

SMALL PELAGICS MARKET ANALYSIS 2026: BELGIUM



BELGIAN MARKET DEVELOPMENTS FOR SUSTAINABLE SMALL PELAGICS

THE BELGIAN SEAFOOD MARKET is entering a new phase of opportunity, shaped by updated national dietary guidance, shifting protein consumption patterns, and growing availability of certified sustainable supply. In 2025, Belgium's revised health advice reaffirmed that consumers should eat 200 grams of fish per week, ideally including at least one portion of fatty fish. Small pelagic species, such as sardines, mackerel, herring and anchovies, play a particularly important role in meeting this recommendation.

At the same time, Belgium is working toward a regional protein transition from the current 60% animal-based to 60% plant-based protein consumption. Within this shift,

seafood, and especially small pelagics, can serve as a low-impact animal protein that complements plant-based diets while safeguarding nutritional quality.

Sardines: A Key Opportunity for the Belgian Market

Sardines represent one of the strongest sustainability opportunities within Belgium's small pelagics category. They are increasingly available from certified sustainable sources and well aligned with both dietary advice and environmental ambitions.

The recent recertification of the Iberian purse seine sardine fishery in Spain and Portugal ensures continued



“For more than 120 years, Cocagne has been bringing sardines to Belgian tables - small tins, great moments. Together with our long-standing partners in Portugal, we carefully select every fish and preserve them according to traditional Portuguese methods. By proactively reintroducing MSC-labelled Portuguese sardines to the Belgian market, we combine craftsmanship with responsible sourcing and continue to invest in the future of this iconic category.”

Christophe Janssens, Head of Marketing Division Food



“At Charlier-Brabo Group, we take a long-term approach to building certified seafood supply chains. Our involvement with the MSC-certified Chilean jack mackerel fishery dates back to 2019, reflecting our early commitment to responsibly managed fisheries. We are pleased to see growing uptake of this certified species in the European market, confirming that sustainable sourcing is an integral part of category development.”

Raf De Smet, Category Manager
Fish and Meat

access to large volumes of MSC-certified sardines and the fishery serves a role as an important supply source for the Belgian market. This is highlighted by recent YouGov data that indicates that sardines are the third most popular canned fish among Belgian consumers, highlighting both familiarity and untapped potential for certification.

Leading brands are responding to this opportunity. For example, market leader for the category, Cocagne, is transitioning toward certified Portuguese sardines, demonstrating how established brands can align long-term sourcing strategies with sustainability commitments.

Mackerel: Long-Term Category Development

Mackerel remains an important species within the Belgian market and is the second most consumed species in the canned category. As supply conditions

continue to evolve across fisheries, retailers and brands are working to maintain stability in the category through portfolio management and long-term sourcing strategies.

Within this context, some market players have broadened their assortments to include MSC-certified Chilean jack mackerel. While not biologically classified as a true mackerel, Chilean jack mackerel is commercially grouped within the mackerel segment in many markets. This reflects ongoing investment in certified fisheries and contributes to maintaining continuity of MSC supply within the broader small pelagics segment.

Charlier-Brabo Group (CBG) has been among the companies engaging with MSC-certified Chilean jack mackerel since 2019. Through long-term partnerships, the company has supported the development of certified supply chains for this species within Europe. ●

Find out more:

<https://www.msc.org/species/small-pelagic-fish>

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