MARKET PLAN

2025 - 2030

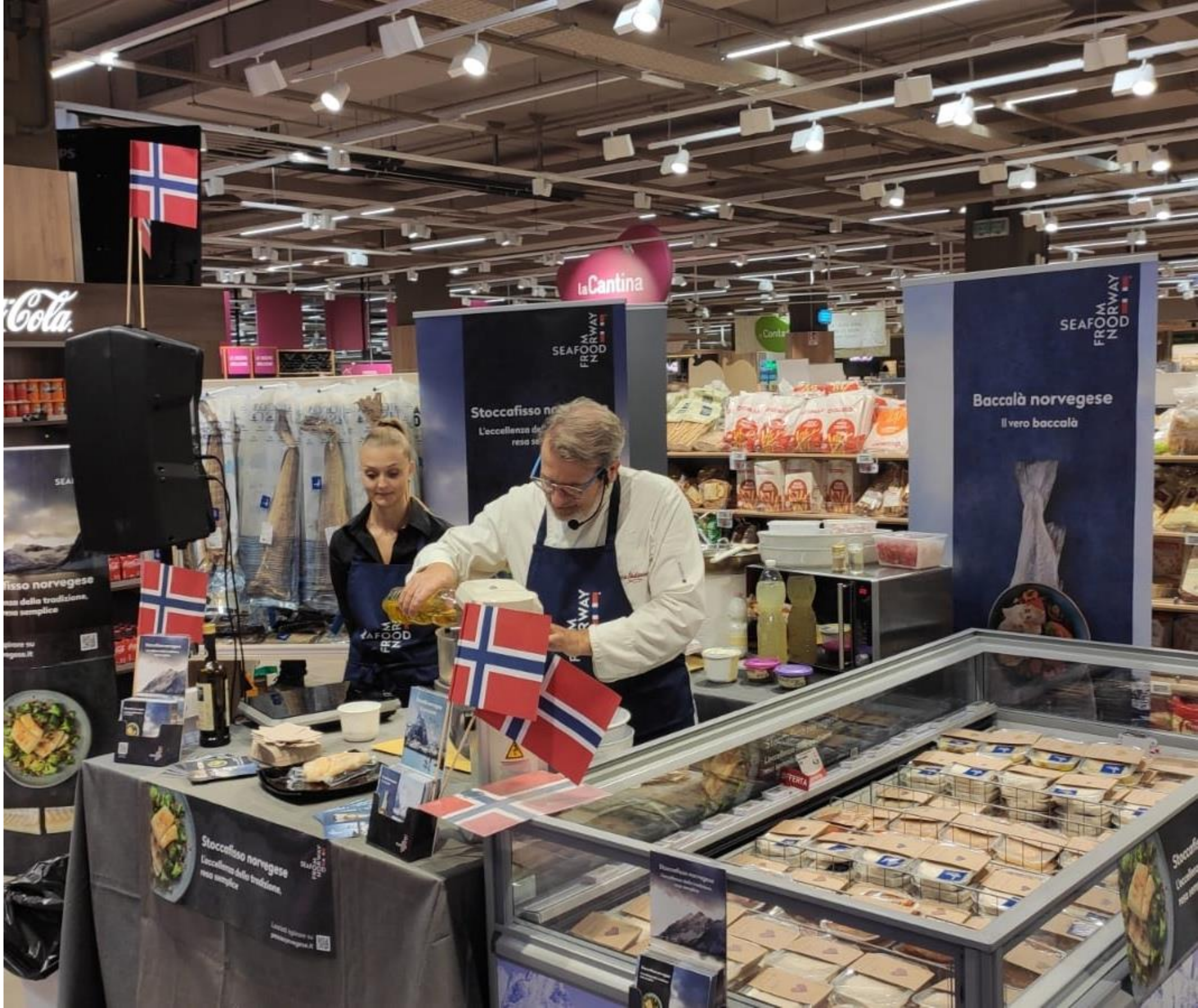
Italy

Baccalà

2026

Revised *September 2025*

Priority: *Maintain*
Budget: 1,5 mNOK



NORWEGIAN SEAFOOD COUNCIL

Table of content

1. Market status
    a. Competitive arena
    b. Consumer insight
    c. Other important information
2. Strategic implications
3. Objective overview: Market Goal 2030 and NSCs objectives in Italy
    a. Objective 1 (Consumer awareness and preference)
    b. Objective 2 (Origin labelling)
    c. Objective 3 (Utility value Norwegian seafood industry)
4. Market strategy 2025-2030
5. Overview key deliveries and objectives 2025-2030
6. Market activities overview 2026

1.a MARKET STATUS | Competitive arena | *Italy* | *Baccalà*

OVERALL SEAFOOD MARKET

The total seafood market in Italy is 1,7 million tonnes (-3% 5Y). Consumption per capita is 29,6 kg annually (-2% 5Y)
Total fish sales for "at-home consumption" was worth €6.5bn in 2024 (same as 2023), while volume was approximately 489 thousand tonnes (-3.8% vs. 2023).
In 2024 there were 1.1 billion servings of fish and seafood out-of-home (OOH) (+3% vs. 23). While servings of fish were down by -1.4%, servings of seafood (e.g. molluscs and crustaceans) increased by 6.6% (Circana, 2024).

THE SPECIES MARKET (All numbers calculated in RWE)

- Salted fillets dominate the market, while there are some volumes of salted whole cod and whole clipfish of cod.
- Norway is the dominant player for clipfish of cod, salted fillet of ling, and salted fillets of tusk with market shares of 76%, 84% and 100% respectively. Norway is also a major supplier of salted fillets of cod with a market share of 24%.
- The total consumption of all clipfish and saltfish made of cod, ling and tusk was 29.8 thousand tonnes in 2024 (-14% 3Y).
- For Baccalà (clipfish of cod + salted cod) the consumption was as follows in 2024:
  - 11 050 tonnes of salted fillet of cod (-44% 3Y). Norwegian market share: 24% (+12pp. 3Y)
  - 3059 tonnes of whole clipfish of cod (-46% 3Y). Norwegian market share: 76% (-11 pp. 3Y)
  - 2623 tonnes of whole salted cod (-48% 3Y). Norwegian market share: 12% (-9pp. 3Y)
- The reduction can be explained by lower quotas and production of baccalà in Norway. In addition, research indicates that preparation difficulties, high prices, and a strong smell and taste are reasons why some consumers do not choose baccalà.
- The consumption of the other main salted fish categories (i.e. species other than cod) is dominated by salted filets of ling and tusk. Key numbers for salted filets of other species than cod below:
  - Total market: 12 619 tonnes RWE (-2% 3Y).
  - Norwegian market share: 33% (-2 pp. 3Y). From Norway, about 75 % of exports is ling, 25 % is tusk
  - Faroe Islands 50 % market share (+4 pp 3Y). Faroe Islands export statistics does not distinguish between species, but based on catch statistics we assume that about 2/3 of the Faroese supply is ling.
  - Other exporters: Spain (6 %, -3 pp 3Y), species unknown, China (6 %, +2 pp 3Y), species unknown, Iceland (5 %, -1pp 3Y), mostly ling
  - Based on the above we estimate these market shares for ling: Faroe Islands (54%), Norway (40%) and Iceland (6%)

VALUE CHAIN

- The value chain for both food and seafood is extremely fragmented in Italy. E.g. the 3 biggest retail groups (Conad, Selex and Coop) accounts for around 41% of the grocery market. In comparison, the top three retailers in UK and France control around 55–60% of the market. Additionally, within each retail group there are often many different retail chains, regions or cooperatives (e.g. Coop Nord Ovest, Coop Alleanza 3.0., etc.)
- The majority of baccalà is sold at traditional retail like fishmongers and ambulant traders and street vendors (63% of the total volume in Italy), 27% are distributed to modern supermarkets and the remaining 10% to foodservice (Meros 2023)
- The top retail chains for Baccalà sales in Italy are Coop, Conad, Esselunga, Famila, Carrefour and Bennet (GfK)

Macro trends (by 2030)

4%	-1%
GDP growth	Population growth

Market shares Norway

1. Salted fillet of cod (24 %)
2. Clipfish of cod (76%)
3. Salted cod whole (12%)
4. Salted fillets other, mainly ling and tusk (33%)

Share retail/Horeca
(value chain data)

Retail 90%
HORECA 10%

Sales channels retail and HoReCa

1. Fishmongers/ambulant traders (63%)
2. Super-/hypermarkets (27%)
3. Foodservice (10%)

Format of [species] in retail

1. Soaked (55%)
2. Not soaked (45%)

KEY CONSUMER INSIGHT

- The unaided awareness to Norwegian baccala is 40%. Second is Italy with an awareness of 26%.
- Baccalà has a long tradition in Italy. It is closely tied to regional cuisines and traditional recipes – regarded as a bit "old-fahioned"
- One way to identify the core consumer of a given product is by using a buyer index. This index is calculated by dividing the share of buyers into a certain demographic group, by the share of total households that are in that group and then multiplying the number by 100. If these shares match, the index is 100. If the demographic group is overrepresented as buyers of a certain product, the index exceeds 100, and vice versa.
- This exercise has been done for baccalà and stockfish showing that seniors (65+), 2-member households, and high social classes overperform as buyers, while younger age groups (especially 35–49) underperform.

		Baccalà		
Demographic category	**Group**	**Share of households**	**Share of Buyers**	**Index**
Members in household	1 Member HHs	35,58	28,22	79
	2 Member HHs	27,3	38,3	140
	3 Member HHs	18,18	18,52	102
	4+ Member HHs	18,94	14,96	79
Age	-34	9,31	3,4	37
	35-49	29,71	15,41	52
	50-64	29,34	26,19	89
	65+	31,63	55	174
Social Class	High	20,57	29,52	144
	Low	20,81	16,34	79
	Medium Low	28,2	25,45	90
	Medium-High	30,42	28,69	94

Consumption (self reported)

1. Home (71%)
2. Restaurants (21%)
3. Take away (8%)

Unaided awareness of Country of origin

1. Norway (40%)
2. Italy (20%)
3. Don't know (20%)
4. Iceland (13%)
5. Canada (7%)

Preference for Country of origin

1. Norway (43%)
2. Italy (26%)
3. Iceland (17%)
4. Don't know (13%)
5. Scotland (12%)

Awareness Seafood from Norway logo

2025: 58%
2024: 56,5%
2023: 55%

OTHER IMPORTANT INFORMATION

- Norwegian baccalà produced from gadus morhua is sometimes in a disadvantageous position compared to baccalà produced from Gadus macrocephalus because the latter is bigger and whiter, i.e. it looks more attractive to Italian consumers (Meros, 2023)

- It is a lack of differentiation between different types and origin of baccalà in the market, meaning that the customers doesn’t necessarily understand the differences between clipfish, salted fish and lightly salted products.

- One of the main challenges in the market is that Italian producers and their customers (e.g. retail) don’t differentiate on origin towards the end consumer. Baccalà products are bought from several different supplying nations such as the Faroe Island, Norway and Iceland.

- Additionally, both gadus morhua and gadus macrocephalus are being used without any form for differentiating towards the end consumer.

Strategic implications for Norwegian [species] and NSC’s market efforts

Italy is one of the most important markets for Baccalà consumption. However, it has been a downward trend for years that can be explained by factors such as increased competition (e.g. other seafood products), record high-prices due to lower quotas and production, and changing habits and way of living.

Baccalà is considered traditional and a product that you either eat at typical Italian restaurants or at home, often prepared by the grandmother (nonna). Additionally, baccalà has historically been seen as “food for the poor” implying that it is something everyone could afford, resulting in a gap between the real value and what many consumers think the product should cost. The loyal customers are older who cooks traditional recipes for the families. **The strategic implication of this is that a repositioning of the product in the minds of the consumer is needed to increase the perceived value and the willingness to pay for the product to secure the position of the product during a time when supply will be affected and prices will increase.**

When families become smaller and the new generations lives a more hectic and modern lifestyle, traditional products like baccalà has also been suffering due to preparation barriers and lack of time. However, there has been introduced more value-added products in recent years, and these products have gained market share – especially in regions such as Lombardia and Lazio with big cities such as Milano and Rome leading the way. The reason for increased sales in the latter ones is because many people that has the tradition of eating baccalà move to these cities. Both retail and HoReCa buys more soaked and ready-to-eat products, but retail is still considered the most important channel, and a key marketing channel for seafood. Modern retail represents 1/3 of the end channel sales and is showing potential for growth. Desalted / soaked baccalà is the primary baccalà product form sold in this channel, but it is seldom differentiated on origin towards the consumers. **The strategic implication of this is that the NSC must “follow the products” and activate them at POS through clear country-of-origin marketing.**

Key challenges/opportunities:

- Increase perceived value and willingness to pay
- Activate products where they are present
- Get producers and retailers to differentiate the baccalà products

Overall target groups:

B2B: Producers and retail chains

Market goal by **2030**

By 2030, the aim is to strengthen the attitudes towards Norwegian Baccalà among key decision makers and consumers

NOTE. The market goal has been set in collaboration with NSC's advisory group and reflects a common desired goal dependent on efforts beyond The Norwegian Seafood Council's marketing efforts.

NSC's objectives in **2030**

Objective 1
Consumer:

Consumers in priority markets shall have high awareness and preference for Norwegian baccalà over competing origins

KPI 1: Awareness	*40%*
KPI 2: Preference	*45%*
KPI 3: SfN logo awareness	*Above 60%*

Objective 2
Origin labelling

Increase origin labelling of Norwegian Baccalà

KPI 1: Origin labelling	*TBD*

Objective 3
Norwegian seafood industry/exporters

High utility value for the Norwegian seafood industry

KPI 1: Utility value for Norwegian seafood industry	*TBD*

NSCs Objective 1 | 2026

Consumers in priority markets shall have high awareness and preference for Norwegian [species] over competing origins.

KPI 1

Unaided awareness	*40%*

KPI 2

Preference	*45%*

SfN logo awareness	*2026: Above 60%*

Note

Both unaided awareness and preference are at relatively high levels today. Increasing it further without increasing budgets substantially from today's level is not considered possible. Anyway, this KPI is not seen as a priority since the first step would be to work towards businesses to make them utilize theorigin as a differentiator.

Target group (only for tactical investments in SoMe and PR)

Geography	*Italy*

Size	

Description

The target group is born between 1960-1996 (Gen X and Millenials) and lives all over Italy. They have an income between 24-120K EUR per year and have at least a high school education. They eat baccalà once a month or more often, and they eat it mostly at home, but occasionally also at restaurants. They are often young or established families or empty nesters (parents with kids that have moved out). These three groups accounts for 70% of the medium consumer group (eating baccalà 1-3 times a month):

NSCs Objective 2 | 2026

High percentage of origin labelling

KPI 1: Origin labelling

xxxx	YYYY: TBD

Note

The main target group is retail, and more specifically the ones responsible for category and marketing management, as well as purchase in specific retail chains. A baseline measurement for origin labelling in Italy is in process. Will be added as soon as possible.

NSCs Objective 3 | 2026 and 2030

High utility value for the Norwegian seafood industry

KPI 1

xxxx	YYYY: TBD

Note

A baseline measurement will be added in 2026.

The NSC shall work to ensure that key decision makers starts to highlight the origin and use terms such as “Baccalà Norvegese” to build a stronger platform for future growth. To do this, the NSC will work closely with companies in the value chain to undertake targeted marketing activities such as POS activations in retail and utilize origin labelling to differentiate and increase storytelling about the products. Additionally, the NSC will offer educational sessions/academies to retail to increase knowledge and loyalty to Norwegian baccalà. To make this happen, the NSC will piggyback on the investments for salmon and stockfish and by that be able to include baccalà under the Seafood from Norway-campaign umbrella.

The NSC will also work to increase the perceived value of Baccalà through targeted PR activities, and investments in digital channels. This will be done by re-positioning the image of the product by focusing on some of the key drivers such as taste, while working on barriers such as preparation. The NSC will have a B2B2C strategy in the market, where the primary target group will be retail, with the aim of building a stronger position for Norwegian Baccalà among their consumers

The NSC shall also contribute with added value to the Norwegian industry and their customers by offering meeting places and updated market insights. The NSC will make sure that activities are communicated and coordinated to achieve best possible synergies. The joint marketing program will be presented as a tool towards the Norwegian industry specifically to increase marketing of products, brands, or private label while at the same time strengthening the position of Norwegian baccalà and the SFN-trademark.

The NSC shall be present with Seafood from Norway communication throughout the year to secure synergies between the investments for stockfish, salmon and baccalà (saltfish and clipfish).

5. OVERVIEW OF KEY DELIVERIES AND OBJECTIVES 2025 - 2030| *Country | Species*

	Baseline	2025	2026	2027	2028	2029	Objective 2030
Objective 1	Unaided awareness (40%) and preference (45%)	Unaided awareness (40%), preference (45%) and SFN Awareness (60%)	Unaided awareness (40%), preference (45%) and SFN Awareness (60%)	Unaided awareness (40%), preference (45%) and SFN Awareness (62%)	Unaided awareness (40%), preference (45%) and SFN Awareness (62%)	Unaided awareness (40%), preference (45%) and SFN Awareness (65%)	Unaided awareness (40%), preference (45%) and SFN Awareness (65%)
Key deliveries		SoMe postings and PR events	SoMe postings and PR events	SoMe postings and PR events	SoMe postings and PR events	SoMe postings and PR events	
Objective 2	Increase origin labelling	Increase origin labelling (KPI to be decided)	Increase origin labelling (KPI to be decided)	Increase origin labelling (KPI to be decided)	Increase origin labelling (KPI to be decided)	Increase origin labelling (KPI to be decided)	Objective will be set when we have baseline measurement
Key deliveries		Establish baseline for origin labeling	Min. 1 retail campaign and 2 seafood academies Increase number of products highlighting Norwegian origin	Min. 1 retail campaign and 2 seafood academies Increase number of products highlighting Norwegian origin	Min. 1 retail campaign and 2 seafood academies Increase number of products highlighting Norwegian origin	Min. 1 retail campaign and 2 seafood academies Increase number of products highlighting Norwegian origin	
Objective 3	High perceived value for the Norwegian salmon industry	High perceived value for the Norwegian salmon industry	High perceived value for the Norwegian salmon industry	High perceived value for the Norwegian salmon industry	High perceived value for the Norwegian salmon industry	High perceived value for the Norwegian salmon industry	Objective will be set when we have baseline measurement
Key deliveries		Seminar, updated market insights, industry communication (newsletters, webinars)	Seminar, updated market insights, industry communication (newsletters, webinars)	Seminar, updated market insights, industry communication (newsletters, webinars)	Seminar, updated market insights, industry communication (newsletters, webinars)	Seminar, updated market insights, industry communication (newsletters, webinars)	

6. OVERVIEW OF MARKET ACTIVITIES 2026 | *| Baccalà*

Campaigns in market	POS Campaign retail
Value chain activities	Communicating with Norwegian and Italian seafood industry, protect and contribute and safeguard the reputation, share insight, support on market access cases Seafood Academies Tuttofood (May 11-14) Seafood seminar (May 12) Updated insights HoReCa and retail Seafood Academies
Other activities	PR and social media communication (Always on)

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

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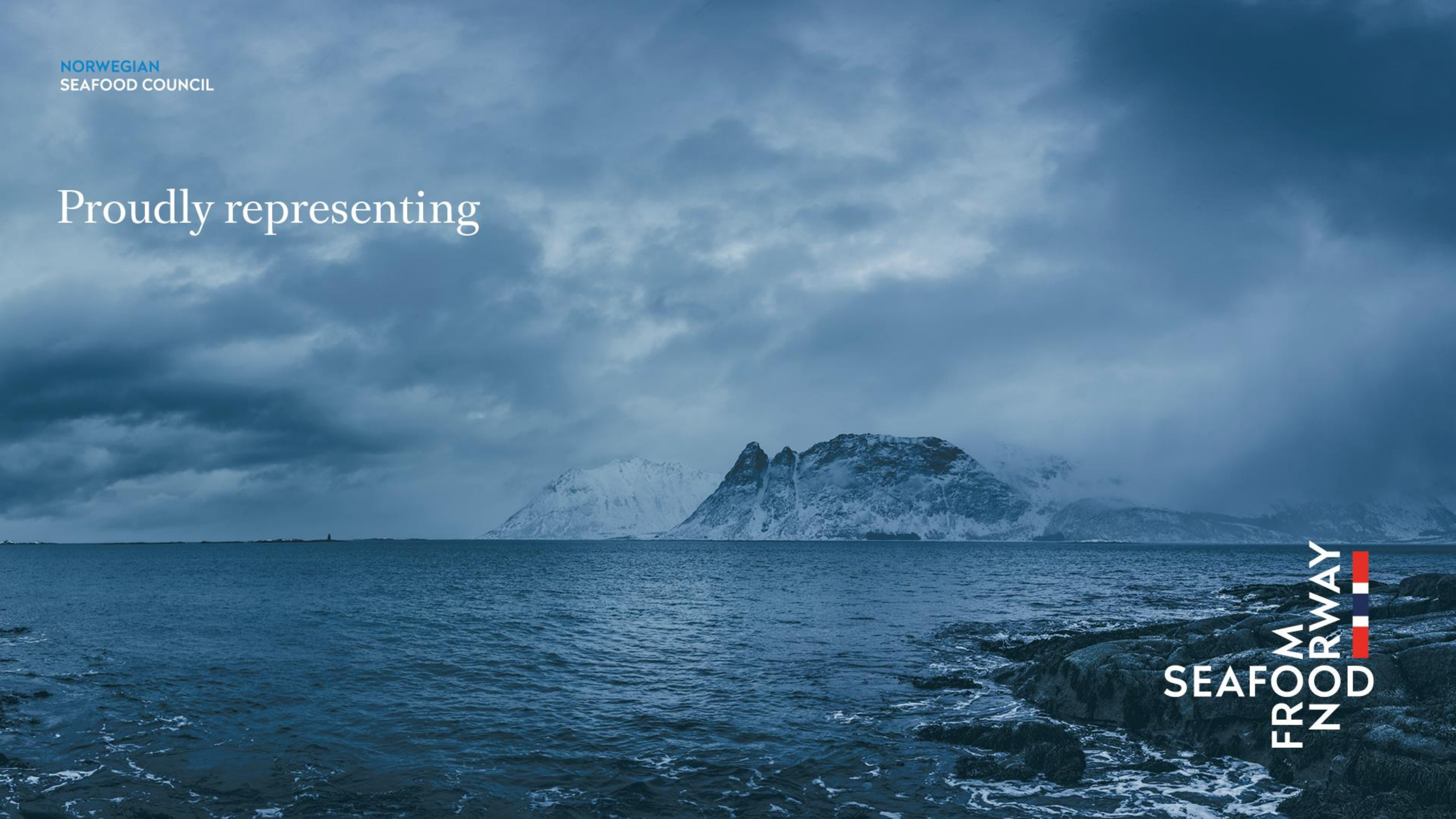

SEAFOOD FROM NORWAY