday fish by consumers.[4]
- **Key motivations:** as with salmon, health is a key driver of choice with 48% choosing cod as they want to maintain a healthy diet and 41% are seeking a sense of enjoyment from their food.[5]
- **Planned vs impulse:** 64% of cod purchases are planned before entering the store.[6]
- **36% of French consumers look for quality and 35% are focused on price** – these are the top two reasons for buying when in store; range and availability also play a role.[7]

Top five country of origins stated when consuming cod at home[2]



Cod is a popular fish in French households, valued for its health benefits, taste, and versatility. Consumers prioritize quality, affordability, and convenience when purchasing cod. There's an opportunity to target different segments with tailored products and messaging, focusing on health, value, and ease of preparation.

See appendix for sample size and Questions.

Consumer behaviour tracking report

SEAFOOD FROM NORWAY

NORWEGIAN SEAFOOD COUNCIL

Image: *Norwegian Seafood Council.*

CONSUMER BEHAVIOUR TRACKING

67% of French consumers eat fish or seafood at least once a week and nearly half the population recognise Norway as a key country of origin with salmon, the largest consumed fish species (Kantar).

Background & methodology

Background: The Norwegian Seafood Council aims to measure developments in key KPIs for Norwegian seafood and defined Norwegian seafood products.[1]

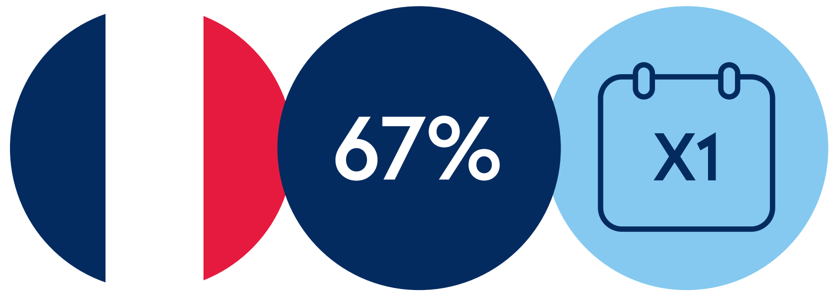
Research Objectives:

- Measure consumption of Norwegian seafood.
- Assess awareness of Norway as a country of origin.
- Evaluate usage and consideration of Norwegian seafood.
- Determine brand strength of Norway as a country of origin.

Sample details:

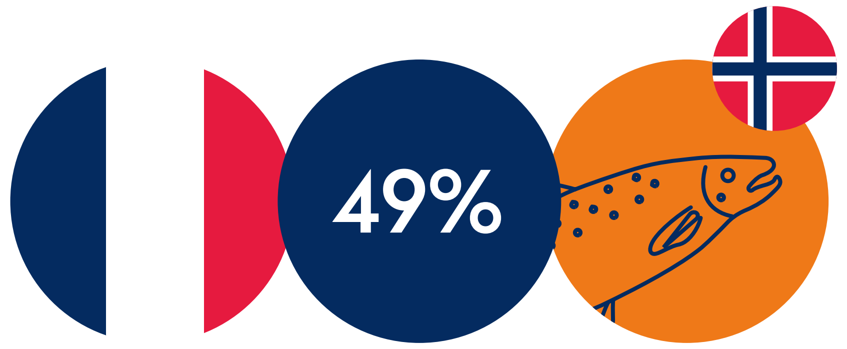
- National representative sample 20 - 65 years old.
- Consumers eating fish/seafood less than every third month are screened out of the survey.
- N = 750.
- Data Collection: Online device agnostic.
- Fieldwork Period: 2024-11-04 - 2024-11-07.

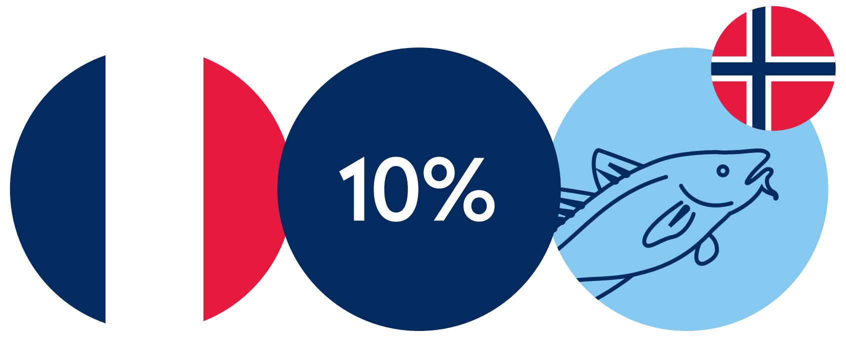
Summary of key findings



67% of French consumers eat fish or seafood at least once a week.

49% of French consumers think about Norway in terms of salmon & country of origin (top of mind).





10% of French consumers think about Norway in terms of cod & country of origin (top of mind).

Other key species:

- 6% of French consumers stated that Norway was top of mind for saithe.
- 18% of French consumers stated that Norway was top of mind for skrei.

Source 1: *Consumer Tracking Report 2024.*

CONSUMER BEHAVIOUR TRACKING

31% of French consumers have seen the Seafood from Norway logo and Norway features in the top five preferred countries for French consumers when buying salmon, saithe and skrei.

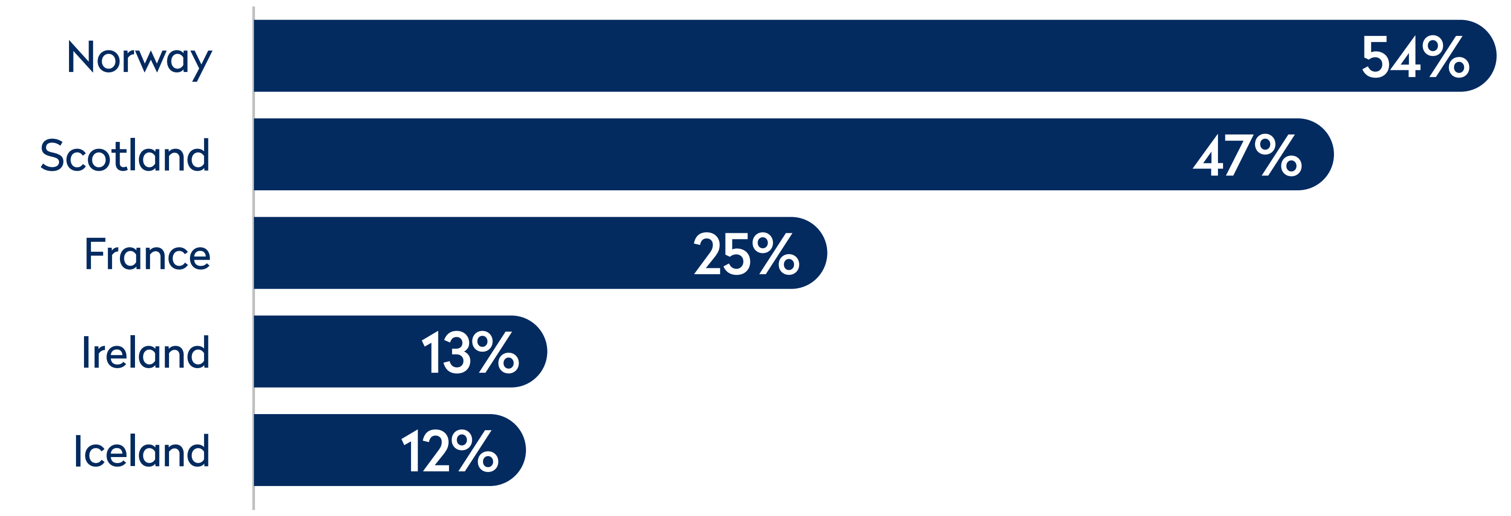
31%

31% of French consumers have seen the Seafood from Norway Logo.
(Feb 2024)

This has risen from 27% in January 2021 and over the last four years peaked in February 2023 at 37% of the population. Linked to this is the fact that 54% of French consumers highlighted they preferred Norway as the country of origin for salmon.

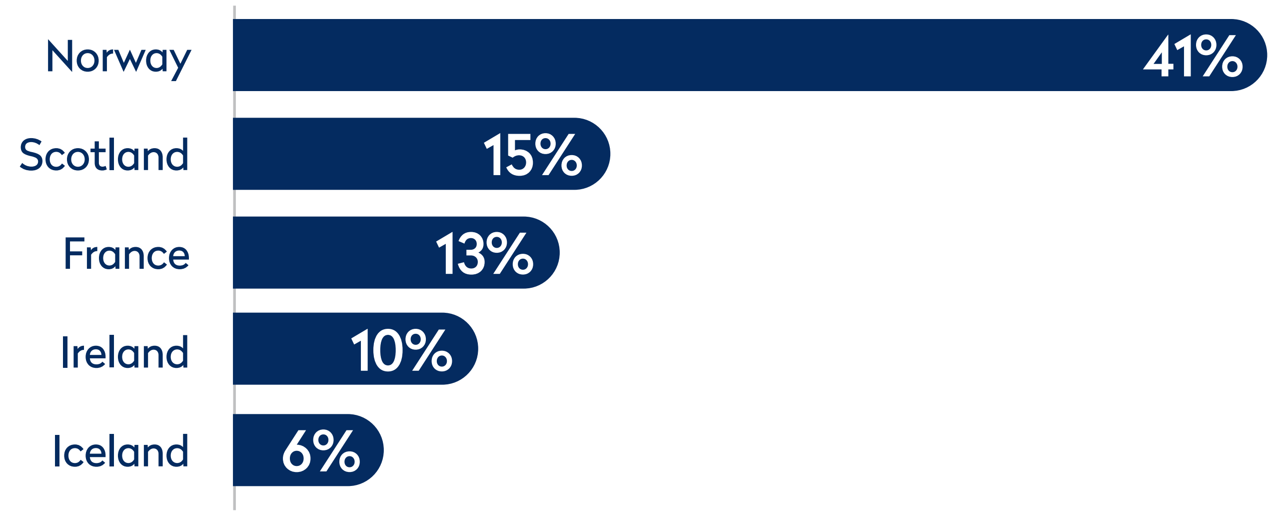
Question: Can you remember having seen this logo? Base Total 750

Top five preferred countries to buy **salmon** from....



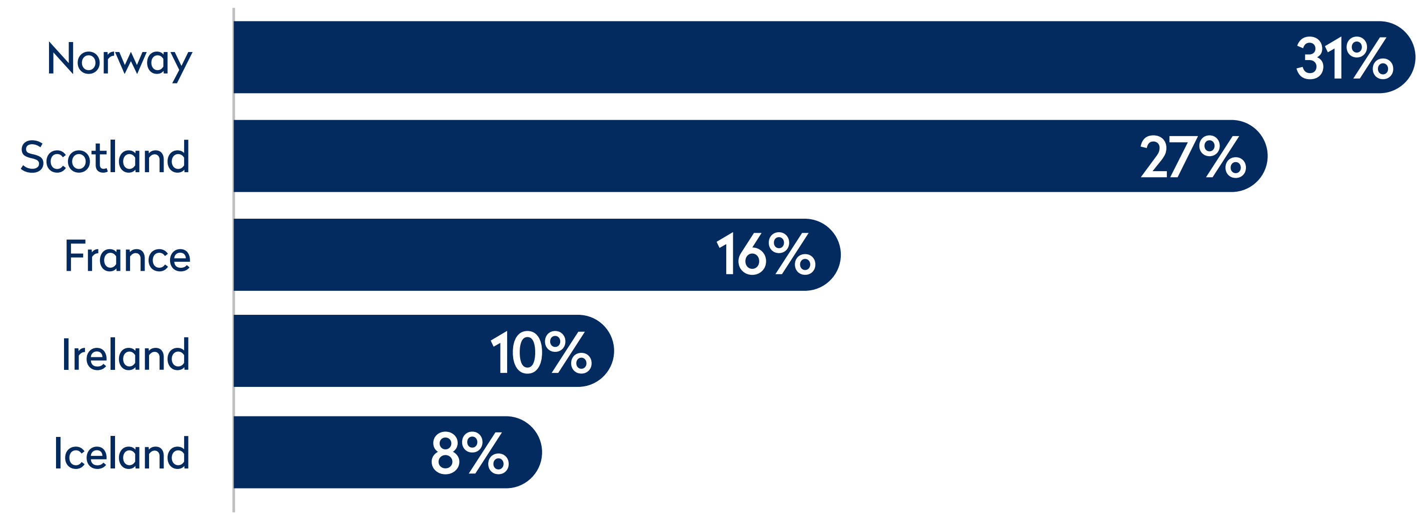
Base: Awareness of country of origin, salmon: 647

Top five preferred countries to buy **saithe** from....



Base: Awareness of country of origin, saithe: 563

Top five preferred countries to buy **skrei** from....



Base: Awareness of country of origin, skrei: 114

Source: *Consumer Tracking Report 2024.*

CONSUMER BEHAVIOUR TRACKING

Whilst 93% of French consumers have fish / seafood at least once a month at home, salmon is seeing more people eat it less vs six months ago vs other key species.

		AT HOME		OUT OF HOME	
		Once a MONTH or more	Once a WEEK or more	Once a MONTH or more	Once a WEEK or more
Fish / Seafood		93%	64%	45%	15%

Do you eat more, less or the same amount today compared to six months ago?

		MORE	LESS	SAME AMOUNT	DON'T KNOW
Salmon		11%	34%	53%	2%
Cod		11%	27%	59%	3%
Saithe		9%	25%	61%	5%
Skrei		4%	15%	34%	47%

Question: Do you eat more, less or the same amount today compared to 6 months ago; Base 750

Source: *Consumer Tracking Report 2024.*

Category opportunities in seafood.


Photo: *Alexander Mass / Pexels.*

- **Convenience:** There is a strong opportunity for Norwegian producers to develop more convenient formats – around 24% of French consumers are looking for quick, ready-to-eat options that require minimal prep. Products like seafood-based ready meals or snacks, especially those sold in supermarket delicatessen sections, could meet this growing demand for fast, high-quality solutions.
- **Target by age group:** Norwegian producers could tailor seafood offerings by age group, tapping into older consumers (65+) who are confident home cooks and open to trying lesser-known species like saithe, with formats designed for scratch cooking. Meanwhile, younger consumers, likely drawn to quick-service dining, represent a strong target for convenient, ready-to-eat products featuring familiar favourites like prawns and smoked salmon.
- **Seafood-based on-the-go snacks** present strong potential in France, where busy lifestyles and rising snacking occasions are reshaping eating habits. Convenient options like seafood wraps, bites, or chilled snack packs could appeal to younger, mobile consumers looking for protein-rich, healthy alternatives during commutes or between meals.
- **Traditional retailers:** Norwegian producers could support struggling traditional retailers like fishmongers by developing products that celebrate the appeal of French home cooking. Ready-to-cook seafood dishes inspired by classic regional recipes—such as Bouillabaisse or Provençal-style stews—could help fishmongers offer added value, attract home-cooking consumers, and counteract the impact of rising prices through quality-led differentiation.
- **Health** remains a powerful purchase driver in France, and Norwegian seafood producers can capitalise by promoting the nutritional benefits of species like salmon and cod - both rich in lean protein and heart-healthy omega-3s. Positioning these as natural, wholesome options can resonate strongly with wellness-conscious consumers, especially within trends like flexitarianism, clean-label eating, and light, balanced meals.

NORWEGIAN SEAFOOD COUNCIL

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Seafood from Norway

Access more market insight at:
en.seafood.no/market-insight

Norwegian Seafood Council
WOJO Champs Elysees,
16 rue Washington, 75008, Paris, France
+33 6 82 43 31 88

www.en.seafood.no

Sigrid Louise Philippart
Director, France

Solveig Forre
Marketing advisor, France

Photo: *Norwegian Seafood Council*