



SUSTAINABLE WILD SALMON IN THE MSC PROGRAM

Baltic and Central Europe

Webinar

2 MARCH 2026



WELCOME

AGENDA

1. MSC Intro and salmon market
2. Salmon fisheries
3. Focus on consumers
4. Q&A

SPEAKERS



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Program Director
Baltic & Central
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Country Manger
Sweden



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Alaska Fisheries
Outreach Manager



**Johanna
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Marketing
Communications
Lead BCE

THE SEAFOOD MARKET IS CHANGING

- Regulatory and reporting pressure is accelerating
- Global supply chains are increasingly fragile
- Geopolitical tensions are reshaping seafood trade
- Climate & stock variability
- Retail under scrutiny

**Salmon is a cornerstone species
in Baltic & Central Europe
— not only in volume, but in value.**



SALMON MARKET OVERVIEW

- Cornerstone species in value and visibility
- Mature Nordic markets (high per capita consumption)
- Growing Central & Eastern Europe markets
- Strong retail-driven category structure
- Growing interest in diversifying beyond farmed salmon





Marine
Stewardship
Council

**THIS IS WHERE
MSC COMES IN**



TURNING OCEAN SUSTAINABILITY INTO BUSINESS VALUE

- Independent, non-profit organization
- Science-based fisheries standard
- Rigorous third-party certification
- Chain of Custody ensuring traceability
- Blue ecolabel = wild-caught from sustainable fisheries



**Sustainability only works
when it works commercially**



MSC CREATES MARKET TRANSFORMATION

1 Incentivise sustainable fisheries

Certification rewards responsible fishing with market access

2 Enable credible sourcing

Full traceability and claim security

3 Drive consumer demand

MSC label builds trust at point of sale

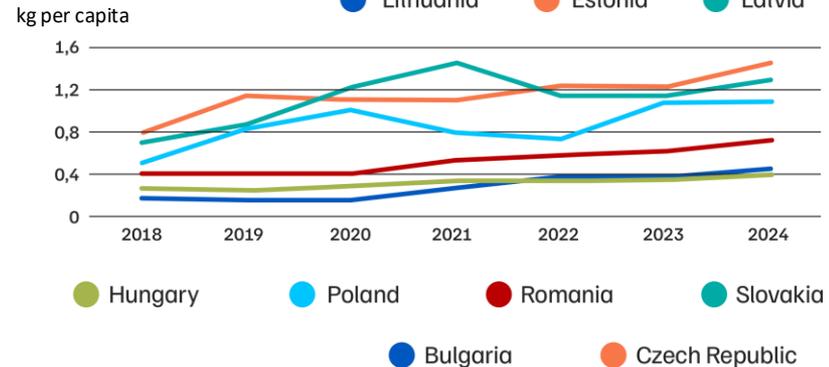
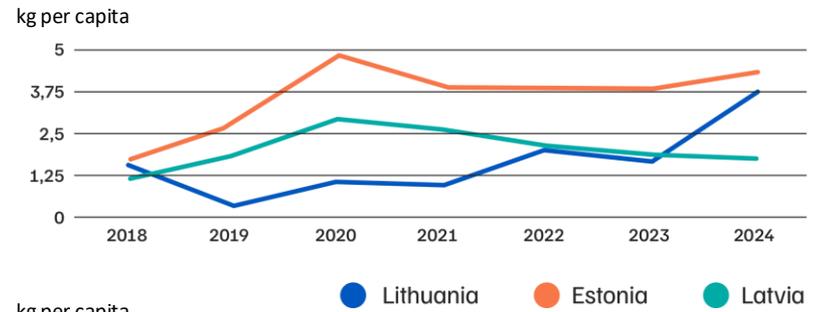
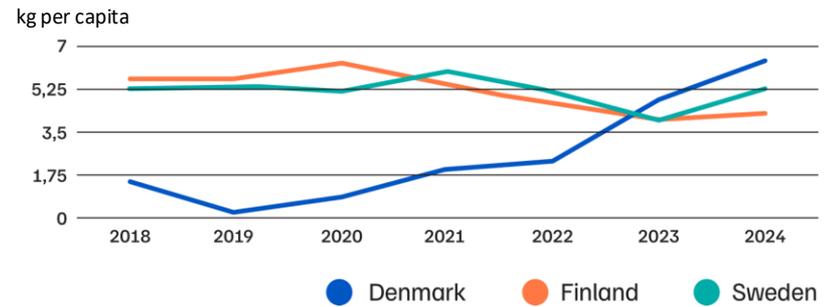


WHY SALMON?



SALMON TRENDS

- EU average salmon consumption (2024): **2.29 kg per capita**
- Nordics: **4–6+ kg per capita**
- Central Europe: **0.8–1.5 kg per capita**, but growing
- Short slowdown in 2022–2023
- 2024 recovery
- High-value retail category



Source: MSC chart based on data from IAFE-NRI

SALMON IN RETAIL

Format Leadership:

- **Fresh** (inc. MAP) dominates across the region
(Romania: 77% fresh share)
- **Smoked** is key in Poland, Sweden, Finland
- **Frozen** is strongest in Denmark

+ 23% of total seafood volume

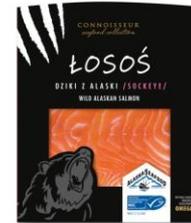


+137.5% value growth in 5 years
+1 million salmon households



MSC WILD SALMON GROWTH DYNAMICS

- Wild salmon represents around 4% of MSC volume in Baltic and Central Europe region
- Central Europe: +150% growth (5 years)
- Nordics: +50% growth
- 100+ brands
- 90+ suppliers



SALMON SPECIES IN MSC PRODUCTS



**PINK / HUMPBAC
SALMON**

Oncorhynchus gorbuscha



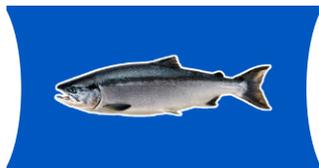
**CHUM / KETA
SALMON**

Oncorhynchus keta



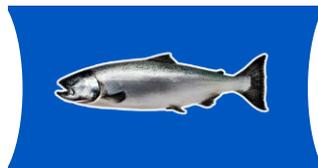
**COHO / SILVER
SALMON**

Oncorhynchus kisutch



**SOCKEYE / RED
SALMON**

Oncorhynchus nerka



**CHINOOK / KING
SALMON**

Oncorhynchus tshawytscha



48% Mixed salmon species

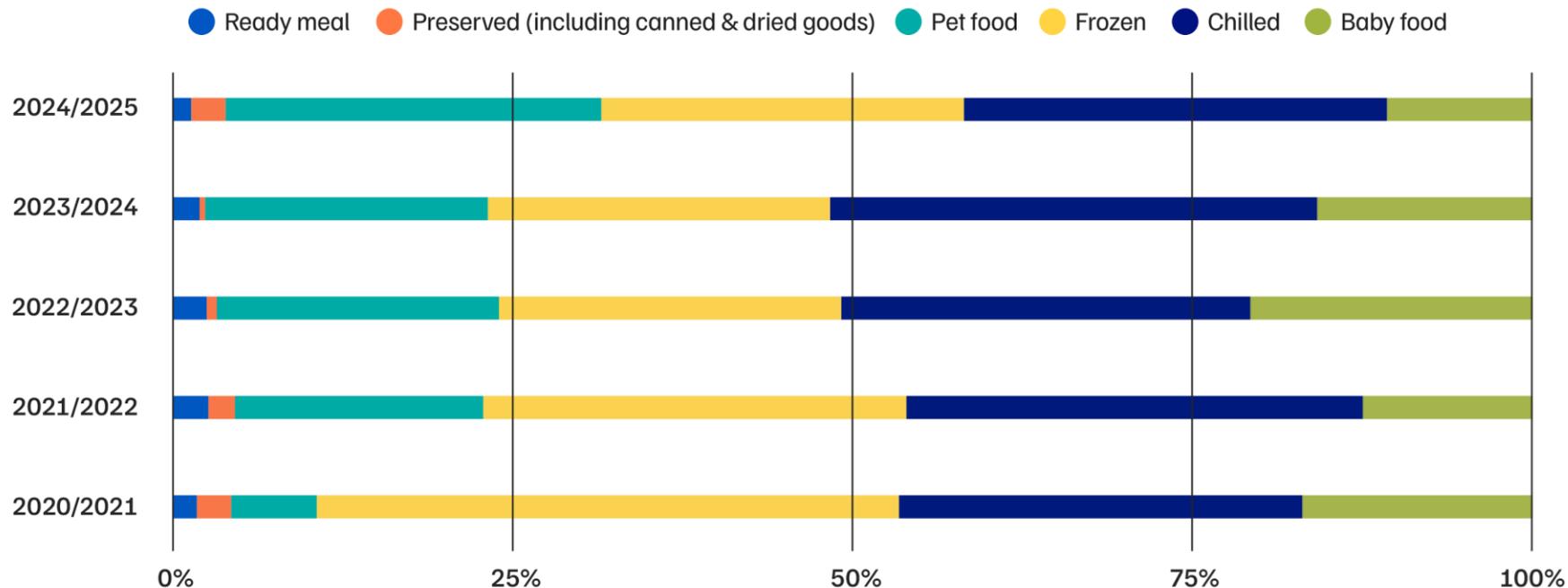
20% Chum salmon

8% Sockeye salmon

24% Pink salmon

1% Coho salmon

MSC PRODUCT SEGMENTS – WHERE EXPANSION HAPPENS



WILD SALMON LEADERS POWERED BY MSC



**CHILLED
- MAP**



**READY
MEAL**

FROZEN



SMOKED



NEW OPPORTUNITIES: PROCESSED SEAFOOD

- Canned seafood consistently popular across the region
- MSC-certified wild salmon still a tiny share of preserved seafood:

Baltic and Central Europe region (0.3%), far behind:

- Northern Europe (3.5%)
- North America (15.2%)



NEW OPPORTUNITIES: PET FOOD

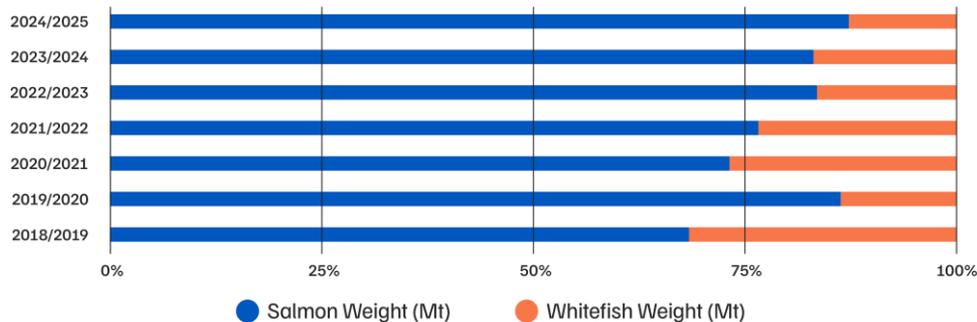
- Fast-growing segment
- Mainly based on mixed wild salmon, which supports scalability and stable supply base
- Low-risk entry point for retailers aiming to increase MSC-certified volumes



NEW OPPORTUNITIES: BABY FOOD

- High-trust, high-relevance category
- Wild salmon prominent (70–85%)
- Opportunity to take an early leadership position

WHITE FISH VS SALMON IN MSC BABY FOOD PRODUCTS IN BCE IN 2021-2025



THANK YOU TO OVER 170 MSC PARTNERS

CHAIN OF CUSTODY CERTIFIED PARTNERS WITH WILD SALMON IN SCOPE

THE CZECH REPUBLIC

1. Blatfood Czech Republic
2. EURO FRIGO Praha
3. Fjord Bohemia
4. FRIGONOVA Fish
5. Hopi Cae Fish Hub
6. Kimbex
7. MAKRO Cash & Carry ČR
8. MOWI Czechia
9. Partner in Pet Food CZ
10. Rybarství Chlumec nad Cidlinou

DENMARK

1. AB Catering
2. Agustson
3. Alimex Seafood
4. Arctic Salar
5. BAKO
6. BC Catering
7. Bjerreflek
8. BHJ (Gråsten)
9. BOSCO Foods
10. C&D Foods Denmark
11. DANSK CATER
12. Ekko Fisk af 2002
13. ESS-FOOD
14. Espersen
15. Feldts Fisk & Skaldyr
16. Fish Feet
17. Fiskehallen Tvilling
18. Food with You
19. Harkrom Foodservice
20. Inco CO
21. JEXA Fish
22. J.P. Klausen & Co
23. Kimpex
24. KD Seafood Denmark
25. Leray Seafood Copenhagen
26. Leray Seafood Hirtshals
27. Mushalm (w tym Frys)
28. Munkebo Seafood
29. Nautic Seafood

ESTONIA

1. Avektra
 2. M.V. Wool
30. Nordic Fish
 31. Nordic Marine Nutrition
 32. Nordic Proteins
 33. Nordic Seafood
 34. NoriDana Foods
 35. Norlax
 36. NOWACO
 37. Odin Seafoods (Holding & Trading)
 38. P. Taabbel & Co. Hanstholm
 39. PLANETS PRIDE
 40. Polar Salmon Hjerting Laks
 41. Polar Seafood
 42. Polar Star Fish
 43. Poselund Seafood
 44. Prime Ocean
 45. Salmoexport
 46. ScanFish Denmark
 47. Scansea
 48. Seafood Sales
 49. SEPIO
 50. Sirena Group
 51. Stepanfood
 52. Snapton (Frysehus)
 53. SnapPack
 54. Tenax Sild
 55. Unique Atlantic Seafood
 56. Vendsyssel Seafood
 57. Verner Andersen's Farsfabrik

FINLAND

1. Kesko (Kespro)
2. SOX Corporation (Prisma, S-Market, Sokos)
3. Wihuri
4. Findus Finland
5. Kalatukku E. Eriksson
6. Suomen Nestlé

HUNGARY

1. Haring-Trade
2. HIPPI
3. Nestlé Purina (Báki)
4. Partner in Pet Food Hungária

LATVIA

1. FishTrans
2. Karavela
3. KH Select
4. Latvian LV
5. SALMAR

LITHUANIA

1. AG Seafood Lithuania
2. Baltic Fish Export
3. Baltic Food Partners
4. BHJ Baltic
5. Fish Factory
6. GONAS
7. ICECO Žuvis
8. Lastena
9. Mars Lithuania
10. MB Amadropas
11. Norvalta
12. Plunges Kooperatine Prekyba
13. Plunges Salties
14. Seafishtrade
15. Viclunai ir Partneriai
16. ZUVITA

POLAND

1. ABRAMCZYK
2. Cantimax
3. Espersen Poland
4. Frasta
5. Gottfried Friedrichs KG
6. Herbert Ospelt Anstalt - Ospelt Petfood
7. Jütra Tiefkühlkost GmbH & Co. KG
8. Korat
9. Mars Polska
10. Mieszko
11. Milorex
12. MOWI
13. MyFood
14. Nord Capital
15. Petri Feinkost GmbH & Co. KG
16. ROYAL GREENLAND SEAFOOD A/S
17. Seacon Poland
18. Suemplot

ROMANIA

1. Bistromar La Timona

SWEDEN

1. Axfood Snabbgross
2. Atria Sverige Foodservice
3. BIF Fisk
4. Chets Culinar
5. Dagab Inköp & Logistik
6. FDC Grossist
7. Feldts Fisk & Skaldjur
8. Gourmet Food
9. Gunnar Dafgård
10. Gustavsson Restauranggrossist
11. JO Food
12. KL Swedish Trading (Royal Foods)
13. Kvalitetsfisk i Stockholm
14. Larö Sverige
15. Larö Smögen Seafood
16. Marsnor
17. Martin & Servera
18. Matia
19. MBP Solutions
20. Menigo Foodservice
21. Mårdskog & Lindkvist
22. Öresundslinjen Helsingborg
23. Piva Food
24. Polar Seafood
25. Royal Greenland Seafood Sweden
26. Royal Seafood
27. SeaSam Food
28. Seabreeze Seafood
29. Skepparholmen Hotell (Nacka Spa & Konferenshotell)
30. Sjömat Group Sweden
31. Smögen Gourmet
32. Svensk Cater
33. Sällpartner Häll
34. Vingo Seafood

UKRAINE

1. Albacor
2. Stingray Company
3. Ukrkharchopromconex
4. Universal Fish Company

RETAILERS WITH WILD SALMON IN OWN-LABEL BRANDS

ALBERT

Albert

ALDI NORD

Freihofer Gourmet, Topik, World's Kitchen, Golden Seafood

ALDI SÜD

Cachet

AXFOOD

Omega and Eldorado

BIEDRONKA

Marinero

CARREFOUR

Targ Świeżości

COOP (DK / NORDICS)

Coop, Irma

KAUFLAND

Blue Bay, K Classic, K Favourite's, K Exquisite

LIDL

Coshida, Culinea, Deluxe, Milbona, Nautica, Nixe, Ocean Sea, Havblå, Rybo v Lidlu / Ryba z Lidla / Targ Rybny Lidla

METRO

Fine Life

NETTO

Navito Seafood, Premier

NORMA

Fjordkrone

PENNY

Louisa

REMA 1000

Rema 1000

RIMI

Rimi

SALLING GROUP

Principi, Vores, Salling

TESCO

Tesco Finest

THE MARKET IS CHANGING. LET'S LEAD IT.

Mature markets → focus on higher-value products

Emerging markets → more households entering the category

Both are ready for diversification

Market value continues to grow

Wild smoked salmon is ready to scale

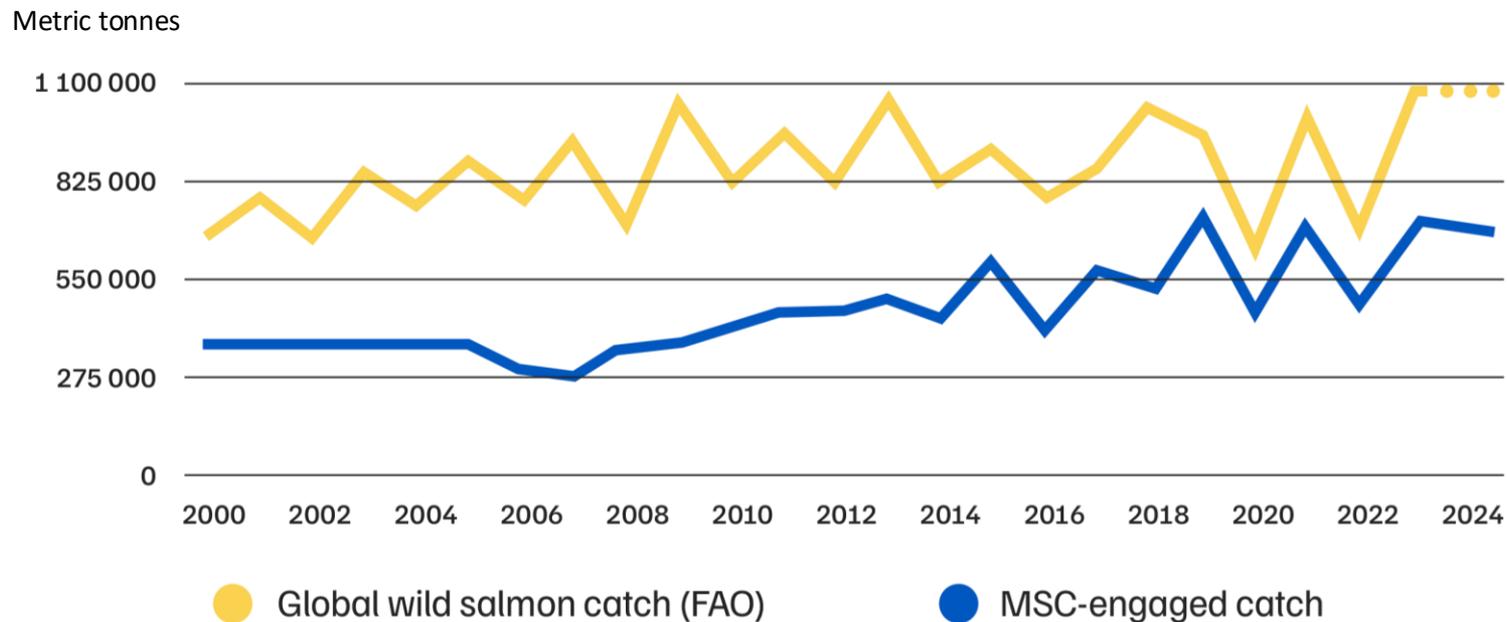
Processed formats offer clear room for expansion

BUT ALL OF US NEED FISHERIES

Carl Dahlman



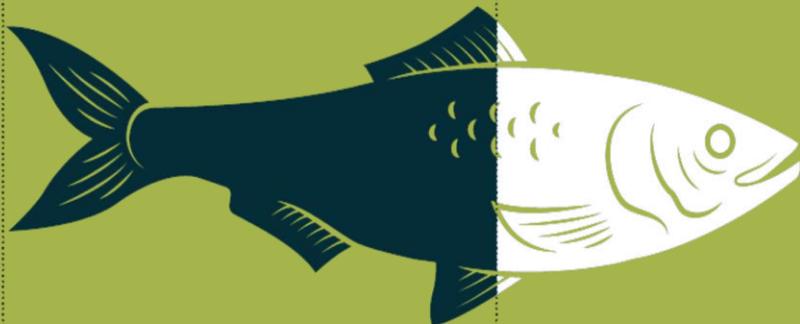
WILD SALMON CATCHES



SALMON FISHERIES IN THE MSC PROGRAM

25+ years of MSC certified Pacific salmon fisheries

62% of the global wild
salmon catch is
MSC certified



47

wild salmon fisheries
engaged in MSC Program

678,280

tonnes of wild salmon
supplied annually by MSC
certified fisheries



MAKING SUSTAINABILITY REAL: INSIGHTS FROM THE MSC SALMON FISHERIES



Wyatt Rhea-Fournier
Alaska Fisheries Outreach Manager
Marine Stewardship Council

FOCUS ON CONSUMERS

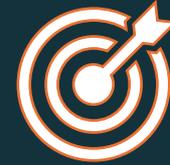
Johanna Vepsä



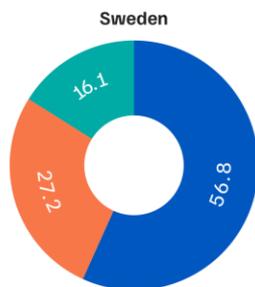
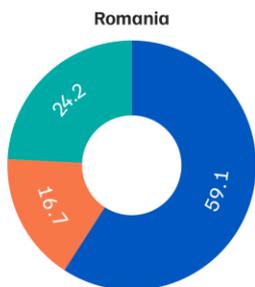
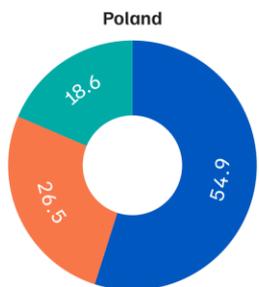
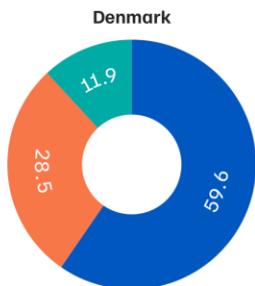
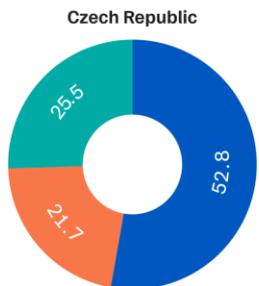


WILD SALMON CONSUMER SURVEY

- To understand the opinions and preferences among consumers in Poland, Czech Republic, Romania, Denmark, Sweden, and Finland
- 3,654 surveys were conducted with a representative sample of: Poles (N=607), Czechs (N=607), Romanians (N=610), Danes (N=610), Swedes (N=610), and Finns (N=610)
- 15 December – 30 December 2025



WHAT DO CONSUMERS WANT?



If price and availability weren't a factor, wild salmon would be the first choice in every market.

-  Farmed
-  Wild
-  I have no opinion

CONSUMPTION PATTERNS

1. Salmon is most popular in Nordic countries – especially Finland and Sweden
 - Core protein in Nordic diets
 - Less common in Central & Easter European countries

19%



17%



PREFERENCES

1. Product preferences vary significantly

Finland → fresh

Sweden → frozen fillets

Denmark and Poland → smoked

Developing markets → processed formats

2. Home preparation is simple and versatile, with strong everyday integration

Salmon is positioned as both: an everyday meal
ingredient AND convenient protein source



SOURCING AND QUALITY

1. Farmed salmon dominates across all markets

→ wild salmon is aspirational

Key drivers of wild preference:

- Taste
- Natural origin
- Health (Central/Eastern Europe)
- Environmental reasons (Nordics)

2. Norwegian salmon clear market leader across all markets

3. Finland shows the highest sourcing awareness and knowledge – 80 %!

4. Price is a key barrier — but not the only driver



WHAT DO WE KNOW ABOUT SALMON CONSUMERS?

- Wild salmon is aspirational
- Certification matters
- Reported behaviour: farmed v. wild
- High uncertainty on sourcing



MEETING CONSUMERS' NEEDS



**MSC ecolabel
=
clear proof it is
wild-caught
salmon**



LEARN ABOUT WILD SALMON!

Dedicated MSC salmon webpages in Polish, Swedish, Danish and Finnish, offering a wide range of consumer-friendly information, including details on available MSC-certified products.



msc.org/pl/losos



msc.org/se/lax



msc.org/dk/laks



msc.org/fi/lohi

MSC WILD SALMON – CONSUMERS’ CHOICE

- **Best MSC Product 2023 Poland:**
1st place for Suempol smoked wild Pacific salmon



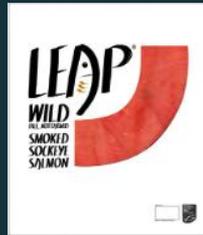
**MSC
POLAND
BEST MSC
PRODUCT
CONSUMER CHOICE
2023**



- **Best MSC Product 2025 Sweden:**
3rd place for Royal Food pink and chum salmon fillet

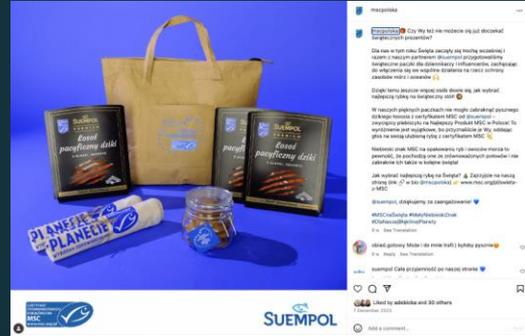


3
**SVERIGES FAVORIT
MSC-PRODUKT
KONSUMENTERNAS VAL
2025**



- **MSC UK Product of the Year 2025:**
Lidl’s salmon and pea risotto and LEAP Wild Smoked Sockeye Salmon on the shortlist for consumers’ voting

POLAND: MEDIA BUZZ AND INFLUENCER MOMENTUM



ŁOSOŚ PREMIUM
Wędzony, zło-wiony w Pacy-fiku. Ma certyfikat MSC zrównowa-żonego rybo-łówstwa. Suempol, 20 zł/100 g.

Suempol Losoś pacy-ficzny dziki z Alaski
Spełnia wymogi zrównowa-żonego rybołówstwa. Wybrany został Najlepszym Produk-tem MSC w 2023 roku.

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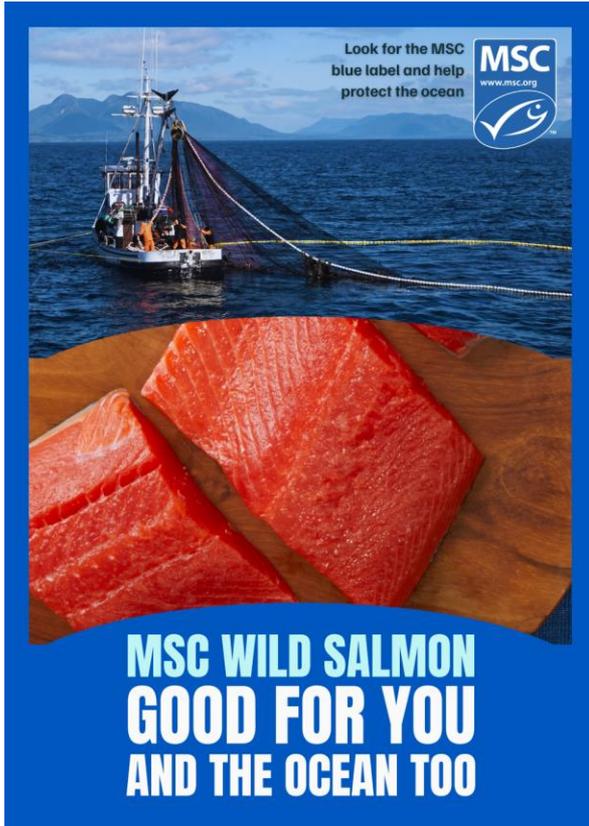
Wędzony na zimno łosoś prosto z wód dzikiej Alaski z certyfikatem MSC to produkt premium. Wybierając go, dbasz o naszą planetę! Od 17 zł/100 g

Suempol Losoś pacy-ficzny dziki z Alaski
Wybrany Najlepszym Produk-tem MSC 2023 roku, tzn. speł-nia kryteria zrównowa-żonych połowów. • 19 zł/100 g

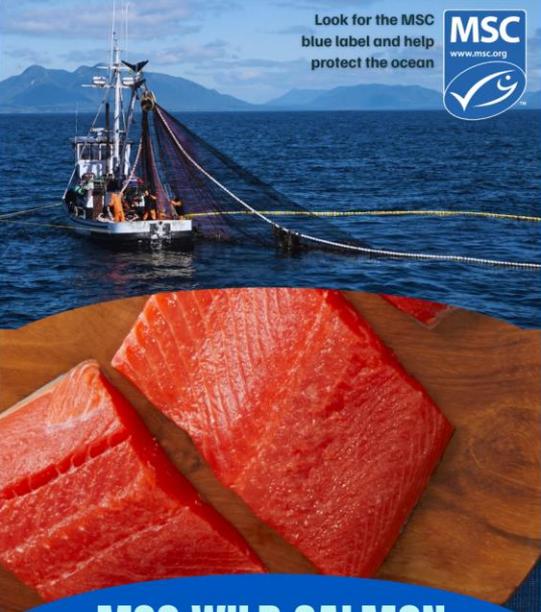
Wędzony Losoś pacyficzny dziki to smaczna przekąska so-ło, ale też święty dodatek np. do sałatek. Ma niebieski certyfikat zrównoważonego rybo-łówstwa MSC (Marine Stewardship Council), czyli pochodzi ze stabilnych, dobrze zarządza-nych łowisk, gdzie łowi się ryby w takich ilościach, które w mniejszym stopniu wpływają na ekosystem morski i nie zaburzają jego równowagi. Suempol, ok. 20 zł/100 g

PARTNER WITH US TO DRIVE OCEAN-POSITIVE IMPACT

New MSC Toolkit with ready-to-use assets available soon!



Look for the MSC blue label and help protect the ocean



**MSC WILD SALMON
GOOD FOR YOU
AND THE OCEAN TOO**



**MSC WILD SALMON
GOOD FOR YOU
AND THE OCEAN TOO**



Look for the MSC blue label and help protect the ocean



PARTNER WITH US TO DRIVE OCEAN-POSITIVE IMPACT

New MSC Toolkit with ready-to-use assets available soon!



**MSC VILDLAX
BRA FÖR DIG
OCH HAVET**



MSC
www.msc.org



**MSC VILLILOHI
HYVÄKSI SINULLE
JA MERILLEMME**



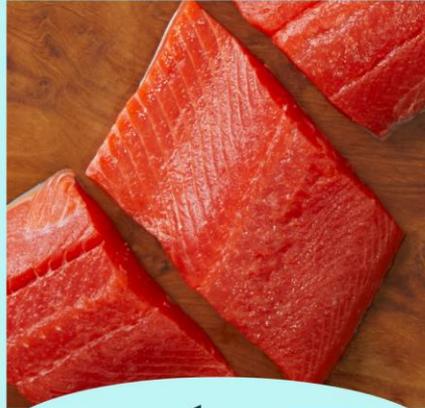
MSC
www.msc.org



**MSC VILDLAKS
GODE FOR DIG
OG FOR HAVET**



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**DZIKI ŁOSOŚ MSC
DOBRY DLA CIEBIE
I DLA OCEANÓW**



MSC
www.msc.org

THE MARKET IS CHANGING. LET'S LEAD IT.



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QUESTIONS & ANSWERS



MORE QUESTIONS? CONTACT OUR TEAM!



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MSC AT SEAFOOD EXPO GLOBAL 2026

Wednesday 22 April 9.00

**Seafood Futures Forum 2026 - The Long View:
The Business Case for Sustainable Seafood**

<https://www.msc.org/seafood-futures-forum>

21-23 April

Exhibition stand with ASC - HALL 4 Stand A401



MSC SIDE EVENTS – LET'S MEET THERE

- **MSC Innovation:** Digital Traceability in Sustainable Seafood Supply Chains
- **MSC Certified Tuna** – Global Supply and Market Opportunities
- **MSC Certified Small Pelagics** – Global Supply and Market Opportunities
- **The Future of MSC Certified Cod**

