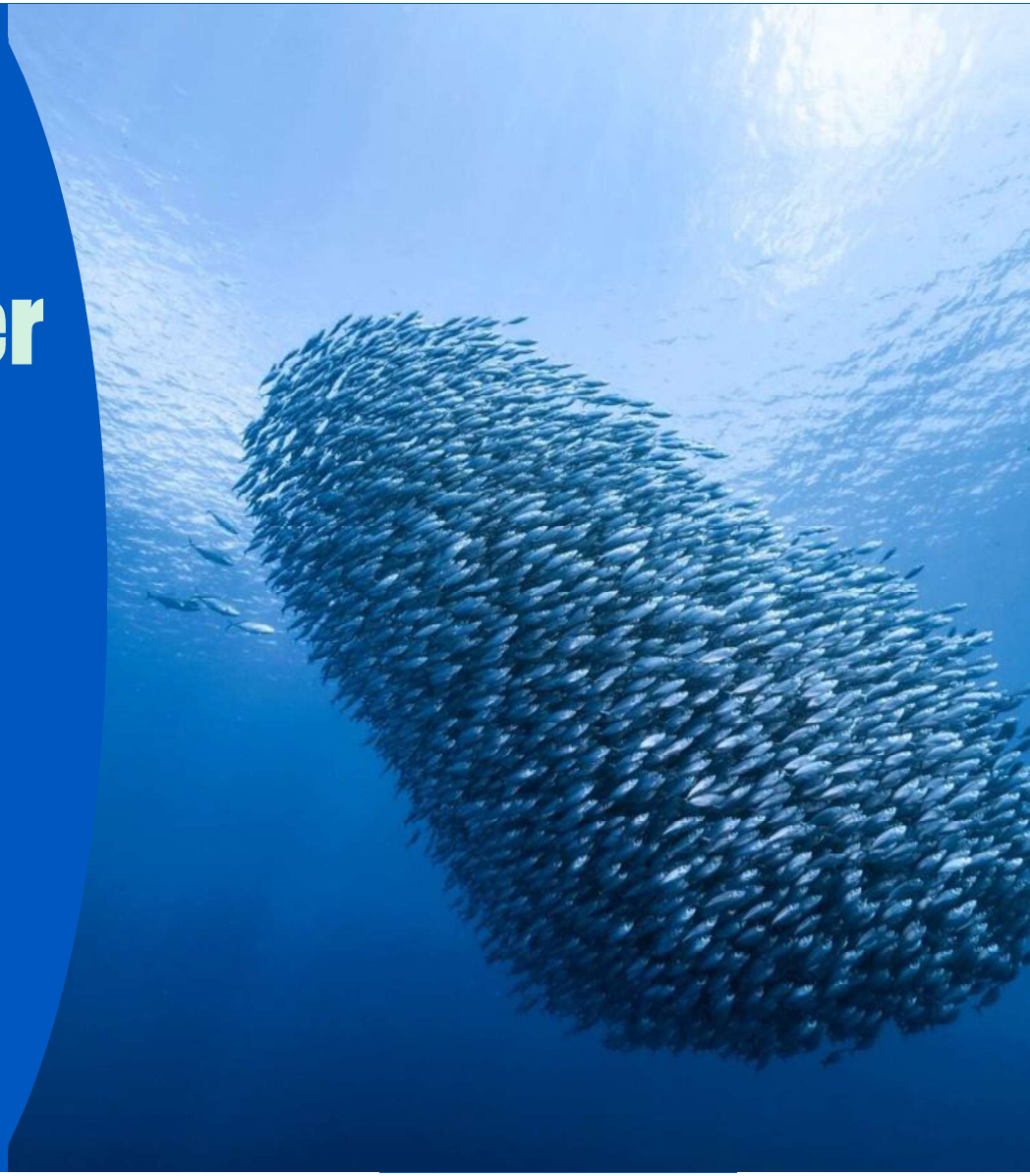
# The Fresh Choice: Understanding the Behaviour of Seafood Consumers

# 2026 Seafood Consumer Perceptions Study

## Changing attitudes to diet and sustainability



Marine Stewardship Council

GlobeScan

# 2026 Global Consumer Insights from GlobeScan and MSC

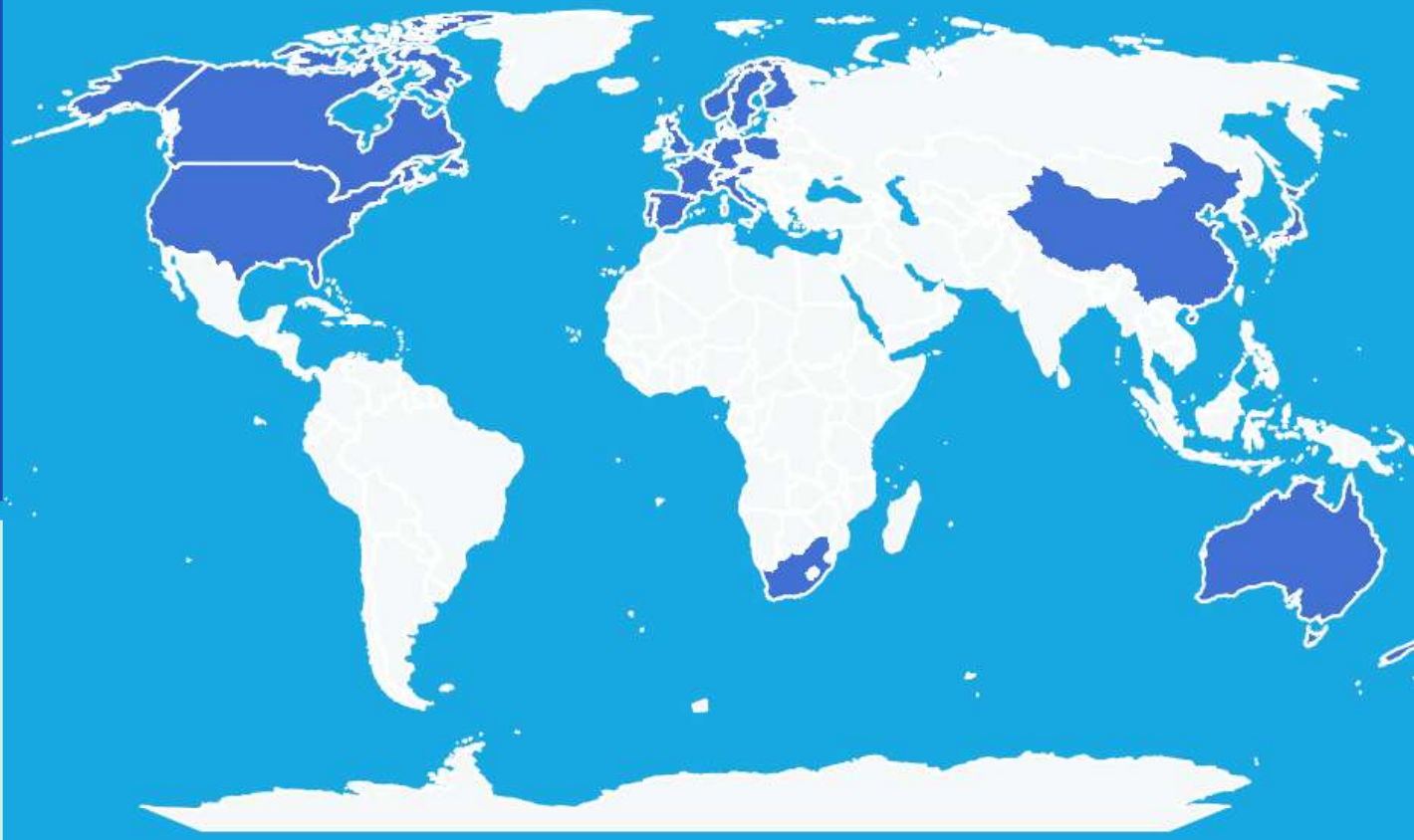
The Marine Stewardship Council partnered with GlobeScan to conduct the fifth wave of a **global research study** into **consumer perceptions**.

*n*=31,074 general public,
*n*=20,543 seafood consumers
in 23 countries
*Feb – March 2026*

*This report is focussing on North America and Europe*

Healthy & Sustainable Living

*n*=32,106 consumers
in 33 markets
*July – August 2026*



# Understanding the consumer in this study

| | Global Sample Size |
|---|---|
| **N. America and Europe general public**<br>A representative sample of consumers across the country (as far as possible using online surveys) | *n*=23,972 |
| **N. America and Europe seafood consumers**<br>Consumers in a household where someone has purchased seafood in the past 2 months and/or who regularly eat seafood at home or in a restaurant | *n*=15,613 |
| **N. America and Europe MSC-aware consumers**<br>Seafood consumers who recall having seen the MSC label “often” or “occasionally” | *n*=9,148 |
| **Nordic countries**<br>Seafood consumers from Sweden, Denmark, Finland and Norway | *n*=2,801 |

**Statistical significance of tracking and comparisons**

Differences of +/- 1 percentage point are statistically significant (approx.) at a global level. Caution should still be taken when interpreting and communicating results as small differences may be significant but not always meaningful. Please note that figures are rounded to whole numbers throughout. This may mean some charts do not add up to 100%.

# Agenda: Four key themes

1. **Concerns for the environment are changing**
   Where do ocean issues fit in consumers list of concerns?

2. **Diet preferences and attitudes to seafood**
   How are diets shifting, and where does seafood fit?

3. **Consumers scrutinise sustainable choices**
   What stops people buying sustainable seafood, and do they believe sustainability claims?

4. **What consumers think about ecolabels and MSC**
   Who do they trust and how are consumers using ecolabels today?

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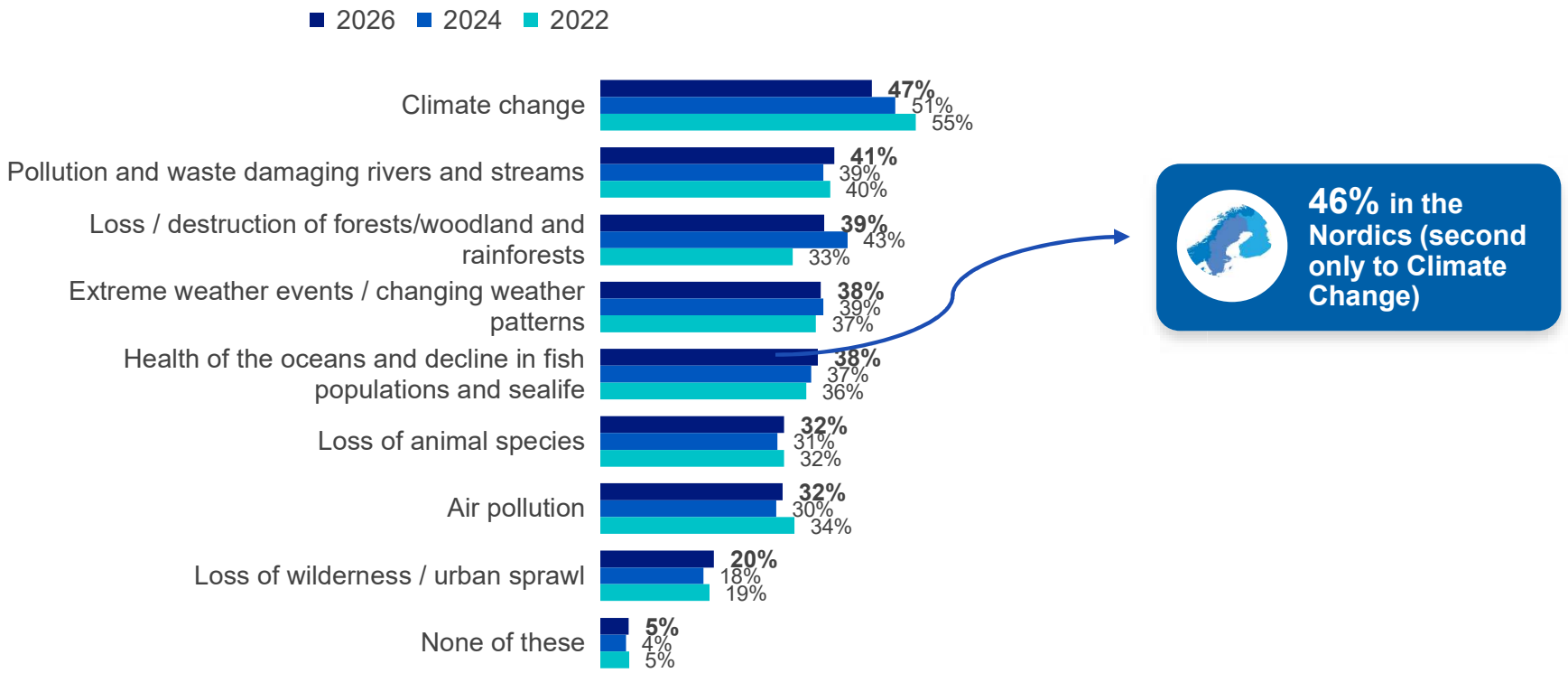
# Concerns for the environment are changing

Where do ocean issues fit in consumers list of concerns?

# Climate change is decreasing from highs in 2020 and concern for ocean health is increasing

**Most concerning environmental issues, choosing issue in their top three, N. America and Europe general population, 2022–2026**



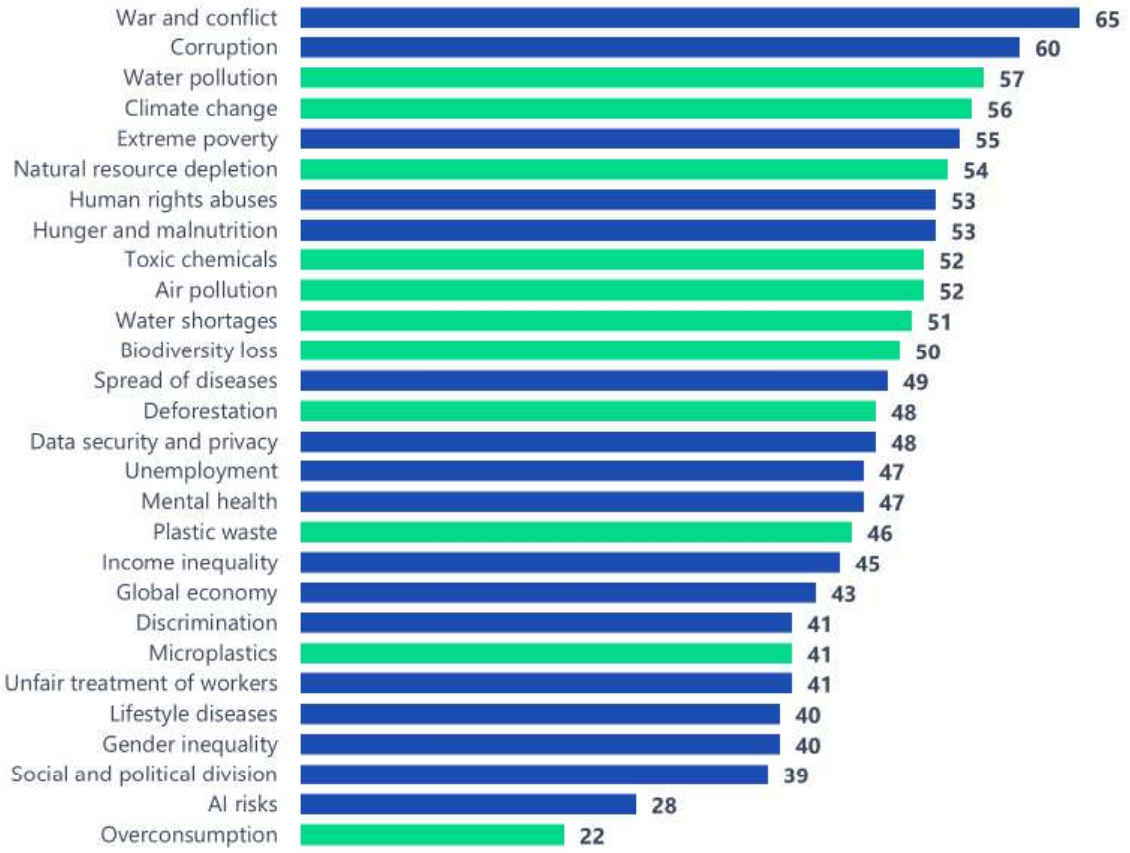



Q1.2: Which, if any, of the potential environmental issues are you most worried about?

# War and conflict and corruption now top the list of global concerns

**Perceived Seriousness of Global Problems**

"Very Serious," Average of 33 Markets, 2026




Environmental issues

Socio-economic issues

7 T1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious or not at all serious problem.

Healthy & Sustainable Living

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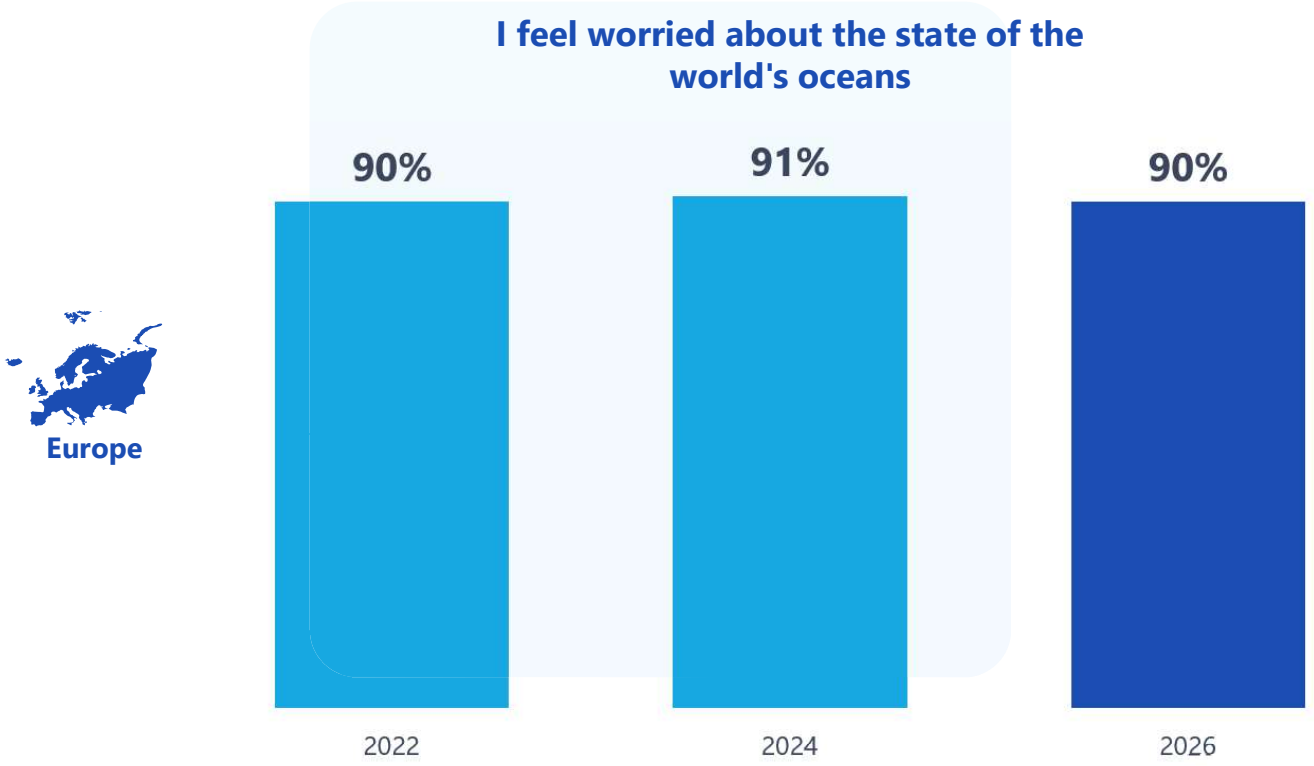
# Concern about the ocean remains high across Europe

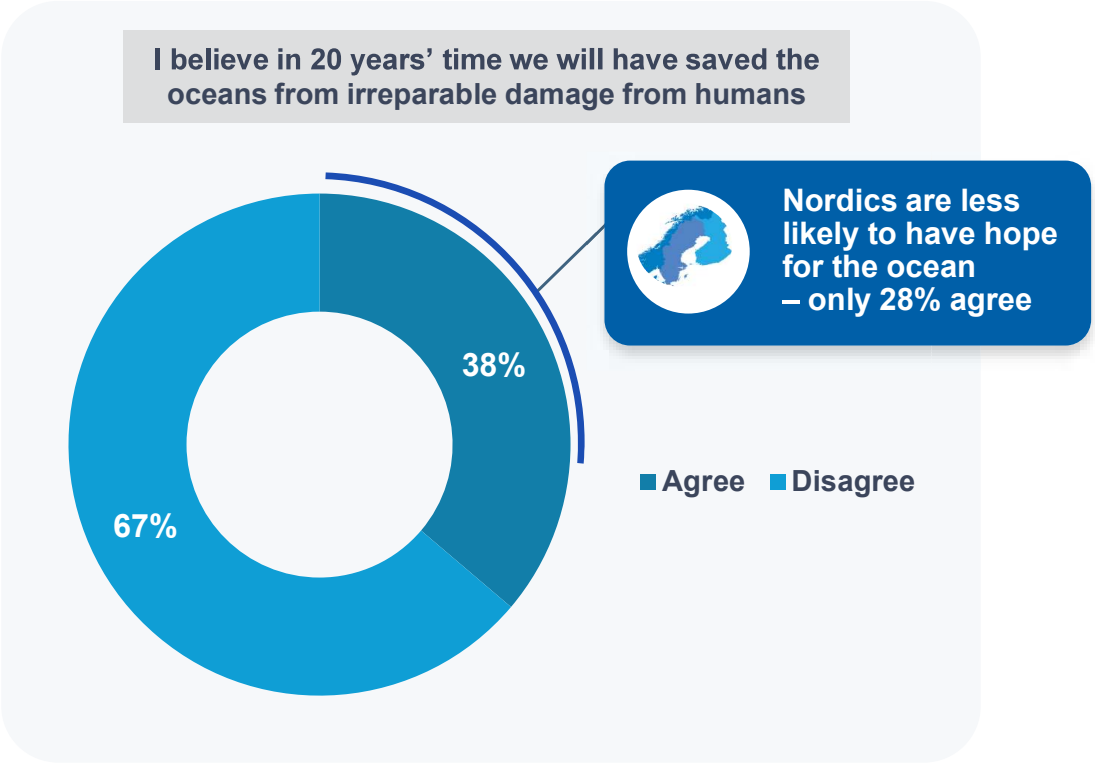
**"Agree" (3+4 on a 4-point scale), general population, Europe, 2022–2026**




Q105.1: To what extent do you agree or disagree with the following statements?

# There is still a large majority of consumers who are pessimistic about the health of oceans

**Perceptions of fish availability over time, N. America and Europe seafood consumers, 2026**

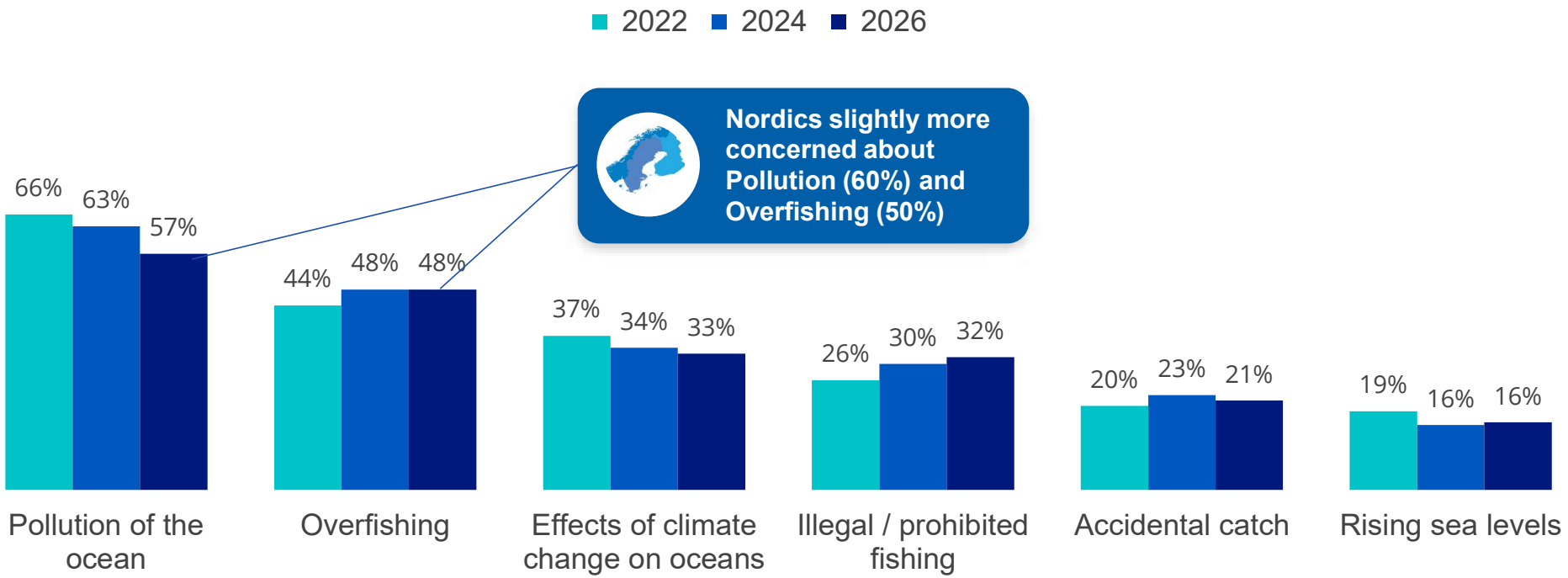





Q5.31: How well does each of the following statements describe your opinions? Q4.5 Please indicate how much you agree or disagree with the following statement.

# There has been an increase in worries about overfishing

**Most concerning ocean issues, N. America and Europe seafood consumers, 2022–2026**




 Q1.2 There are many different potential threats to the world's oceans, the wildlife living there and the people who work there. Which of these potential issues worries you the most?

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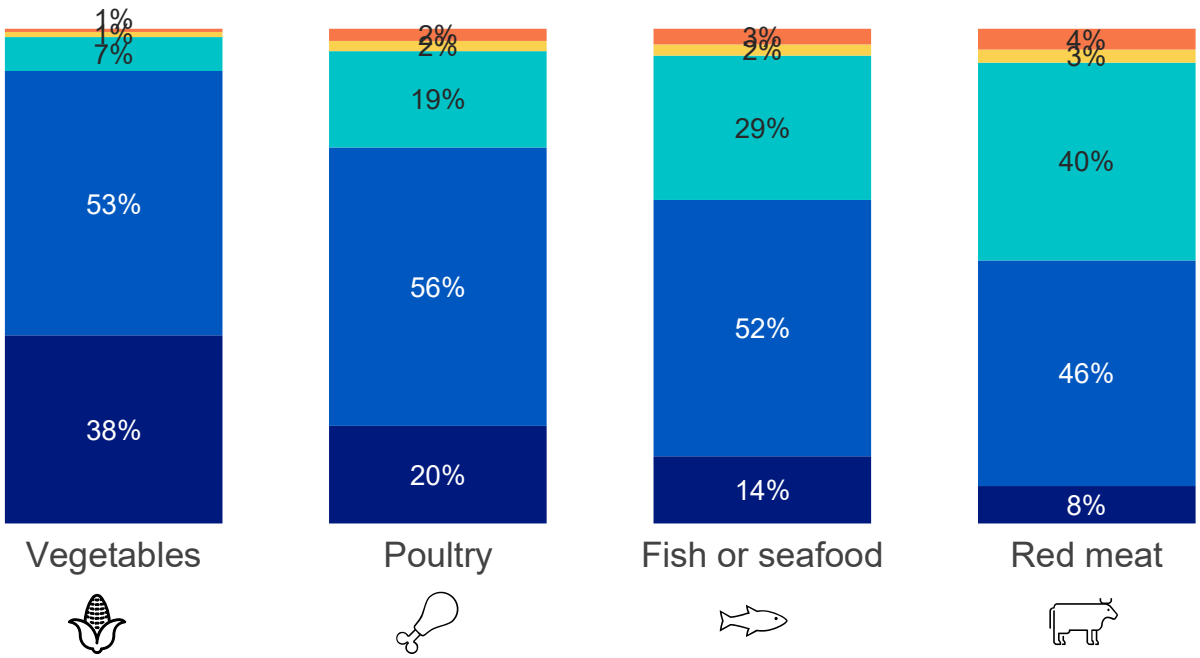
# Diet preferences and attitudes to seafood

How are diets shifting, and where does seafood fit?

# Seafood consumers are cutting red meat harder than the general population and eating more vegetables

**Changes in diet, N. America and Europe general population vs N. America and Europe canned seafood consumers, 2026**




## Europe vs the global total

**Europe is cutting red meat faster (40% eating less vs 37% globally). Nordics are virtually the same as the rest of Europe.**

- I didn't eat this food two years ago and I still don't
- Used to eat it two years ago but I do not eat it at all anymore
- Eat less, but I still eat it



Q101: Do you eat more or less of the following foods than you did two years ago?

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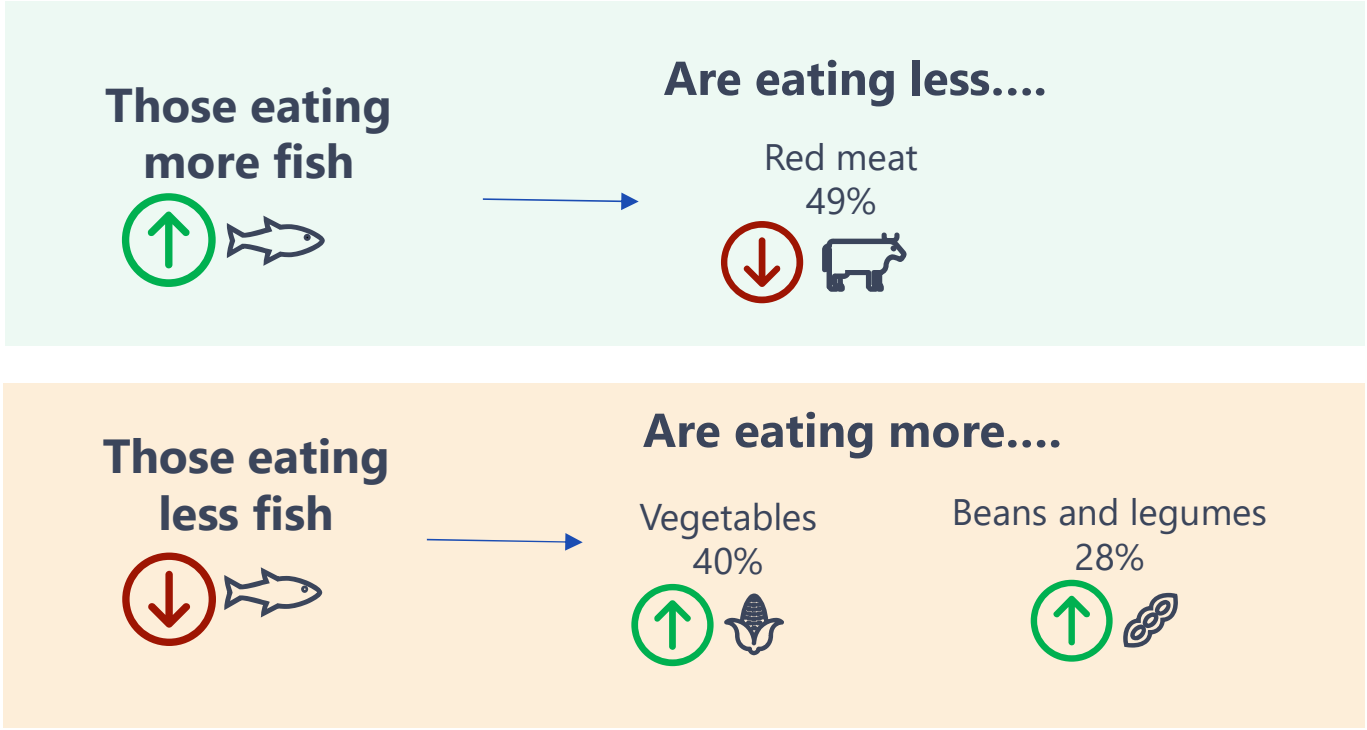
# Diet change patterns are similar to 2024, with those eating more fish mainly moving away from red meat, while those eating less fish are introducing more vegetables to their diets

**Changes in seafood consumption compared to two years ago, N. America and Europe canned general population, 2026**

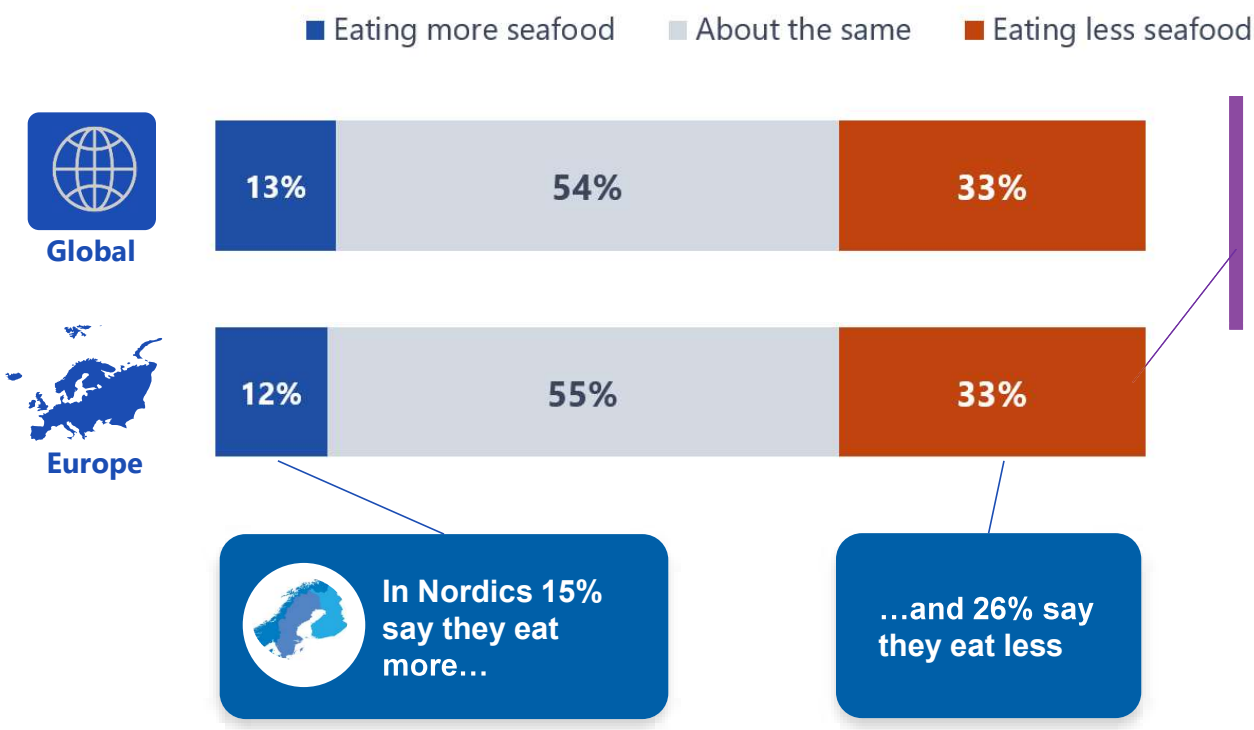





Q101: Do you eat more or less of the following foods than you did two years ago?

# Europe mirrors the world on seafood consumption, with people in southern Europe eating less

**Change in fish/seafood eating vs two years ago, general population, 2026**



38%

**Southern Europe cuts back hardest**

of Southern Europeans are eating less seafood than two years ago, vs 33% globally

Q101: Do you eat more or less of the following foods than you did two years ago?

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GlobeScan

Marine Stewardship Council

# Consumers scrutinise sustainable choices

What stops people from buying sustainable seafood, and do they believe the claims?

# Quality, health, and price are still primary motivators of seafood purchase

**Motivators: max diff analysis, importance score, N. America and Europe seafood consumers, 2026**

## Top Seafood purchase motivators Nordics

1. Taste
2. Safe to eat
3. Good for my health/my family's health
4. Fresh
5. Price
6. Sustainably sourced
7. Easy to cook

**Key:**

- Conventional purchase motivators
- Sustainability-focused
- Traceability-focused
- Nutrition purchase motivators



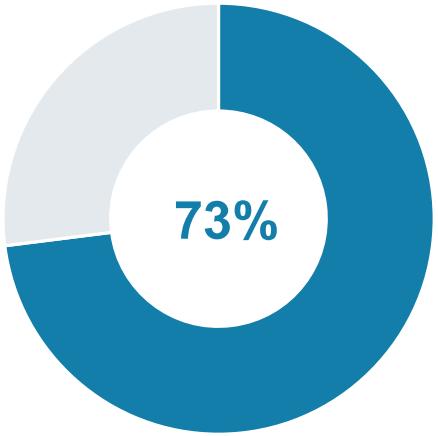
Q4.2: Thinking about your recent purchase of [fish type], which of the following five considerations was the most important and which was the least important? *Statements "High in protein" added in 2026

# The majority of seafood consumers think we need to consume seafood from a sustainable source

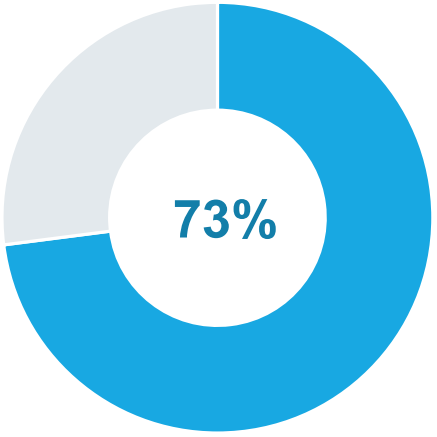
**Views on eating sustainable seafood, N. America and Europe seafood consumers and N. America and Europe Canned seafood consumers, 2026**

**In order to save the ocean, we have to consume fish/seafood only from sustainable sources**

Seafood consumers




Nordic seafood consumers

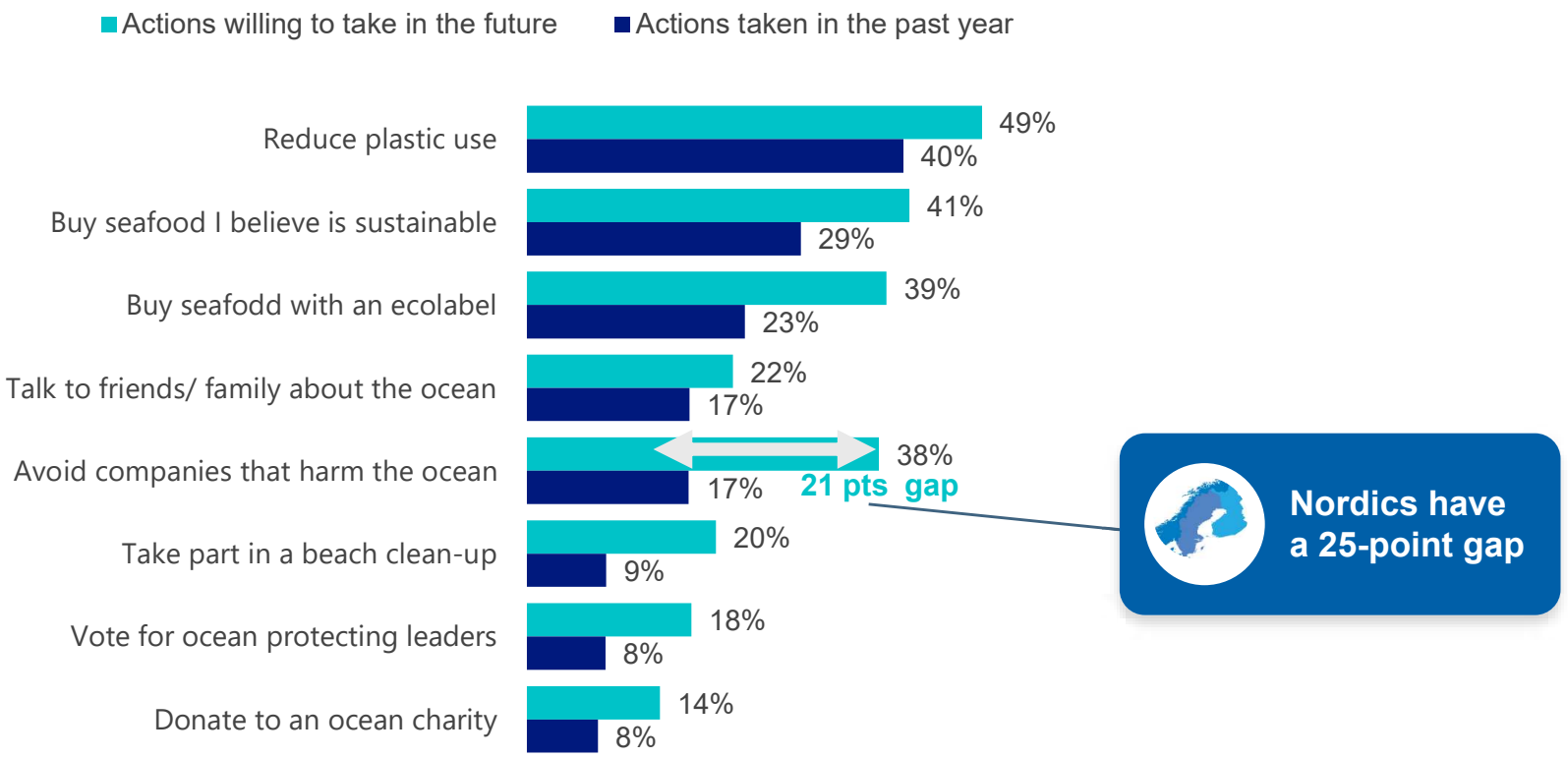





Q5: How well does each of the following statements describe your opinions.

# Seafood consumers are willing to take action, and are more likely to reduce plastic use or buy seafood they believe is sustainable

**Actions taken in the last year vs actions willing to take in future, N. America and Europe seafood consumers, 2026**

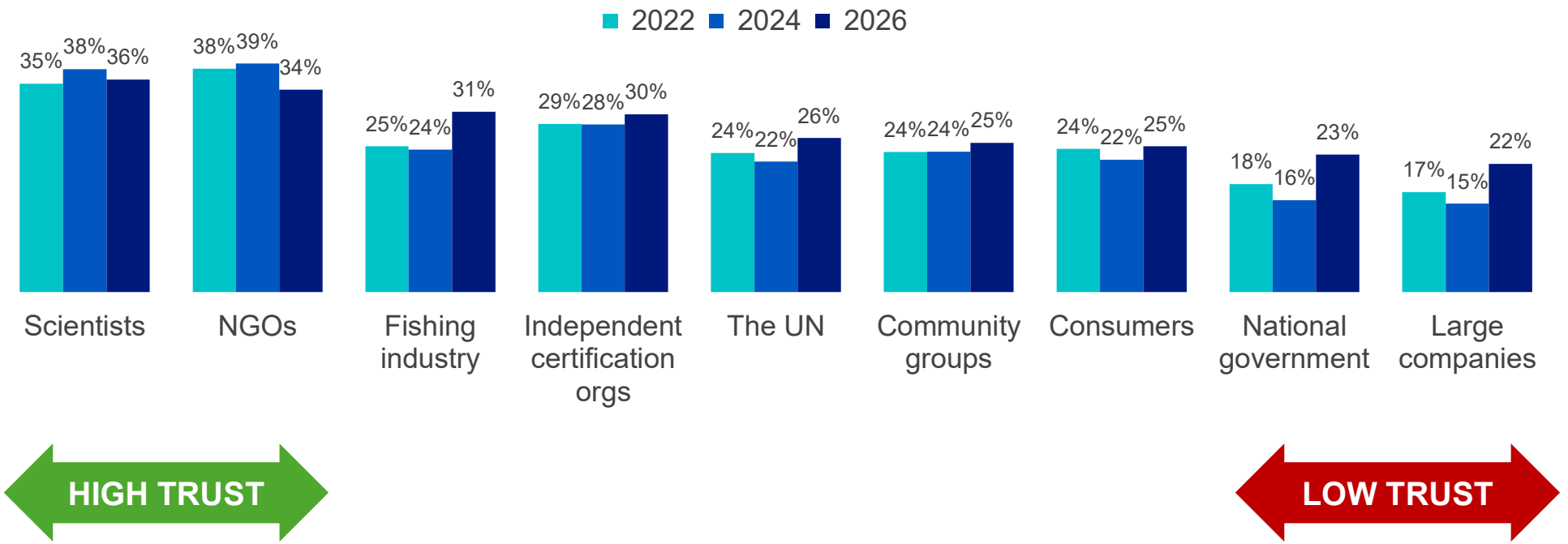





Q11.4a: Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans? Q11.4b: And which actions would you be willing to take in the future to protect the fish and seafood in our oceans?

# Scientists and NGOs continue to be perceived as the key contributors to ocean protection, but perceptions of their role have weakened, while views of other groups are improving

**Actors perceived to be contributing "well" to protecting the ocean environment, (6+7 on a 7-point scale), N. America and Europe seafood consumers, 2022–2026**




 Q3.1a: How well do you think the following groups or institutions are contributing to protecting the world's ocean environment?

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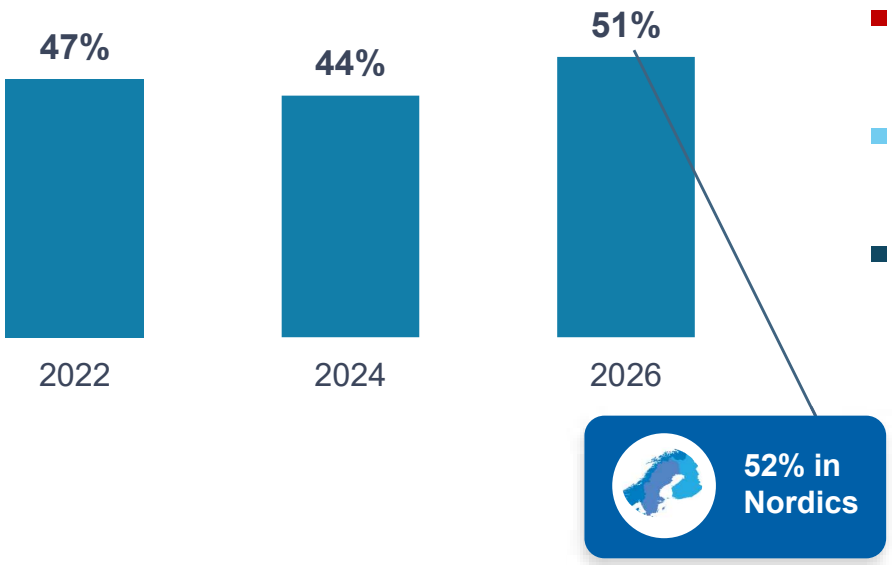
# What consumers think about ecolabels and MSC

Who do they trust and how are Europeans using ecolabels today?

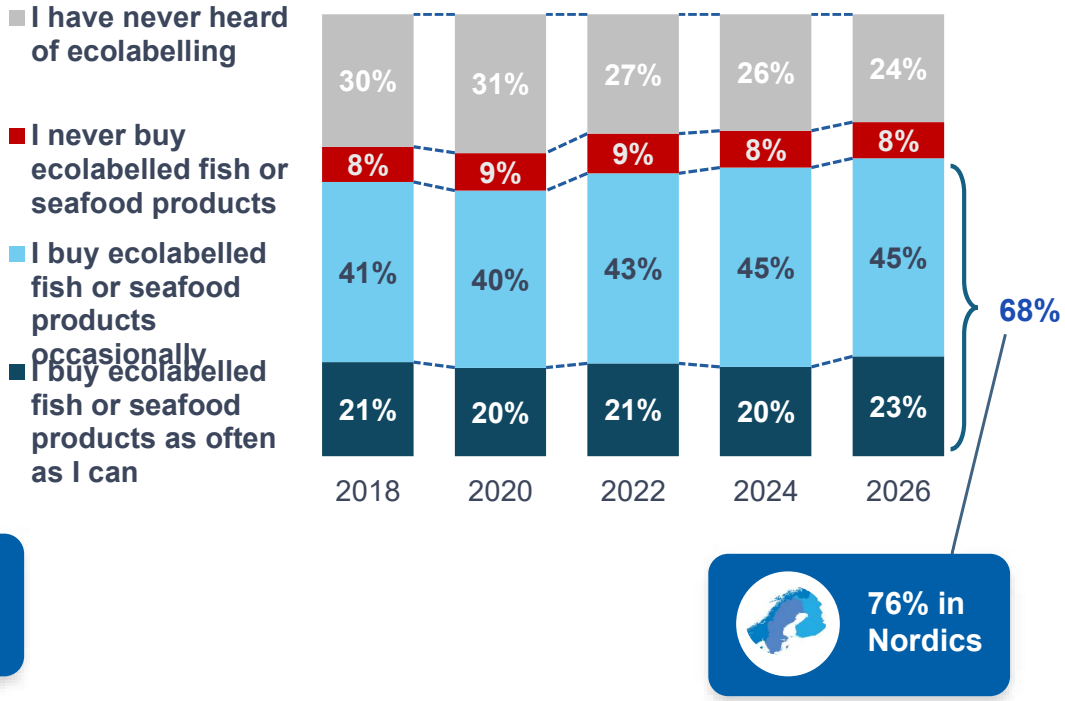
# People are noticing ecolabels when they are shopping and are more likely to buy them

Awareness of ecolabels, "agree" (5+6+7 on a 7-point scale), N. America and Europe seafood consumers, 2018–2026

**Noticing ecolabels when I'm shopping**



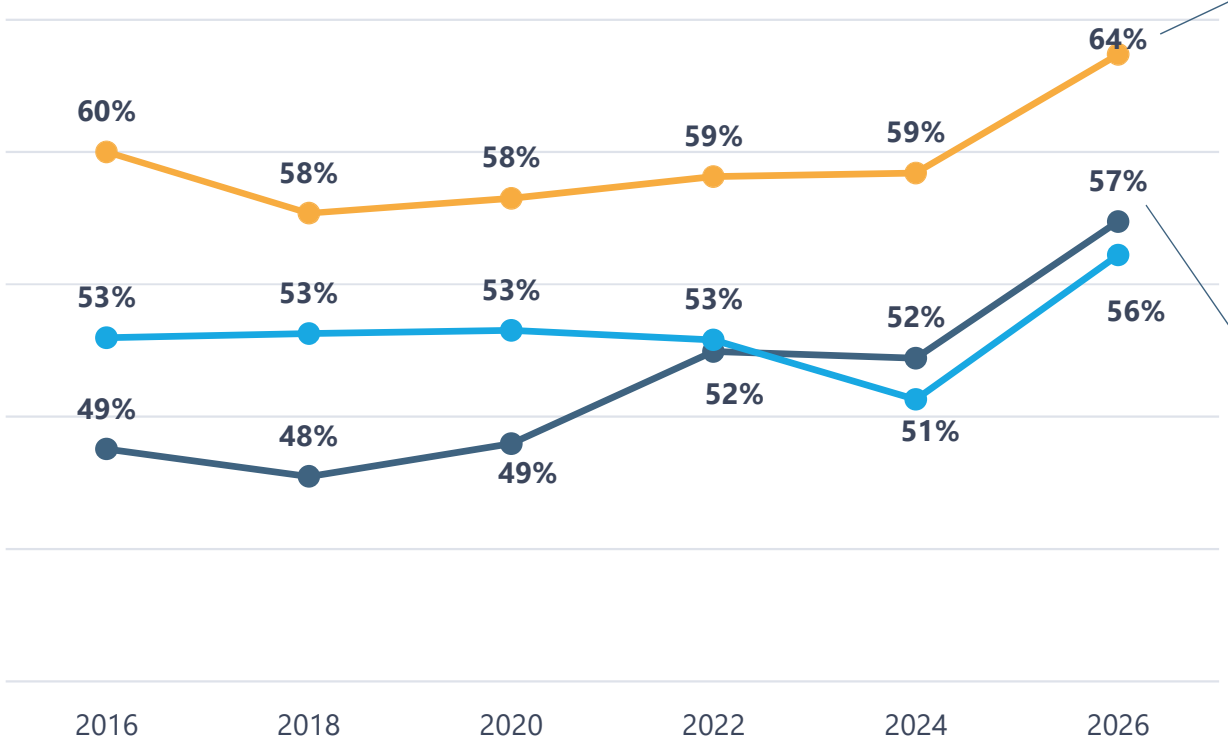

**Buying ecolabelled products**




Q8.16: How well does each of the following statements describe your opinions about ecolabels? Q7.1 The term "ecolabel" refers to a label or certification on a product which indicates that the product is more environmentally-friendly or sustainable in some way. How often do you buy ecolabelled fish and seafood products?

# Positive opinions of ecolabels are trending upward over time

**Opinions on ecolabels, "describes opinion well" (5+6+7 on a 7-point scale), N. America and Europe seafood consumers, 2016–2026**




65% in Nordics

Ecolabels on fish and seafood products raise my trust and confidence in the brand

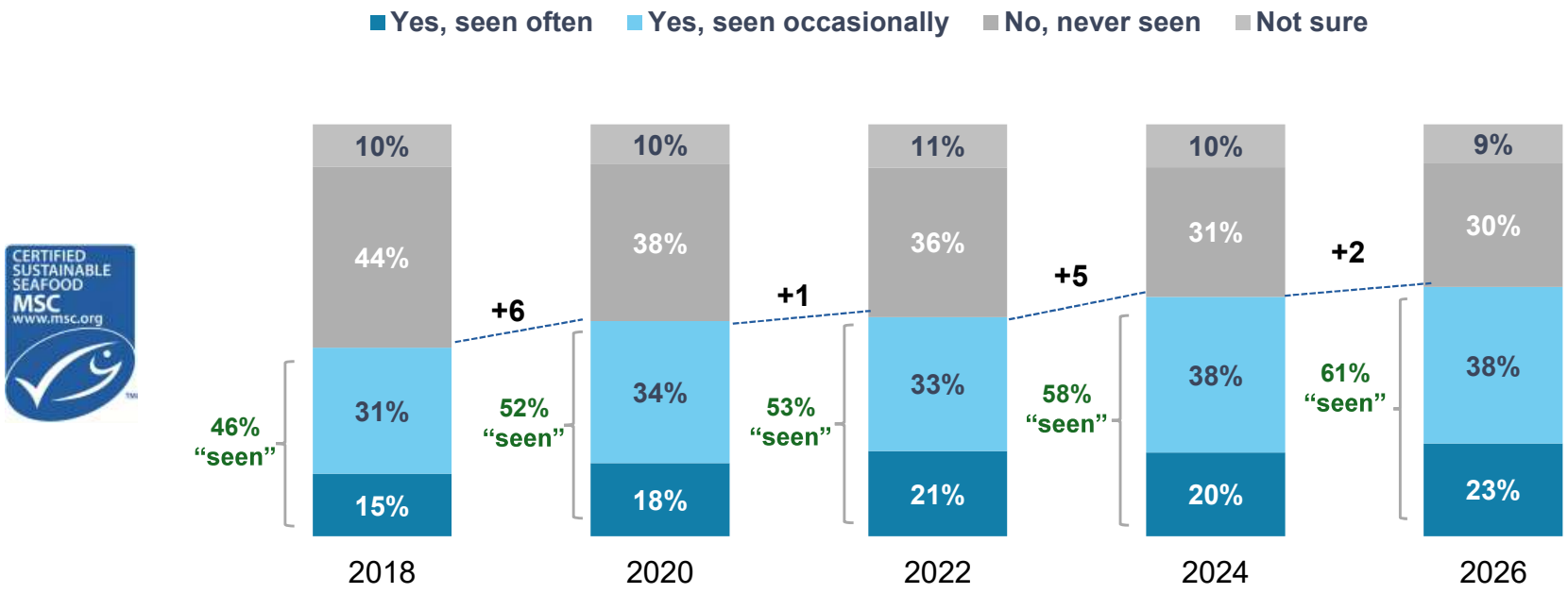
Ecolabelled fish and seafood is better for our health

58% in Nordics

 Q8: How well does each of the following statements describe your opinions about ecolabels?

# Awareness of the MSC label has continued to grow since 2024, following the trend in increased awareness since 2016

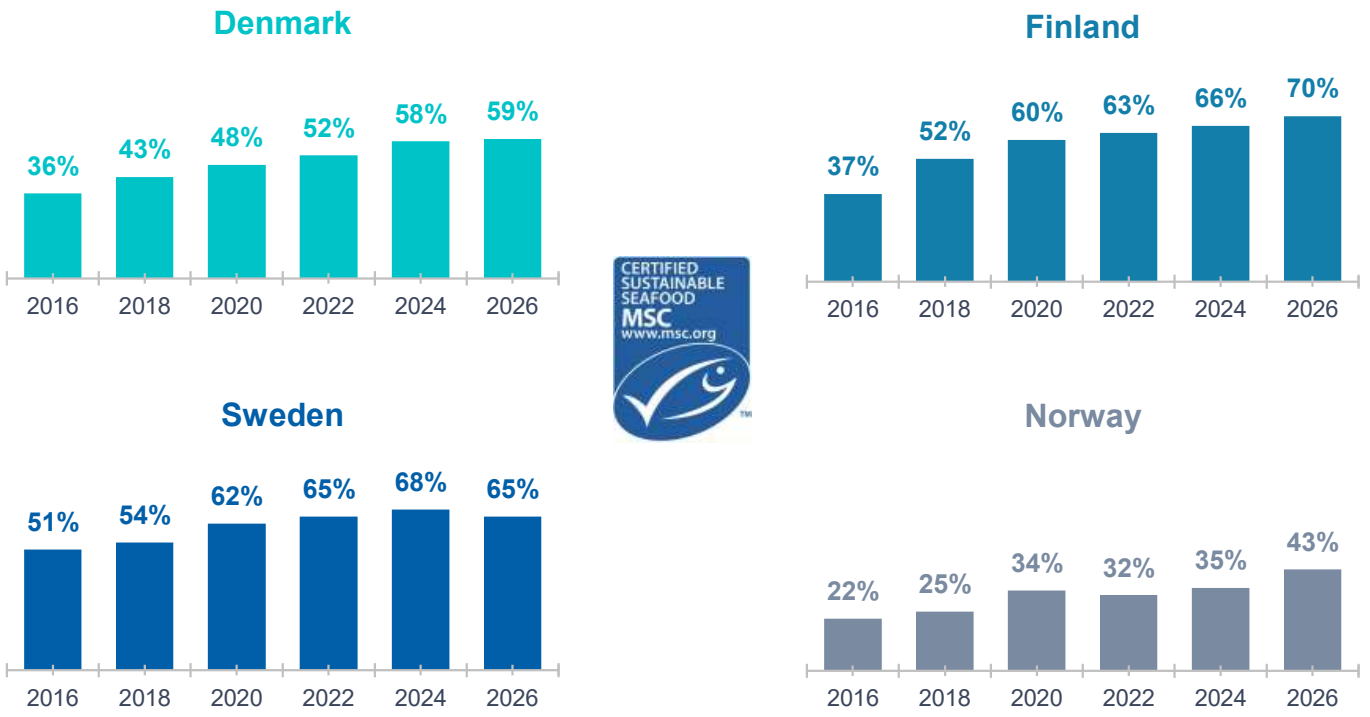
**Awareness of the MSC label, N. America and Europe general population, 2016–2026**




 Q1.1: Have you ever seen the following logos?

# MSC awareness has risen significantly in Nordic Countries over the past 10 years

**Awareness of the MSC label, "seen often" + "seen occasionally," by market, general population, 2016–2026**

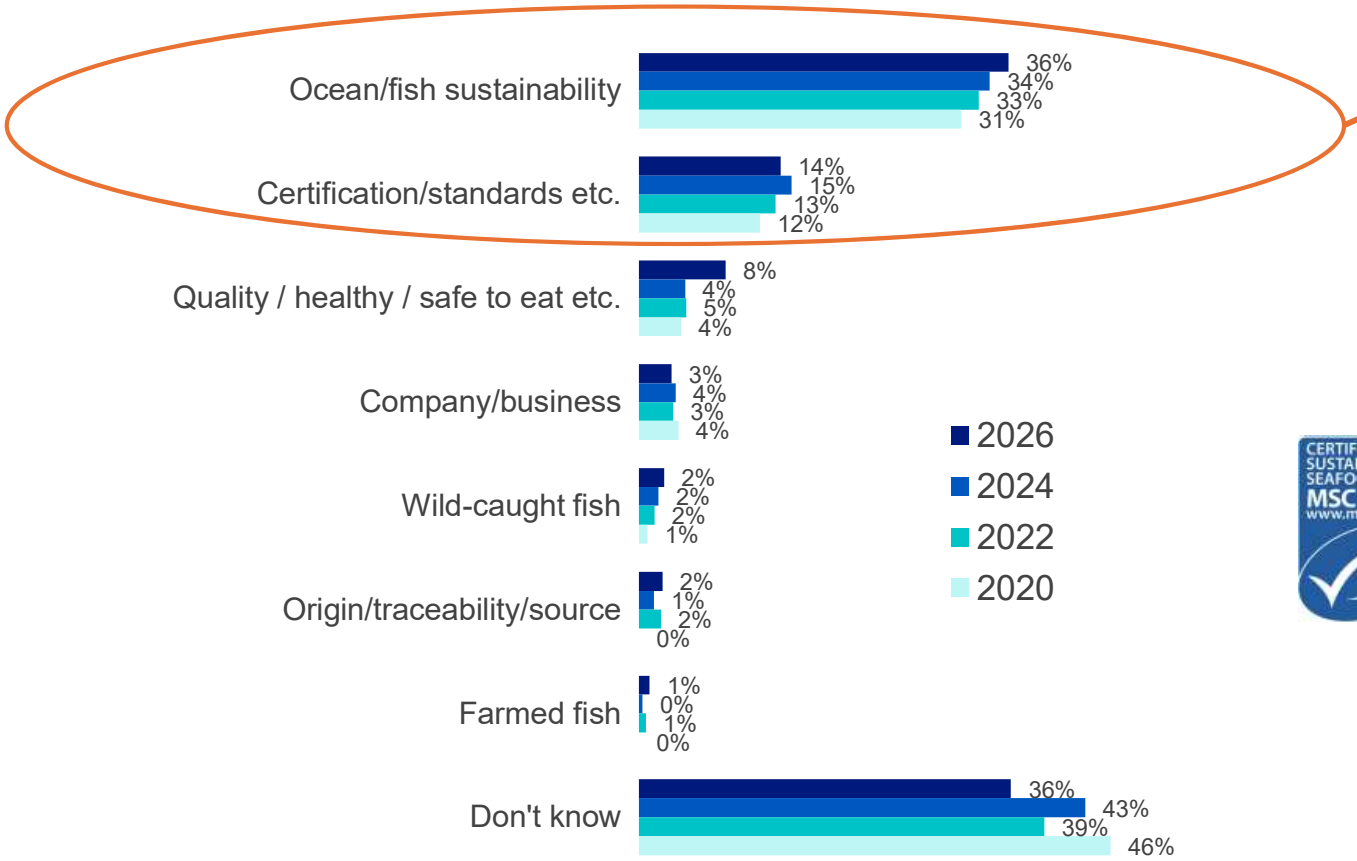





Q1.1: Have you ever seen the following logos? - MSC

# In addition to ocean/fish sustainability and certification/standards, understanding includes growing quality / health associations

**Unprompted understanding of the MSC label, N. America and Europe seafood consumers, 2016–2026**

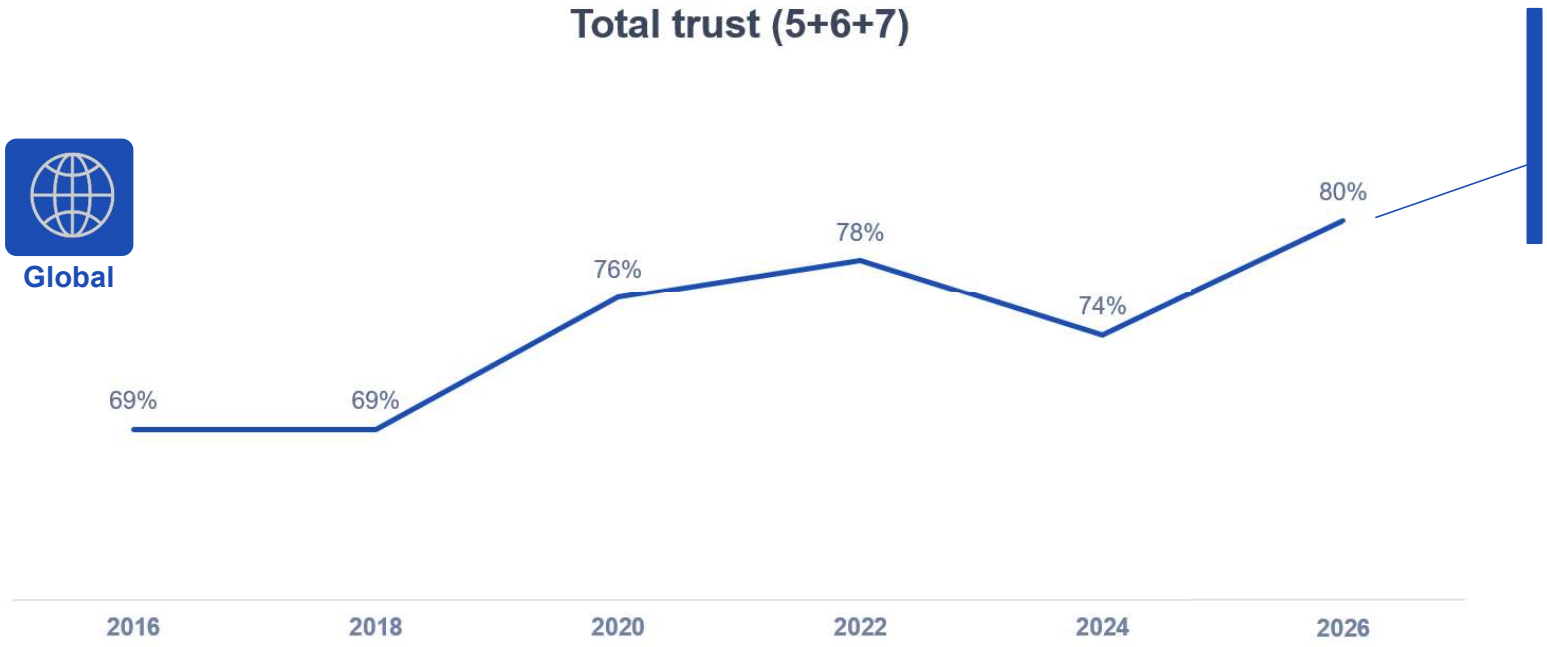



**Unprompted, seafood consumers most commonly understand the MSC label is about fish sustainability or certification**

 Q6: What does this logo mean or represent?

# Over eight in ten consumers trust the MSC label, with a return to trust levels seen in 2022

**Trust in the MSC label, MSC-aware seafood consumers, 2016-2026**




**Nordic consumers have high trust in the MSC label**

**78%**

CERTIFIED SUSTAINABLE SEAFOOD MSC www.msc.org

94 Base: MSC-aware seafood consumers, global, *n*=10,145 *Note: China excluded as a clear outlier (significant inflation relative to 2024)*
Q9.2: How much trust do you have in the claims of the following initiatives/organisations?

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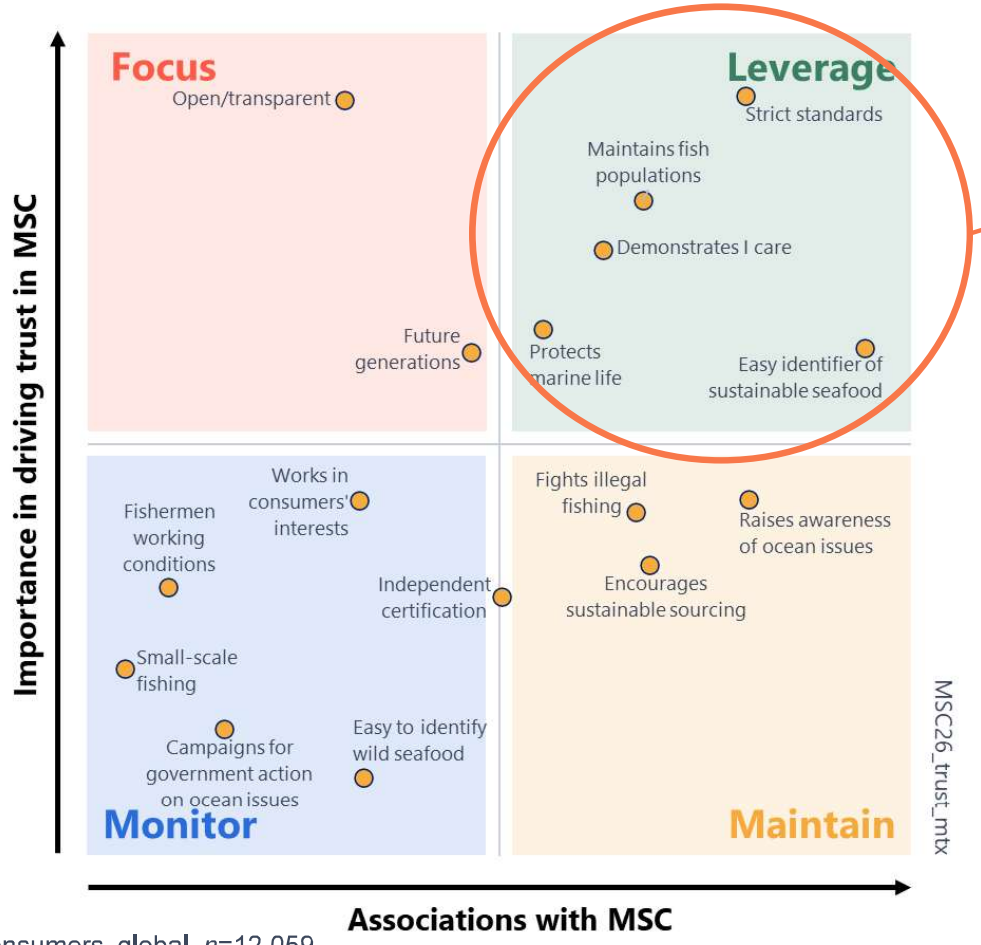
# Drivers of Trust in the MSC:
# Core areas to leverage are standards and healthy fish populations

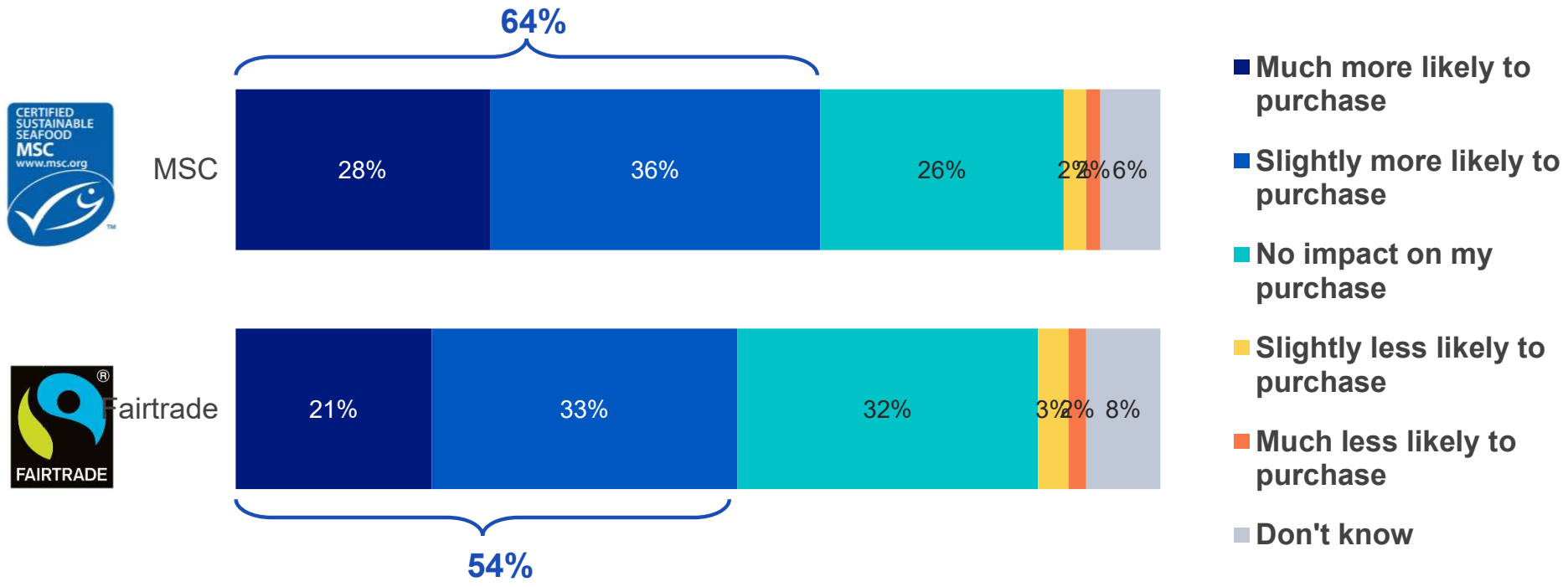



These are all important in driving trust in MSC and are strongly associated with the MSC label

95 Base: MSC-aware seafood consumers, global, *n*=12,059

# Close to two thirds of seafood consumers are more likely to buy a product carrying the MSC label, ahead of Fairtrade

**Impact on likelihood to purchase, N. America and Europe seafood consumers, 2026**






Q104: What impact would the following labels have on your likelihood to purchase a product?

# Conclusions

## High ocean relevance

- Non-environmental concerns are rising but ocean concerns and overfishing remain high; people are more aware of the issues.
- But there is still confusion and more want to act than do and expect business to lead.

## Trust and transparency

- More than half of European consumers distrust claims and doubt that the fish is what the label says.
- Independent certification and credible labels can help consumers navigate complex choices.

## Price and health dominate

- Many consumers want to make more sustainable choices, but competing priorities such as price, and convenience often get in the way.
- European consumers are eating less seafood and younger consumers, in particular, seem to have more barriers to eating seafood and prefer other sources of protein.

# What do seafood consumers want?

PANEL

**Anna Billing**
ICA Malmborgs

**Henrik Vinther Olesen**
Salling Group

**Krishan Kent**
Swedish Seafood Association

MODERATOR

**Pia Tuxen**
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