

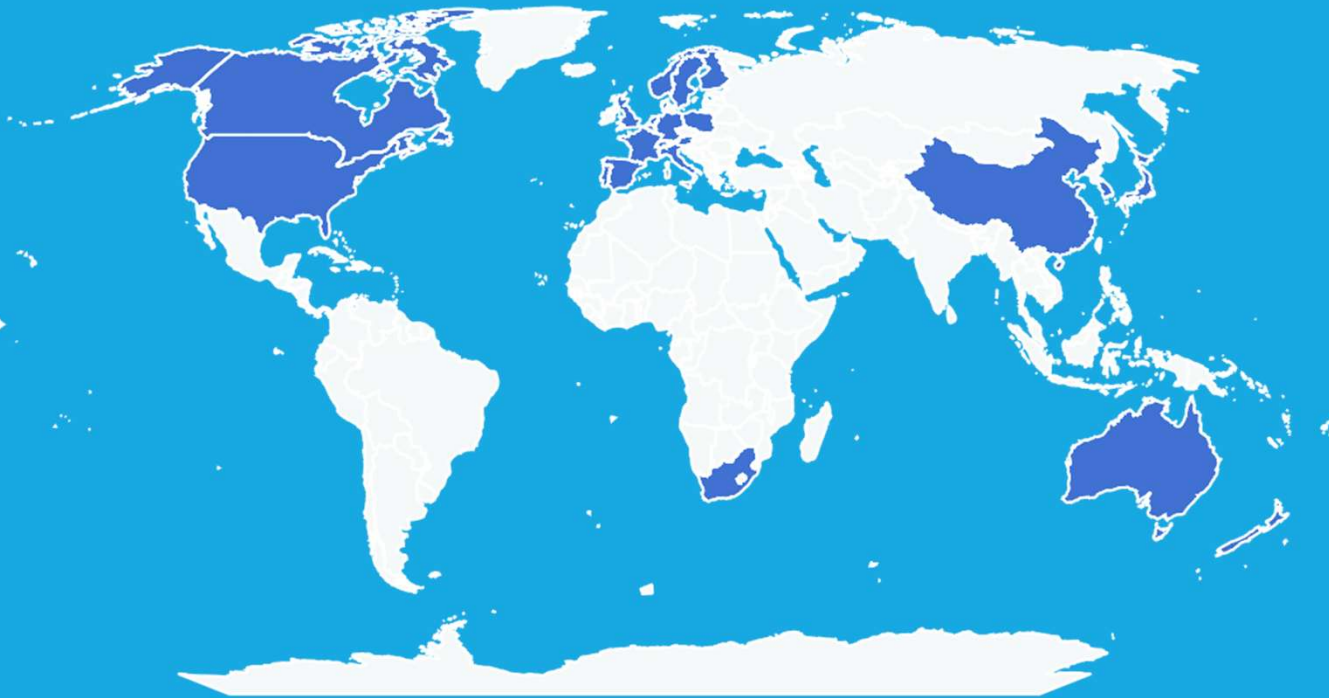
2026 Seafood Consumer Perceptions Study

Changing attitudes to diet and sustainability

Presentation to Market Advisory Council, EU
September 2026



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**.

GlobeScan



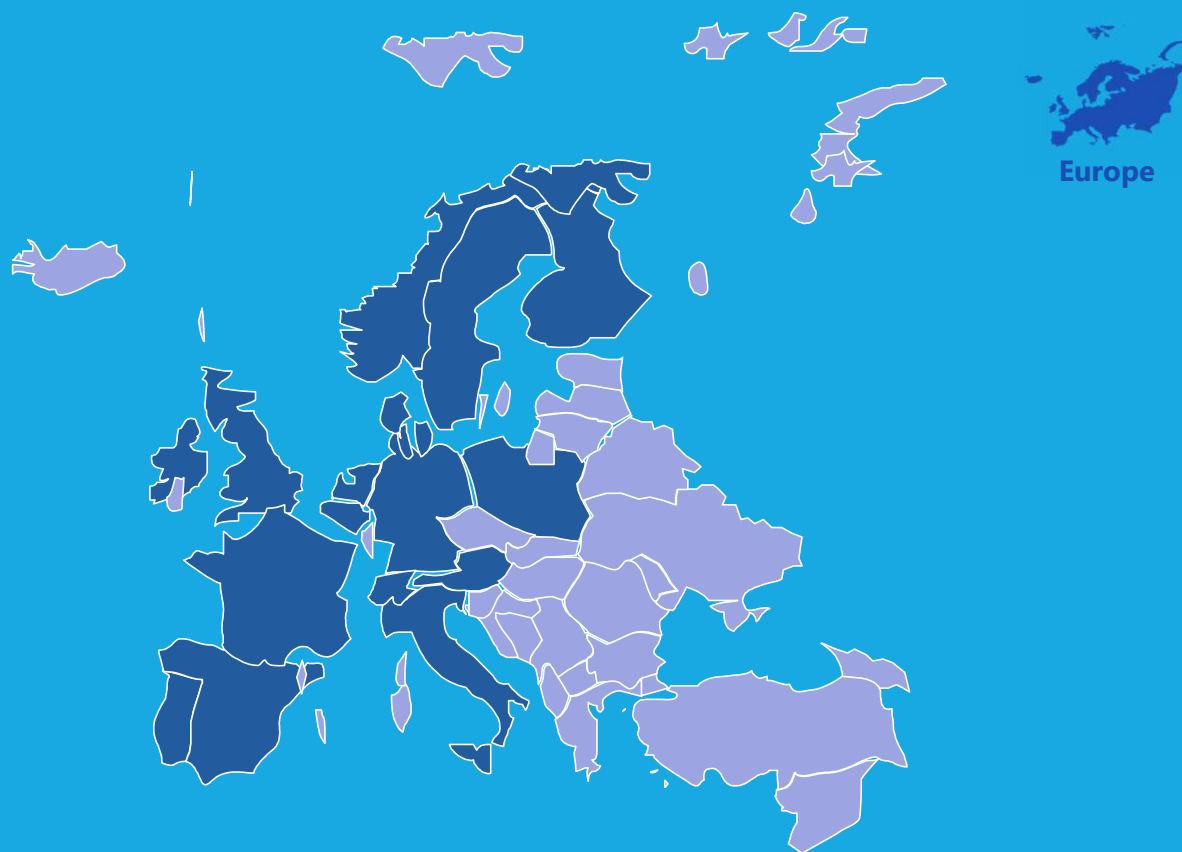
*n=31,074 general public,
n=20,543 seafood consumers
in 23 countries
January – March 2026*

**Healthy &
Sustainable
Living**



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

Focus on countries in Europe for the MAC



15 Markets covered: Austria, Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, UK, and Portugal.



$n=14,518$ general public,
 $n= 11,171$ seafood consumers

Agenda: Four key themes

1

Concerns for the environment are changing

Where do ocean issues fit European consumers list of concerns?

2

Diet preferences and attitudes to seafood

How are European 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 Europeans using ecolabels today?





Concerns for the environment are changing

Where do ocean issues fit European consumers list of concerns?

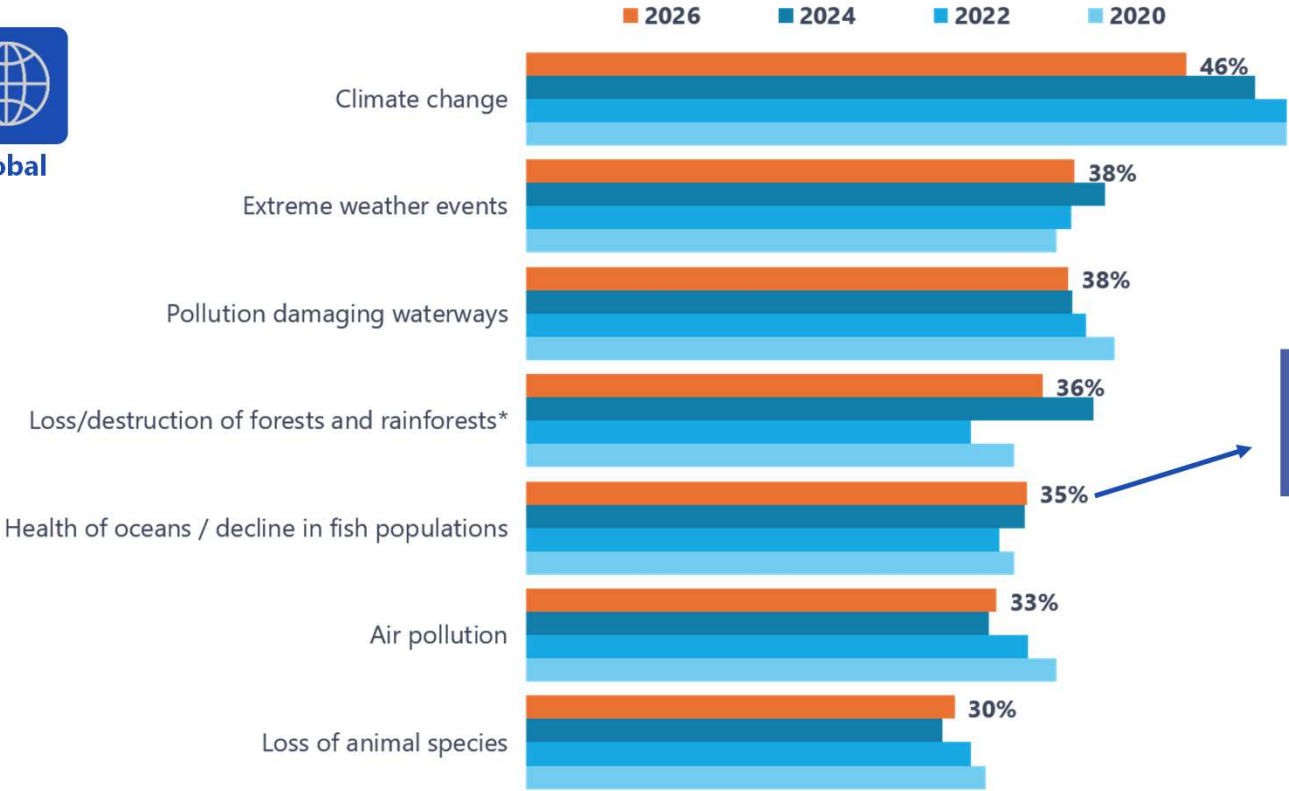


Climate change is decreasing from highs in 2020 and 2022 and concern for ocean health holds steady

Most concerning environmental issues, choosing issue in their top three, general population, 2020–2026



Global



Health of oceans
35% in Europe overall
37% in Southern Europe



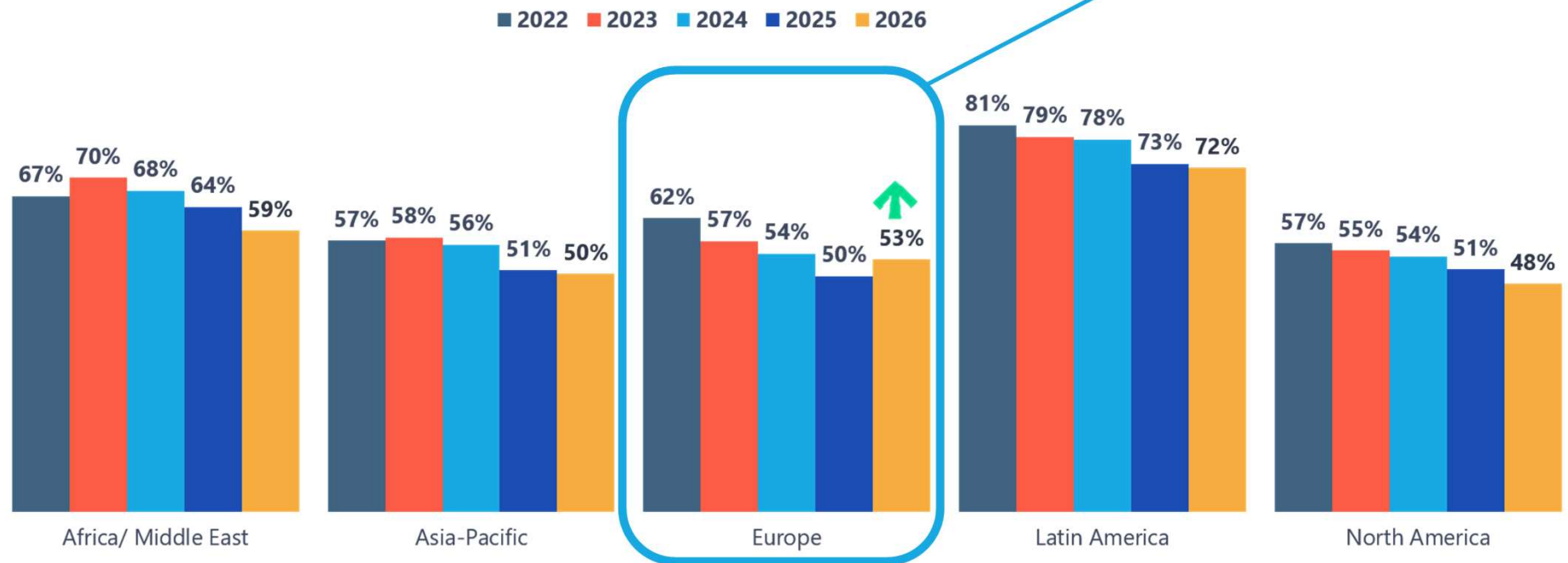
Q1.2: Which, if any, of the potential environmental issues are you most worried about?



Climate concern has more recently started rising again in Europe, unlike other regions

Perceived Seriousness of Climate Change

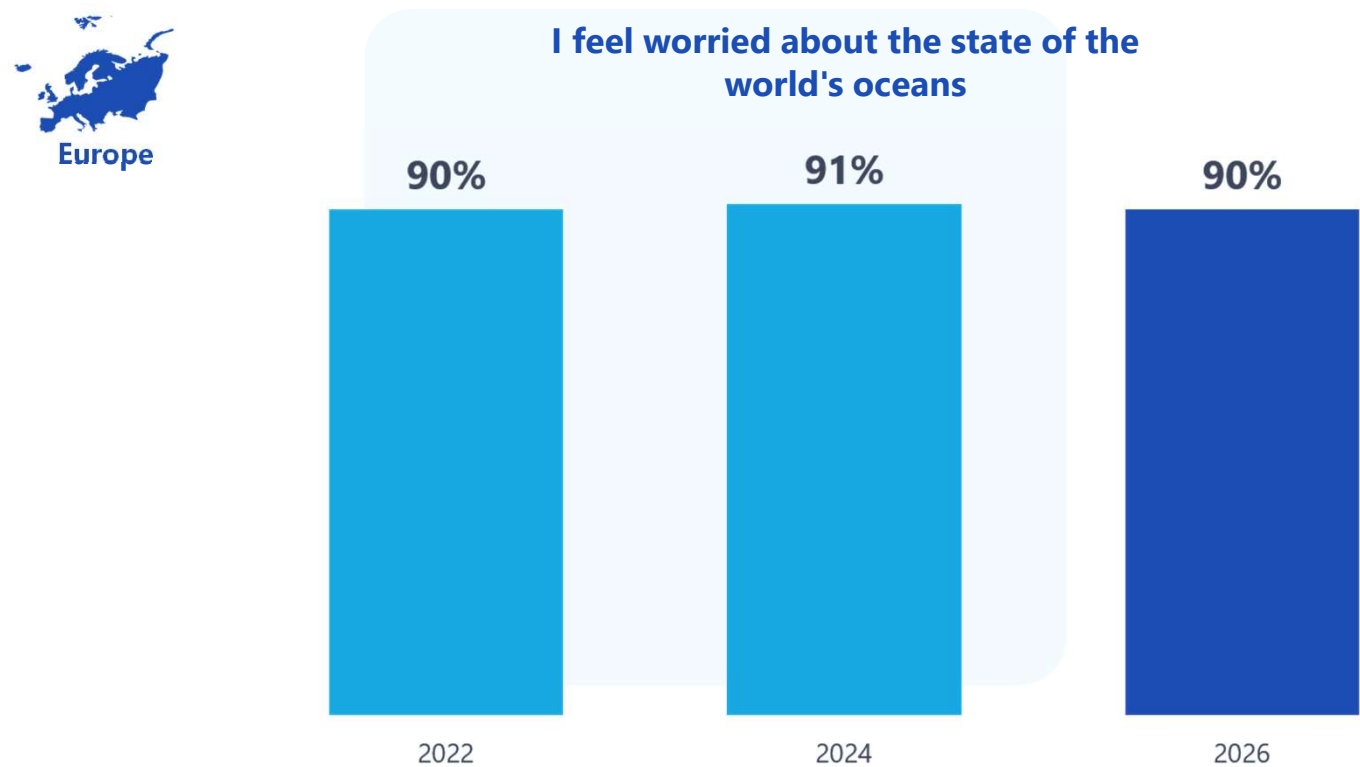
"Very Serious," by Region, 2022–2026



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. [Climate change or global warming]

Concern about the ocean remains high in Europe

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



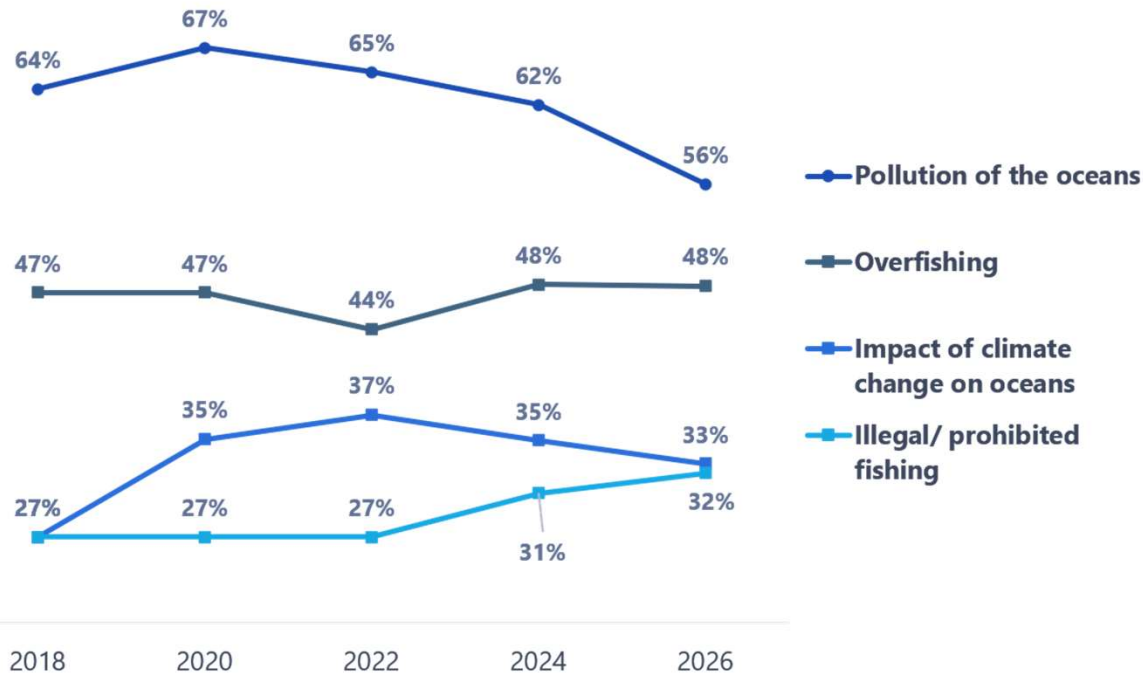
Q105.1: To what extent do you agree or disagree with the following statements?

Europe's ocean concerns are similar to the global picture, with an increase in worries about overfishing in Europe and globally

Most concerning ocean issues



Global



Ocean pollution still tops both lists

57% of European seafood consumers name it, just above 56% globally.

Concern for overfishing is increasing in Europe and globally

32% in Europe are concerned, against 33% globally

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?



Concern for environmental issues reached a peak: consumers no longer think they can save the world, but are still worried and want to do their bit

Concern has passed its peak

Worry about most environmental issues has eased since the 2022 high. However concern for climate change seen a recent bounce back in Europe recently.

But concern for the ocean holds firm

Concern for ocean health has not moved since 2020 and stays high in Europe in every survey since 2022. Europe's concern for overfishing has increased in recent years.

Consumers are more sceptical

Fewer people believe the ocean can still be saved, and 43% doubt their favourite seafood will be available in 20 years. They still want to do their bit but they need proof it makes a difference.



Diet preferences and attitudes to seafood

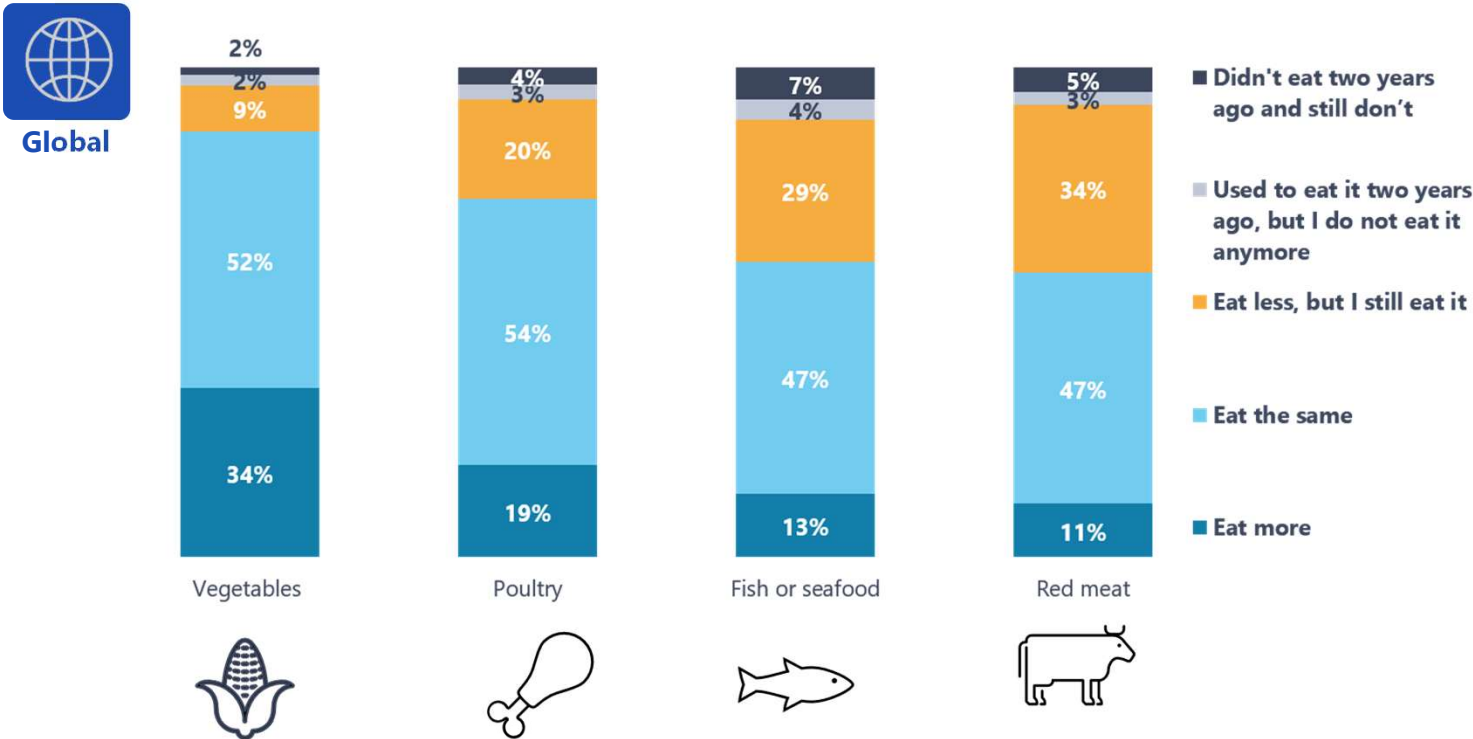
How are European diets shifting, and where does seafood fit?



wis

The trend to more flexitarian diet seen in 2022 continues, with people eating less red meat and more vegetables

Change in consumption, general population, 2026



Europe vs the global total

Europe is cutting red meat faster (40% eating less vs 37% globally).

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

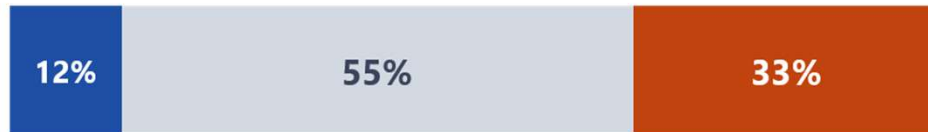
■ Eating more seafood ■ About the same ■ Eating less seafood



Global



Europe



38%

Southern Europe cuts back hardest

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



31%

The North holds steadier

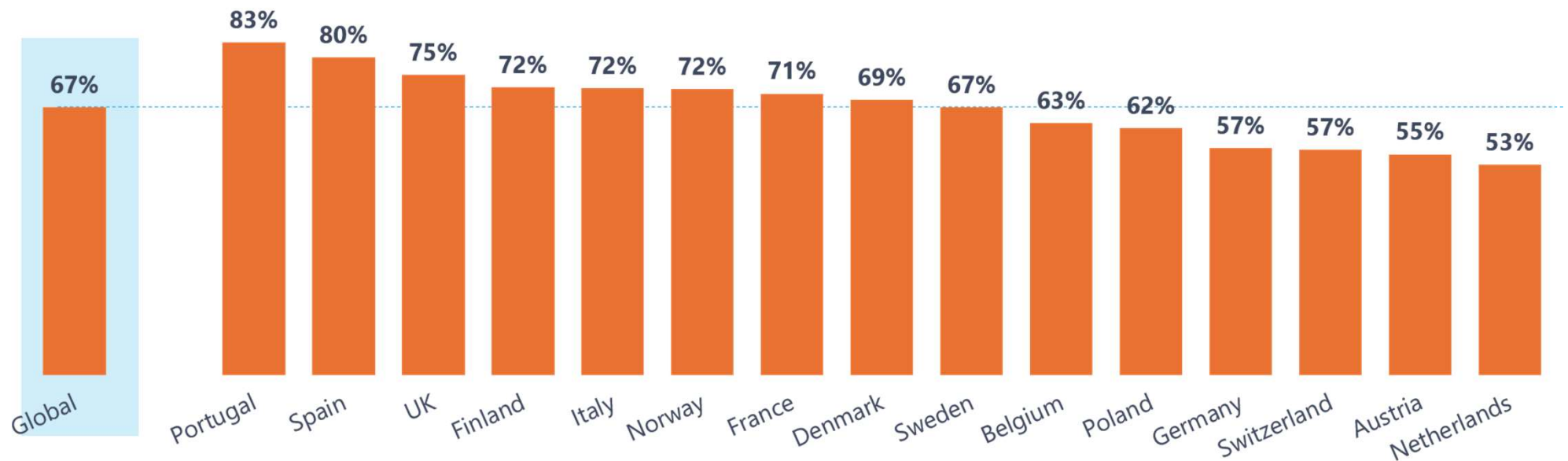
of Northern Europeans are eating less seafood, and 13% are eating more – in line with the global picture

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



Love of seafood remains high especially in southern European countries

Love of seafood, "like" (4+5 on a 5-point scale), general population, by European market, 2026



Q2.7. How much would you say you personally enjoy eating fish and other seafood?

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

Motivators: max diff analysis, importance score, seafood consumers, 2026



- Top Seafood purchase motivators Europe**
1. Taste
 2. Safe to eat
 3. Fresh
 4. Good for my health/my family's health
 5. Price
 6. Sustainably sourced

Key:

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

15 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 “Low in mercury”, and “High in protein” added in 2026

The 2022 diet trends continue; Europe is cutting red meat faster than the world, with seafood consumption reducing overall

Consumer continue to cut red meat, but the boom in plant-based meat alternative seems to be over

40% of Europeans are eating less red meat or have stopped, vs 37% globally. The shift is going to beans, legumes, and vegetables – not to processed plant-based alternatives, which 42% never eat at all.

Average seafood consumption across all markets surveyed is decreasing – in Europe there is North vs South divide

Europe matches a global average picture on fish and seafood. The real split is within Europe: 38% of Southern Europeans are eating less seafood than two years ago, against 31% in Northern Europe (compared to 33% globally).



Marine
Stewardship
Council

Consumers scrutinise sustainable choices

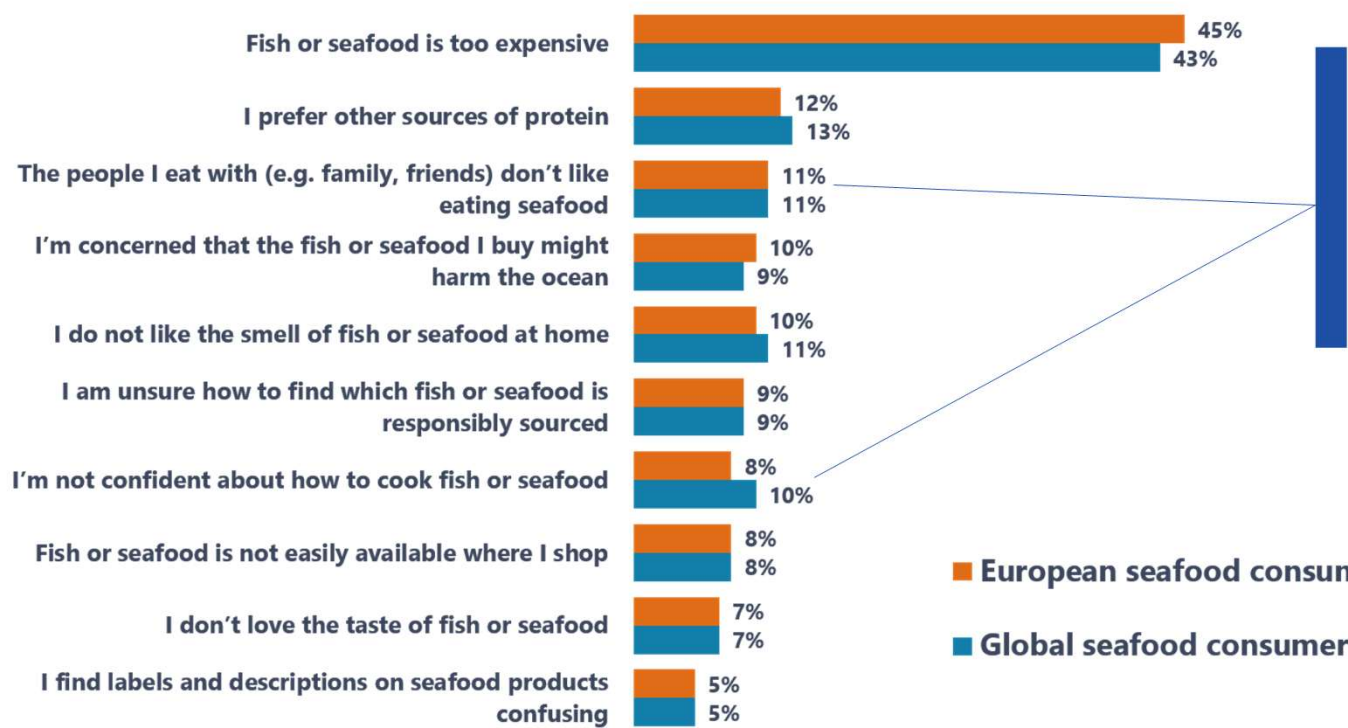
What stops people buying sustainable
seafood, and do they believe the claims?



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Barriers to seafood are similar to Europe as they are globally, with price being slightly more of a barrier

Reasons for not eating fish/seafood more often, global seafood consumers vs European seafood consumers, 2026



Younger buyers lack confidence

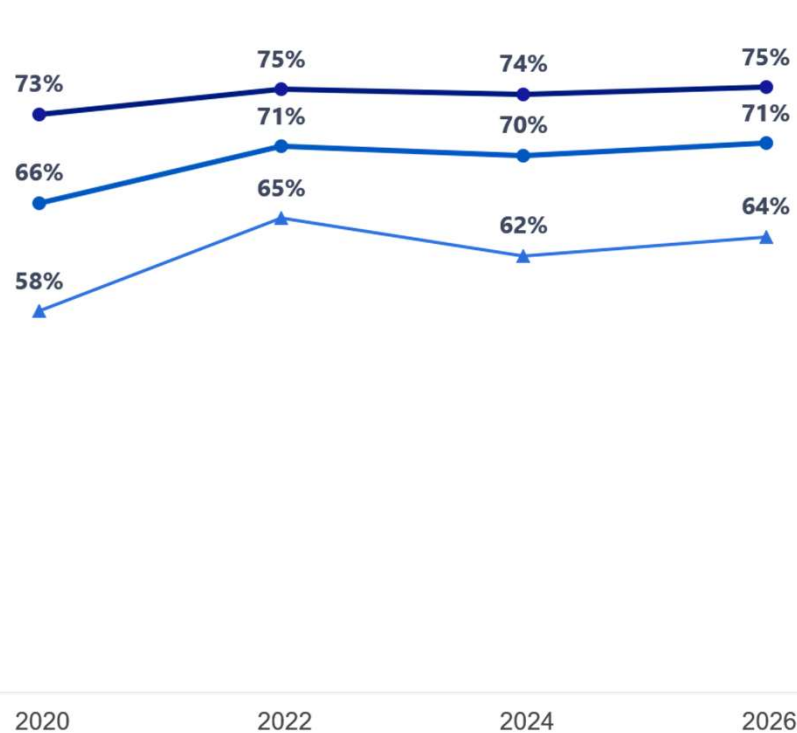
15% of 18–24s aren't confident cooking fish (vs 7% of 55+), and 15% say the people they eat with don't like seafood (vs 8% of 55+).

Q202. Which of the following are reasons you don't eat fish or seafood more often?



There is a gradual increase in Europeans wanting to know where their seafood has come from

Opinions on seafood choices, European seafood consumers, "Describes opinion well" (5+6+7 on a 7-point scale), 2020–2026



- Supermarkets' and brands' claims about sustainability and the environment need to be clearly labelled by an independent organisation
- I want to know the fish I buy can be traced back to a known and trusted source
- The choices I make about eating fish/seafood can make a difference to the health of our oceans

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



Scepticism is high; over half of European seafood consumers distrust green claims, and six in ten doubt the label

Opinions on seafood choices, European seafood consumers, "Describes opinion well" (5+6+7 on a 7-point scale), 2026



52%



Green claims are not trusted

of European seafood consumers say they do not trust the environmental claims made about the products they buy.

61%



Doubt about what is on the label

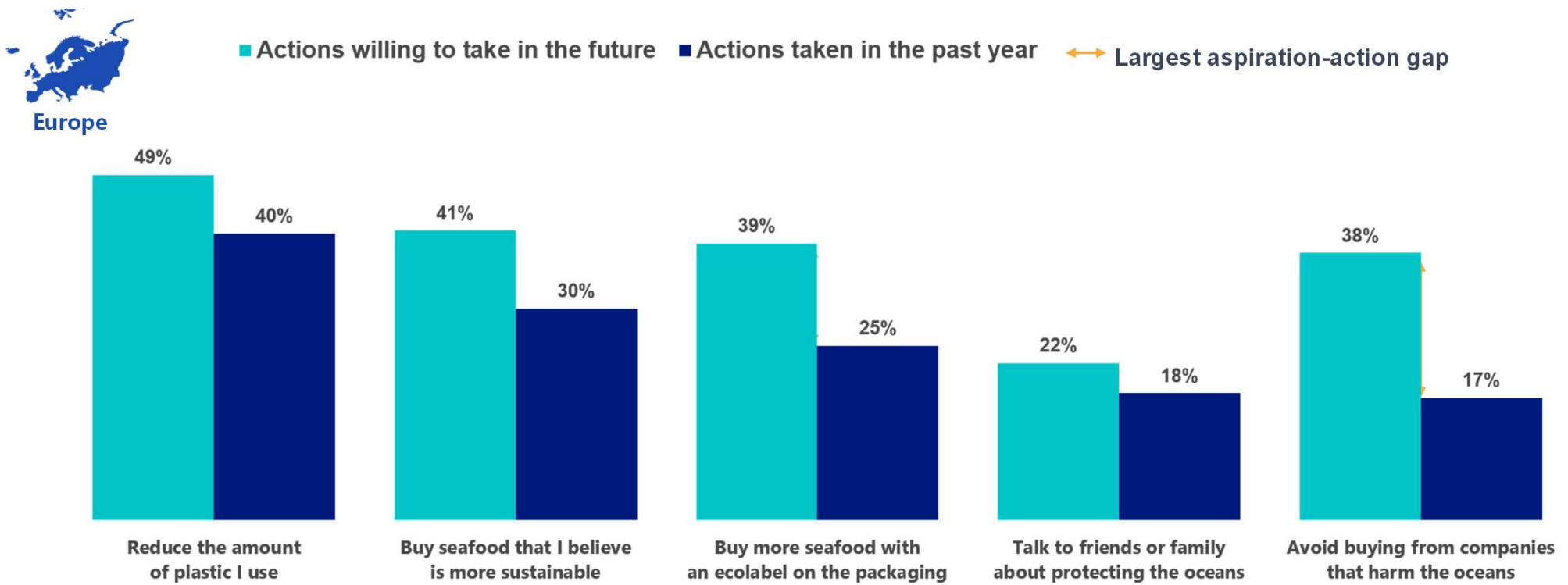
sometimes doubt that the fish they buy is really what the label says it is, up from 52% in 2020 and 59% last year.

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



Europe's widest aspiration-action gap sits where companies hold the levers

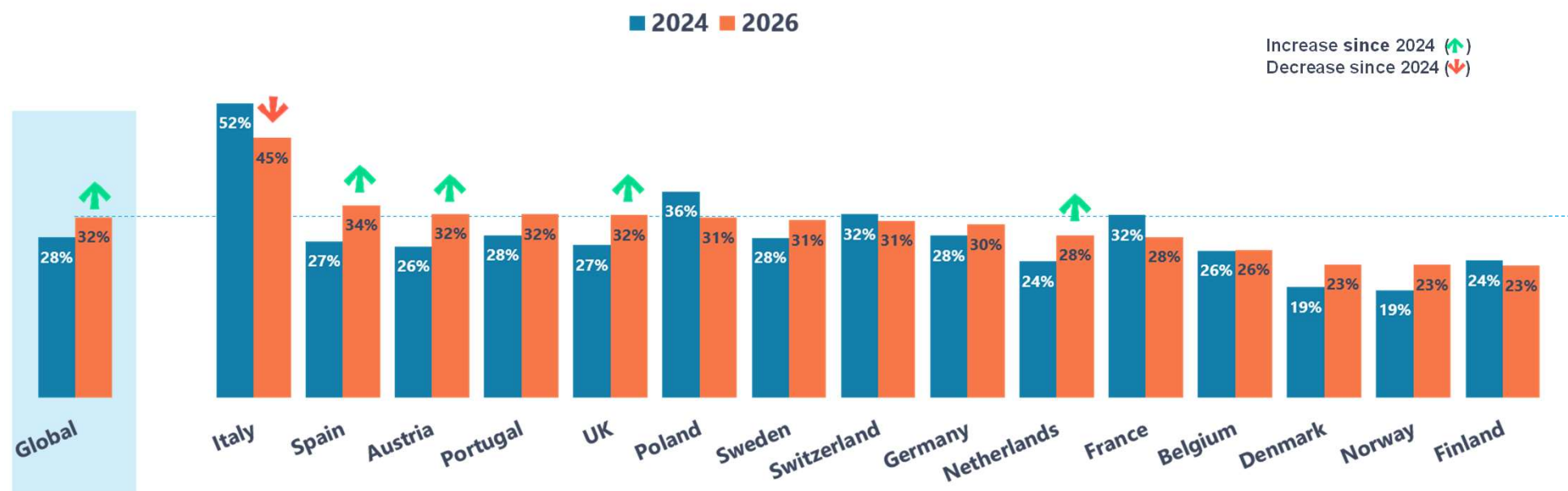
Top actions taken in the last year to protect fish and seafood and actions willing to take in the future, multi-select, European seafood consumers, 2026



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 other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?

There is an increase in many markets in perceiving independent certifications contributing to protecting oceans

Perceived to be contributing “well” to protecting the ocean environment: Independent certification organisations, (6+7 on a 7-point scale), Global vs European seafood consumers, 2024 and 2026



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

Scepticism is high and independent verification matters more than ever; people scrutinise claims, but low knowledge still blocks clear choices

Claims are scrutinised, and doubted

52% of European seafood consumers do not trust environmental claims on the products they buy, and 61% doubt the fish is really what the label says.

Independent verification is what earns trust

More Europeans want to know where their seafood comes from, and more now believe independent certification is doing well at protecting the ocean

Intent outweighs action

The widest aspiration-action gap sits where companies hold the levers: 38% would avoid companies that harm the ocean but only 17% say they currently do.



What consumers think about ecolabels and MSC

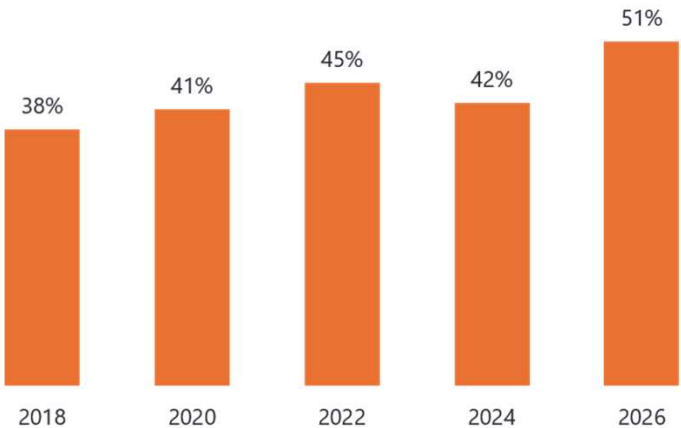
Who do they trust and how are Europeans using ecolabels today?



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

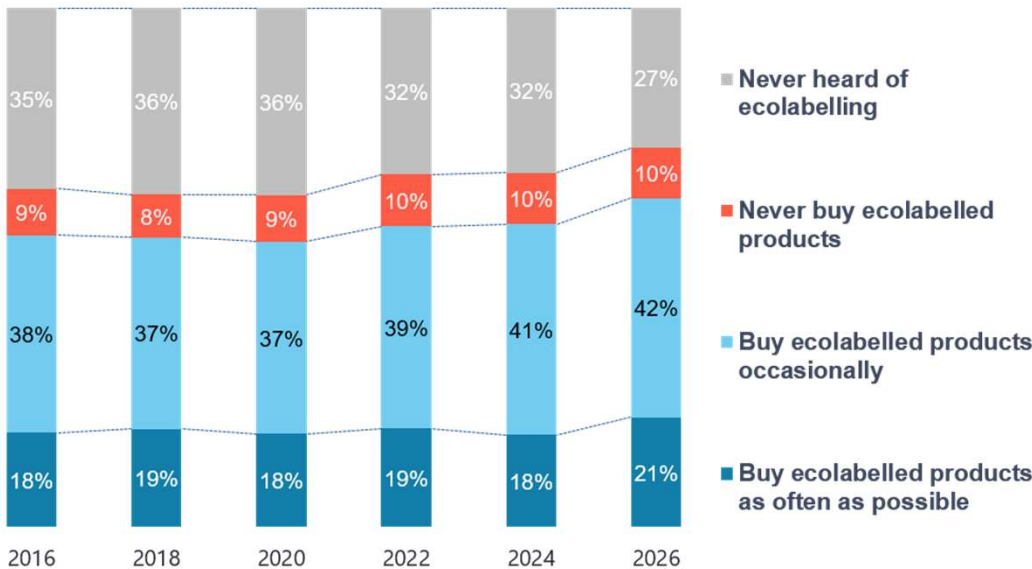
Awareness of ecolabels, "agree" (5+6+7 on a 7-point scale), seafood consumers, 2016-2026

Noticing ecolabels when I'm shopping



 **54%** notice ecolabels when shopping, up from 46% in 2024

Buying ecolabelled products

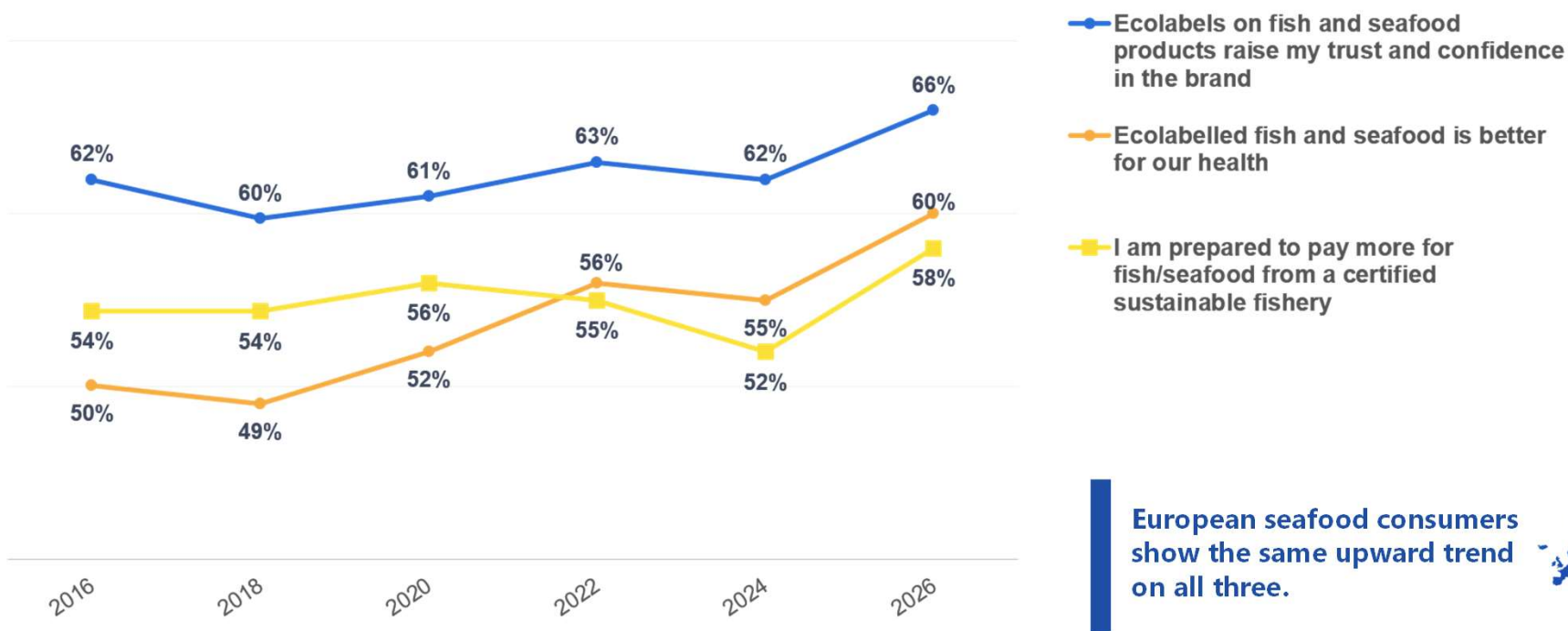


 **73%** buy ecolabelled seafood, up from 70% in 2024

Q8.16: How well does each of the following statements describe your opinions about ecolabels?
Q7: How often do you buy ecolabelled fish and seafood products?

Positive opinions of ecolabels are trending upward over time

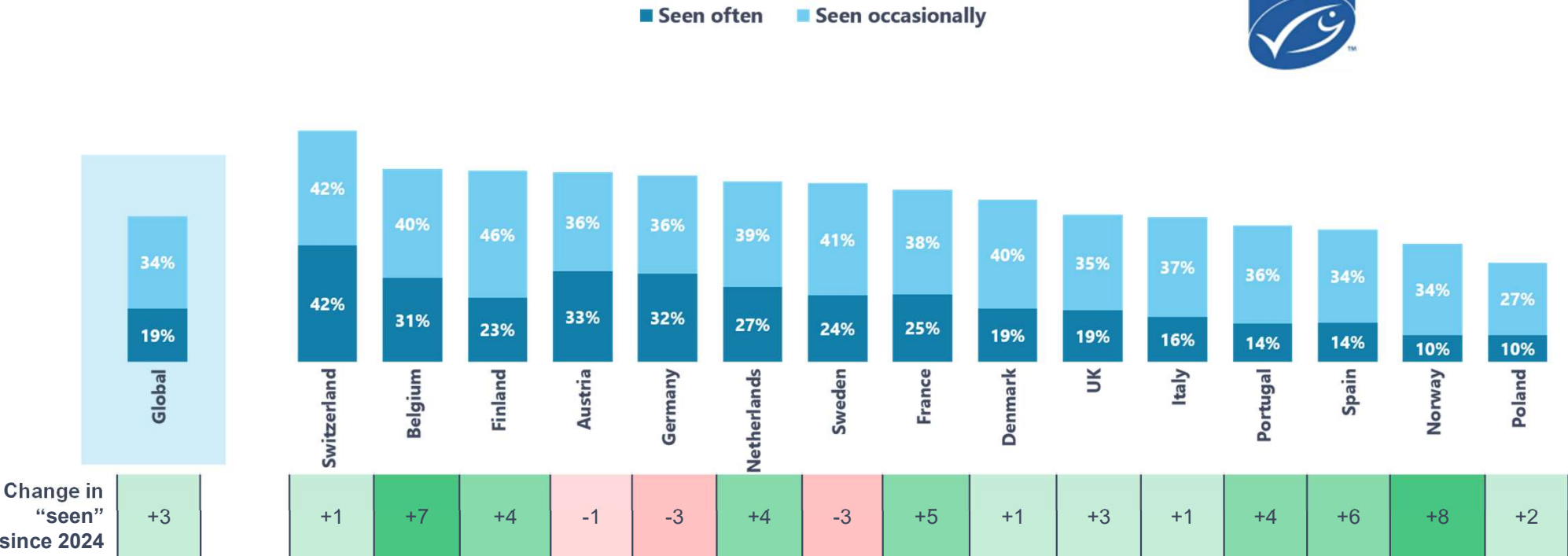
Opinions on ecolabels, “describes opinion well” (5+6+7 on a 7-point scale), seafood consumers, 2016–2026



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

MSC Awareness is rising in almost all markets, with only minor decreases in Austria, Germany, and Sweden

Awareness of the MSC label, by country, European general population, 2024 and 2026



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



Along with MSC, many ecolabels have seen a rise in awareness globally

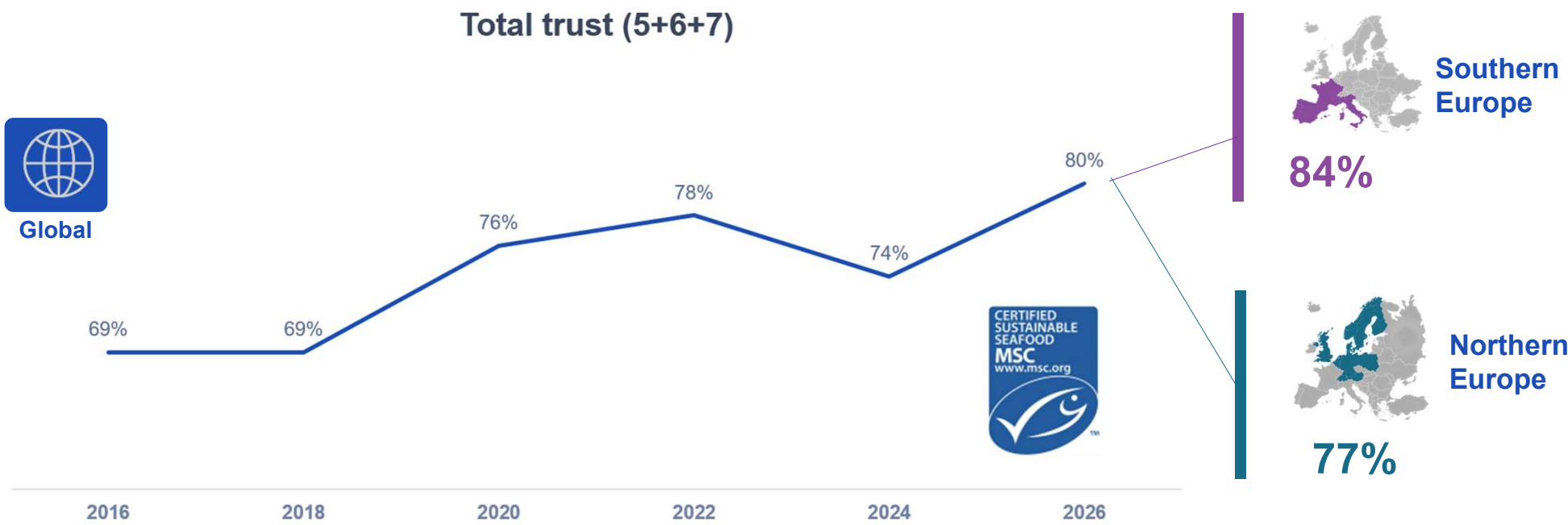
Awareness of the MSC and peer labels, general population, 2016–2026



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

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



29 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?

Trust in ecolabelling has bounced back from the post-Covid dip of 2024, and MSC is rising with it

Ecolabels still have relevance

54% of seafood consumers notice ecolabels when shopping, up from 46% in 2024. Positive opinions of ecolabels are trending up on all three measures, in Europe as globally.

MSC awareness is rising globally

Awareness of the MSC label has increased in nearly all markets. Other ecolabels are gaining recognition too, so the whole category is growing.

Trust in ecolabels has bounced back

Trust in the MSC label increased in every European market since 2024. Europeans see MSC's role as protecting fish populations and ocean wildlife,



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 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 particularly younger consumers seem to have more barriers to eating seafood and prefer other protein



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