

# WHITEFISH MARKET ANALYSIS 2026: ITALY



# MSC CERTIFIED WHITEFISH IN ITALY

WHITEFISH HAS LONG BEEN THE LEADING CATEGORY FOR SUSTAINABLE FISHING IN ITALY. Pollock, hake, cod and plaice are among the most common species in seafood products that bear the MSC blue label in supermarkets. These species account for 60% of the total volume of seafood products sold with the MSC label and feature in more than 550 products available on the Italian market<sup>1</sup>.

Over the past five years, volumes of MSC certified whitefish products have grown by 25%, reaching almost 55,000 tonnes in the 2025/26 financial year. Hake (+87%) and cod (+30%) have recorded some of the largest increases<sup>1</sup>. MSC certified whitefish is used mainly in frozen products, both prepared and plain, which account for 90% of total whitefish volumes and grew by 11% compared with the 2024/25 financial year<sup>1</sup>. Within the frozen seafood sector, prepared products continue to account for the largest share at 66% of MSC certified whitefish volumes, while the plain frozen segment has also grown, reaching 22% of volumes<sup>1</sup>.

Growth is being driven by leading brands such as Findus and FRoSTA and by retailers' private labels, including: Eurospin, Lidl, Conad and Selex, which are significantly expanding their certified ranges. In 2025,

MSC certified whitefish accounted for an impressive 47% of the total volume of frozen seafood sold through retail, a market estimated at 104,000 tonnes<sup>2</sup>. This figure shows how far products from MSC certified sustainable fisheries have penetrated the frozen seafood category.

Growth in MSC certified whitefish extends to other categories. Over the past year, some segments have recorded particularly strong increases in volume: pet food grew by as much as 237%, while prepared packaged fresh seafood grew by 40%<sup>1</sup>. The latter reflects an emerging trend in the seafood market: the rise of ready-to-cook products<sup>3</sup> that are cleaned and portioned to meet consumers' growing demand for convenience.

The expansion of MSC certified products and the growing range on offer show that sustainability has become an integral part of seafood companies' strategies, both for national brands and retailers' own brands. Although price remains the main factor in purchasing decisions, sustainability is increasingly becoming a determining factor for seafood consumers in Italy: NielsenIQ data show that this is the case for 52% of respondents<sup>4</sup>.

1. MSC data, fiscal year 2025/2026

2. Source: IIAS <https://www.istitutodelsurgelati.it/surgelati-nel-2025-continua-la-crescita-dei-consumi-nelle-case-degli-italiani-11-rispetto-al-2024-per-un-totale-di-oltre-642-mila-tonnellate-consumate/>.

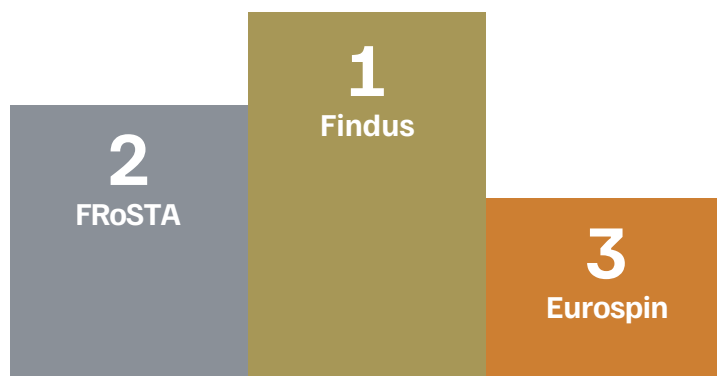
3. Source: Il Sole 24 Ore. (2026, 21 giugno). Cucinare il pesce frena l'80% degli italiani, avanza la filiera del 'tutto pronto'. <https://www.ilssole24ore.com/art/cucinare-pesce-frena-l-80percento-italiani-avanza-filiera-tutto-pronto-A16qljnD>.

4. Source: [Quarta gamma del mare: la svolta del pesce pronto](#)



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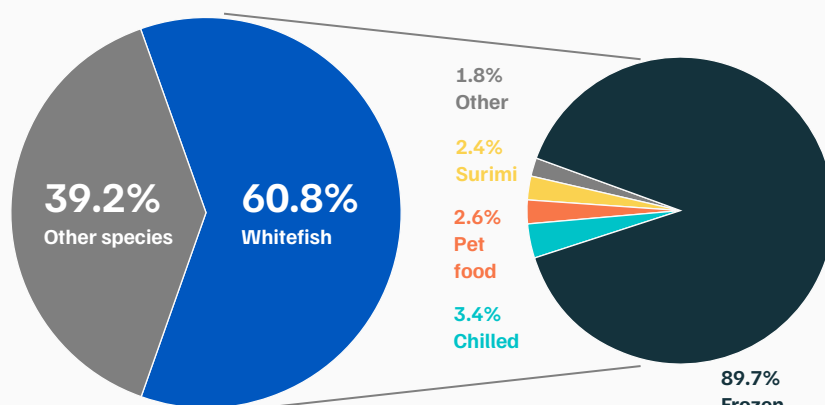
Top three Italian brands by volume sold



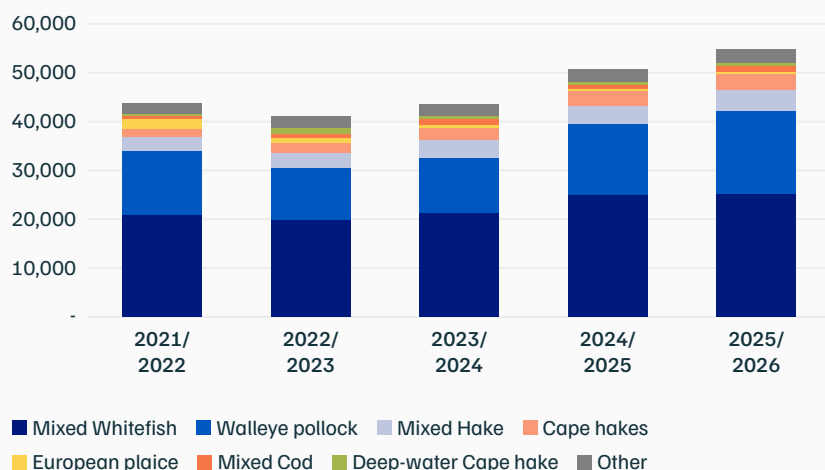
“The health of seas and oceans, and the protection of their resources, are a shared responsibility, essential to preserving them for future generations. For us, Findus’s achievements in certified seafood are more than a milestone: they confirm the importance of continuing to make concrete choices to protect marine resources throughout the seafood supply chain.”

Alessandro Solazzi, Cluster Marketing Director Southern Europe, Findus

Volume of MSC labelled whitefish sold in Italy by product category



MSC labelled whitefish by species - Italy



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Registered Charity number: 1066806.

Registered Company number: 3322023.

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