

MARKET PLAN

2025 - 2030

France Salmon

Revised October 2024

NORWEGIAN SEAFOOD COUNCIL



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OVERALL SEAFOOD MARKET

The **total seafood market** in France is 2,2 million tonnes (-4% 5Y). Consumption per capita is 33,6 kg annually.

THE SALMON MARKET

- The salmon market in France is 192 thousand tonnes as of 2023 (-11% 3Y). Norway has a market share of 63% (+0 pp 3Y). The largest competitors are United Kingdom (28% , -1 pp 3Y), Chile (3% , -1 pp 3Y), and Iceland (3% , +1 pp 3Y)
- The largest product formats in retail are smoked (39% of total value, +2 pp 3y), natural fresh (36%, 0 pp 3y), prepared (18%, 0 pp 3y), and natural frozen (7%, -1 pp 3y)
- The 3 largest sales channels for salmon are Hypermarkets (35%, 0 pp 3 Y), Supermarkets (28%, 0 pp 3 Y), and Discounts (13%, 0 pp 3 Y)
- Norwegian salmon has a strong awareness amongst French consumers (91%); However, Scottish salmon has a very high awareness (83%) and mental market share (27% vs. 32% for Norwegian) compared to their actual market share –very much due to their link to Label Rouge.
- Meal situations with salmon: 77% at home, 17% in restaurant or similar, 6% take away/delivery.
- Consumption per capita went from 3,3 in 2022 to 2,8 kg YTD in 2024. Home consumption is in decline while out-of-home is increasing.
- The Scottish salmon volumes are increasing and taking more market shares in the French market.
- Salmon is sold both under private labels and salmon brands. With private brands it is harder to ensure the origin labelling.
- The origin of the salmon is very well communicated in the smoked section, but less so in the fish counter. The Norwegian origin is less 'promoted' than what Scottish salmon tends to be (due to the Label Rouge link)
- Salmon is frequently subject to reputational issues in French media

Other information

The inflation in France has been relatively high the last few years, but the inflation rate is projected to trend around 2% in 2025. Consumers are concerned with sustainability, seasonality, quality and price. IMF expects a GDP per capita of 47 359 USD in 2024. Real GDP per capita is expected to grow 6% from 2024 to 2029. The population is 66 million in 2024. Population is expected to grow 1% from 2024 to 2029

Macro trends (by 2030)

6%	1%
GDP growth	Population growth

Market shares

1. Norway (63)
2. United Kingdom (28%)
3. Chile (3%)
4. Iceland (3%)

Sales channels retail

1. Hypermarkets (35%)
2. Supermarkets (28%)
3. Discounts (13%)
4. Specialists (11%)
5. Neighborhood Stores (6,5%)
6. Online (5,7%)

Consumption formats retail

1. Smoked (39%)
2. Natural fresh (36%)
3. Natural frozen (7%)
4. Prepared (18%)



Strategic implications for Norwegian salmon and NSC's market efforts

As demonstrated, France is a well-established and one of the largest consumption markets for Norwegian salmon. Per capita consumption of salmon is the highest in Europe, excluding Nordic markets. As such, the total consumption growth, relative to other markets, is expected to be low to moderate in the next couple of years.

To maintain or moderately grow Norway's leading position in the French salmon market, it will be essential to protect the established strong position (awareness, preference) Norwegian salmon has in the minds of French consumers. Utilizing most efficient media and communication activities that will deliver on maintaining the position amongst specific target groups will be key moving forward. Monitoring and addressing trends that could impact consumption patterns, negatively or positively, such as reputational issues, the rise in raw consumption and changes in the protein category, should be addressed in parallel.

The low degree of origin labelling in several product categories in French retail should be addressed to ensure efficient marketing spend by making Norwegian salmon physically available in-store. This may also build barriers to key competing origins (Scotland) and will drive the effect of media and communication investments.



Market goal

By 2030, increase consumption volumes of Norwegian salmon from 123 000 tonnes to 129 000 tonnes (5 %)

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

Objective 1

Consumers shall have a high awareness of and prefer Norwegian salmon over competing origins

KPI 1 *Maintain unaided awareness above 60%*

KPI 2 *TBD*

Objective 2

High degree of origin labelling

KPI 1 *TBD*

Objective 3

High degree of industry satisfaction with NSC's services

KPI 1 *Above 70 % (Satisfaction survey)*



Market strategy 2025 - 2030

To maintain the strong position Norwegian salmon has in the minds of French consumers (unaided awareness and preference) The NSC will invest in media and PR campaigns towards high impact target groups. Simultaneously, together with Norwegian and local stakeholders, The NSC will work to safeguard the reputation of Norwegian salmon, both proactively and reactively.

With clear value propositions, The NSC will actively engage with the industry in France and Norway to increase origin labelling on Norwegian salmon products available in French retail.

The NSC will take an advisory role for the industry with regards to market insight by tracking key consumer trends and other market developments taking place in France. Through dialogue with the industry, the NSC shall increase the value of such information so that the Norwegian salmon industry can utilize this insight in their business operations.

Key deliveries and objectives 2025 – 2030

	Baseline	2025	2026	2027	2028	2029	Objective 2030
<p>Objective 1 Consumers shall have a high awareness of and prefer Norwegian salmon over competing origins</p>	Define awareness and preference within chosen target groups	Keep overall awareness and preference above 60 and xx	Keep overall awareness and preference above 60 and xx	Keep overall awareness and preference above 60 and xx	Keep overall awareness and preference above 60 and xx	Keep overall awareness and preference above 60 and xx	<p>Maintain overall awareness and preference above 60 and xx</p> <p><i>Uphold and grow awareness and preference within defined target groups.</i></p>
Key deliveries	Optimize agency structure to ensure long-term holistic approach and synergies (B2B2C)	Media campaigns and PR	Media campaigns and PR	Media campaigns and PR	Media campaigns and PR	Media campaigns and PR	
<p>Objective 2 Higher degree of origin labelling</p>	TBD	TBD	TBD	TBD	TBD	TBD	<p>Increase origin labeling by X % TBD</p>
Key deliveries	Define baseline	Define labelling objectives for certain retailers and product groups with exporters	Continue increasing general origin labelling	Continue increasing general origin labelling	Continue increasing general and SFN labelling	Continue increasing general and SFN labelling	
<p>Objective 3 High degree of industry satisfaction with NSC's services</p>	N/A	Define baseline	TBD	TBD	TBD	TBD	<p><i>Above 70%</i></p>
Key deliveries	<p>Explore expectations from the industry and how we can create long-term value together in France.</p> <p>Stakeholder mapping for proactive reputation mgt</p>	<p>Define need for market insight to detect market opportunities</p> <p>Industry communication</p>	<p>Industry communication</p> <p>PR B2B</p>	<p>Industry communication</p> <p>PR B2B</p>	<p>Industry communication</p> <p>PR B2B</p>	<p>Industry communication</p> <p>PR B2B</p>	

Overview of activities 2025



Q1

Q2

Q3

Q4

Budget allocation

	Q1	Q2	Q3	Q4	Budget allocation
Objective 1		Salmon campaign		Salmon campaign	75 %
Objective 2	Origin labelling	Origin labelling	Origin labelling	Origin labelling	5 %
Objective 3		Seafood seminar			20%

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The Norwegian flag is positioned vertically to the right of the text, featuring three horizontal stripes of red, white, and blue.