

# SMALL PELAGICS MARKET ANALYSIS 2026: GERMANY, AUSTRIA & SWITZERLAND



# MARKET GAPS AND OPPORTUNITIES FOR SMALL PELAGICS

SMALL PELAGIC SPECIES PLAY a central role in the DACH markets (Germany, Austria, and Switzerland) and have historically been a key driver of the strong availability of MSC labelled seafood products in the region. Their importance, however, varies by country. In Germany and Austria, herring is by far the most popular small pelagic species and forms the backbone of small pelagics consumption in the market. In Switzerland, by contrast, sardine and anchovy play a more prominent role in retail assortments<sup>1</sup>.

In 2025/2026, volumes of MSC labelled small pelagic species sold across the DACH markets increased slightly by 3%, reaching 45,796 metric tonnes (product weight)<sup>2</sup>. MSC labelled volumes remain heavily dominated by herring, which accounted for 44,303 metric tonnes. Only limited MSC volumes were recorded for other species such as sardine, anchovy, sprat, jack mackerel, krill and smelt.

Although the overall share of MSC labelled seafood in the DACH retail market is high - reaching 58% of all seafood (wild and farmed) sold in German retail<sup>3</sup> - there are significant gaps within small pelagic assortments. These gaps are largely a consequence of the long-standing challenges facing small pelagic stocks in the North East Atlantic, which have restricted the availability of MSC certified herring and mackerel. The 2025 MSC DACH Herring Report analysed these gaps with regards

to herring, particularly in the chilled category, where many brands still show a relatively low share of MSC labelled products. At the same time, several companies have demonstrated strong sustainability leadership, including Appel, Hawesta, LIDL and MERL with leading in MSC certified herring assortments. In 2025, MERL (chilled) and Hawesta (canned) were recognised with the MSC DACH Herring Awards for their consistent commitment to sourcing MSC certified herring.

The recent developments in other European markets present blueprints for emerging opportunities in the DACH market. These include concrete corporate commitments from brands and retailers to exclusively source MSC certified small pelagics, in addition to the entry of new sardine and mackerel fisheries into the MSC program.

Together, these developments create favourable conditions for market players in the DACH region to close existing sustainability gaps, strengthen certified assortments, and align more closely with leading European markets. ●

<sup>1</sup> NielsenIQ, Global Snapshot Switzerland, 2025

<sup>2</sup> Forecasted data for 2025/2026

<sup>3</sup> Circana, retail categories frozen, ready meals, chilled, canned; total retail + drug stores (incl. retail 200–799sqm, retail >= 800sqm, discounters, drugs stores); in mt; 2020–2024



**Find out more:**

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

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