

SMALL PELAGICS MARKET ANALYSIS 2026: CZECHIA



CZECHIA MARKET OVERVIEW: SMALL PELAGIC FISH & MSC CERTIFICATION

THE AVERAGE FISH CONSUMPTION in Czechia is 5.7 kg per person per year, with a market volume of around 62,000 metric tonnes. The processing industry produces 7000 tons of fresh water and seafood products. The herring market presents a unique blend of traditional consumption patterns and evolving market dynamics. This analysis delves into the current state of the market, consumption trends, retail availability, key brands. Despite herring not being a native species, it plays a crucial role in the Czech diet, mainly through imports.

Herring Market Dynamics

Herring holds a significant position in the Czech market, commonly consumed in processed forms such as marinated fillets, smoked products, and canned goods. Czechia imports frozen herring, which is further processed into fish salads and smoked products. With the increasing popularity of seafood and the rise of specialty seafood restaurants, herring consumption is expected to grow.

Major retail chains offering herring products include Lidl, Tesco, Albert, Kaufland, Billa, Penny, and Makro. These retailers provide a diverse selection, ranging from marinated fillets to canned options. Leading brands apart, retailers in the market include: Varmuža, Nordsee, Atlantik, Losoś Ustka.

Sustainability & MSC

As small pelagic consumption grows and consumer awareness increases, it is essential for market players maintain sustainable sourcing. A few years ago, small pelagic fish dominated the MSC-certified seafood sector in Central Europe, with over 420 SKUs and 23,000 metric tonnes. Today, the share has fallen by 60%, in comparison to few years ago due to fisheries failing to meet MSC standards:

- Atlantic mackerel fisheries have been suspended since 2019 due to poor management and overfishing risks. Pacific jack mackerel, widely available in Western





Europe, remained absent in Czechia in 2025.

- AS (NSS) herring does not meet MSC certification criteria, but alternatives from the North Sea, Iceland, Bothnian Bay, and Gulf of Riga are available and successfully utilized in other markets.

- Baltic sprat fisheries lost MSC certification in 2023, eliminating MSC-certified sourcing options. However, international efforts are underway to reintegrate sprat into the MSC program.

However in Czech Republic the volume of MSC certified Small Pelagic seafood has increased by 11% compared to last year.

In 2026 the vast majority of 78 MSC-certified small pelagic products in Czechia are herring, accounting for nearly 3,900 metric tonnes (increase by 11% since last year). Other species, such as sardines and anchovies, still represent less than 1% of all MSC-certified small pelagic products. Chilled prepared products with increase of 12% since 2025, account for the majority of MSC herring sold, with a small proportion canned (drop by 17%).

MSC Market Leaders

The MSC-certified small pelagic category shows mixed performance among leading brands. Albert, a major retail private label, is the standout performer with nearly 130% volume growth since 2025, driven by assortment expansion and strong sustainability positioning. Varmuža, a traditional fish brand focused on canned and marinated products, recorded solid growth of almost 8% year-on-year, reflecting stable consumer demand. In contrast, Penny's value-oriented private label declined by 19%, likely due to competitive pressure. Lidl and Tesco, both international retailers with strong private label seafood ranges, maintain stable positions supported by clear MSC communication, while Atlantik and Łosoś Ustka, established processors with strong regional recognition, continue to hold steady shares in the segment.

The path forward is to promote sustainable fishing and increase consumer awareness to ensure long-term market stability and secure supply chains. Expanding the availability of MSC-certified products will not only help preserve fish stocks but also strengthen the industry's resilience and commitment to sustainability. ●

Find out more:

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

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