



Nordic Council  
of Ministers

POLICY BRIEF

# Nordic Aquatic Food Systems

System Preparedness and  
Recommendations for Increasing  
Seafood Consumption



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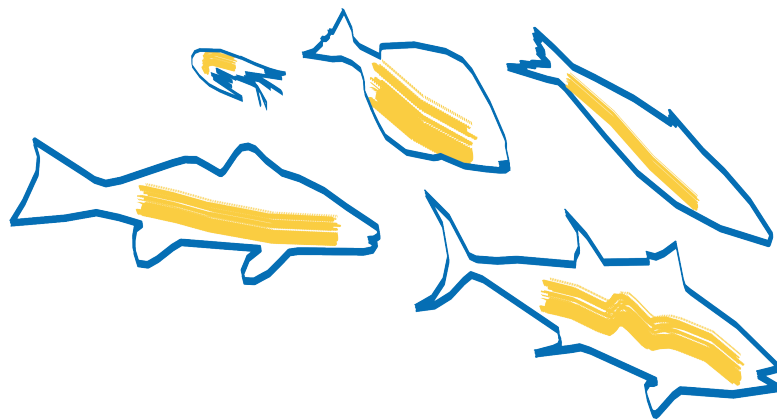
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# Background

The Nordic region is a major global producer of aquatic foods, but value chains are highly globalised and dependent on imported feed, processing outside the Nordic region, overseas markets, and long-distance logistics. While this structure brings efficiency and market access, it can reduce flexibility during disruptions in supply chains, markets, or changes in geopolitical conditions.

Geographical distance between production areas and population centres, together with unstable or unresolved coastal-state agreements for key shared stocks, further constrains crisis-time responsiveness.

At the same time, aquatic food consumption in the region remains below recommended levels, influenced by high and rising prices, lack of knowledge and skills, limited familiarity, and sensory dislikes.



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# Key challenges

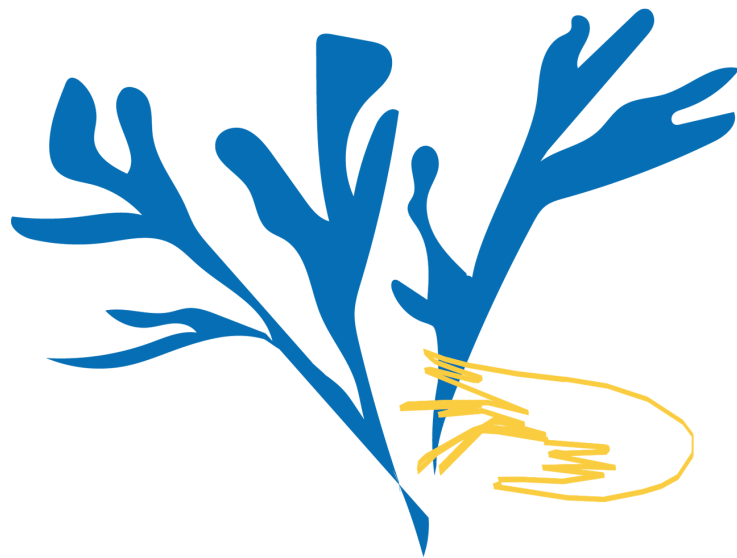
## Globalisation in the value chain

Processing outside the region limit Nordic control in crises and may reduce access to critical processing routes.

Heavy reliance on overseas demand creates vulnerability to market shocks, associated price drops, and trade barriers, limiting market access.

Dependence on imported feed for aquaculture production.

- **Biological and regulatory constraints:** Several key stocks face reduced biomass or unstable quota frameworks.
- **Low consumption:** Consumption is lower than recommended in all regions, in particular among the younger consumers, reflecting barriers related to price, skills, familiarity, and weak social norms.



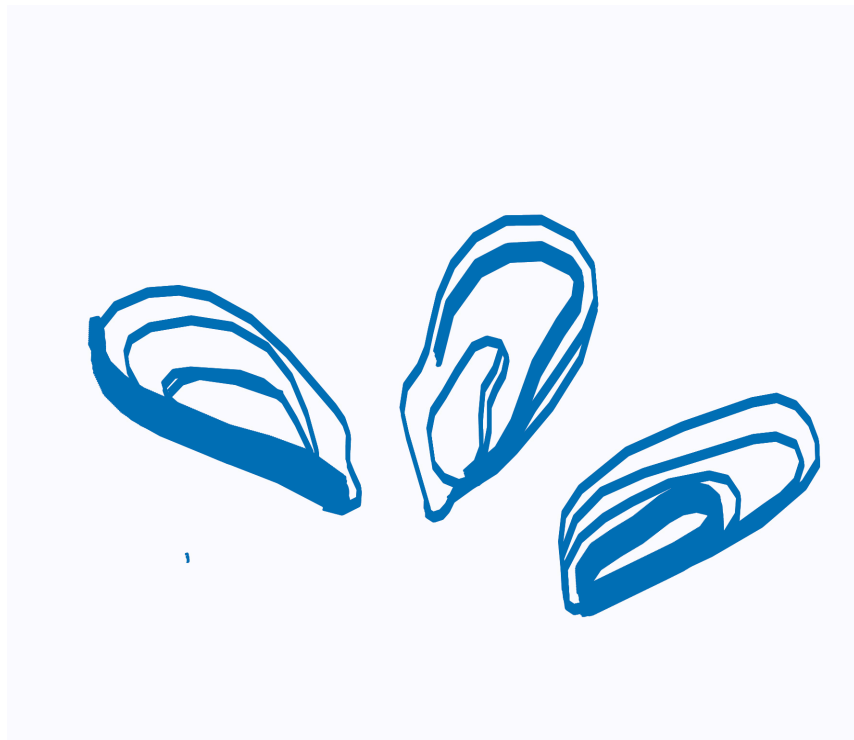
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# Policy implications

Nordic food system preparedness requires addressing structural dependencies in feed, processing capacity, logistics, and market access, while also managing biological and regulatory constraints.

A coordinated Nordic approach is needed, integrating system-level resilience with behaviourally informed measures that strengthen consumer capability, motivation, and access.

The recommendations below reflect these combined needs.



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# Recommendations for preparedness

The following measures address the structural vulnerabilities outlined above and aim to strengthen preparedness in the Nordic aquatic food system.

## 1. Systematically assess and prepare supply chains disruptions

Nordic seafood value chains are closely integrated with global markets for inputs, processing, and logistics. Coordinated, scenario-based assessments should be used to examine how disruptions to feed supply, processing capacity, transport routes, or market access would affect product flows. This would help identify critical bottlenecks and clarify the minimum levels of regional processing flexibility and routing capacity needed to maintain supply when external routes are constrained. Strengthening such internal options can reduce exposure to disruptions and support both crisis preparedness and consumer access.

## 2. Diversify feed sources

Nordic aquaculture remains highly dependent on imported feed ingredients, exposing the sector to global supply disruptions and limiting preparedness. Increasing the share of regional or domestically sourced feed materials would reduce risk and improve the robustness of primary production across the Nordic region.

## 3. Strengthen management co-operation on shared stocks and management of all stocks

Fisheries management is a core element of Nordic preparedness. While the management of many stocks is science-based and well-functioning, several important stocks now face biological pressure due to high fishing mortality, low spawning biomass, or unresolved management frameworks. For shared stocks, unresolved coastal-state agreements and quota disputes further reduce predictability and long-term resilience. Such constraints should be mitigated in peacetime.

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# Recommendations for increased consumption of aquatic foods

Insights from the aquatic food choice framework and the COM-B model show that aquatic food choice is shaped by multiple interrelated factors. As a consequence, no single policy instrument can shift behaviour on its own.

This complexity calls for comprehensive, long-term strategies that combine multiple policy tools. Building on the Nordic Council's dietary recommendations and the identified determinants of aquatic food choice, the following sections outline actionable measures across market-based, regulatory, nudging, and information-based approaches to promote sustainable aquatic food consumption.

## 1. Reducing VAT

Aquatic foods have experienced the steepest price increases in the Nordic region, rising over 40% since 2015, making cost a major barrier to meeting dietary recommendations. Because price is one of the strongest determinants of aquatic food choice, reducing VAT on fish and seafood, would significantly improve affordability and stimulate consumption.

## 2. Information Campaigns Targeting Young Consumers

Young people consume far less aquatic food than recommended, and information-based tools can effectively strengthen their motivation and capability by increasing awareness, knowledge, and practical skills. Funding integrated campaigns, combining nutritional messaging with cooking tutorials, hands-on workshops, and pretested communication materials, would give young consumers clearer guidance and greater confidence in choosing and preparing fish and seafood.

## 3. Clear and Harmonised Labelling

Consumers increasingly want to make healthy and environmentally responsible choices, but unclear or inconsistent labels reduce their opportunity to act on these intentions. Strengthening and harmonising labelling systems would make it easier for consumers to identify healthier and more sustainable aquatic foods at the point of purchase.

## 4. Strengthening Public Procurement

Public procurement has the potential to influence everyday food choices by ensuring that schools, hospitals, and workplace canteens offer fish and seafood at least twice a week. By doing so, institutions make these options readily available while reducing the need for individuals to prepare the dishes themselves, thereby improving both the opportunity and the practical capability to choose nutritious aquatic foods. To improve implementation, training support for catering staff would help increase their capacity to create appealing, nutritionally appropriate aquatic food dishes.

## 5. Mandatory Training in Schools

Introducing mandatory education and training in handling and preparing fish and other aquatic foods in schools would strengthen young people's capability to cook and consume aquatic foods. As younger age groups report both lower seafood intake and limited cooking skills, early skill-building would reduce practical barriers and support adherence to dietary recommendations.

## 6. Make fish the default option

Default options can help shape everyday habits and social norms by making fish the standard protein choice in settings such as schools, workplace canteens, and hospitals on selected days. This nudging approach increases aquatic food consumption without limiting their freedom, since most individuals tend to stick with the option that is already in place rather than actively selecting an alternative.

## 7. Promoting Lesser-Used Aquatic Species

Aquatic food consumption in the Nordic region is concentrated on a small number of familiar species, even though many lesser-used options are both widely available and more affordable. Encouraging people to choose these species requires building food literacy through education, recipes, and cooking guidance, while also reducing neophobia by offering tastings, working with chefs, and using cultural stories to make unfamiliar fish feel more familiar. Introducing lesser-used species as default options in public meals and ensuring clear sustainability and health labelling can further expand opportunity and normalise their consumption.

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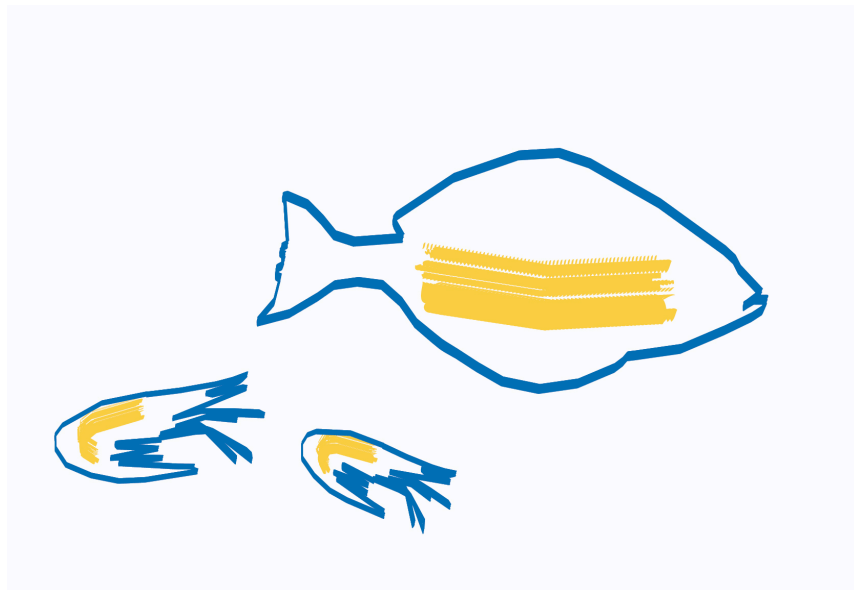
# About this project

The project was conducted in cooperation between

- Nofima AS, Norway (Ingrid K. Pettersen, Morten Heide, and Themistoklis Altintzoglou)
- University of Copenhagen, Denmark (Max Nielsen and Kira Lancker),
- Aarhus University, Denmark (Liisa Lähteenmäki)
- University of Iceland (Sveinn Agnarsson)
- Lund University, Sweden (Cecilia Hammarlund)
- University of Faroe Islands (Hans Ellefsen and Heri á Rógvi).

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# About this publication

Policy brief:

## Nordic Initiatives on Aquatic Food Systems – System Preparedness and Recommendations for Increasing Seafood Consumption

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In 2019, the Nordic prime ministers presented a vision of the Nordic Region as the most sustainable and integrated region in the world by 2030. The work of the Nordic Council of Ministers is designed to pursue that goal by making the Nordic Region green, competitive and socially sustainable.

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