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Whitefish Market Analysis 2025: USA

Market Analysis: US whitefish

WHITEFISH SPECIES REPRESENT SOME OF the largest stocks on the planet, supplying abundant seafood to consumers worldwide. In the US, whitefish is an integral part of fishery production, processing, exports, and consumption. It's critically important to manage whitefish fisheries sustainably, both to maintain a vital source of low-carbon protein and ensure the wider health of ocean ecosystems.

US Whitefish fisheries summary and key impacts/ highlights for improvements

Altogether, the US represents over 35% of global fishery landings by volume of MSC certified whitefish. The BSAI and GOA Alaska pollock fishery is the largest fishery in the US and currently the largest certified fishery in the MSC program. In 2005, it became the 11th fishery to achieve MSC certification and is currently undergoing its fourth reassessment, marking 20 years of engagement with the MSC.

The future is never certain, as stocks are shifting more than ever before due to changing ecosystems and climate change, but MSC certified whitefish fisheries have proven to be resilient, well-managed, and collaborative.

US market analysis of MSC whitefish

The US is the fourth largest market for whitefish in

the world. In the 2024/25 MSC fiscal year, there were 72,576 metric tons of MSC ecolabeled whitefish in the market, representing more than 40% of labeled seafood sales in the US. Alaska pollock makes up the largest volume of MSC certified whitefish, followed by Pacific cod, North Pacific hake, and mixed whitefish. The US market has over 400 MSC labeled whitefish products for sale across multiple categories. The volume of MSC labeled whitefish product sales in the US is driven by the frozen category, accounting for 40% of all MSC whitefish sold. This is followed by foodservice, surimi, pet food, and retail fish counters.

In terms of company leaders, McDonald's continues to dominate the US in whitefish sales volume with their MSC labelled Alaska pollock Filet-O-Fish® menu item, which has consistently held this lead since it became MSC certified and added the ecolabel in the US. At retail, Trans-Ocean has marked its place as the clear leader in MSC certified surimi, and Walmart continues to be a leader with over 8300MT of volume and 19 private label whitefish products.

While inflation, the continuing cost-of-living crisis, and supply chain disruptions continue to impact the industry and consumers, sales of frozen and chilled whitefish have remained resilient. Whitefish continues to play a critical role in the US in terms of both livelihoods, seafood production, and diversity of products for consumers. ●



Market Data: US whitefish

Top five US brands by volume sold

	2025	2024
MCDONALD'S	1	1
TRANSOCEAN	2	4
WALMART	3	2
VAN DE KAMP'S	4	-
MRS PAUL'S	5	-

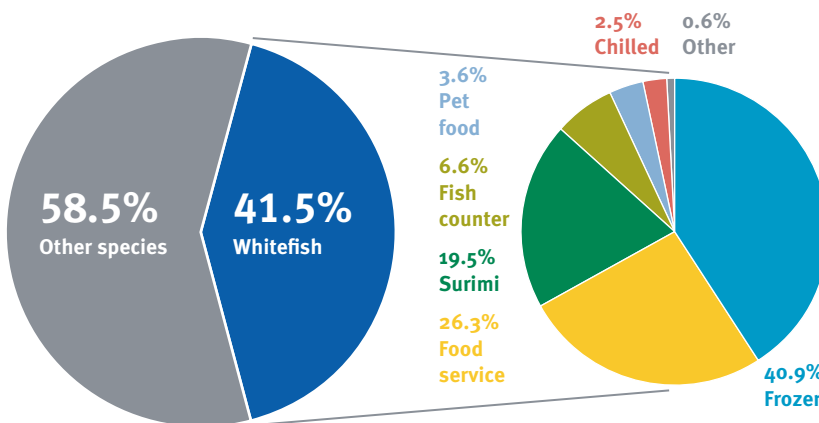
“Whitefish is a delicious and nutritious category of fish - making sure consumers can identify sustainable whitefish is important so that it can seamlessly become part of their regular cooking repertoire and families can reap the essential health benefits.”

Linda Cornish, founder and president, Seafood Nutrition Partnership

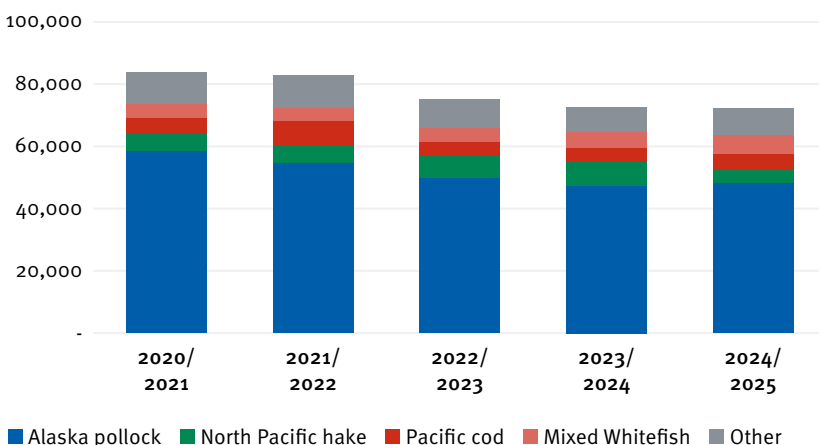
78%
of global whitefish catch is MSC certified

6 million+
metric tonnes of certified whitefish is in the MSC program

Total MSC Labelled Whitefish (metric tonnes): US



MSC labelled whitefish by species - US





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

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MSCbluefish



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All data in this report is correct as of 30 June 2025 unless otherwise stated. Forecast data included in 2024/2025.
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