Marine Stewardship Council

NORDIC REGION: STATE OF THE MARKET 2026

Demonstrating partnerships, progress, and commitments to sustainable seafood and healthy oceans in Denmark, Finland, Norway and Sweden.

OCTOBER 2026

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MESSAGE FROM OUR PROGRAM DIRECTOR: A SHARED NORDIC MARKET, DIFFERENT REALITIES, A COMMON RESPONSIBILITY

Seafood has always been closely connected to the Nordic countries: to our coastlines, food culture and economies. Yet, while Sweden, Denmark, Norway and Finland share many characteristics, their seafood markets are far from identical. Different traditions, species, supply chains, and retail structures shape what consumers ultimately find on the shelf.

What these markets increasingly share are the challenges. Changing fish stocks and quotas, pressure on marine ecosystems, geopolitical uncertainty, rising costs and price-conscious consumers are reshaping seafood supply chains. At the same time, safeguarding the ocean and securing seafood supplies for future generations has never been more important.

Expectations around sustainability are also changing. Consumers, regulators and businesses increasingly require credible, independently verified evidence behind environmental claims. New EU legislation, including the Empowering Consumers for the Green Transition Directive, is raising the bar further. The MSC programme can help businesses demonstrate that their seafood sustainability commitments are supported by a robust, science-based, and independently verified standard.

This first MSC Nordic Market Report brings together data and insights from Sweden, Denmark, Norway and Finland. It highlights strong progress in MSC certified sustainable seafood, but also significant differences between countries, species, and product categories. Although Nordic markets often source from the same fisheries and suppliers, MSC labelled seafood reaches consumers in very different ways.

The report is both a snapshot of where we are today and an invitation to shape what comes next. Nordic businesses have the influence to drive change throughout seafood supply chains and inspire progress in neighbouring European markets. By expanding access to MSC certified seafood and making the MSC label more visible, they can help turn market leadership into a measurable impact for the ocean.

Continued progress will require collaboration among fisheries, suppliers, brands, retailers, and other stakeholders. Together, we can ensure that MSC certified sustainable seafood remains a credible, visible, and accessible choice for Nordic consumers.

The Nordic region has the knowledge, influence, and ambition to lead.

It takes all of us.

Anna Dębicka
Program Director,
Baltic and Central Europe
Marine Stewardship Council

EXECUTIVE SUMMARY

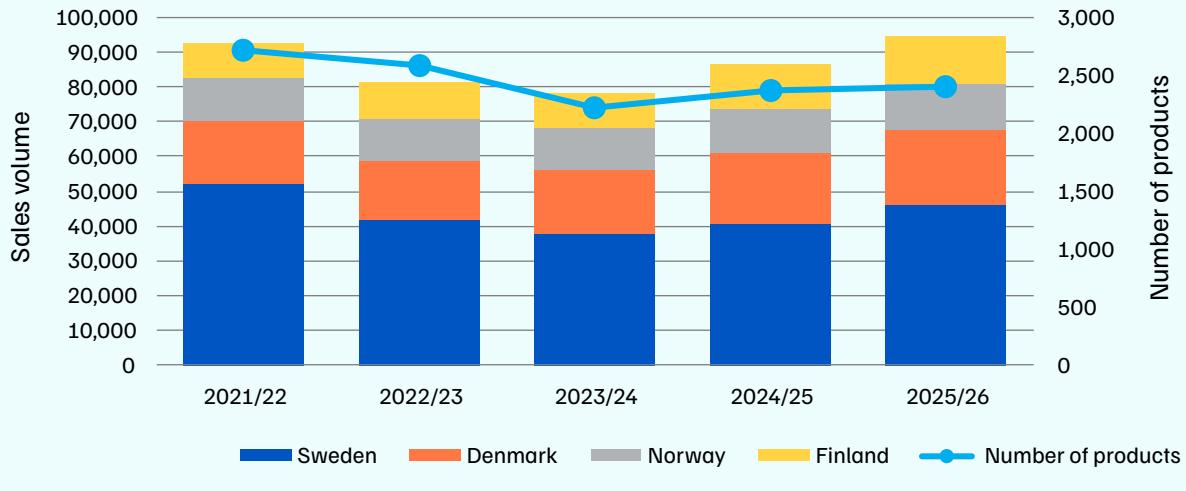
The Nordic market for MSC labelled seafood is entering a new phase of growth and diversification. This report brings together market data from Sweden, Denmark, Finland and Norway to provide a Nordic overview (excluding Iceland) of how the certified seafood market is developing across species, product categories, supply chains and consumer markets.

In 2025/26, MSC labelled seafood sales across the four Nordic countries reached almost 95,000 metric tonnes, an increase of approximately 9% year-on-year. Sweden with the world's highest proportion of MSC labelled seafood per capita remains by far the largest market, accounting for close to half of regional volume, while Finland has shown the strongest longer-term growth. The four markets nevertheless have distinctly different profiles, reflecting differences in species, product preferences, and market structures.

The species mix is changing too. Whitefish remains the backbone of the Nordic MSC labelled market, with more than 42,000 tonnes in 2025/26, but its composition is shifting as cod declines. At the same time, tuna has emerged as the strongest growth story, increasing from around 5,000 tonnes in 2020/21 to more than 21,000 metric tonnes in 2025/26. Tuna is increasingly mainstream across all four markets, supported by retailer commitments, growing brand participation, and greater availability of certified supply. Small pelagics are also recovering as retailers fulfill sustainability commitments and shift to source MSC certified herring, although volumes still remain well below historical levels.

The product mix is evolving alongside species. Frozen remains the largest category, but growth has levelled off as other parts of the market expand more quickly. Canned and preserved seafood is a major driver of current growth, while emerging areas such as retail food-to-go and pet food are broadening the occasions and formats.

MSC CERTIFIED SALES VOLUME BY COUNTRY AND NUMBER OF PRODUCTS



A WIDE NETWORK BEHIND A MORE SUSTAINABLE SEAFOOD MARKET

MSC labelled products sold in the Nordic region are supplied by a diverse network of license holders, reaching consumers across hundreds of brands and species.

279
LICENCE HOLDERS

2,000+
MSC PRODUCTS
available on the markets

300+
BRANDS
offering MSC products

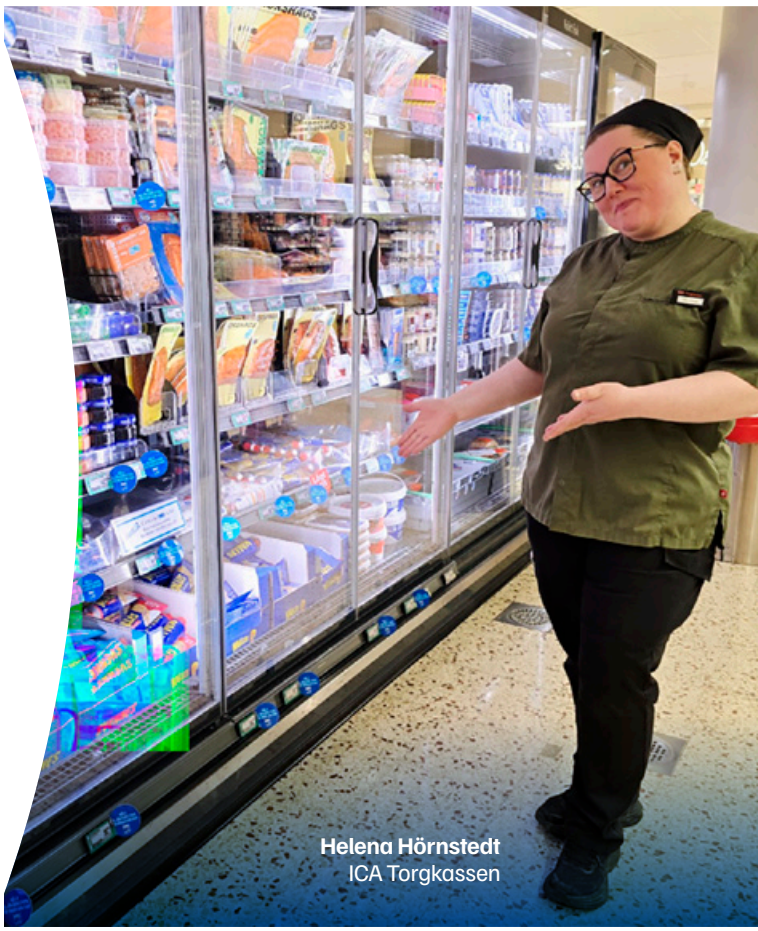
70+
SPECIES
in MSC certified products

95,000
TONNES
MSC labelled seafood sold across the Nordic market

Behind this development is a broad network of 279 license holders supplying more than 2,000 MSC labelled products across over 300 brands and more than 70 species. These suppliers, together with retailers and brands, play an important role in translating sustainable sourcing commitments into products available to Nordic consumers.

The market is also evolving within a changing regulatory and consumer landscape. New EU requirements around environmental claims, including the Empowering Consumers Directive (EmpCo), together with growing consumer expectations for independent verification, are increasing the importance of credible sustainability certification and clear communication. Across the Nordic countries, a majority of consumers believe that sustainability and environmental claims made by supermarkets and brands should be independently verified.

Taken together, the data points to a Nordic MSC market that is not simply growing in volume, but becoming broader, more diversified and more deeply integrated across species, categories and supply chains – at a time when expectations for credible sustainability claims are higher than ever before.



Helena Hörnstedt
ICA Torgkassen

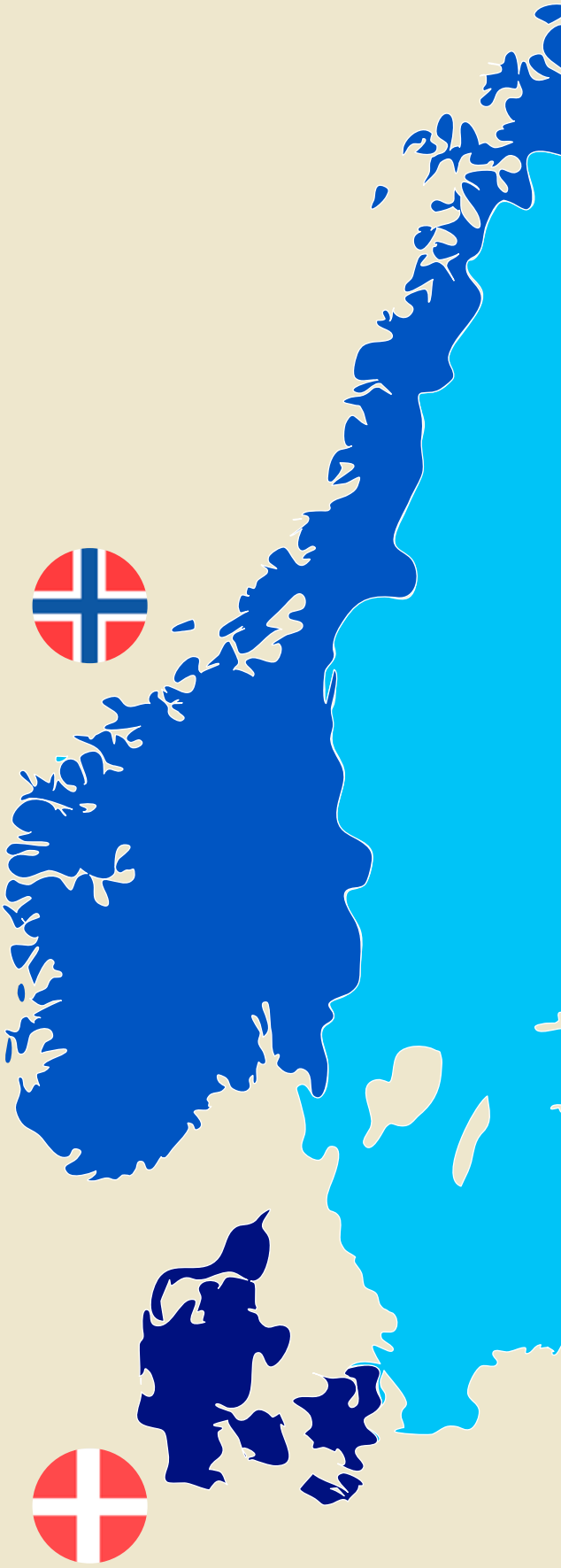
NORDIC MARKET OVERVIEW

NORWAY

Population:	**5.65 M**
Retailers:	**COOP, Rema 1000, Norgesgruppen**
Key brands for MSC products:	**Findus, Mars**
Top fish (general) consumed:	**Salmon**
Top MSC certified fish consumed:	**Pollock**
How many times a week do people eat fish?*	**2.3**
Number of MSC products available in the market:	**357**
MSC total volume sold:**	**13,105**
Top MSC category:	**Frozen**
MSC consumer awareness:	**43%**

DENMARK

Population:	**6 M**
Retailers:	**Rema 1000, Salling, Lidl, COOP, Dagrofa**
Key brands for MSC products:	**Royal Greenland, Saeby Glyngøre, Amanda, Rahbek, K-Salat**
Top fish (general) consumed:	**Salmon**
Top MSC certified fish consumed:	**Tuna**
How many times a week do people eat fish?*	**1.6**
Number of MSC products available in the market:	**951**
MSC total volume sold:**	**21,550**
Top MSC category:	**Canned**
MSC consumer awareness:	**59%**



FINLAND

Population:	**5.67 M**
Retailers:	**K-group, S-group, Lidl**
Key brands for MSC products:	**Kokkikartano, Atria and Saarioinen, Sillikonttori, Findus**
Top fish (general) consumed:	**Salmon**
Top MSC certified fish consumed:	**Tuna**
How many times a week do people eat fish?*	**1.2**
Number of MSC products available in the market:	**657**
MSC total volume sold:**	**13,922**
Top MSC category:	**Frozen/Canned**
MSC consumer awareness:	**70%**

SWEDEN

Population:	**10.7 M**
Retailers:	**ICA, AXFOOD (Hemköp, Willys, Citygross), Lidl, COOP**
Key brands for MSC products:	**Findus, ABBA, KALLES, Feldts**
Top fish (general) consumed:	**Salmon**
Top MSC certified fish consumed:	**Pollock**
How many times a week do people eat fish?*	**1.3**
Number of MSC products available in the market:	**1,341**
MSC total volume sold:**	**46,123**
Top MSC category:	**Frozen**
MSC consumer awareness:	**65%**

* NORMO 2025 report Nordic Monitoring 2014-2024, https://pub.norden.org/nord2025-026/nord2025-026.pdf

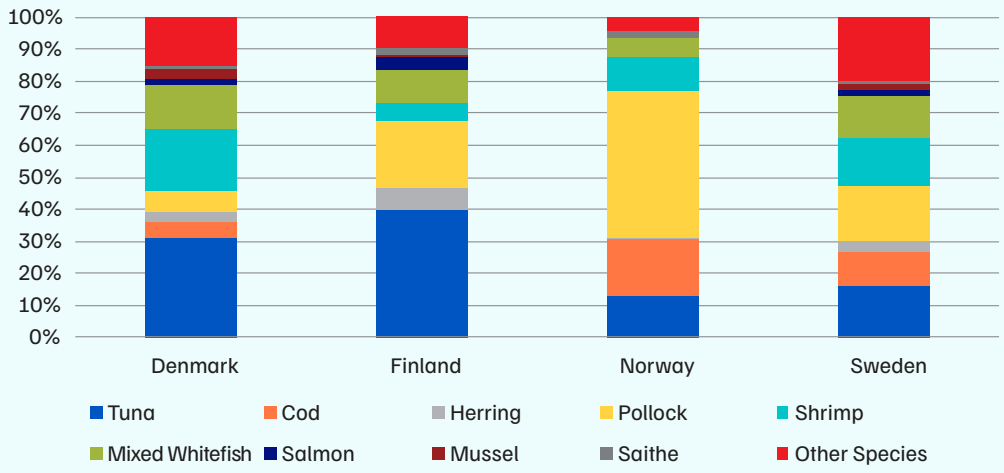
** Excluding foodservice meals

A CHANGING CATCH: THE NORDIC SPECIES MIX

Across the Nordic markets, when it comes to MSC labelled seafood, tuna, pollock, prawn and whitefish form a common core, but their relative importance differs significantly. Tuna is one of the strongest growth areas across the Nordic markets for MSC. Salmon holds a unique position in the Nordic seafood market, but consumption is overwhelmingly dominated by farmed Atlantic salmon. MSC labelled wild salmon volumes remain a relatively small share, although volumes are growing, particularly in Sweden and Finland.

Sweden is both the largest and most diverse market, with a MSC labelled volume of 46,123 metric tonnes – nearly half of the Nordic total. Its species mix is comparatively balanced, led by pollock, tuna and shrimp/prawn. Sweden also shows the strongest growth with approximately 15% year on year, driven mainly by mixed whitefish, herring and tuna. Cod is declining, while shrimp/prawn remains broadly stable.

DISTRIBUTION OF SPECIES

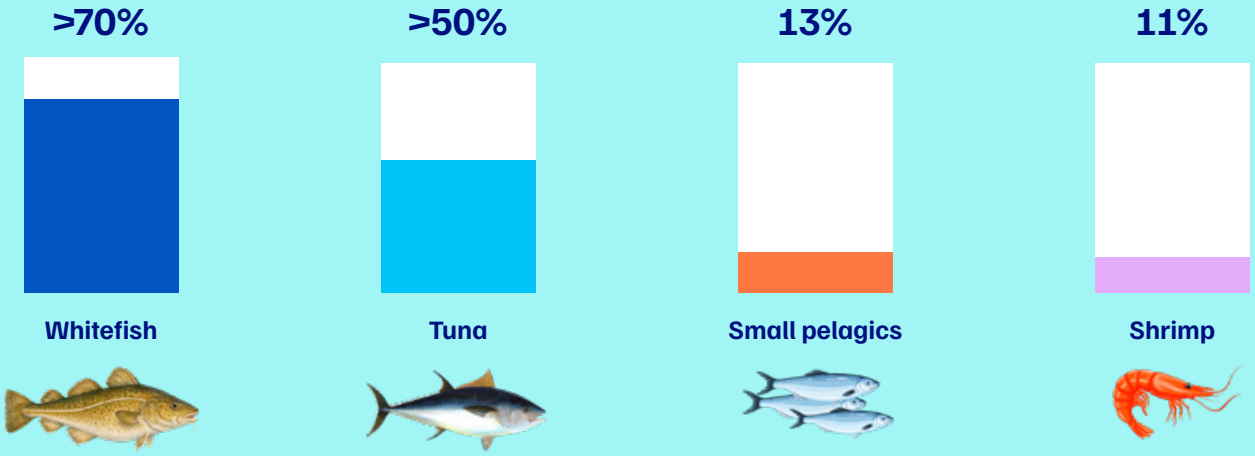


Denmark is the second-largest market, at 21,550 metric tonnes of MSC labelled volume. Tuna plays a larger role here; it represents approximately 31% of the volume. Shrimp/prawn is also important at around 20%. Growth in the recent years has been modest as increases in tuna, pollock and herring are partly offset by declines in mixed whitefish, mussels and saithe. Denmark is the only country where plaice is in the top 10 category.

Finland and Norway have similar total volumes – 13,922 and 13,105 metric tonnes of MSC labelled volume respectively – but very different profiles. Finnish market relies heavily on tuna and pollock, whereas the Norwegian is dominated by pollock and cod. Tuna is growing in all four countries, while shrimp/prawn is either stable or in minor decline.

SHARE OF GLOBAL CATCH FROM MSC CERTIFIED FISHERIES

Percentage of global catch (by weight) that is from MSC certified fisheries.



Source: MSC Sustainable Whitefish Yearbook 2025, MSC Sustainable Tuna Yearbook 2026, MSC Small Pelagics Yearbook 2026 and MSC Prawn & Shrimp Yearbook 2026

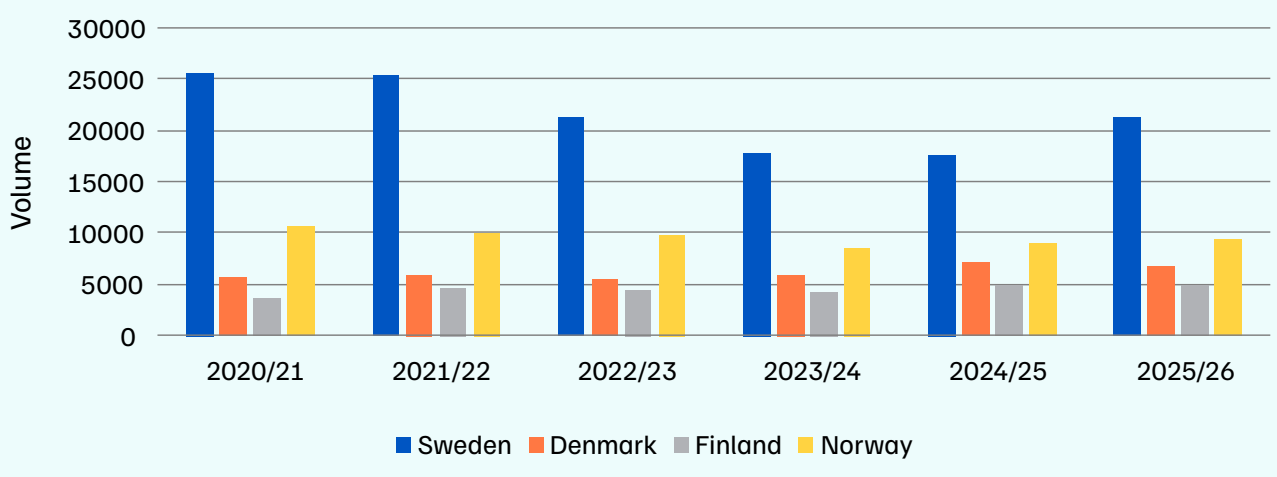
WHITEFISH: THE BACKBONE OF NORDIC MSC LABELLED SEAFOOD

More than 70% of the global whitefish catch is now MSC certified, with species such as cod, Alaska pollock and hake carrying the MSC label. Whitefish accounts for almost 40% of the total volume of seafood engaged in the MSC Program.

In the Nordics, whitefish remain the most important part of the MSC labelled seafood market. In 2025/26, volumes increased by 10% compared with the previous year to over 42,000 metric tonnes. The category also has a broad presence in the market, with more than 800 MSC labelled whitefish products across the Nordic countries. Considerable differences can be seen between different countries. Sweden is the largest whitefish market, accounting for almost half of Nordic volume, and is also the main driver behind the growth in recent years.

Norway has a very different profile: while smaller in absolute terms, whitefish accounts for around 85% of all MSC labelled seafood volume in Norway, compared with 48% in Sweden, 36% in Finland and 32% in Denmark.

NORDIC WHITEFISH VOLUME DEVELOPMENT BY COUNTRY

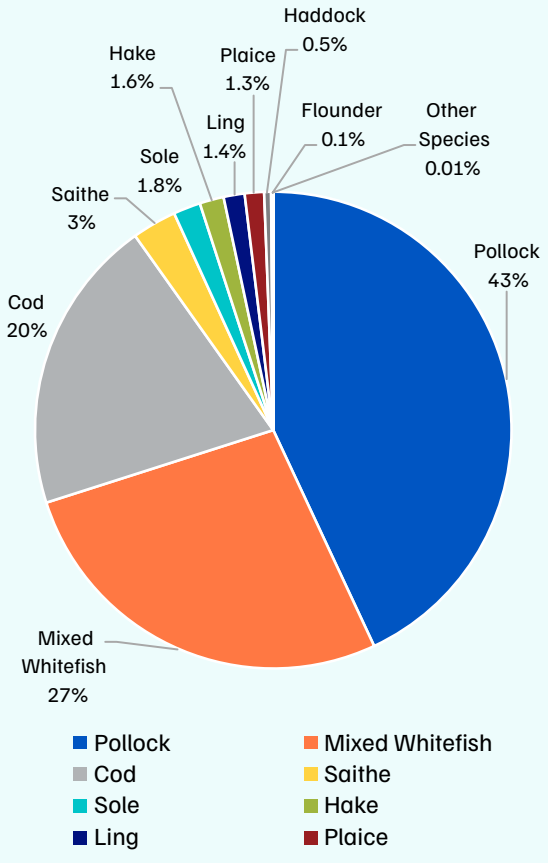


BEYOND COD: A MORE DIVERSE WHITEFISH MARKET

The species mix within whitefish is also changing. Pollock is the most prominent whitefish species and continues to grow – around 11% increase in 2025/26. The mixed whitefish category shows an even stronger increase with 35%, largely driven by caviar spreads that are found in this category, where we also find a wide variety of products such as fish fingers and surimi. Together, pollock and mixed whitefish now account for approximately 70% of Nordic MSC labelled whitefish volume.

At the same time, cod (Atlantic and Pacific) continues to lose ground with volumes declining by around 13% compared with the previous year and approximately 25% below 2022/23 levels. Rising prices, driven by reduced quotas and strong demand, are likely contributing to the decline. The change can also be seen in the product offering: the number of MSC labelled cod products has fallen from 337 in 2022/23 to 226 in 2025/26. Smaller species show a more varied picture, with sole and hake growing, while saithe, ling and flounder decline. Saithe volumes have been affected by the suspension of North Sea saithe in July 2025, which has impacted not only saithe products, but also a large volume of mixed whitefish products containing saithe among other whitefish species.

NORDIC WHITEFISH SPECIES MIX 2025/26



Looking at product categories, two-thirds of total volume is sold as frozen, representing more than 400 products with a strong presence of both retailers' own brands as well as established seafood brands in the category such as Findus and Rahbek.

In a longer-term perspective, the Nordic whitefish market is therefore not simply recovering in volume – it is also changing in composition, with a clear move towards greater diversification. This development reflects a broader shift highlighted in the MSC Sustainable Whitefish Yearbook 2026: as supply of some traditionally dominant species comes under pressure, a broader range of certified whitefish can provide brands and retailers with greater sourcing flexibility while maintaining sustainability commitments. Hake is an interesting example. The species has quietly built a strong sustainability story, with certified hake now supplied by fisheries across several regions. Although still small compared with cod and pollock in the Nordic market, MSC labelled hake recorded particularly strong growth in 2025/26.

"MSC certified hake is gaining momentum in a growing number of markets. With tightening supply linked to the impact of climate change affecting stocks of species that historically have dominated in North Europe, brands seeking to expand their range of whitefish species while maintaining their commitments to sustainability."

Toby Middleton, Head of Market Operations, MSC

KALLES CAVIAR: AN ICONIC SWEDISH FAVORITE WITH MSC LABEL

Kalles Caviar has won the hearts of Swedish consumers since the 1950s and remains one of the country's most iconic seafood products. In a market where around 4,500 metric tonnes of caviar are sold each year, largely based on cod roe, Kalles' recent progress shows how a familiar everyday product can help make certified seafood visible to consumers at scale.

Kalles began its transition in 2024 and has accelerated significantly over the past year.

Sales of MSC labelled products have increased by more than 700%, and the range now includes 11 labelled products.

From an MSC perspective, Kalles Caviar is a strong example of how certified seafood can become visible in everyday food choices. As one of Sweden's most familiar seafood products, its transition to MSC labelled raw material helps bring sustainable sourcing into a category with high consumer recognition and strong local relevance. It also illustrates how growth in MSC labelled whitefish is increasingly shaped not only by traditional fillets, but by processed products that reach consumers at scale and help normalize certified seafood in everyday meals.

TUNA:
LEADING THE NORDIC MSC LABELLED SEAFOOD MARKET

Across the region, MSC labelled tuna continues to show strong market momentum, driven by dedicated retailer commitments and growing brand participation along with the increasing global availability of MSC certified supply. More than half of landed global tuna catch is now MSC certified (2025), and MSC labelled tuna products grew year-on-year by 39% to around 400,000 metric tonnes in 2025/2026.

The growth regionally throughout the recent years has been significant.

The total MSC labelled tuna volume in 2020/21 was 4,967.50 tonnes and by the end of 2025/2026 this has grown to over 21,000 tonnes, an 18% increase from 2024/25 alone. Across the Nordics, Tuna has become a mainstream MSC labelled seafood category and is found primarily as a canned/preserved product. All other categories from chilled to pet food, while smaller, are also seeing growth, with the biggest leap for retail food-to-go such as tuna wraps. Skipjack is the dominant certified tuna species.

SKIPJACK TUNA

Katsuwonus pelamis

Volume MSC certified catch: 2,373,240 tonnes

Skipjack tuna are widely distributed and live in the open ocean, feeding near the surface. They are the smallest of the major commercial tuna species, growing up to 80 centimetres in length, and the most abundant. Despite their relatively short lifespan of approximately seven years, they mature rapidly and can reproduce throughout the year. Skipjack is popular among consumers. It is generally the most affordable of the tuna species.

In Sweden, more than nine out of ten canned tuna products sold through supermarkets now carry the MSC label (NIQ, 2026, Ref. no. 07498894). The market leader Abba has sold MSC tuna for over a decade, and all major retail chains offer certified private label alternatives. As the largest tuna market in the region, Sweden recorded labelled volume of 7,318 metric tonnes in 2025/26, an increase of 11%. Product assortment increased from 143 to 181 products within the year.

Finland has emerged as one of the region's fastest growing markets for MSC certified tuna. Labelled volumes have more than tripled since 2021/22, with growth extending beyond traditional canned formats into frozen products, ready meals and pizza. MSC labelled tuna volume reached approximately 5,500 tonnes in 2025/26, an 18% increase from 2024/25 and the number of products on market increased from 133 to 166 products.

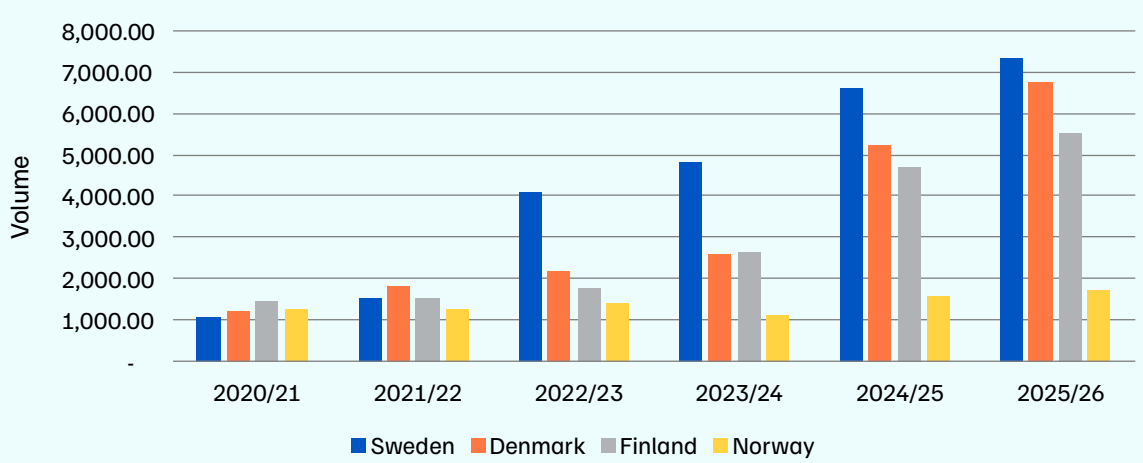
Denmark has experienced a similar market growth, with MSC labelled tuna moving from a niche, premium proposition into the mainstream across retailers and price points. Labelled tuna volume grew by 29% to 6,734 metric tonnes in 2025/26, representing the strongest growth rate among the four Nordic markets. Product availability from 125 to 162 products.

While Norway remains the smallest tuna market in the region, also here, the growth continues. MSC labelled tuna volume increased by 9% to 1,720 tonnes in 2025/26. Product availability expanded to 58 products.

Ref.no 07498894, Date: 04/09/2026

Source: Based on NIQ RMS data, Grocery Total, PRESERVED FISH & SHELLFISH Tuna Category, Sales Units, Lates 52 Weeks w/ e09/08/2026 (Copyright © 2026, NIQ)

NORDIC TUNA VOLUME DEVELOPMENT BY COUNTRY



SAARIOINEN TUNA READY-MEALS

In March 2026, Finland's leading convenience food brand, Saarioinen brought MSC labelled tuna more visibly into Finland's ready-meal sector when it announced that all its tuna products, including the Good to Go Tonnikalawrap and classic Tonnikalapizza, would now carry the blue MSC ecolabel.

The move is significant as consumers can now see that the tuna comes from a certified sustainable fishery. Saarioinen had already been purchasing MSC certified tuna since the beginning of 2024, but the company's factories and supply chain needed to complete third-party MSC certification audits before the ecolabel could appear on packs.

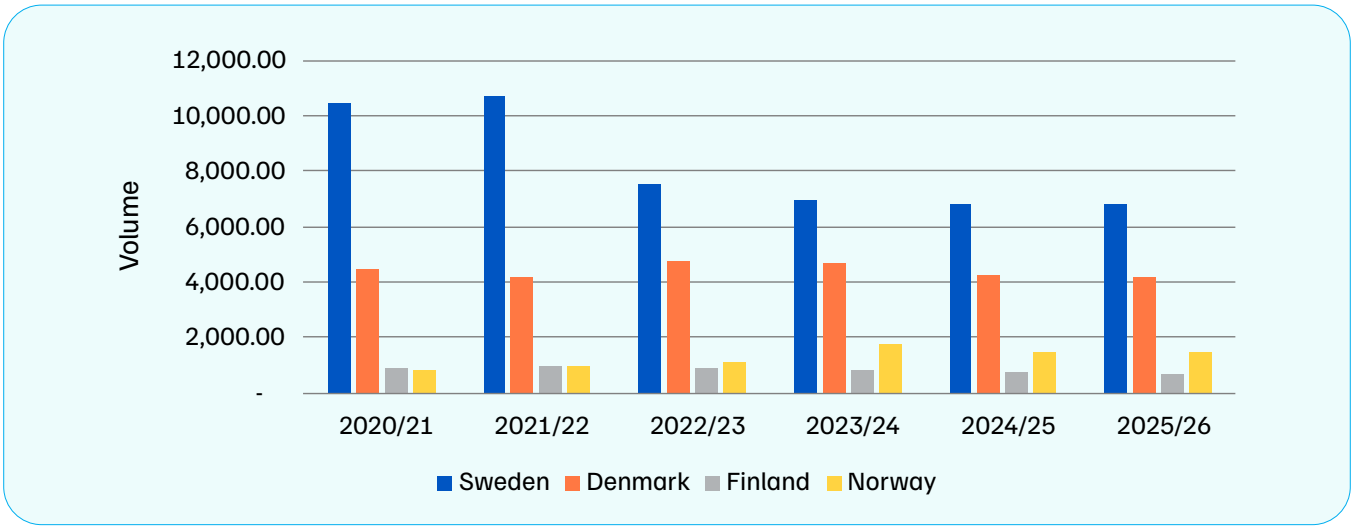
The decision by Saarioinen to use the blue ecolabel shows how the growth in certified tuna is opening new opportunities beyond tuna cans and frozen seafood.

PRAWNS: A NORDIC FAVOURITE SHAPED BY SUSTAINABLE FISHERIES

Wild-capture shrimp and prawn production is only a small fraction of the total global volume, with aquaculture production increasing exponentially in recent years. Of that wild-capture volume, approximately 76.6% remains unassessed or uncertified – and the Swedish shrimp fishery is amongst them. Currently, 11% of the global prawn catch is MSC certified.

Shrimp and prawn species rank third in terms of volume of MSC labelled sales in the Nordic region. Over 90% of MSC labelled shrimp and prawns are northern prawns (Pandalus borealis) from the waters around Greenland, primarily sold as either frozen or chilled in brine.

NORDIC PRAWN VOLUME DEVELOPMENT BY COUNTRY



Sales of MSC labelled shrimp and prawns have decreased slightly in recent years. This decrease relates to the reduction in catch quotas, which has led to rising prices. The reduction in quotas is a result of good stock management, which has led to the stock staying within safe biological limits. The second reason for the decline of volume can be found near to home, in Sweden; during the pandemic the fishery responsible for most of frozen prawns sold by weight in retail lost its certification and still has not made it back into the program.

A smaller proportion of shrimp sold is Oregon pink shrimp. They are smaller in size, and these shrimps are often used in products like shrimp salads. In 2025 the first Argentine red shrimp fishery was MSC certified, and small volumes of the exclusive larger shrimp have already reached the Nordic market with the blue label.

SUSTAINABLE FISHERIES GREENLAND

In Greenland, the MSC certification of the fisheries has a slightly different structure than other fisheries organizations. Here the vessel owners and fishing and seafood companies have come together to form 'Sustainable Fisheries Greenland', a collaboration with the purpose of obtaining and maintaining the MSC certification of Greenland fisheries. The two largest members are Polar Seafood and Royal Greenland, and both companies operate both fishing trawlers and processing facilities. Royal Greenland is a vertically integrated company, but what sets it apart is that it is 100% owned by the Greenlandic government.

Being owned by the people of Greenland, the company has an obligation to protect the livelihoods of the people, many of whom live in very remote settlements where fishing is by far the most important industry. This obligation includes maintaining landing and processing facilities in remote settlements, but it also includes the preservation of fish stock, and thus income, for the future. Fishing sustainably is a key part of that, and here the MSC certification plays a huge role.

SMALL PELAGICS: TURNING TIDE IN NORDIC MSC LABELLED SEAFOOD

Small pelagic fisheries account for more than 24 million metric tonnes of the global marine catch. Several small pelagic fisheries are lagging on sustainability compared to for other species, only 13% of global small pelagic landings are MSC certified,showing a significant gap in sustainable supply.

Progress has been slow for several reasons. Small pelagic stocks are highly variable and sensitive to environmental factors.

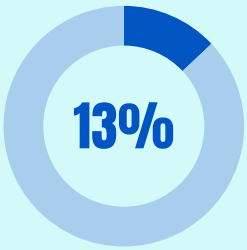
Many are also managed through international agreements and are challenged by climate shifts altering stock distribution. Some destination markets often lack incentives for demonstrating sustainability, reducing motivation. However, led by brands and retailers committed to sustainable sourcing, the landscape is starting to change. They are joining forces with NGOs and certification standards, such as the MSC, to end overfishing of small pelagic fisheries.

GLOBAL IMPORTANCE

>24 MILLION TONNES

Small pelagic fisheries account for more than 24 million metric tonnes of the global marine catch.

MSC CERTIFIED SHARE



Only 13% of global small pelagic catch is from MSC certified fisheries, showing a significant gap in sustainable supply.

KEY SPECIES IN THE MSC PROGRAM

Herring

Chilean jack mackerel

Sardine

Anchovy

WHY IT MATTERS

Supports marine biodiversity

Provides livelihoods for millions of people worldwide

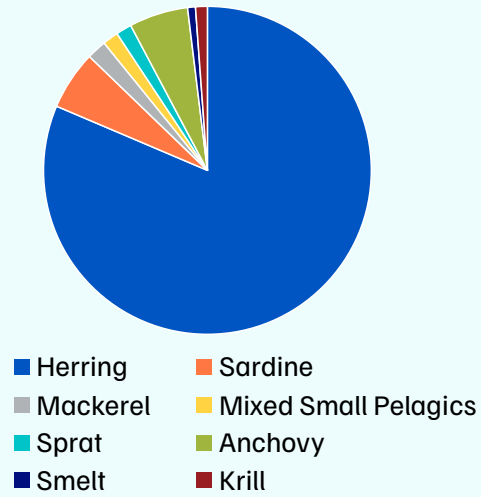
Contributes to global food security

Across the Nordic markets we can see a strong recovery in 2025/26 where the labelled small pelagic volumes have increased by approximately 39% compared with the previous year and is now up at 3600 metric tonnes. Sweden is the main growth engine, almost doubling its volume, while Denmark also records substantial growth of around 43%. Norway remains a very small market with a further decrease of around 13%. Finland is the most stable market with several lasting 100% MSC commitments from sustainable actors such as Suomen Sillikonttori, Kesko and Lidl. Despite this there has been a decline with 8% over the last year.

Within the category small pelagics, herring continues to dominate, accounting for roughly 88% of volume at 3,200 metric tonnes. Sardine and the category mixed small pelagics (often used in caviar mix) also show strong increases, while mackerel rebounds sharply from an exceptionally low comparison base. Conversely, sprat, smelt and krill decline.

In a longer-term perspective, the market remains considerably below the levels recorded in 2020/21 before the suspension of AS-herring and when the industry still had certified Atlantic mackerel in stock, following the sharp contraction in 2022/23. The latest year should therefore be viewed as a meaningful recovery, but not yet a return to the market's previous scale. Looking at the forecast for next year we can see a large amount of new small pelagic products entering the market, showing that the tide is turning.

NUMBER OF PRODUCTS PER SPECIES



MACKEREL

Scientists have warned that NEA mackerel numbers have decreased to critical levels and continue to be overfished. To protect the species for the future, coastal states have to agree on a quota-sharing agreement which is set in line with the scientific advice. For brands and retailers that rely on stable supply chains and credible sustainability claims, concerns on the status of NEA mackerel are becoming increasingly difficult to ignore.

A growing number of companies are reviewing their sourcing and looking to MSC certified fisheries, mainly Chilean Jack Mackerel. In the Nordic market several partners have launched Chilean jack mackerel products last year i.e. Saeby Fiskeindustri, Dagrofa and Axfood.

LEADING PLAYERS IN MSC LABELLED SMALL PELAGICS

These three companies stand out in the Nordic small pelagics market, helping to maintain and expand the availability of MSC labelled products across the region.

SUOMEN SILLIKONTTORI OY

Founded in 2015 and the only one of its kind in Finland, Suomen Sillikonttori Oy was founded in 2019 and operates in the heart of Finland's herring tradition – the historic herring port of Röölä in Rymättylä.

Led by herring-processing expert Matti Ruuska, who has worked in the industry since 1977, Sillikonttori is committed to bringing high-quality, traditionally crafted herring products to the market, using only the best sustainably caught MSC certified raw material.

With its 100% MSC commitment, nearly 50 herring and Baltic herring products both under its own brand and private label, and over 15 % annual market growth, Sillikonttori has proven to be a key player in sustainable herring on the Finnish market.

BEYOND FROZEN: HOW THE LABEL COVERAGE ACROSS CATEGORIES IS EVOLVING

Nordic MSC certified sales grew strongly in 2025/26, with growth concentrated in only a few categories. The 'canned' category visibly drives Nordic growth and 'frozen' remains the largest category, however we can see growth in the convenience formats and pet food.

Canned/Preserved is the main driver of Nordic growth. The category grew by approximately 29% year on year and now represents around 28% of total Nordic volume. It accounts for most of the overall increase versus 2024/25 and has also grown significantly compared to 2022/23. In Denmark, canned is the largest category, and in Finland it has reached this year the same volume as frozen.

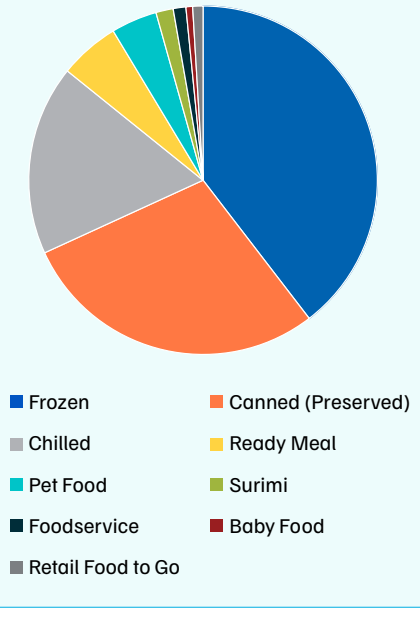
Frozen remains the largest category, but growth has levelled off. It represents around 39% of Nordic volume and is broadly stable year on year.

Chilled shows signs of recovery, although performance differs by market. Nordic 'chilled' volumes (i.e. MAP-packed fish fillets, shrimp in brine and mayonnaise) grew modestly versus last year, supported by positive development in Sweden and Norway. However, the category remains below 2022/23 levels.

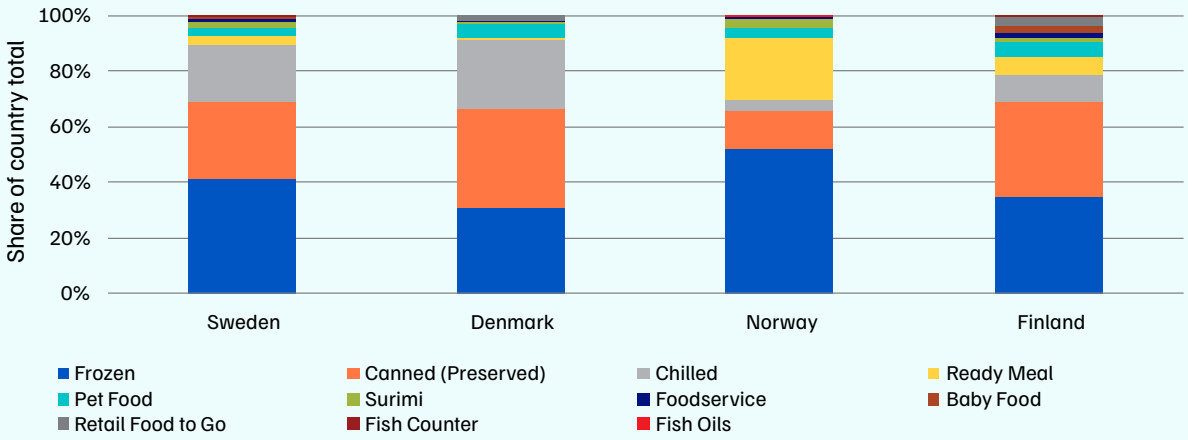
Convenience – individual ready-to-eat grows, while multi-serve packaging decline.

Retail Food to Go such as salads, sushi boxes and wraps delivered strong year-on-year growth for MSC labelled products. At the same time, **ready meals** decline further and remain materially below 2022/23 levels. Finland is the only country in the Nordics where volumes for both food to go and ready meals increase. The difference between these two categories is that ready-to-eat meals are individual packs not requiring heating while ready meals products are of larger size and need to be heated before serving. This development is consistent with wider market trends towards convenience and affordable alternatives to eating out, suggesting that grocery retailers may increasingly be competing for meals traditionally served by restaurants and takeaway.

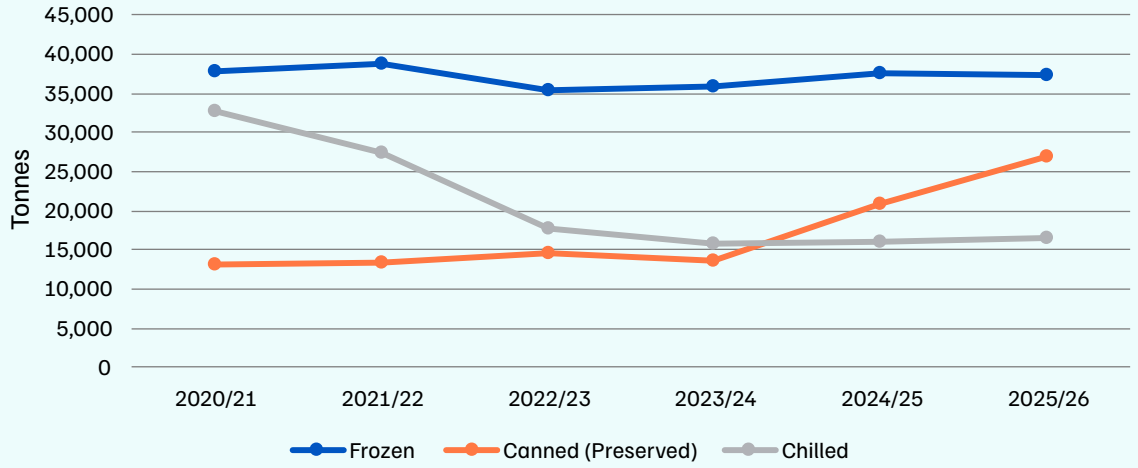
CATEGORY DISTRIBUTION 2025/26



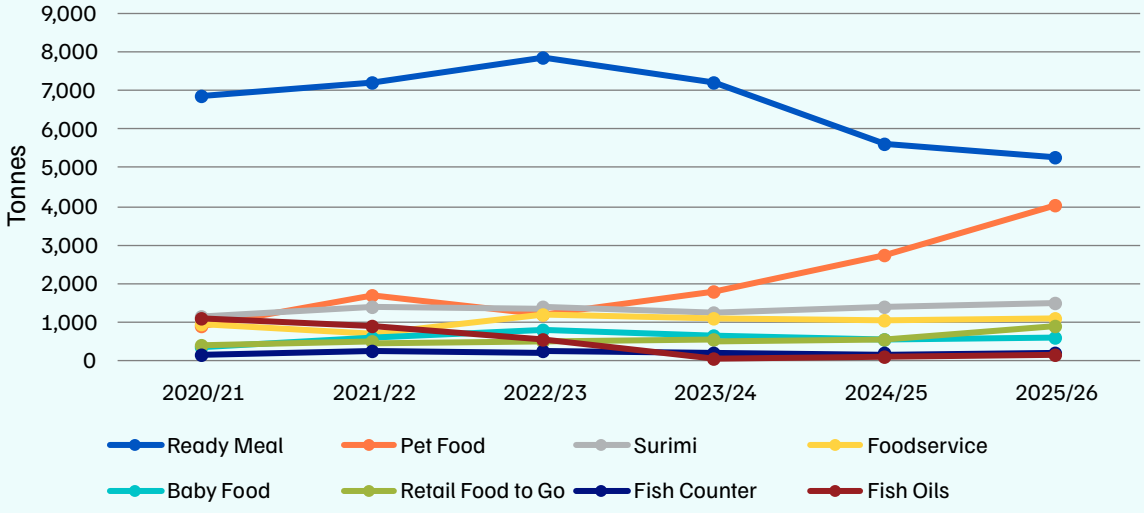
DISTRIBUTION OF CATEGORIES BY COUNTRY 2025/26



NORDIC HIGH VOLUME TRADITIONAL CATEGORIES



NORDIC DEVELOPING CATEGORIES



PET FOOD EMERGES

Pet food has become one of the fastest-growing categories for MSC labelled seafood in the Nordic market with volumes reaching more than 4,000 metric tonnes in 2025/26, an increase of almost 50% year-on-year, and more than four times the level recorded in 2020/21. The number of products has also increased substantially, from 105 to 163 over the same period.

The rapid growth of MSC labelled pet food demonstrates how Nordic retailers are putting their sustainability commitments into practice, applying responsible sourcing policies across an increasingly broad range of products and categories.

Growth is broad-based across the region, with particularly strong development in Finland (+72%), followed by Sweden (+47%), Denmark (+45%) and Norway (+26%) in 2025/26 compared with 2024/25. While pet food still represents only around 4% of Nordic certified volume, its sustained growth across several markets suggests that it is becoming an increasingly meaningful part of the portfolio rather than remaining a niche category.

Mixed-species products dominate, accounting for around two-thirds of pet food volume. However, salmon and tuna are becoming increasingly important, showing strong growth in 2025/26. Mars, including pet food brands such as SHEBA®, has contributed to the growth of MSC-labelled pet food products in the Nordic market. MSC-labelled volumes associated with Mars have increased more than fivefold since 2020/21 and grew by approximately 55% in the latest year. This translated into almost double the number of MSC-labelled products on shelves over the past five years.

4,000+ TONES
MSC labelled pet food volume in 2025/26

+50%
year-on-year growth

163 PRODUCTS
up from 105 in 2020/21

~4%
of Nordic labelled volume

4x
the 2020/21 level

FRESH FISH COUNTERS: THE FACE OF INSTORE SUSTAINABILITY

The Nordic market for MSC and ASC certified fresh fish counters consists of approximately 200 locations across Finland and Sweden. Finland accounts for the majority of the locations, with over 140 fish counters, while Sweden has less than half of that. Presently, Denmark and Norway do not have any certified fresh seafood counters.

In Finland, certified fish counters are operated by the two largest retailers, K-Group and S-group. In Sweden, certified counters are operated by Hemköp and ICA. Across both countries, certified counters are primarily located in larger supermarkets and hypermarkets, with the highest concentration in major urban areas. In Finland, this is the Helsinki metropolitan area, Tampere, Turku and Oulu. Rovaniemi is currently the northernmost city in Finland, and at the same time in the world, with a certified fish counter. In Sweden, certified counters are concentrated around main urban areas such as Stockholm and Malmö.
The northernmost city with a certified fish counter in Sweden is Hudiksvall.

MSC CERTIFIED FISH-COUNTER STORES

191 stores:

Sweden - 48

Finland - 143

- Hemköp 35
- ICA 13
- S-group 75
- K-group 68

CASE STUDY: K-GROUP

K-group started a pilot fish counter certification project in 2019 with five volunteer K-Supermarkets in Helsinki: Postitalo, Fortuna, Hertta, Redi and Tripla.

As independently lead stores this meant creating new structures jointly with a central Kesko structure. This meant handbook creation, training development and agreeing reporting structures. These five pilot stores achieved certification in October 2019 which meant that the stores could sell MSC and ASC labelled fish and shellfish unpackaged at the fresh counter, provided that the required traceability and handling procedures were followed as outlined by MSC's Chain of Custody Standard.

Following the successful pilot, certification was opened to all volunteer store and today more than 65 K-group stores have a certified fish counter.

"The certified fish counters give our customers a window to our sustainable fish strategy. Our fish counter staff is at the front of this which means that giving them sufficient information is key – hence we worked hard with MSC to develop an online training module to support them. What came as a positive learning was that the increased visibility for sustainable seafood increased sales for ecolabelled fish throughout the store in all categories. It proves that if we provide our customers the information they need, they are keen to make a sustainable choice in store."

Anna Blässar
Sustainability Manager, Kesko Oyj

SPOTLIGHT ON SWEDEN

Sweden continues to stand out as the largest Nordic market for MSC labelled seafood, with sales reaching 46,123 tonnes in 2025/26 – close to half of the total Nordic volume. Despite declining overall seafood consumption, MSC labelled seafood has continued to grow, with volumes up 15% compared with 2024/25. Strong commitments from key partners on herring, kaviar and whitefish have helped underpin growth in the Swedish market. Herring has been a particularly important driver, as the shift from Atlanto-Scandian (AS) herring to MSC certified North Sea herring accelerated during the year. Lidl and IKEA have led this transition for several years, offering MSC certified herring products while much of the industry continued to source non-certified AS herring. All major retailers have now banned AS herring caught before April 2025, and several key players have moved to MSC certified sourcing.

Market leader Abba began labelling its MSC certified herring products in 2026, recording 71% year-on-year growth. Klädesholmen, ICA and Axfood had already introduced the MSC label on their herring jars during 2025/26, broadening the availability of certified products.

Among the Swedish retailers we see mostly a strong growth. Axfood shows the strongest development, followed by ICA and Coop.

Among the top five independent brands, Kalles stands out with a remarkable 718% year-on-year increase. The growth follows Abba's return to MSC labelling on Kalles Kaviar, made possible by the return of Northeast Arctic cod to the MSC programme. A remarkable brand development further explored in detail in the Whitefish section. The pet food brand Sheba, owned by Mars, is a newcomer in the top five and has delivered substantial growth of 57%. Other established brands such as Findus and Royal Greenland remain important volume contributors. Another brand that stands out is the in-store sushi chain Kelly Deli with 60 products and growth of more than 1,000% in just one year.

THE SWEDISH ROADMAP FOR A SUSTAINABLE FOOD SUPPLY CHAIN

Sweden also stands out through a highly coordinated industry agenda that is helping to drive change across the full seafood market. WWF's initiative, The Swedish Roadmap for a Sustainable Food Supply Chain, brings together 14 of Sweden's largest retailers and food brands around eight goal areas for the food supply chain towards 2030. Its joint seafood goal is that 100% of seafood should be MSC- or ASC-certified, KRAV-labelled or green-listed in the WWF Fish Guide by 2030. Herring is one clear example of this market-wide shift, where long-standing commitments from players such as Lidl and IKEA, combined with the recent retail move back into MSC certified sourcing, show how the roadmap can help turn shared ambition into category-level change. Together, this makes Sweden a strong driving force for certified seafood sourcing.

SWEDEN - MSC MARKET SNAPSHOT

How the Swedish MSC labelled seafood market is changing

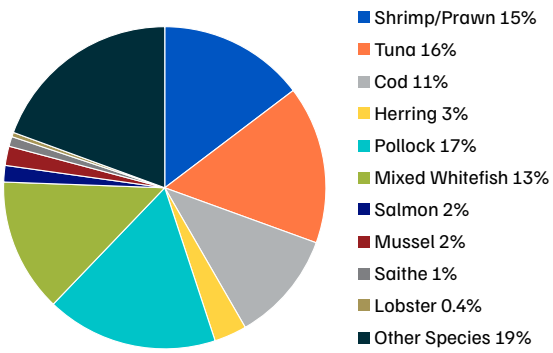
46,123
METRIC TONNES
MSC labelled seafood sold in 2025/26

+15%
compared with last year

FROZEN
top category

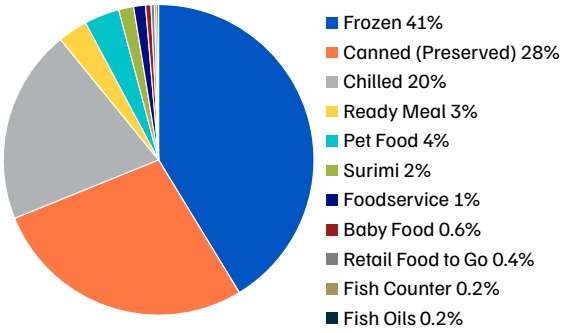
MSC SPECIES MIX BY VOLUME

2025/26



PRODUCT CATEGORY MIX BY VOLUME

2025/26



GROWTH STORY: MIXED WHITEFISH ON THE RISE

+242%
compared with last year

Sweden remains the largest Nordic MSC market.

MARKET SHIFTS

Herring sourcing shifted back toward MSC certified North Sea herring.

A coordinated industry roadmap is helping drive certified sourcing.

BRANDS & RETAILERS ON THE MOVE

AXFOOD	COOP	ICA
+26%	+13%	+10%

Retail private label brands:
MSC labelled volume growth, 2025/26 vs 2024/25

KALLES	ABBA	SHEBA
+718%	+71%	+57%

Top 3 brands:
MSC labelled volume growth, 2025/26 vs 2024/25

SPOTLIGHT ON FINLAND

Finland has been bucking the trend on the Nordic markets with consistent growth in MSC sales through the recent years to hit an all-time highest volume of 13,922 metric tonnes in 2025/26. With overall growth of 7% year-on-year and 38% compared to 22/23, Finland has shown to be the quickest growing market in the Nordics.

With great commitments from key partners on tuna, herring, and whitefish, this is not a surprise. Tuna has been the runaway hero in species with over 286% growth in volume since financial year 2020/21 – and the category is expected to continue to expand with recent 100% MSC tuna commitments from Saarioinen in tuna ready meals and Kesko in all its private label tinned tuna.

The retail sector is leading the top brand volumes in Finland. The Kesko partnership continues to be the strongest in the market with a significant lead in market share and a steady 20% growth year on year in K-Group brands combined. Ready meals are also moving into the top 10 brand space with Snellman Kokkikartano leading the way and more traditional brands Atria and Saarioinen following – both showing some of the largest growths in volume with both doubling their volume year on year.

Out of independent brands, Findus remains the clear leader. This also makes it the runaway leading brand in the whitefish category with over a quarter of the market volume. An early mover in the sustainable fish space, Findus' wild-caught fish products in Finland have all been MSC certified already since 2019.

Finland also stands out in the herring category where, unlike other Nordic countries, some of the key partners stood their ground in sourcing MSC certified herring after Atlanto-Scandian herring lost its certificate in 2020. Finland's only domestic herring processor Suomen Sillikonttori has been 100% MSC certified since the start of its operations in 2015.

FINLAND - MSC MARKET SNAPSHOT

How the Finnish MSC labelled seafood market is changing

13,922 METRIC TONNES

MSC labelled seafood sold in 2025/26

+7%

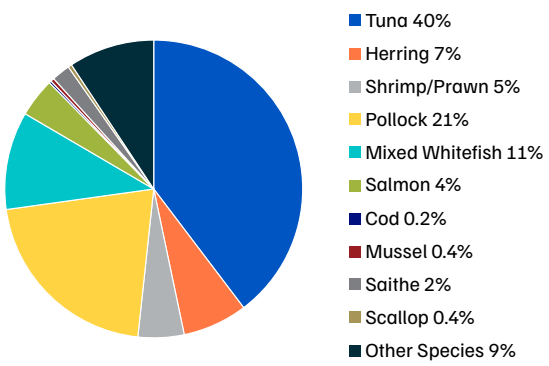
compared with last year

FROZEN & CANNED

top categories

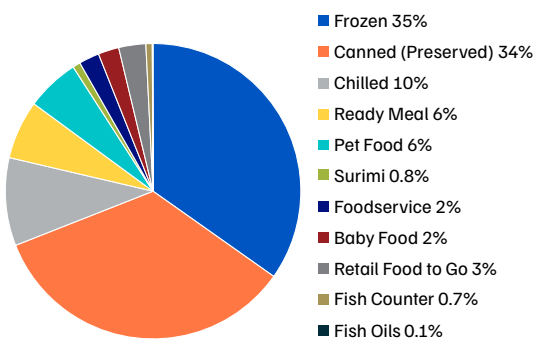
MSC SPECIES MIX BY VOLUME

2025/26



PRODUCT CATEGORY MIX BY VOLUME

2025/26



GROWTH STORY: BROAD-BASED DEVELOPMENT

Tuna	Pollock	Wild salmon
+18%	+23%	+32%

Finland is the fastest-growing Nordic MSC market.

CATEGORY MOMENTUM

Pet food **+72%**

Retail food to go **+75%**

BRANDS & RETAILERS ON THE MOVE

K-GROUP	MARS	FINDUS	ATRIA
+23%	+508%	+26%	+105%

MSC growth 2025/26 vs 2024/25

SPOTLIGHT ON NORWAY

Norway has a distinctive profile within the Nordic MSC market. MSC labelled volume reached approximately 13,100 tonnes in 2025/26, with moderate growth compared with the previous year. Norway remains the most whitefish-oriented of the Nordic MSC markets, with pollock alone accounting for close to half of labelled volume. Cod also remains important, although volumes have largely stabilized following several years of decline. This whitefish dominance gives Norway a very different profile from Finland, despite the two markets having similar total MSC labelled volumes.

At the same time, growth is increasingly coming from other parts of the portfolio. Tuna continued to expand in 2025/26, increasing by around 9% year-on-year, while saithe and several smaller species recorded strong percentage increases from lower bases. The prawn category also remained comparatively resilient, flat MSC labelled volumes in 2025/26. Beyond traditional seafood categories, MSC labelled pet food grew by approximately 26%, further broadening the Norwegian MSC portfolio.

Several established brands play an important role in bringing MSC labelled seafood to Norwegian consumers. In no particular order, Rema 1000, Findus, Coop and Mars with Sheba as their brands are among the larger brands represented in the data, and all recorded growth in 2025/26. MSC labelled volumes associated with Rema 1000 had a growth on 3%, Findus increased by around 6%, Coop by around 10% and Mars by approximately 36%. Their different portfolios also illustrate the breadth of the Norwegian market, from traditional frozen whitefish to newer growth areas such as pet food.

FROM NORWAY AND ROADMAP FOR SUSTAINABLE AQUATIC FOOD SYSTEMS

At the same time, sustainability and provenance are receiving greater attention. The extension of the Nyt Norge origin label to seafood and the Norwegian Government's new Roadmap for Sustainable Aquatic Food Systems both put greater emphasis on how seafood is sourced and communicated to consumers. For MSC, this creates an interesting market dynamic: origin and independently verified sustainability can act as complementary signals in a market where consumers are increasingly confronted with higher prices and changing seafood choices.

NORWAY - MSC MARKET SNAPSHOT

How the Norwegian MSC labelled seafood market is changing

13,100 METRIC TONNES

MSC labelled seafood sold in 2025/26

+5%

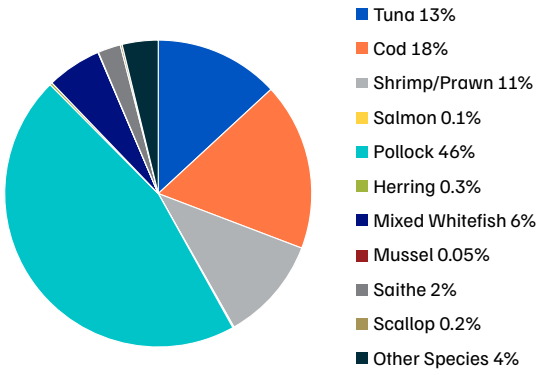
compared with last year

FROZEN

top category

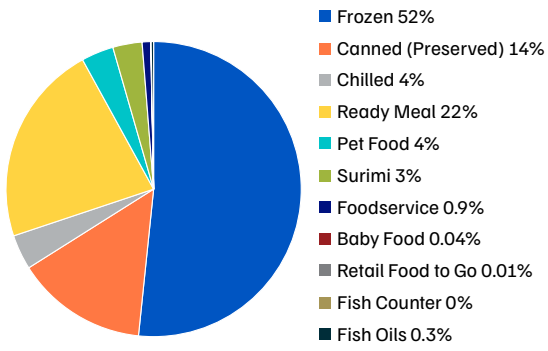
MSC SPECIES MIX BY VOLUME

2025/26



PRODUCT CATEGORY MIX BY VOLUME

2025/26



GROWTH STORY: WHITEFISH LEADS

Pollock	Saithe	Tuna
+6%	+41%	+9%

Pollock alone accounts for close to half of labelled volume.

CATEGORY MOMENTUM

Chilled **+34%**

Fish oils **+50%**

BRANDS & RETAILERS ON THE MOVE

COOP	REMA 1000	FINDUS	MARS
+10%	+3%	+6%	+36%

MSC growth 2025/26 vs 2024/25

SPOTLIGHT ON DENMARK

Sales of MSC labelled seafood in Denmark has shifted substantially during the last five years, with key market players showing willingness to adapt in response to market challenges. 21,550 metric tonnes of MSC-labelled products were sold in Denmark in the 2025/26 financial year, a modest increase of 4% year-on-year as well as compared to five years ago. But the raw numbers hide a substantial change in the market.

Volumes of MSC labelled tuna have seen tremendous growth in recent years, with a growth of 460% since 2021. MSC labelled canned tuna used to be a premium product, but today almost all canned tuna in the Danish retail space carries the blue label. Today almost a third of the volume of MSC labelled products sold in Denmark are tuna products.

Sales volumes of whitefish products have also seen a steady growth, primarily driven by low cost, frozen fish products containing a mix of whitefish species. However, a large volume has been saithe and due to the suspension of the MSC certification of the saithe fishery in the North Sea in 2025, some of these products have lost the MSC label.

Coop is the retailer that has had the highest growth in volume of MSC labelled products in the last year. Coop has also taken the initiative to change the sourcing of its own brand range of marinated herring products, away from the non-certified Atlanto Scandian herring to the MSC certified North Sea herring.

REMA 1000 is both the leading retailer, and its private label is the leading brand in terms of sales volume of MSC labelled products sold in Denmark. Despite the loss of MSC labelled saithe products, the strong commitment from REMA 1000 continues.

The ongoing problems with a lack of quota sharing agreements for Atlantic mackerel has also cause a shift in the market, with MSC certified Chilean jack mackerel hitting the shelves in the traditional cans with tomato sauce. Canned mackerel producer Sæby Fiskeindustri has launched an MSC labelled range of jack mackerel products, and retailer Dagrofa has introduced jack mackerel under its First Price private label.

DENMARK - MSC MARKET SNAPSHOT

How the Danish MSC certified seafood market is changing

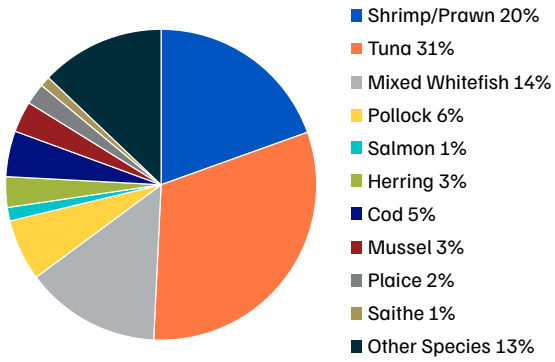
21,550
METRIC TONNES
MSC certified seafood sold in 2025/26

+4%
compared with last year

CANNED
top category

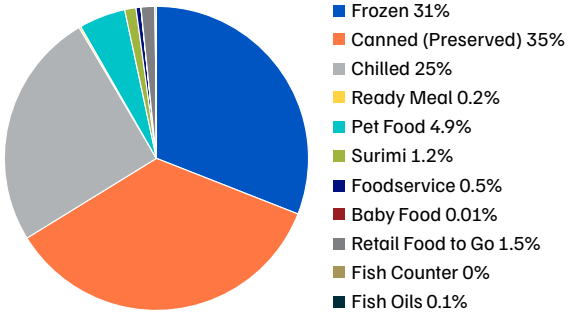
MSC SPECIES MIX BY VOLUME

2025/26



PRODUCT CATEGORY MIX BY VOLUME

2025/26



GROWTH STORY: TUNA ON THE RISE

+29%
compared with last year

+460%
since 2021

1/3
Almost one-third of Danish MSC volume is now tuna

MARKET SHIFTS

Whitefish grew steadily, driven by low-cost frozen products

MSC certified Chilean jack mackerel has entered traditional canned formats.

BRANDS & RETAILERS ON THE MOVE

COOP
highest retailer growth

REMA 1000
leading retailer and private label

SÆBY FISKEINDUSTRI
launched MSC certified jack mackerel

DAGROFA
launched MSC certified jack mackerel in their private label

ROLE OF SUPPLIERS

The over 2,000 MSC labelled products sold in the region are supplied by 279 license holders. The companies that MSC call 'license holders' operate under a range of different business models – some of them produce MSC labelled products under their own consumer brands and others primarily manufacture products for retailers and third-party brands, while many combine branded and private-label production. License holders registered in the four Nordic countries account for nearly half of the region's total reported volume, Sweden and Denmark representing the largest shares at 49%. However, the location of a license holder does not necessarily reflect where its products are manufactured. Many partners operate major production facilities outside of the Nordic countries, for example the Danish company Espersen has significant processing operations located in Poland.

The following section focuses on license holders that manufacture products primarily for third-party brands, especially within retailers' private-label ranges. These companies may be less visible to consumers than brand owners, but they play a significant role in making MSC labelled seafood available across the Nordic market.

PRINCES GROUP

Princes Foods BV is a Netherlands-based producer and a leading supplier of MSC labelled canned tuna. It supplies 16 brands across the Nordics, with the largest volumes sold in Sweden. In 2025/26, the reported MSC volume increased by more than 13% year on year.

MARENOR SEAFOOD

Marenor AB is one of the largest MSC license holders in Sweden, supplying mainly the domestic market and working with more than ten brands. Its broad portfolio includes herring, hake, Alaska pollock, cod and saithe across marinated, preserved, breaded, frozen and chilled products, as well as fish roe and caviar-style spreads. Its reported MSC volume has increased by 21% in 2025/26

Lerøy Seafood Group is one of Europe's largest vertically integrated seafood companies, covering wild catch, aquaculture, processing, product development, sales and distribution. The group specializes in cod, haddock, saithe and cold-water prawn products and operates processing facilities and sales offices across Scandinavia. Most products are supplied in frozen or chilled formats. Its reported MSC labelled volume increased by 5% in 2025/26.

NIRSA
NEGOCIOS INDUSTRIALES REAL S.A.

NIRSA is an Ecuadorian seafood company with its own fishing fleet and processing facilities in Posorja. Following the certification of bigeye tuna in 2025, NIRSA reports that 100% of the tuna catch from its own fleet – skipjack, yellowfin and bigeye – is now MSC certified.

In 2025/26, its reported labelled MSC volume sold in the Nordic countries increased by 52%, an exceptional achievement compared with NIRSA's performance in other regions where it supplies MSC labelled products. All products in the Nordic markets are canned tuna.

ESPERSEN

Espersen is a Danish, foundation-owned seafood company and one of Europe's leading processors of frozen whitefish products. The company is specialised in cod, Alaska pollock, haddock, saithe and hoki, producing fillets, portions, fish fingers, breaded products and ready meals. More than half of Espersen's reported MSC labelled production in the Nordics is supplied for third-party brands, including major Nordic retailers. Espersen also has its own consumer brand called Rahbek.

Örneborgs Delikatesser is a Swedish producer specializing in chilled seafood salads, sauces, spreads and mayonnaise-based products. The company operates a certified production facility in Gothenburg and focuses strongly on developing private-label products, recipes, and packaging solutions for Scandinavian and European customers. Almost 90% of its reported MSC labelled volume is supplied for third-party brands.

Plungės Kooperatinė Prekyba is a Lithuanian company belonging to Vičiūnai Group and one of the group's main production facilities in Plungė. It specialises primarily in chilled and frozen surimi products, including crab sticks, crab meat, bites, and other formed products. The company produces more than 350 MSC labelled products annually for markets worldwide. Within the Nordic MSC program, its private-label volume increased by 25.5% in 2025/26.

"Although supply partners are rarely visible on the front of the pack, they play a crucial role in making MSC labelled seafood widely available across the Nordic countries. Through their expertise, certified supply chains and cooperation with multiple retailers and brands, they can introduce responsible sourcing across entire product categories and deliver a significant impact at scale."

Anna Dębicka
Program Director,
Baltic and Central Europe,
Marine Stewardship Council

CONSUMER INSIGHTS: TRENDS IN SUSTAINABLE SEAFOOD CONSUMPTION

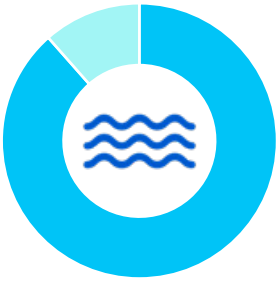
Seafood remains an important part of Nordic diets and is highly appreciated among consumers, although consumption patterns vary. Nordic consumers are concerned about ocean health, with pollution and overfishing standing out as a main threat and in all Nordic countries most of the consumers would like to hear more from companies about the sustainability of their seafood products. For all countries taste comes before price and sustainably sourced products.

Support for ecolabels is strong across the region, and MSC is increasingly associated with trust, ocean protection and sustainable fishing, even where awareness and understanding are lower.

ATTITUDES TO OCEAN SUSTAINABILITY

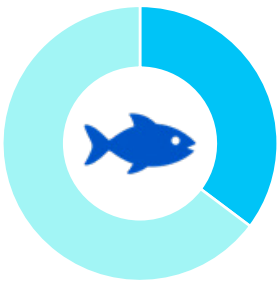
Nordic consumers are highly concerned about ocean health, the future availability of seafood and the need for trusted sustainability claims.

FEEL WORRIED ABOUT THE STATE OF THE WORLD'S OCEANS



FI	SE	DK	NO
91%	88%	91%	84%

THINK THEIR FAVOURITE SEAFOOD MAY NOT BE AVAILABLE IN 20 YEARS



FI	SE	DK	NO
32%	37%	39%	33%

BELIEVE SUSTAINABILITY CLAIMS SHOULD BE VERIFIED BY AN INDEPENDENT ORGANISATION

FI	SE	DK	NO
72%	72%	76%	64%

SEAFOOD REMAINS POPULAR ACROSS THE NORDICS

Seafood is widely enjoyed across all four Nordic markets, although the share of consumers eating it at home at least once a week varies considerably by country.

LIKE EATING SEAFOOD

FI	SE	DK	NO
72%	67%	69%	72%

DECLARE EATING SEAFOOD AT HOME AT LEAST WEEKLY

FI	SE	DK	NO
34%	37%	33%	57%

TOP 3 MOTIVATORS OF SEAFOOD PURCHASE

Taste ranks first as a seafood purchase motivator across all Nordic countries, with "safe to eat" consistently ranking second.

FINLAND	SWEDEN	DENMARK	NORWAY
1 Taste	1 Taste	1 Taste	1 Taste
2 Safe to eat	2 Safe to eat	2 Safe to eat	2 Safe to eat
3 Price	3 Good for my health / my family's health	3 Fresh	3 Good for my health / my family's health

TOP 3 BARRIERS TO EATING MORE FISH/SEAFOOD

Price is the biggest barrier in all four Nordic countries, followed by a preference for other protein sources.

FINLAND	SWEDEN	DENMARK	NORWAY
1 Too expensive	1 Too expensive	1 Too expensive	1 Too expensive
2 Preference for other protein	2 Preference for other protein	2 Preference for other protein	2 Preference for other protein
3 I do not like the smell of fish or seafood at home	3 The people I eat with don't like eating seafood	3 The people I eat with don't like eating seafood	3 The people I eat with don't like eating seafood

MSC AWARENESS, UNDERSTANDING AND TRUST

	FINLAND	SWEDEN	DENMARK	NORWAY
AWARENESS Share of the general public who are aware of the MSC label	70%	65%	59%	43%
UNDERSTANDING Share of seafood consumers who understand what the MSC label means	52%	43%	40%	24%
TRUST Share of MSC-aware seafood consumers who trust the MSC label	77%	78%	80%	79%

ATTITUDE TOWARDS ECOLABELS

MORE LIKELY TO PURCHASE A PRODUCT WITH THE MSC LABEL

FI	SE	DK	NO
65%	62%	58%	51%

ECOLABELS ON FISH AND SEAFOOD PRODUCTS RAISE MY TRUST AND CONFIDENCE IN THE BRAND

FI	SE	DK	NO
66%	72%	63%	61%

Our latest consumer survey conducted by Globescan across 23 countries between February and March 2026 surveyed 7,057 people across Finland, Sweden, Denmark and Norway, 2,801 of them seafood consumers.

ABOUT THE MSC

The Marine Stewardship Council (MSC) is a non-profit science-based certification program for environmentally sustainable fishing. The program is based on global best practice, providing trust and transparency to fishery and commercial partners around the world.

GLOBAL REACH AND IMPACT

Currently 789 fisheries globally are engaged in the MSC program representing 19.5% of wild marine catch, with MSC certified products widely available across global markets.

STAKEHOLDER DRIVEN, SCIENCE-BASED STANDARDS

The MSC Fisheries Standard offers a complete view of sustainability – including stock health, ecosystem impacts, and management – based on rigorous research from fisheries and sustainability experts, input from external stakeholders, and led by our internal science and standards team.

LEADING CERTIFICATION FOR COMPLIANCE AND CREDIBILITY

MSC certification meets requirements set by globally recognized organizations, making it a credible indicator for fisheries sustainability for over 25 years.

- **Meeting Global Best Practices:** The MSC is the only global wild capture fisheries certification program that simultaneously meets best practice requirements set by the UN Food and Agriculture Organization and has been independently evaluated against the International Social and Environmental Accreditation and Labelling (ISEAL) Codes of Good Practice.
- **Exceeding Benchmarking:** The MSC meets the Global Sustainable Seafood Initiative's (GSSI) rigorous standards and 63 supplemental indicators, going beyond the benchmark in best practices in fisheries and seafood sustainability.
- **Industry Alignment:** The MSC is a partner of Science Based Targets for Nature (SBTN), an industry standard for sustainability claims and reporting.
- **United Nations Sustainable Development Goals:** The MSC is recognized by the United Nations a key contributor to several SDGs, including SDG2 (no hunger) and SDG 14 (life below water).

MSC CERTIFICATION: TRUSTED BY SHOPPERS, BACKED BY SCIENCE

MSC certified products hold a competitive edge in crowded markets, allowing fisheries, supply chain companies, brands, and retailers who source MSC certified seafood to credibly position themselves as sustainability leaders. The MSC ecolabel provides access to key global markets, strengthens business relationships, minimizes risk to companies, and provides a return on investment.

AS THE LEADING GLOBAL STANDARD FOR SUSTAINABLE WILD FISHERIES, HERE IS WHAT SETS THE MSC APART:

CLEAR SUSTAINABILITY DEFINITION

Requires fisheries to meet minimum scores for target stocks, ecosystem impacts, and management systems, ensuring fisheries are committed to a holistic definition of sustainability that represents global best practice.

STRONG STANDARDS

The MSC fisheries standard is reviewed every five years to ensure it continues to meet best practice and fisheries are required to transition to the newer versions over time, showing a commitment to continued improvement and sustainability.

CHAIN OF CUSTODY

Supply chain businesses handling MSC certified seafood must meet the MSC Chain of Custody standard, which ensures that seafood sold with the MSC blue fish label comes from an MSC certified fishery, combatting issues like mislabelling.

STAKEHOLDER ENGAGEMENT

The MSC program is inclusive and transparent, with multiple opportunities for stakeholder engagement, including during each fishery assessment, overall standard reviews, and in other topics. The MSC also conducts capacity building training to support fisheries in the pre-MSC space.

PROGRAM COSTS

MSC certified fisheries and businesses do not pay anything to MSC for their certification. Brands, restaurants, and retailers pay a royalty fee to use the MSC ecolabel on products sold to consumers. These fees ensure our program continues into the future and that we can offer the on-the-ground expertise our partners need, and help drive consumer demand in key markets around the globe.

FUNDING INNOVATIVE RESEARCH

MSC reinvests 5% of annual royalties from the sale of MSC certified products into research and innovation grants through the MSC Ocean Stewardship Fund, which accepts applications from external researchers and MSC partners.

PRE-CERTIFICATION FISHERIES

The MSC Improvement Program supports fisheries that have opted to make changes necessary to eventually meet the MSC Standard. The program is transparent, time-bound, and independently verified.

MARKET ACCESS

Businesses around the world use the MSC ecolabel and have MSC certification written into their sourcing policies. There are currently more than 22,000 products with the MSC ecolabel on the market worldwide, demonstrating the global reach of our partnerships and access to worldwide markets our partners receive.

PREVENTING GREENWASHING

MSC aligns with the EU Empowering Consumers for the Green Transition Directive criteria to prevent misleading environmental claims by companies, due to its rigorous standards, scientifically backed sustainability metrics, and transparency in the certification process.

CONSUMER RECOGNITION

Highest level of consumer recognition globally among seafood ecolabels – 53% of seafood consumers recall seeing the MSC label, an increase since the previous survey.

STAFF AND RESOURCING

The MSC has over 250 experienced staff across more than 30 countries, giving stakeholders access to skilled experts in their local languages and cultures, and the ability to make connections with fishery and commercial partners worldwide.

METHODOLOGY AND DEFINITIONS

- MSC data used in this report is collected according to the UK financial year: April 1 – March 31. This data is provided to the MSC quarterly, semesterly or annually, by businesses using the MSC ecolabel on products. Total data for a complete financial year are available to licensees after approximately two months processing time.
- The MSC requires that any use of AI is subject to rigorous human review. AI tools were used in this report to assist with language editing and refinement of illustrations. The authors reviewed and approved all AI-assisted content.
- Volume data (weight) is measured in metric tons (t) and is derived from total product weight (NOT fish content).
- "Brand" is an umbrella term referring to businesses, including retailers, seafood companies and restaurant chains, who sell products carrying the MSC label to consumers.
- To preserve confidentiality, the brands are discussed without indicating their relative market ranking.
- Retailers refer only to their private label products (not the entire assortment).
- "Species" refers to species groups rather than individual species (e.g. "Cod" encompasses Atlantic and Pacific cod).
- "Mixed species" refers to products with several types of fish (e.g. fish pie with cod and shrimps).
- "Mixed whitefish" refers to products with several types of whitefish (e.g. pet food with a combination of cod and pollock).
- Prawns and shrimps refers to these species; Northern prawn, Argentine red shrimp, Oregon pink shrimp, Striped shrimp and Brown shrimp.
- Small pelagic refers to these species; Herring, Sardine, Mackerel, Mixed small pelagics, sprat, Anchovy, Smelt, Krill.
- "Category" refers to the product format and store segment in which products are sold.
- "Supplements" refers to concentrated dietary products taken for health benefits, and can include products such as collagen powders and supplement tablets.
- "Foodservice" refers to products sold by restaurants and caterers.
- "Retail food-to-go" are products intended for immediate consumption, with no further preparation or cooking required. Examples include sushi, sandwiches or salads.
- "Ready meal" products are whole meals in a pre-cooked form that only require reheating and include products such as microwave meals, pizzas and pies.

CHECK OTHER MSC REPORTS

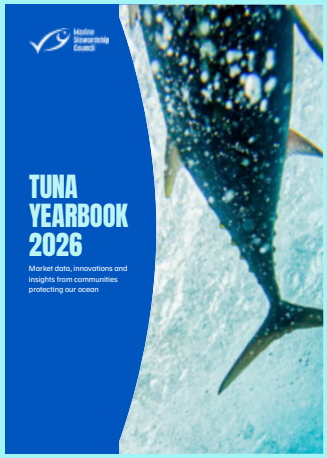
WHITEFISH

msc.org/species/whitefish-yearbook

SHRIMP AND PRAWN

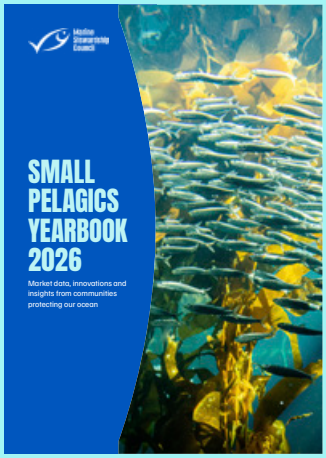
msc.org/species/shrimp-and-prawn-report

TUNA



msc.org/species/tuna/sustainable-tuna-yearbook

SMALL PELAGICS



msc.org/species/small-pelagic-fish/yearbook

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All data in this report is correct as of 1 October 2026, unless otherwise stated.

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