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Small Pelagics Market Analysis 2025: France

Market analysis: France continues to process sustainable small pelagics

IN FRANCE, THE AVERAGE ANNUAL seafood consumption is 30.4 kg per capita¹. The main small pelagic species consumed are mackerel, sardine, and herring, which are primarily found in canned and processed fresh product categories. Blue whiting is also present on the French market in the form of surimi.

According to FranceAgrimer, in 2023, the consumption of small pelagic-based products (excluding surimi) amounted to approximately 50,000 metric tonnes², across both national brands and private labels.

Before the suspension of small pelagic fisheries in the Northeast Atlantic and the Bay of Biscay sardine fishery, small pelagic products were widely available on the French market, with significant growth starting in 2017, particularly for mackerel and herring products.

In 2019, with a growing number of commercial partners committed to the MSC program—including companies specializing in canned, smoked, and processed fresh products—small pelagics were well represented, mainly in the canned food aisle, accounting for 10% of the total volume of MSC-labeled products sold.

Currently, the French retail sector continues to offer herring products (sourced from the North Sea and Eastern Channel fisheries), with around twenty product references in canned and smoked formats. Over the past five years, we have also observed a growing range of MSC-labeled anchovy products, particularly in the aperitif segment, now comprising 58 references, mainly under the Carrefour, Pêcheur de Saveurs, Aldi, and Casino brands.

Looking ahead, opportunities are emerging with the ongoing assessment of the Iberian sardine fishery, which could lead to the development of new product references, particularly in the canned food category.

With a well-established market for MSC-labeled products in France (over 2,000 references), committed industry players, and strong consumer demand for sustainable seafood, we hope that the challenges facing the small pelagic sector will continue to be addressed, driving greater sustainability. ●

¹ FranceAgriMer Kantar Worldpanel – 2023

² FranceAgriMer Kantar Worldpanel – 2023





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Find out more: <https://www.msc.org/species/small-pelagic-fish>

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