

NORGES SJØMATRÅD

# France buys 10% less salmon. What's eating the French?

22<sup>nd</sup> of November /  
Christmas seminar - Fish Pool



Trine Horne – Country Director France

But...

...what are the French  
eating?





Our mission

# Increase value of Norwegian seafood

# France overview

- Population: 67,75 million (2021)
- France is one of the largest consumers of fish, going from 20 kg in the 1960s to 33.7 kg today.
- The perception of seafood is quite homogeneous. It is overall seen as an essential part of the French daily diet, that combines pleasure, diversity and nutritious properties.
- 7/10 French people say they eat fish at least once a week, compared to 9/10 for meat.



## Every little hurts

Consumer food prices, % increase on a year earlier



Source: OECD



# Market trends

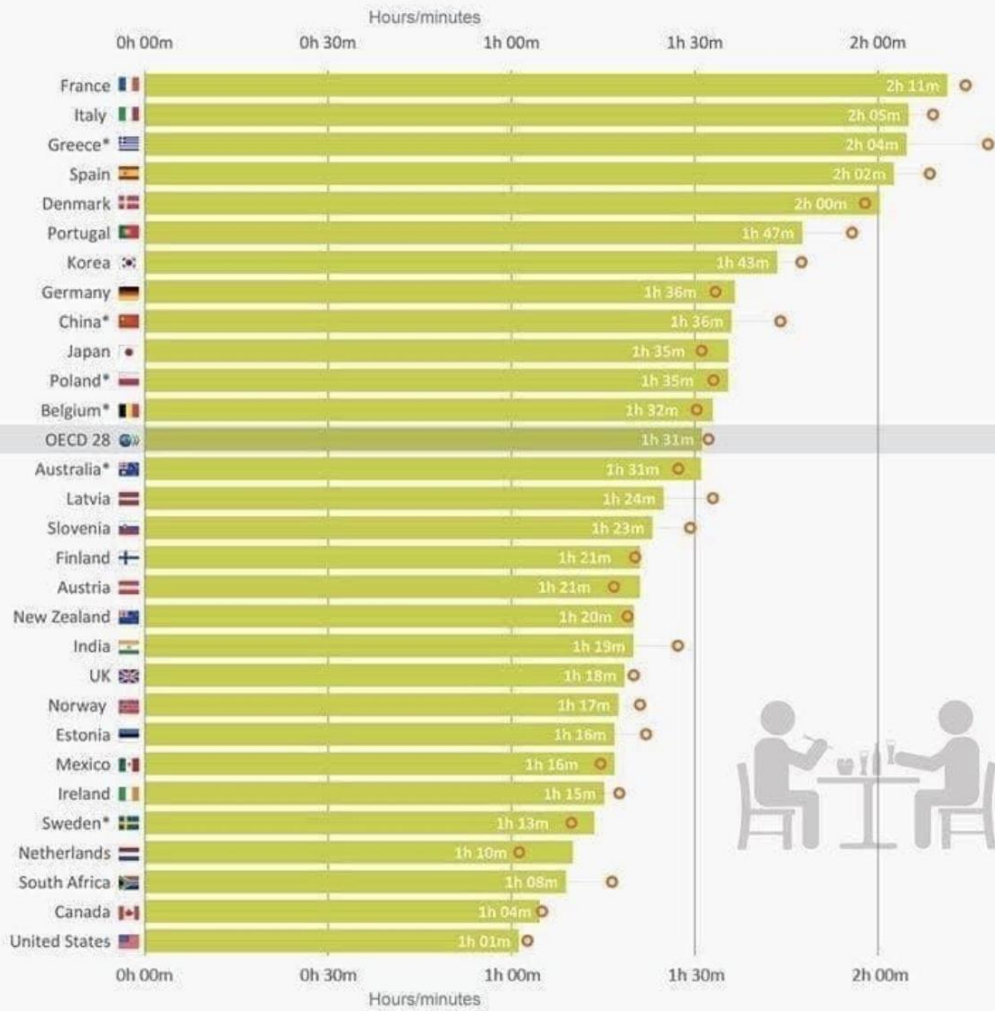
- The taste and the health aspect is important to the French when buying seafood, together with the price.
- Sustainability rapidly emerges as a growing hot topic when it comes to buying seafood. For French consumers and professionals the future of seafood is necessarily sustainable.
- Local produce and French origin are highlighted in both retail and food service.
- There is a contradiction in what people say they want to buy – fresh, wild-caught fish – and what they actually consume
- For seafood overall, three items consistently hold the top-three spots in the French consumer diet: salmon, cod and shrimp





# Time spent eating and drinking

Time spent eating & drinking each day, in hours/minutes  
Women and Men (15-64), 2015 or nearest year (OECD and other selected countries)



Note: Reference years vary across countries. The \* denotes that time use estimates are not fully comparable, due to a difference in the reference age group.

Source: OECD Gender Data Portal based on the OECD Time-Use Database  
[www.oecd.org/gender/data/](http://www.oecd.org/gender/data/)

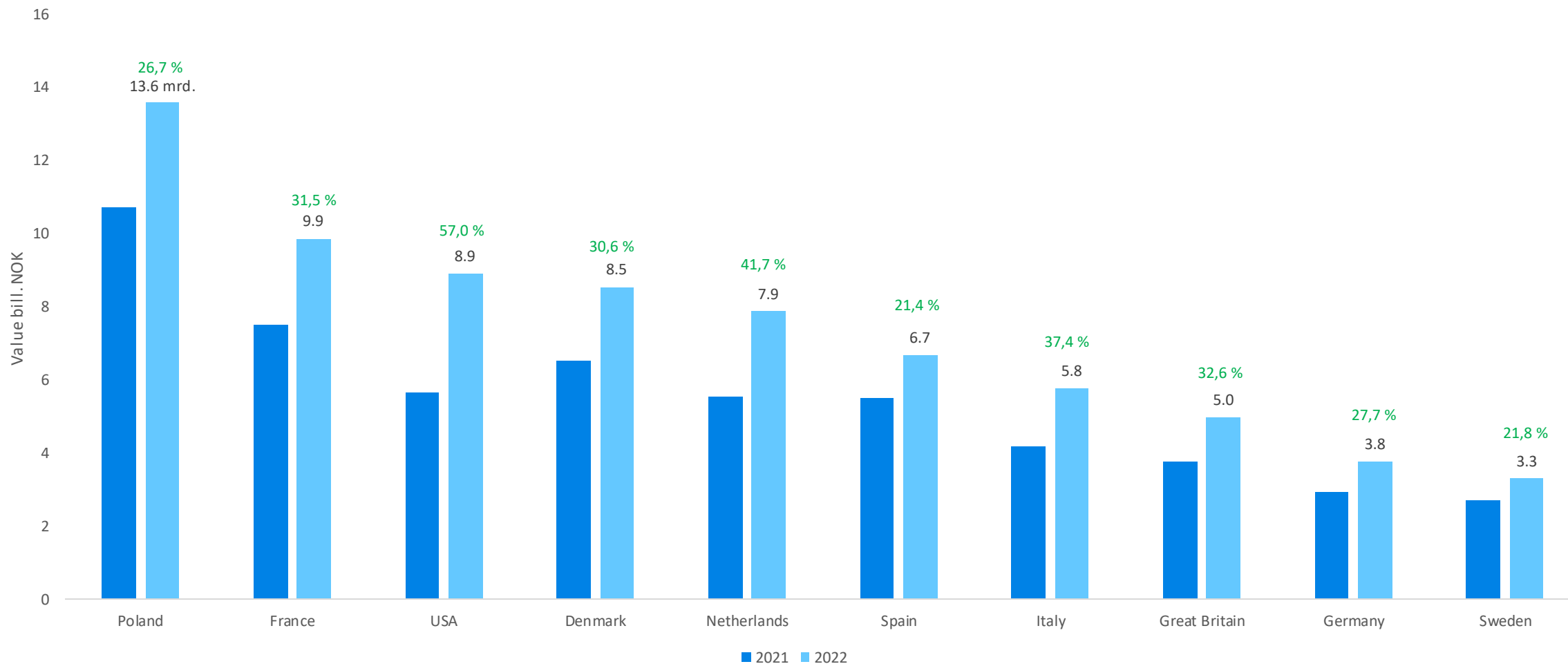


# Exports

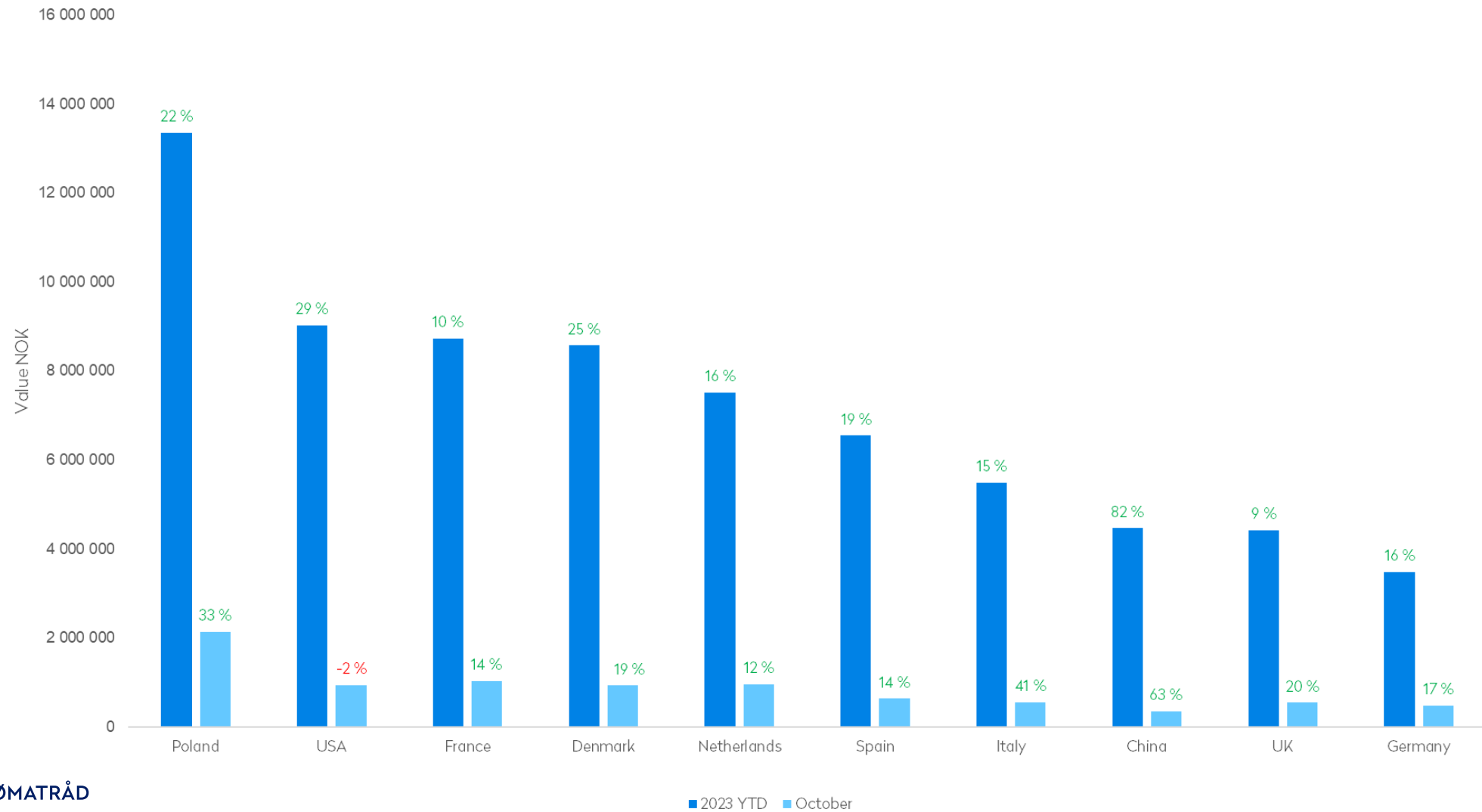




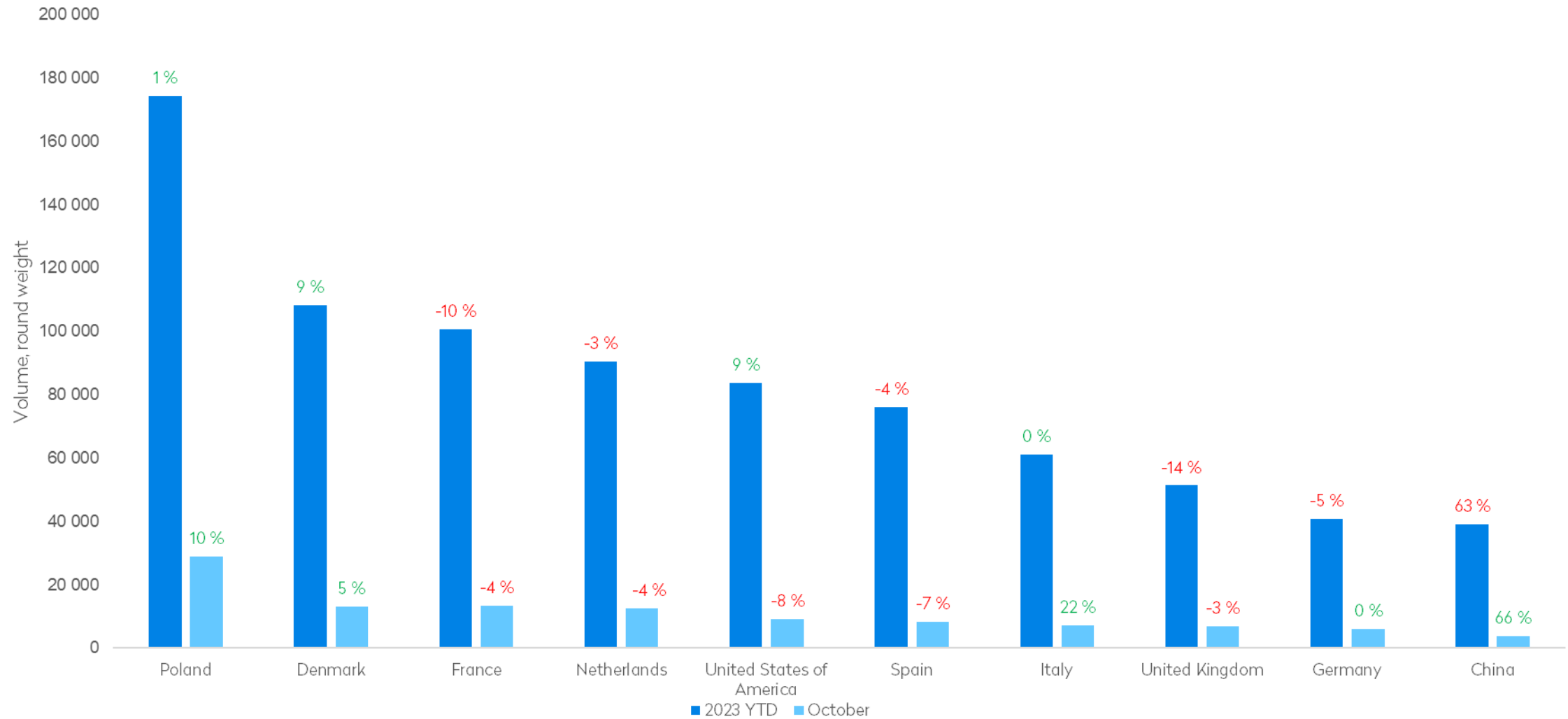
# Top 10 markets for salmon 2022 compared to 2021 (value)



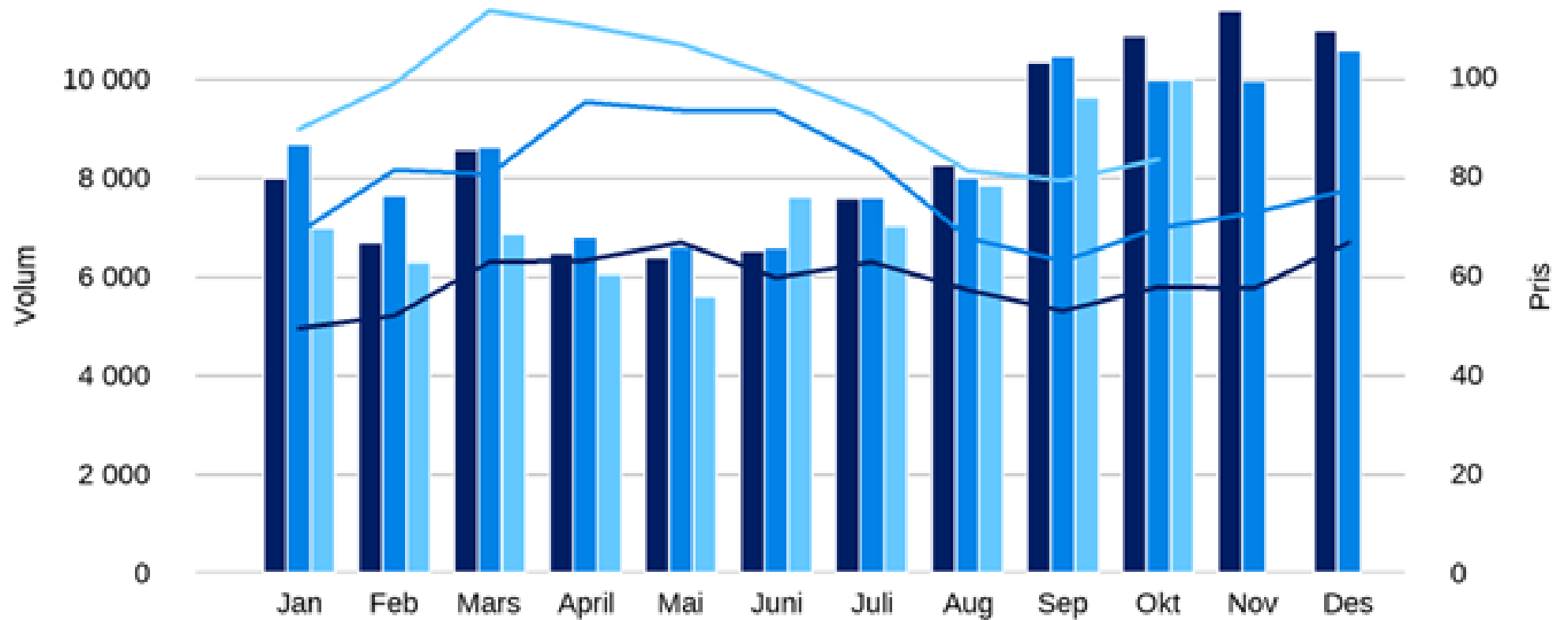
## VALUE - Norwegian salmon – 10 biggest export markets - YTD, October 2023



## VOLUME - Norwegian salmon – 10 biggest export markets - YTD, October 2023



# Norwegian fresh whole salmon exports to France



## 2023 YTD

Tonn: 73 913 (-9%)

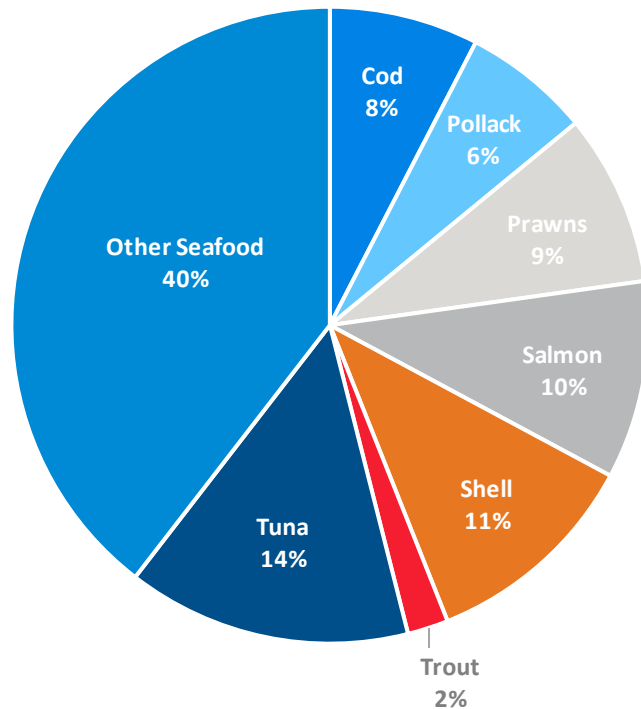
NOK/kg: 93.74 (+20%)

■ 2021 ■ 2022 ■ 2023

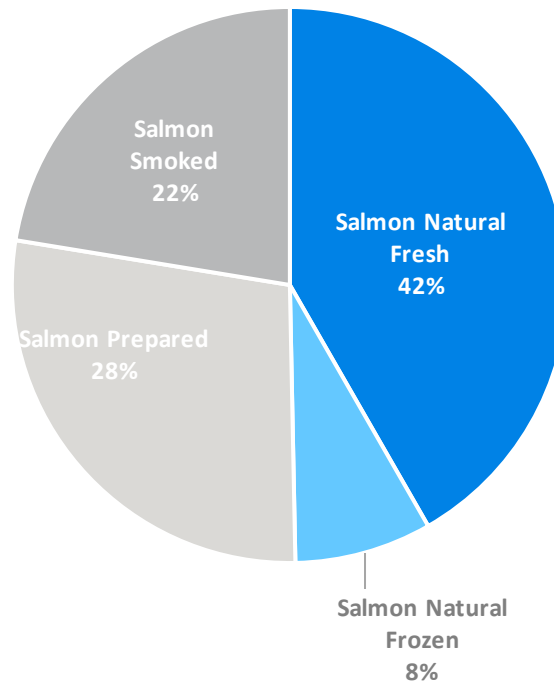
# Importance of salmon in France?

Shares of value for home consumption

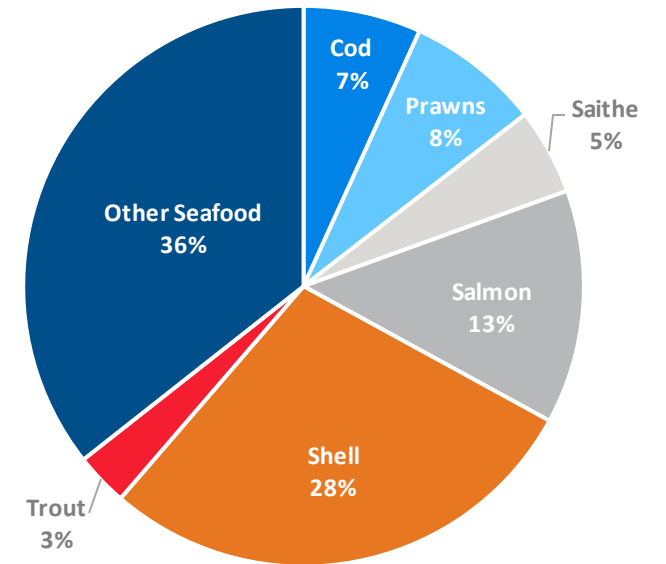
### Share of Total Seafood



### Share Within the Salmon Category



### Share of Fresh Natural Seafood



# Why and how does the French eat salmon?



# Salmon

- Salmon is by far the favourite fish of the French consumer, and continued to gain popularity under the pandemic.
- Smoked salmon is a Christmas staple, with high levels of household penetration. It is clearly a must in the festive period but struggles to break out of that image more broadly.
- Most fresh (and smoked) salmon is bought at supermarkets and hypermarkets, though these stores have been losing out to discount options in recent years.



Voici venue la  
saison du saumon  
fumé de Norvège.

SEAFOOD  
FROM  
NORWAY  
NOD



# Drivers for consuming seafood and top three species

Top three consumed species:  
salmon, cod and shrimps

- Easy to cook, do not require much preparation.
- Well-installed in the habits and bring reassurance – no risk taking.
- Cod tastes neutral / shrimp and salmon are appreciated even by the people who do not like seafood.





# Salmon - Unique, indulgent and versatile - with consumers own words



## A STRONG AND ASSERTED IDENTITY

“The filet of salmon is large. **This thickness is very typical** ” Older low user

“It has a pink-orange color...well the salmon color is named after the fish right, so it is **very special and unique** ” Millennial low user

“**You can't replace salmon.** No other fish has this taste, this texture.” Millennial heavy user

## THE MOST VERSATILE AND UNIFYING SEAFOOD

“Salmon is **for people who don't like fish.** They usually eat salmon and mussels anyway” Older low user

“It is **the first step of the fish,** I began to like the fish with salmon” Older low user

“It is an adaptable fish, **we find it in lots of culinary cultures, in Japan for example**” Millennial, low user

## AN ASPIRATIONAL IMAGERY AROUND NORDIC COUNTRIES

“We always hear Salmon from Norway, from Alaska...it has an image of a **healthy product, caught in clean waters, coming from a Nordic country**” Millennial, heavy user

## A GOURMET PRODUCT, TRADITIONALLY ROOTED IN LUXURY

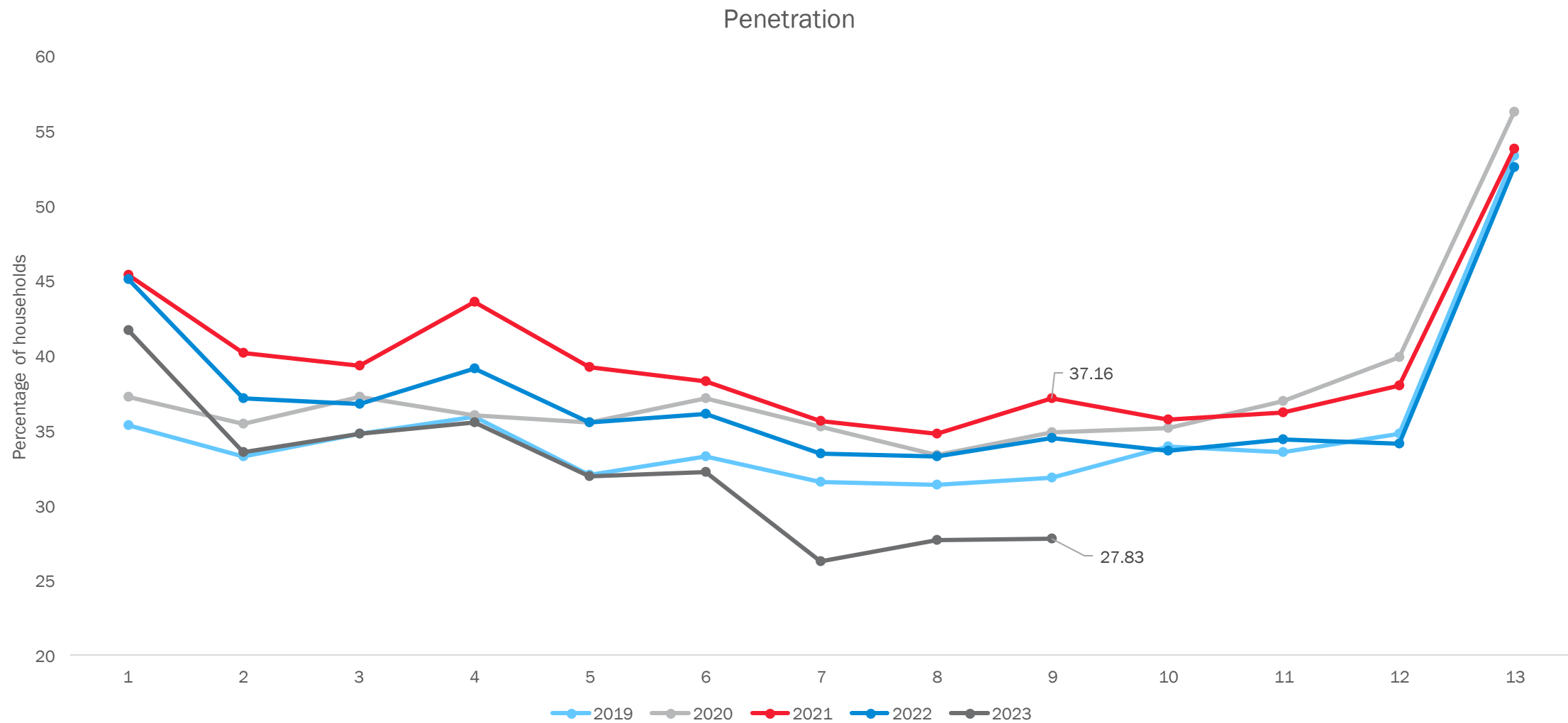
“There are **social classes that cannot afford to eat smoked salmon.** It is something exceptional” Older heavy user

« It is a **prestigious fish;** you do not eat salmon like if nothing » Millennial heavy user

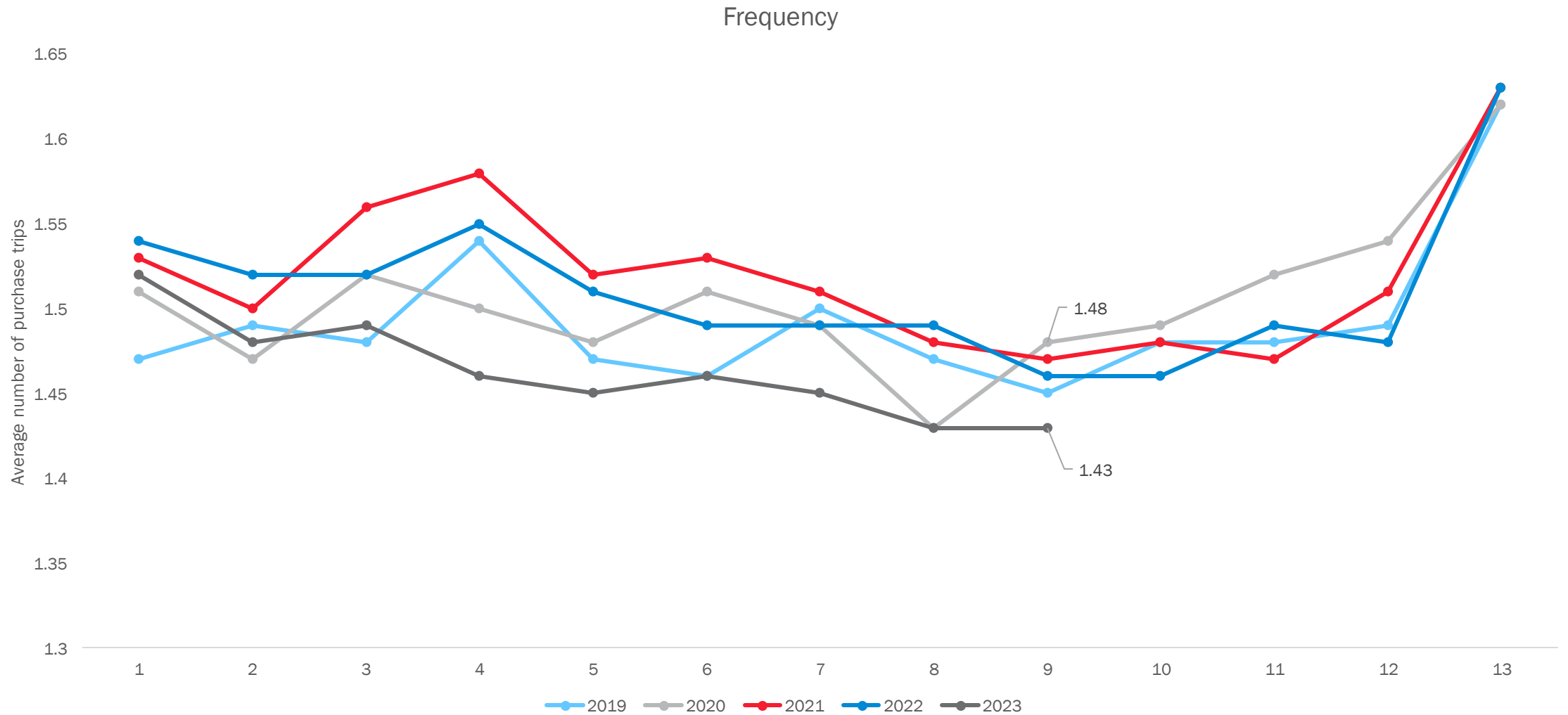
# Consumption



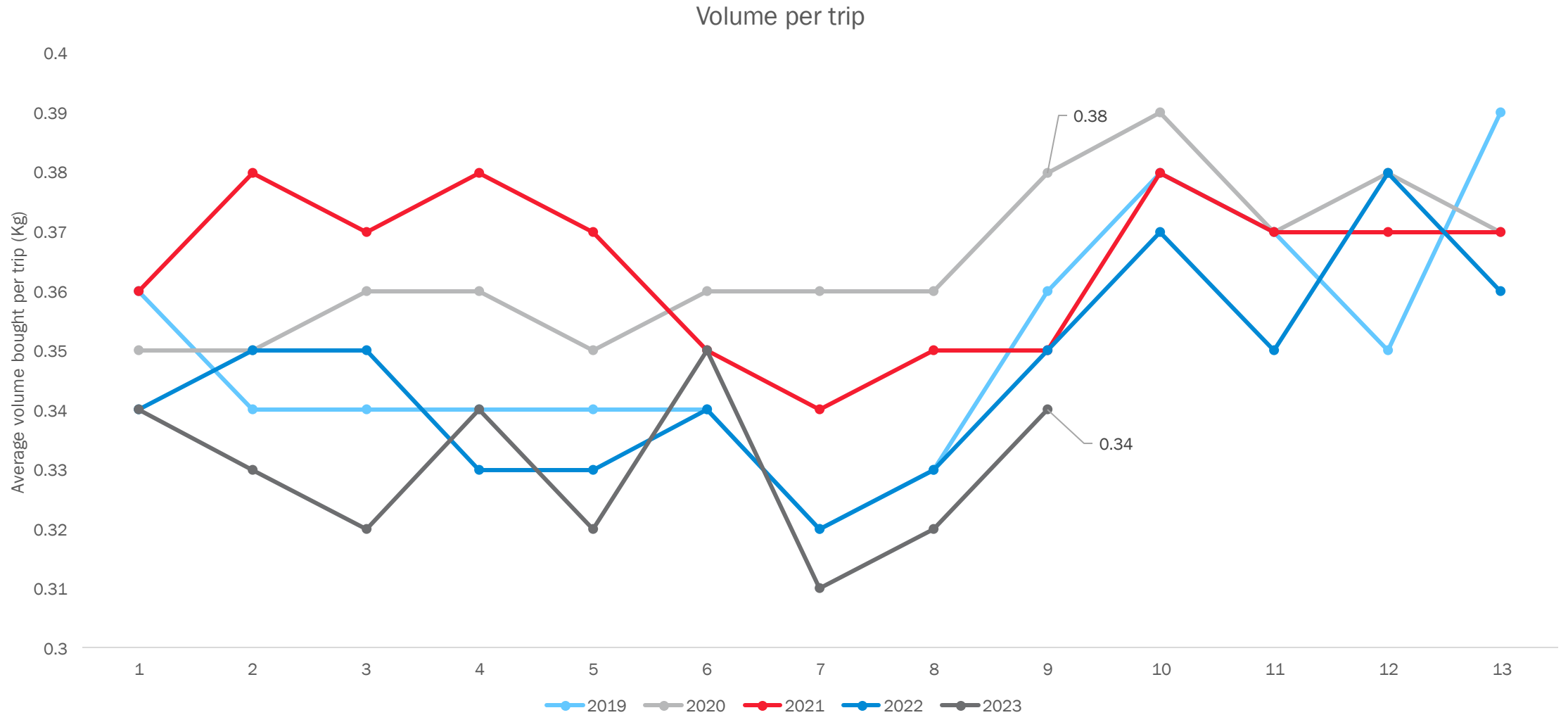
# Penetration for Salmon



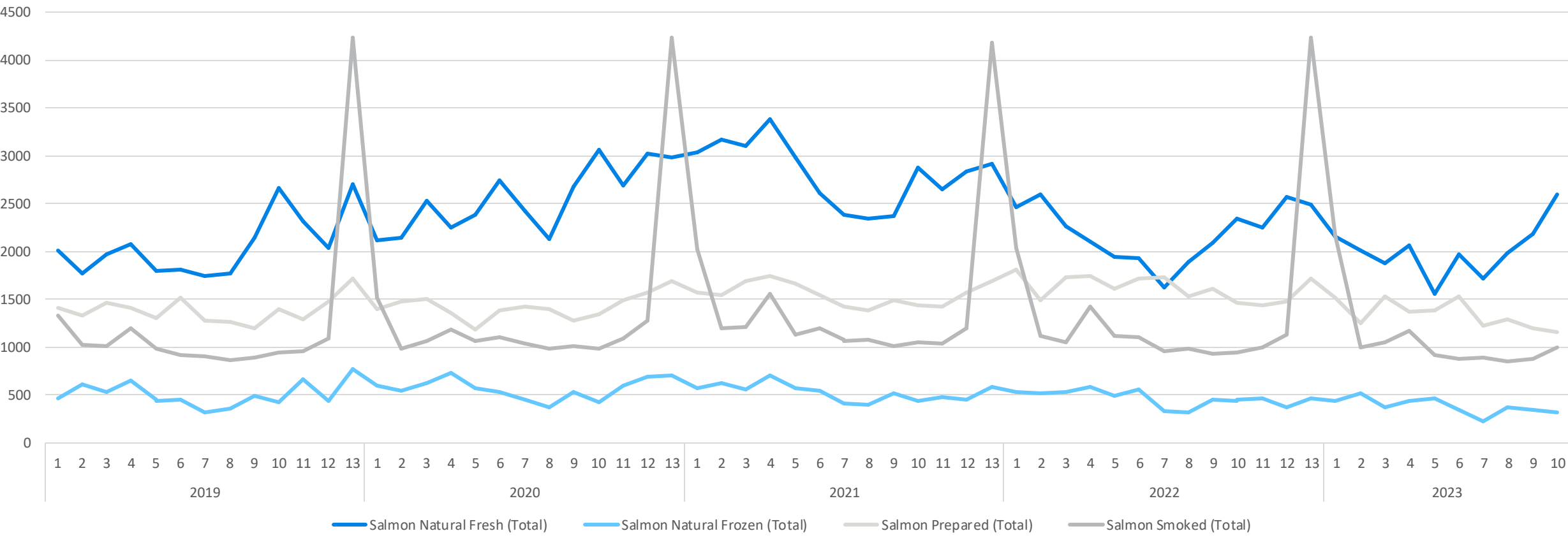
# Frequency for Salmon



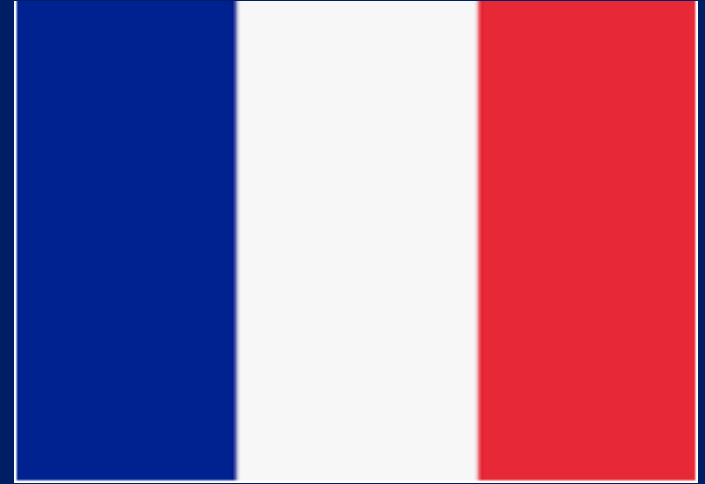
# Volume per trip for Salmon



# Development per product category for home consumption



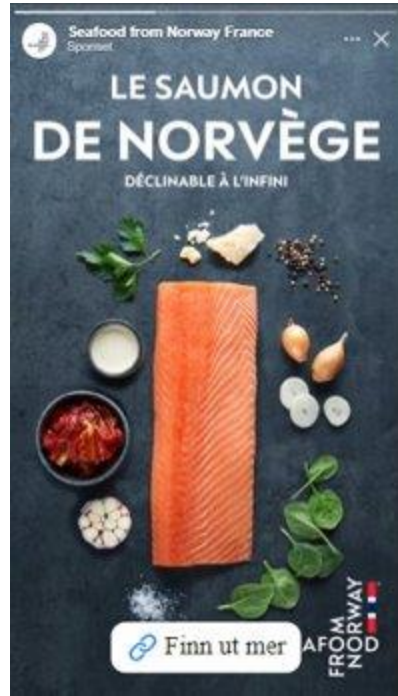
What do we do?



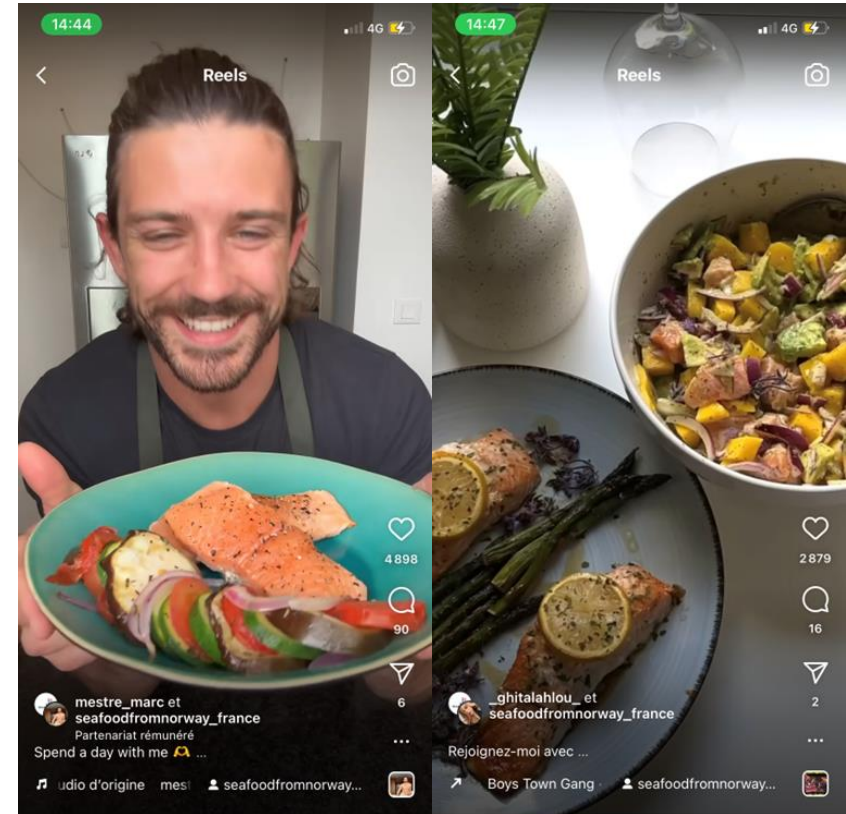
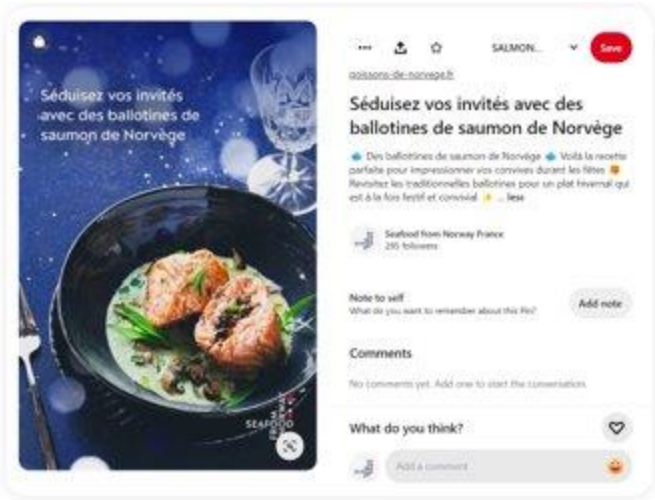
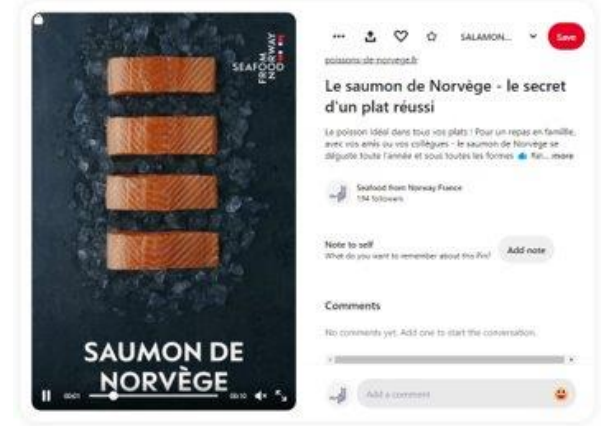




TV sponsorship  
«Petits Plats en Equilibre»

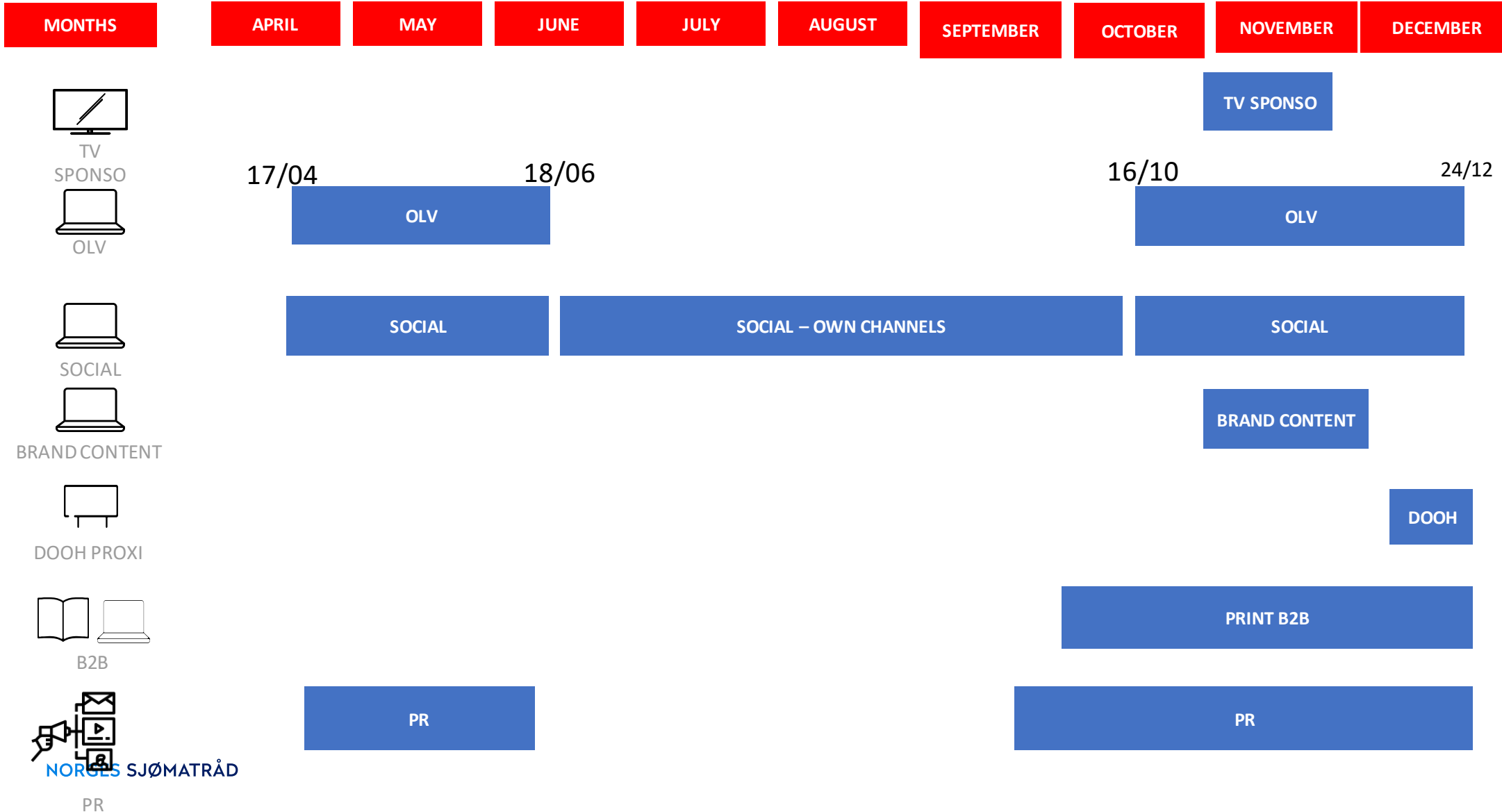


Social Media



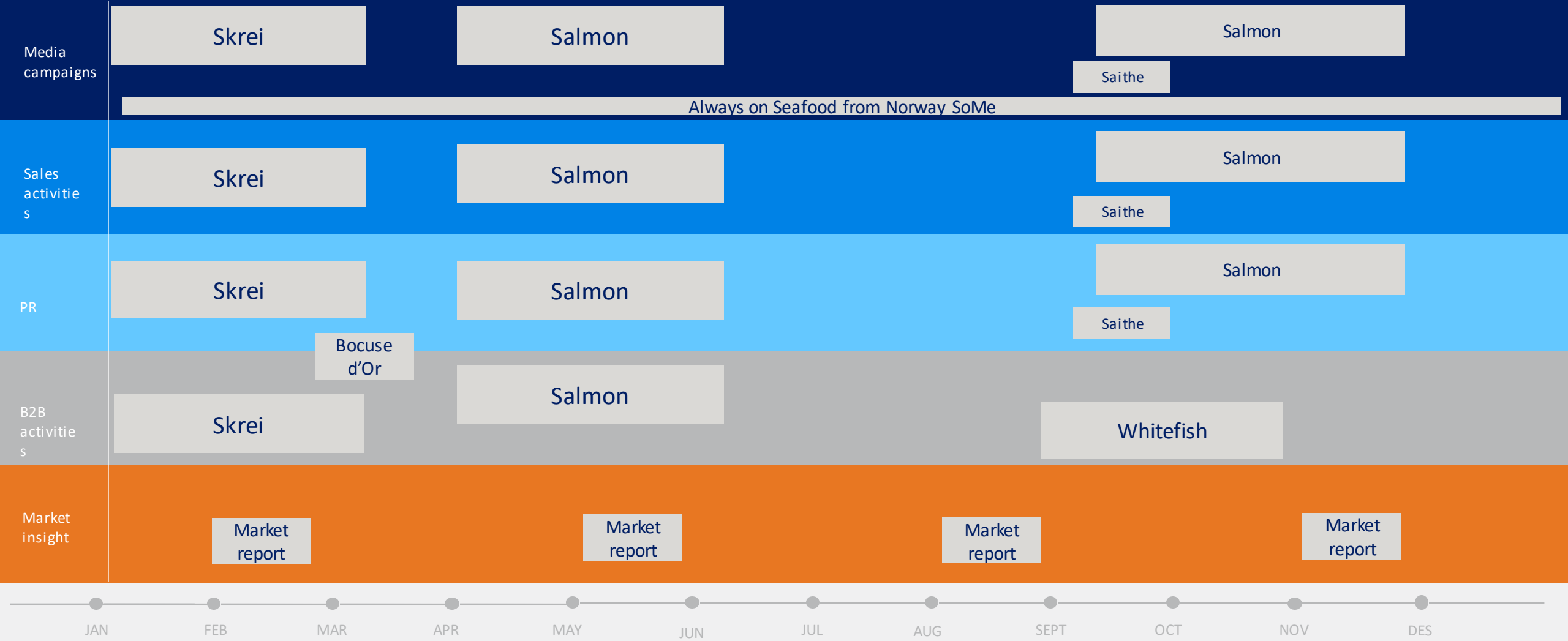
Influencer collaboration

# TO ENSURE A 2023 PRESENCE ALL YEAR LONG



# Timeline

## All market activities



Thank you  
Takk  
Merci

