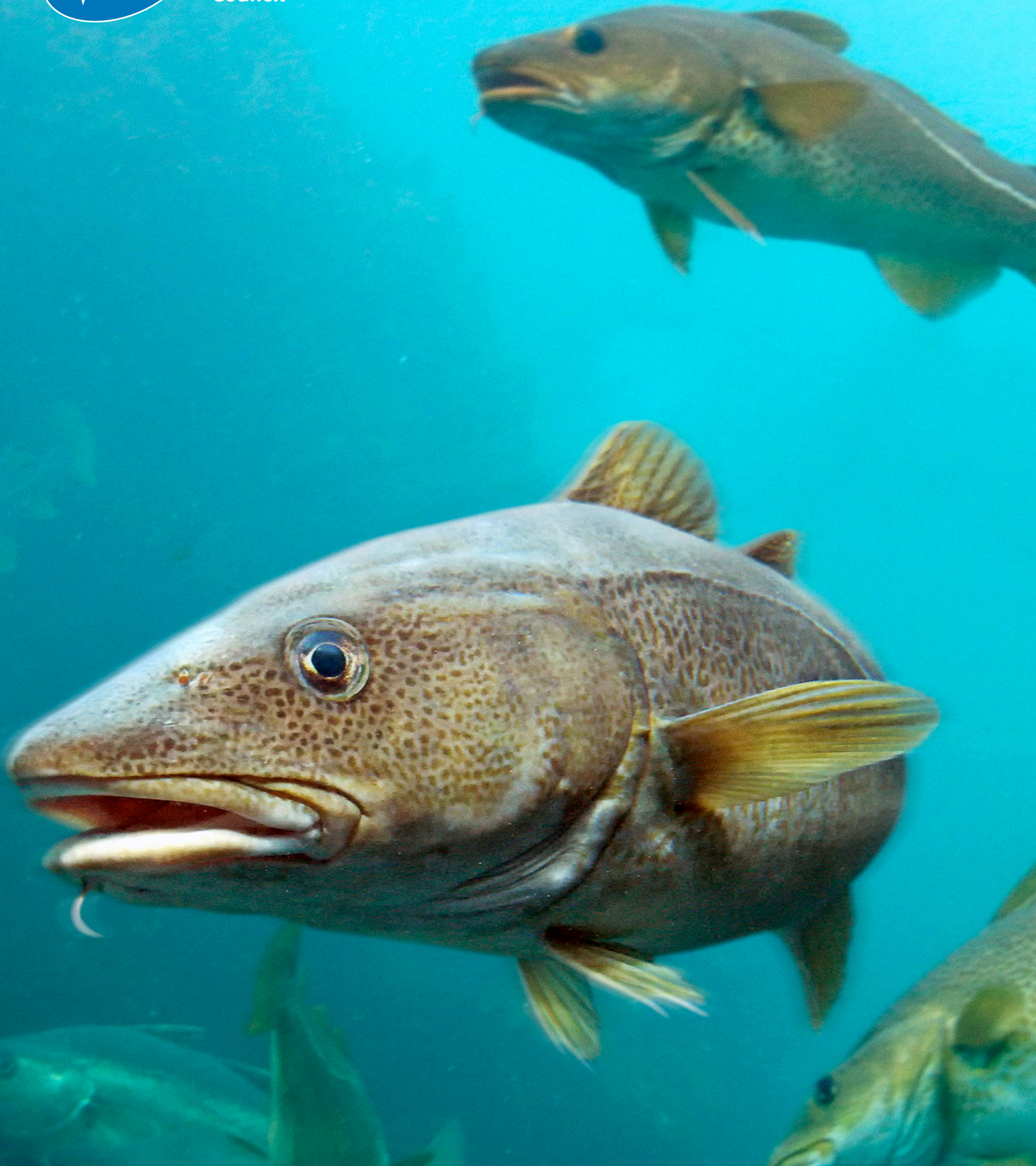




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Whitefish Market Analysis 2024: France

Market Analysis: French Whitefish

IN FRANCE, THE AVERAGE annual consumption of seafood products is 33.7 kg/year/inhabitant¹. The main species of white fish consumed are Alaskan pollock, cod, hake and saithe², which can be found in fresh and frozen, raw or processed products.

MSC labelled white fish products have been present on the French market for several years, thanks to the growing commitment of numerous processing and distribution companies. In 2023/2024, over 104,000 tons of MSC labelled white fish products were sold in France, representing 70% of the total volume of MSC-labelled products. This level of volume has remained stable over the last 3 years at around 100,000 tons. The main species of white fish (excluding 'mixed' fish for surimi) marketed with the MSC label are Alaskan pollock, Atlantic cod and sole. Other species such as saithe, Cape hake and redfish are also present on the French market. Alaska Pollock accounts for 56% of MSC-labelled white fish volumes, Atlantic cod for 22% and sole for 7%.

In terms of product categories, 44.2% of volumes of MSC labelled white fish products are frozen products, mainly Alaska Pollock for raw products, breaded or in sauce. Surimi products account for 25% of the volume of white fish products, with strong growth over the last three years. The fresh products category, in particular packaged, breaded and prepared fresh products,

accounts for 22.8% of volumes marketed, i.e. a 2-fold increase over the last 5 years, with cod, Alaskan pollock and sole products in particular.

The market for MSC labelled white fish products has developed strongly with key seafood players such as Findus, Fleury Michon and Cité Marine, as well as distributors LIDL, Carrefour and E.Leclerc with their own-brand products. Other distributors such as Aldi, Intermarché and Picard are also helping to develop a range of white fish products with the MSC sustainable fishing label. In the foodservice sector, McDonald's, Burger King, Flunch and Ikea have been including MSC-labelled products on their menus for several years now.

In total, there are more than 1,100 MSC labelled white fish products on offer from over a hundred brands.

In France, the market for MSC labelled white fish is large, with a wide range of MSC products offered by all the French retailers and seafood brands committed to sustainable fishing. However, with the volumes and different species made available by MSC certified fisheries, the partners need to continue their efforts to meet consumer expectations for sustainable seafood and support committed fisheries. ●

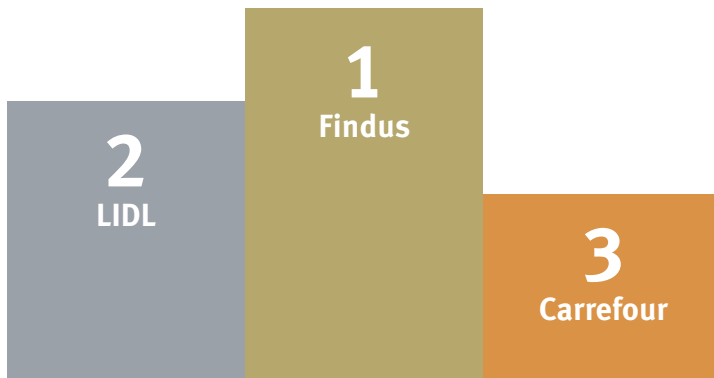
¹ FranceAgriMer Kantar Worldpanel – 2023

² FranceAgriMer Kantar Worldpanel – 2023



Market Data: French Whitefish

Top three French actors by volume sold



“Having more certified fisheries helps us develop and diversify our portfolio and manage risks from climate change.”

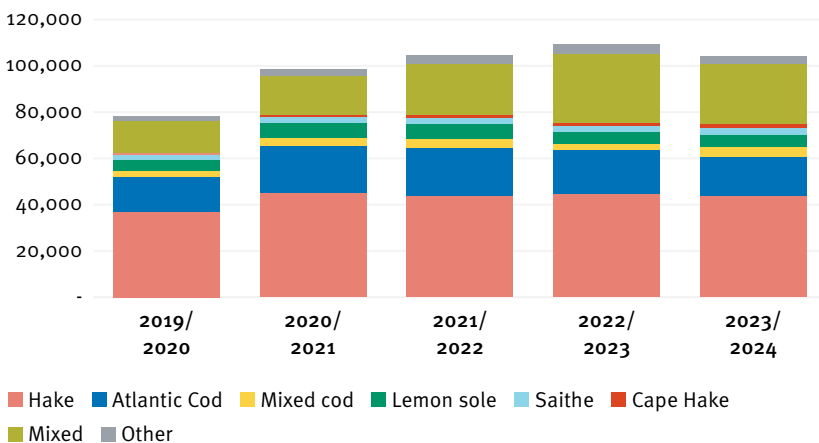
Oliver Spring, Group Sustainability Manager at Nomad Foods, the owner of Birds Eye, Findus and Iglo brands

+100,000
metric tonnes sold (mixed included) in 2023

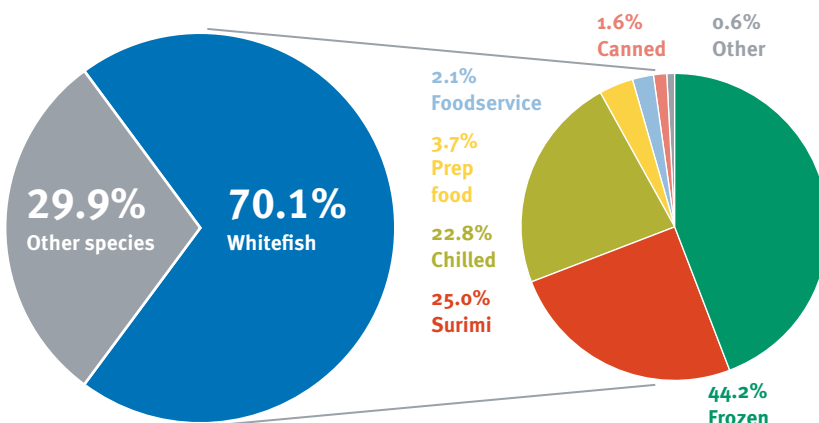
+100
number of brands selling MSC labelled whitefish in 2023

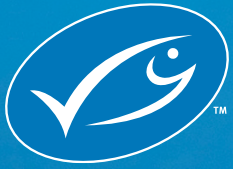
+1,000
number of MSC labelled whitefish listed products in 2023

MSC labelled whitefish sold in France by volume and species



Volume of MSC labelled whitefish sold in France by product category





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Find out more: <https://www.msc.org/species/whitefish-yearbook>

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