



WHITEFISH MARKET ANALYSIS 2026: U.S.



MARKET ANALYSIS: U.S. WHITEFISH

WHITEFISH SPECIES REPRESENT SOME of the most abundant fish stocks in the world and provide an important source of seafood for consumers globally. In the U.S., whitefish is integral to fishery production, processing, exports, and consumption.

U.S. Whitefish fisheries summary and key impacts/ highlights for improvements

The U.S. accounts for approximately 35% of global landings by volume of MSC certified whitefish. The Bering Sea and Aleutian Islands (BSAI) and Gulf of Alaska (GOA) pollock fishery is the largest certified fishery in the MSC program. First certified in 2005, the fishery has maintained more than 20 years of engagement with the MSC. As ecosystems and fish stocks respond to environmental and climate-related changes, collaboration among fisheries, managers, scientists, and industry remains essential to supporting resilient and well-managed whitefish resources.

U.S. market analysis of MSC certified whitefish

The U.S. remains one of the world's largest markets for whitefish products displaying the MSC blue fish label. Forecasted labeled volume for 2025/26 is approximately 10% below the previous year, although this figure may change as outstanding commercial declarations are received. Whitefish nevertheless continues to be a major part of the U.S. sustainable seafood market, with a broad presence across retail, foodservice, pet food, nutritional supplements, and a diverse range of consumer products.

Alaska pollock remains the leading MSC labeled whitefish species by a significant margin, accounting for approximately two-thirds of U.S. whitefish volume. Mixed whitefish, a reporting category that combines products recorded under a general mixed-whitefish designation (mainly surimi, pet food, and supplements), is the second-largest species grouping, followed by North Pacific hake, Pacific cod, and Atlantic cod. Mixed whitefish has demonstrated particularly strong momentum, more than doubling in volume since 2021/22. This growth supports a broader range of products, applications, and consumer price points.

Product development is showing renewed momentum. After reaching a ten-year high of 462 MSC labeled whitefish products in 2022/23, the market dropped to

409 products in 2024/25. In 2025/26, 32 new products were added, bringing the total back to 441.

The rebound is being led by Alaska pollock, with much of the product activity concentrated in convenient, value-added formats such as breaded and battered frozen seafood, fish sticks, and surimi. Smaller additions across haddock and other whitefish species are also contributing to a more varied product assortment. This renewed activity demonstrates how brands and retailers are adapting the category to meet demand for convenient, versatile, and accessible seafood choices.

Leading foodservice, retail, and seafood brands continue to provide a strong foundation for MSC labeled whitefish in the U.S. labeled market. McDonald's leads with its Alaska pollock Filet-O-Fish®, while Trans-Ocean maintains its position as the leading MSC certified U.S. surimi brand. Walmart, Van de Kamp's, and Mrs. Paul's also remain among the top brands by volume, supported by a wider group of national retailers and seafood brands. This mix helps keep MSC labeled whitefish visible and accessible across restaurants, supermarkets (including both national and private label brands), and club stores.

U.S. whitefish products carrying the MSC blue fish label are diverse and well established, even as consumer preferences and product formats continue to evolve. Frozen products continue to anchor MSC labeled whitefish sales in the U.S., while foodservice and surimi remain important volume drivers. Product activity is increasingly concentrated in convenient, value-added formats, with particularly strong year-over-year growth in frozen prepared seafood and surimi. Chilled prepared products have also gained listings, although the chilled category overall remains broadly stable. Private-label and national brands keep certified whitefish visible across supermarkets, club stores, e-commerce, restaurants, pet food, and nutritional supplements.

These trends demonstrate the category's broad reach and adaptability, highlighting the important role whitefish continues to play in U.S. seafood consumption. As consumer demand evolves, opportunities remain to strengthen the category through sustainability, nutrition, versatility, and ongoing product innovation. ●



MARKET DATA: U.S.

Top five U.S. brands by volume sold

	2026	2025	2024
McDonald's US	1	1	1
TransOcean	2	2	4
Walmart	3	3	2
Van de Kamp's	4	4	-
Mrs Paul's	5	5	-

“As consumers continue to look for healthy, delicious, sources of protein that they can enjoy with their families, a large variety of sustainably sourced whitefish can provide them with the value and convenience they are searching for.”

Paul Jewer, President & Chief Executive Officer, High Liner Foods

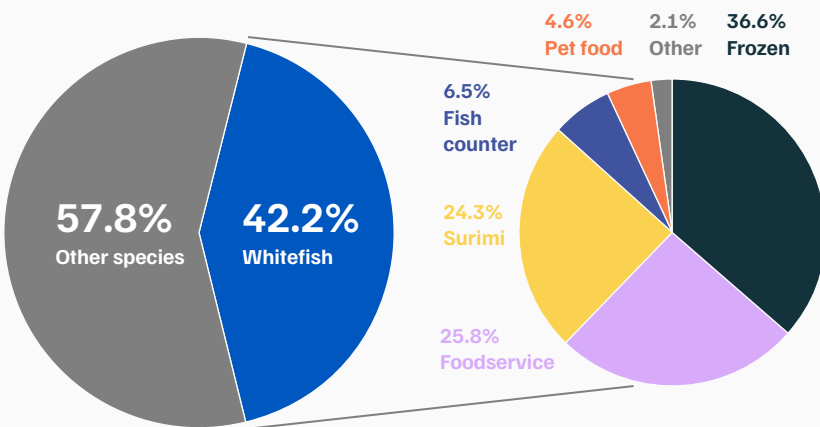
71%

of global catch is MSC certified

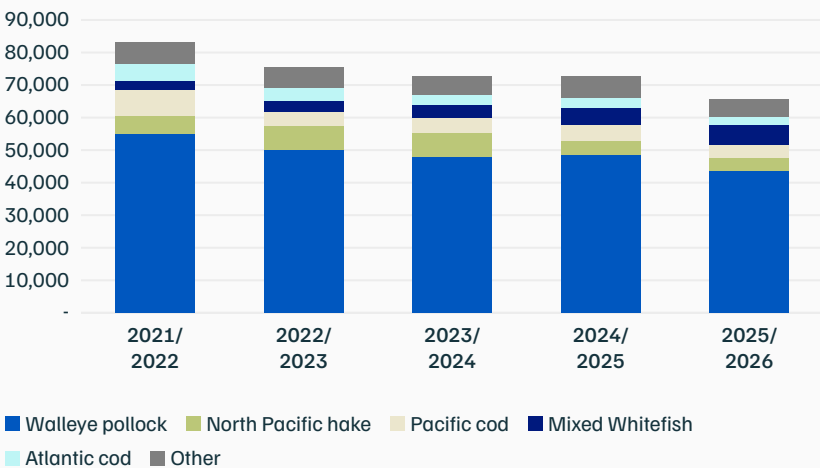
6 million +

metric tonnes of certified whitefish is in the MSC program

Total MSC Labelled whitefish (metric tonnes): U.S.



MSC labelled whitefish by species - U.S.



Find out more

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

Contact us

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All data in this report is correct as of 6 August 2026 unless otherwise stated.

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