



Marine
Stewardship
Council



Whitefish Market Analysis 2024: USA

Market Analysis: US whitefish

WHITEFISH IS AN integral part of US fishery production, processing, exports, and consumption. Alaska pollock lands and processes the highest fishery volume in the country and is currently the largest MSC certified fishery in the world. Production of other groundfish (cod, haddock, hake, ocean perch, and cusk) also make a significant contribution. Alaska pollock and cod make the list of top ten most consumed species in the US, often having to compete for US consumers with cheaper imported farmed fish like tilapia and pangasius.

Altogether, the US represents over 30% of global fishery landings by volume of MSC certified whitefish. It is also in the top four countries for MSC labeled whitefish sales volume, among Germany, France, and the United Kingdom.

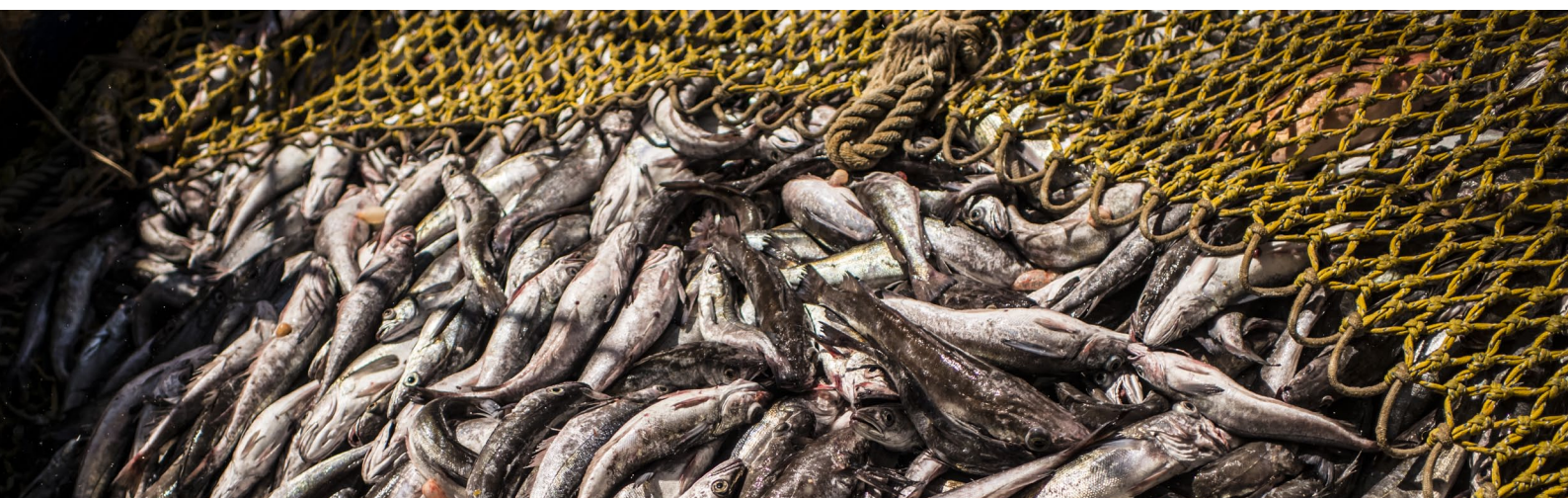
The US whitefish market has faced significant changes in recent years, from a surge (and subsequent dip) in retail sales during the pandemic, to a newly instituted ban on Russian seafood imports that includes pollock and cod. Fluctuations in the import/export mix and prices have also had a significant impact. The volume of MSC labeled whitefish sales surged by about 50% between 2019 and 2022 during the pandemic. Volumes have since decreased but remain above pre-pandemic levels. The impact on the import/export and species mix in the US as a result of the Russian import ban is only just starting to be seen, with true impacts expected in the coming years as the existing frozen supply of Russian seafood is sold through.

The US market has over 400 MSC labeled whitefish products for sale across multiple categories. This is an increase of approximately 50 products from 2019.

These products are dominated by pollock and cod, with smaller numbers coming from haddock, sole, hake, and halibut (among others). MSC labeled product sales volume primarily comes from frozen, followed by foodservice, surimi, pet food, and retail fish counters. Despite recent declines, MSC labeled frozen, surimi, fish counters, and pet food (among others) still have higher, in some cases significantly higher, sales volumes for whitefish compared to pre-pandemic levels. Pet food is the only sector to see consistent year-over-year growth in sales volume over the past six years.

In terms of company leaders, McDonald's dominates the US in whitefish sales volume with their MSC labelled Alaska pollock Filet-O-Fish® menu item. Despite food service sales fluctuations and the impacts of inflation, McDonald's Filet-O-Fish® has consistently held this lead since becoming MSC certified and labelling the carton across the US. At retail, Walmart continues to increase their sales volume of MSC labeled whitefish year-over-year as a market leader in the space. Whole Foods Market now has the largest number of MSC labelled whitefish products in store across multiple categories, with Wiley's Finest coming in a close second with their range of pollock fish oil products.

Overall, MSC labeled whitefish sales volume represents over 40% of labeled seafood sales in the US. Market impacts, including global dynamics, supply chain disruptions, and climate change, continue to create uncertainties. Despite this, these species continue to play an integral part in US-based fisheries, livelihoods, seafood production, and diversity of product choice. ●



Market Data: US whitefish

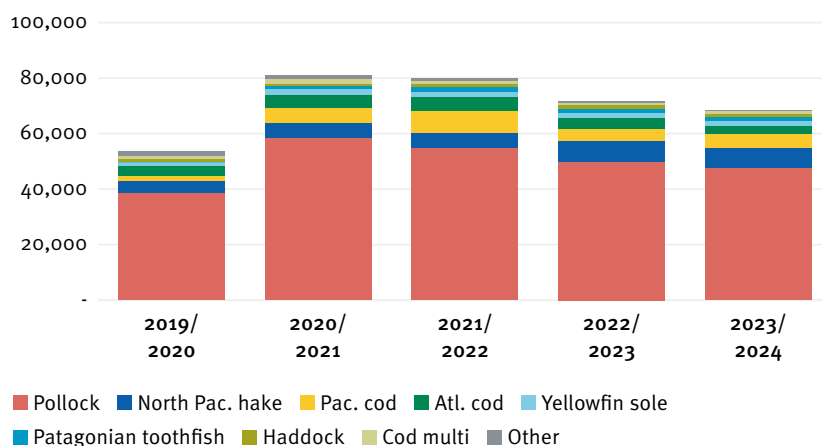
Top five US brands by volume sold

	2024	2023
MCDONALD'S	1	?
WALMART/SAM'S CLUB	2	?
CONAGRA (MRS. PAUL'S & VAN DE KAMP'S)	3	?
TRANSOCEAN	4	?
COSTCO	5	?

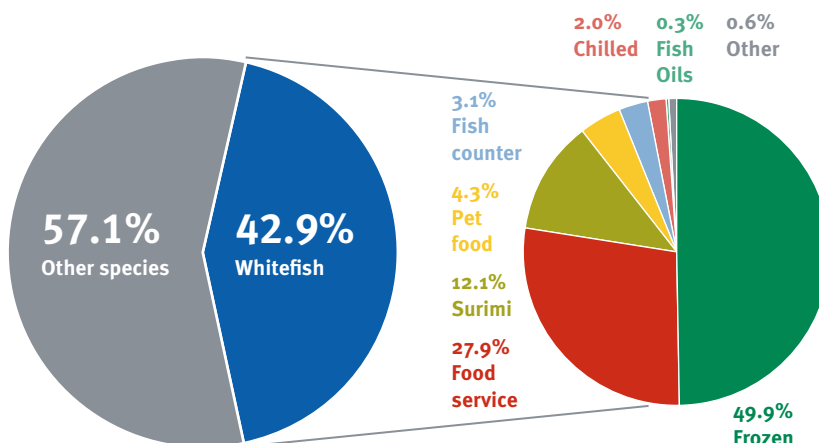
“Whitefish is a delicious and nutritious category of fish - making sure consumers can identify sustainable whitefish is important so that it can seamlessly become part of their regular cooking repertoire and families can reap the essential health benefits.”

Linda Cornish, founder and president, Seafood Nutrition Partnership

MSC labelled whitefish by species - US



Total MSC Labelled Whitefish (metric tonnes): US





Marine
Stewardship
Council



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

Contact us: USmarketing@msc.org



MSCbluefish



@MSCbluefish



/marine-stewardship-council

All images copyright of the MSC unless otherwise stated.
Registered Charity number: 1066806. Registered Company number: 3322023.
© Marine Stewardship Council 2024