

WHITEFISH MARKET ANALYSIS 2026: NETHERLANDS



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WHITEFISH REMAINS OF PARTICULAR INTEREST, as it accounts for 28% of all the MSC-labelled volumes in the Netherlands. Still, the MSC whitefish volumes have declined considerably, to the lowest points in five years, after a considerable increase of whitefish volumes between April 2023 and March 2025. Food price inflation has increased the cost of seafood, prompting consumers to seek alternatives, which likely impacted the market's whitefish volumes.

From April 2025 to March 2026, Dutch consumers purchased 17,924 tonnes of MSC-labelled whitefish. Walleye pollock accounted for 61.9% and mixed whitefish for 21.8%. Alongside Atlantic cod, these categories drove most of the overall decline. Meanwhile, saithe volumes almost doubled between 2022/23 and 2025/26, partly due to growth in sustainable pet food products, which frequently contain saithe. Lucky Cat's MSC-labelled volumes, for example, increased by 181.2% in 2025/26. Volumes of less familiar species also grew by 17.9%, indicating a gradual shift towards alternatives such as blue grenadier (hoki), hake, Pacific cod, golden redfish, haddock, European plaice and yellowfin sole. These developments suggest that the Dutch market is diversifying its MSC-labelled whitefish assortment, creating opportunities for partners to broaden product ranges, explore alternative species and respond to changing consumer demand.

Frozen seafood remains the largest category for MSC-certified whitefish, although its share declined from 70.2% in 2022/23 to 62.6% in 2024/25. Pet food is now the second-largest category, accounting for 10.6% of volumes. Its growing share demonstrates how MSC-certified seafood is increasingly finding applications beyond products intended for human consumption, creating an additional market for certified whitefish.

Chilled seafood represents 10.0% of volumes, including retail products such as kibbeling, while surimi accounts for 8.0%. Although frozen seafood continues to form the foundation of the market, the development of pet food and other categories is contributing to a more diverse market for MSC-certified whitefish.

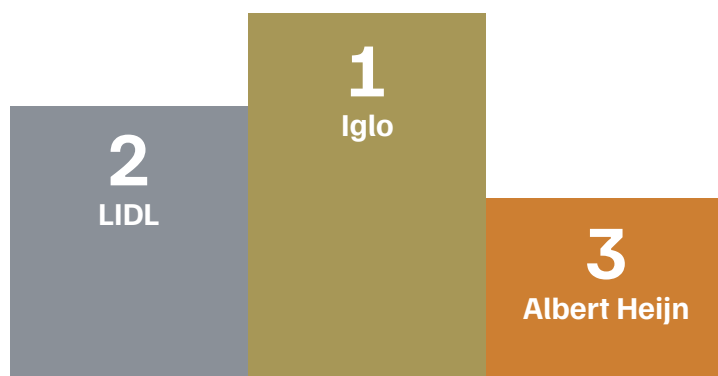
Nomad Foods (with the Iglo brand) is the biggest market partner with MSC-labelled whitefish volumes in the Dutch market and proportionally also accounts for the most products. They are followed by private label brands of Lidl, Albert Heijn, Vis Marine (from Superunie), and ALDI Nord. All whitefish in the frozen assortment of these partners have the MSC label. After Nomad Foods, Pickenpack Seafoods GmbH and AliSa International GmbH are responsible for supplying most of the MSC-labeled whitefish supply in The Netherlands. They are followed by Mowi Belgium, Mowi Lemmer BV and Frosta AG and Umios Food Europe B.V. Private label volumes dominate MSC-labelled whitefish, while numerous international suppliers reflect the global nature of the Dutch whitefish supply chain.

The wide availability of MSC-certified whitefish species creates clear opportunities for further market development, both in seafood products and in the growing pet food category. Partners can consider lesser-known species as sustainable and commercially attractive alternatives, while expanding their ranges to meet demand for affordability, convenience and variety. Pet food also provides an additional outlet for certified whitefish and demonstrates the potential of applications beyond traditional seafood products. Greater diversification across species and product categories can strengthen supply chains, stimulate innovation and build renewed momentum for MSC-certified whitefish in the Netherlands.



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Top three Dutch retailers by volume sold

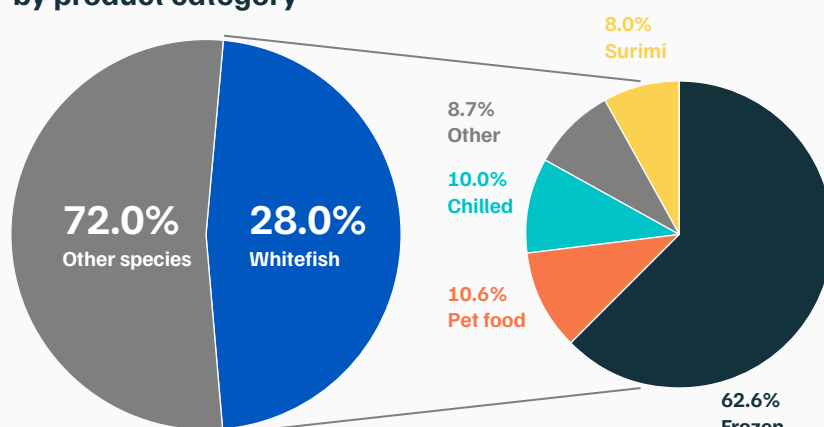


“Through MSC certification, Umios connects reliable whitefish supply with one of the most recognized names in sustainable seafood. With Umios’ MSC-certified products, we can assure that anyone is able enjoy seafood from well-managed fisheries, backed by real science.

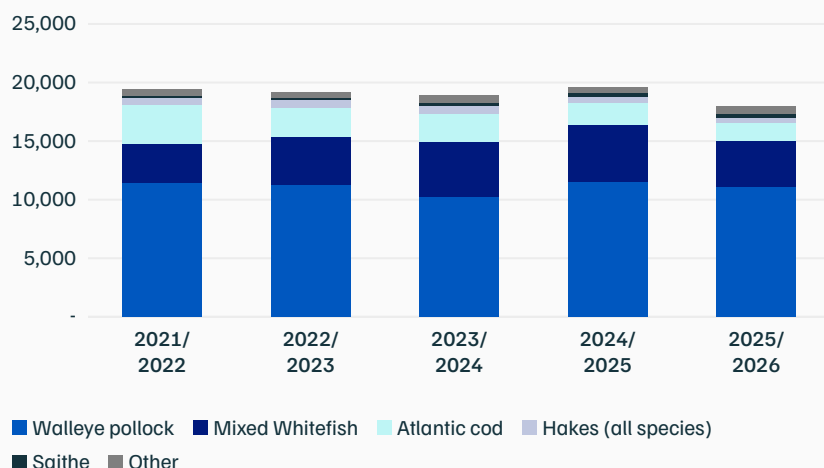
MSC helps Umios create transparency for buyers on environmental impact and protection of fish for the future.”

Jozua Koffeman – Marketing & Sustainability Manager at Umios Food Europe

Volume of MSC labelled whitefish sold in the Netherlands by product category



MSC labelled whitefish by species - Netherlands



Find out more

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

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