



U.S. STATE OF THE MARKET 2026

Demonstrating partnerships,
progress, and commitments
to sustainable seafood and
healthy oceans in the U.S.

A blue rectangular sign with rounded corners is placed in a blue plastic crate. The sign features the MSC logo at the top, the website address "www.msc.org" in the middle, and a stylized white fish icon at the bottom. The crate contains two fresh salmon fillets resting on a bed of crushed white ice.

MSC

www.msc.org



INTRODUCTION

THE MSC MARKET REPORTS highlight the growth and development of individual markets within the MSC's global sustainable seafood certification program. This report focuses on MSC-certified products in the United States, examining availability by species and product category and identifying emerging trends. Leading brands and retailers are also profiled, demonstrating how market leadership and competitive dynamics can play an important role in advancing sustainable fishing practices and supporting long-term ocean health.

Over the past year, the U.S. seafood market has continued to expand access to MSC-certified seafood, offering consumers an increasing range of MSC-labeled products. Several major brands and retailers announced or advanced commitments to grow MSC-certified portfolios, with particularly strong momentum in categories such as tuna. These commitments translated into increased product availability on shelf, contributing to record levels of consumer purchases of MSC-certified seafood.

Despite a very challenging year for the industry due to the geopolitical landscape, U.S. businesses continued to demonstrate leadership by using their sourcing decisions to recognize and reward fisheries that have achieved certification, as well as by supporting fisheries working toward meeting the MSC standard. These efforts help strengthen the resilience of seafood supply chains and create new opportunities for businesses to communicate their sustainability commitments to customers.

This report illustrates how the U.S. continues to play a vital role in the global sustainable seafood movement by showcasing progress, partnerships, and innovation, and provides insight into how continued collaboration can drive further growth and support healthy oceans for future generations.

The MSC appreciates the input and feedback of partners and stakeholders. Please reach out to your MSC contact if you have questions or find contact details at the end of this report.



EXECUTIVE SUMMARY

THIS FIRST EDITION OF THE MSC U.S. MARKET REPORT shows the exceptional progress that businesses have made in increasing the amount of certified sustainable seafood products for sale over the last decade. It profiles trends in MSC-labeled product sales, species newly available with the MSC blue fish ecolabel, and new and emerging sectors where there are opportunities to grow the availability of sustainable seafood choices further. Market data analyzed and presented in this report is provided to the MSC by businesses using the ecolabel on products and menus. Key findings:

Sustained growth in MSC-labeled products: The total number of MSC-labeled seafood products in the U.S. market shows consistent year-over-year growth across the reporting period, indicating expanding retailer and brand participation.

Brand participation is widening: Established seafood brands (e.g., Bumble Bee, Mowi, Nestlé, Thai Union) and specialty/niche brands increasingly feature MSC-labeled lines, indicating both mainstream and premium segment engagement.

Category depth increasing within retailers: Not only are more retailers participating, but existing partners are expanding the number of labeled products across multiple species and formats, suggesting maturation rather than one-off adoption.

Core species dominate label use: Cod, pollock, salmon and tuna account for the largest share of labeled products, with salmon and tuna acting as primary drivers of visibility and volume.

Broadening species diversification: Secondary and emerging species (e.g., anchovy, clam, crab, herring, krill, scallop, mixed whitefish) are showing gradual increases, pointing to portfolio diversification.

Shelf-stable and frozen lead product categories: Shelf-stable and frozen seafood consistently represent the highest counts of MSC-labeled products, while refrigerated fresh and ready meals demonstrate steady but smaller growth.

Expansion into adjacent categories: Pet food, supplements, retail food-to-go, and foodservice channels show incremental adoption, signaling label penetration beyond traditional retail grocery formats.

Major retailers as key enablers: ALDI, Kroger, Target, Walmart (including Sam's Club), and Whole Foods Market appear repeatedly among top contributors to labeled product counts, underscoring the importance of national chains for scale.

Rising certified sales volume: Sales are increasing because of consumer demand and increased partner commitments to ecolabeling.

Overall market signal is positive but uneven: While headline growth is strong, adoption varies by species, category, and channel, with shelf-stable/frozen and top species outpacing fresh, ready meals, and lesser-known species—highlighting targeted opportunities for future expansion.

The U.S. market has remained firmly committed to supporting fisheries that are engaged with MSC's program. This is evident in the growing number of products and species available with the MSC blue fish ecolabel profiled in this Market Report. The report also highlights further MSC labeling opportunities and those that are being developed to meet growing consumer demand for sustainably sourced fish and seafood.

REPORT 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.
- Volume data (weight) is measured in metric tons (t) and is derived from total product weight (NOT fish content).
- “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).
- “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.
- “Refrigerated & fresh” refers to products sold in tamper-proof packaging, retail tray pack, or on fresh seafood counters.
- “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.
- “Brand” is an umbrella term referring to businesses, including retailers, seafood companies and restaurant chains, who sell products carrying the MSC label to consumers.



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MARKET OVERVIEW

THE UNITED STATES HAS ALWAYS prided itself as a leader across many areas, and ocean stewardship is no different. After the MSC's founding in 1997, U.S. companies and fisheries were early adopters. The MSC has worked with partners in the United States since 1999, when Whole Foods Market signed on as the first U.S. retailer to make certified sustainable seafood available to its customers. Shortly after in 2000, the Alaska Salmon fishery became one of the first and, at the time, largest fisheries to become certified to MSC's Fishery Standard. The momentum has continued to grow since.

In the last ten years, the number of MSC-labeled products on the U.S. market has increased 201% to over 1300 unique products. Over that same time period, volumes of MSC-labeled products sold increased at a whopping 278% to over 170,000 metric tons per year. Over the last five years, or since 2019/20, there has been a 30% increase in the number of MSC-labeled seafood products available to U.S. consumers, growing from 1,154 in 2019/20 to 1,502 in 2024/25. This modest increase in diversity of sustainable seafood options available has consequently led to an increase in volume of sales of

MSC-certified seafood sold in the U.S. by 89%, or by an additional 80,000 metric tons sold annually since 2019/20.

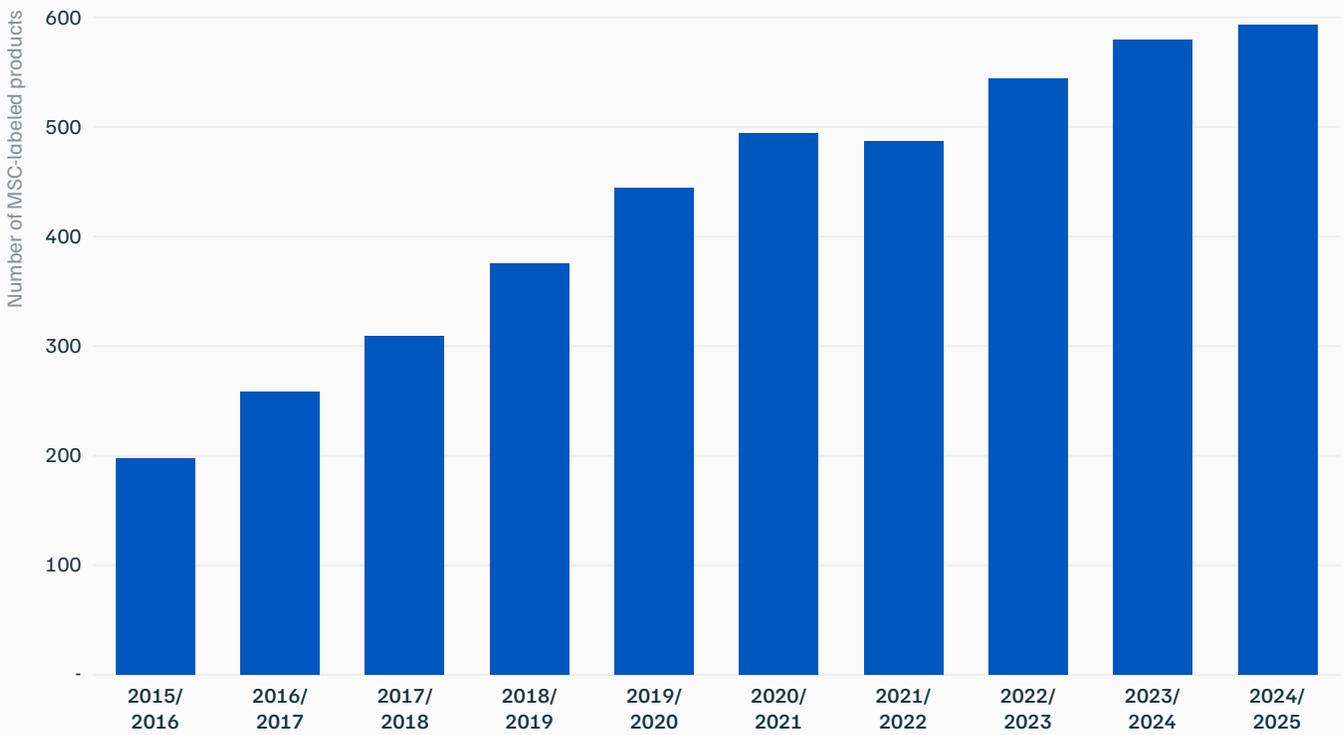
Shelf-stable tuna has emerged as the key driver of this growth. Over the same timeframe, the number of MSC-certified shelf-stable tuna products nearly tripled, increasing from 57 to 302 items. This expansion translated into substantial volume gains, with MSC-certified shelf-stable tuna volumes rising from 729 metric tons in 2015/16 to 56,145 metric tons in 2024/25—an increase of more than 55,000 metric tons in just nine years.

Bumble Bee Seafood played a pivotal role in accelerating this growth by introducing a portfolio of 56 MSC certified tuna items followed by Safe Catch, Chicken of the Sea, and a handful of other national tuna brands.

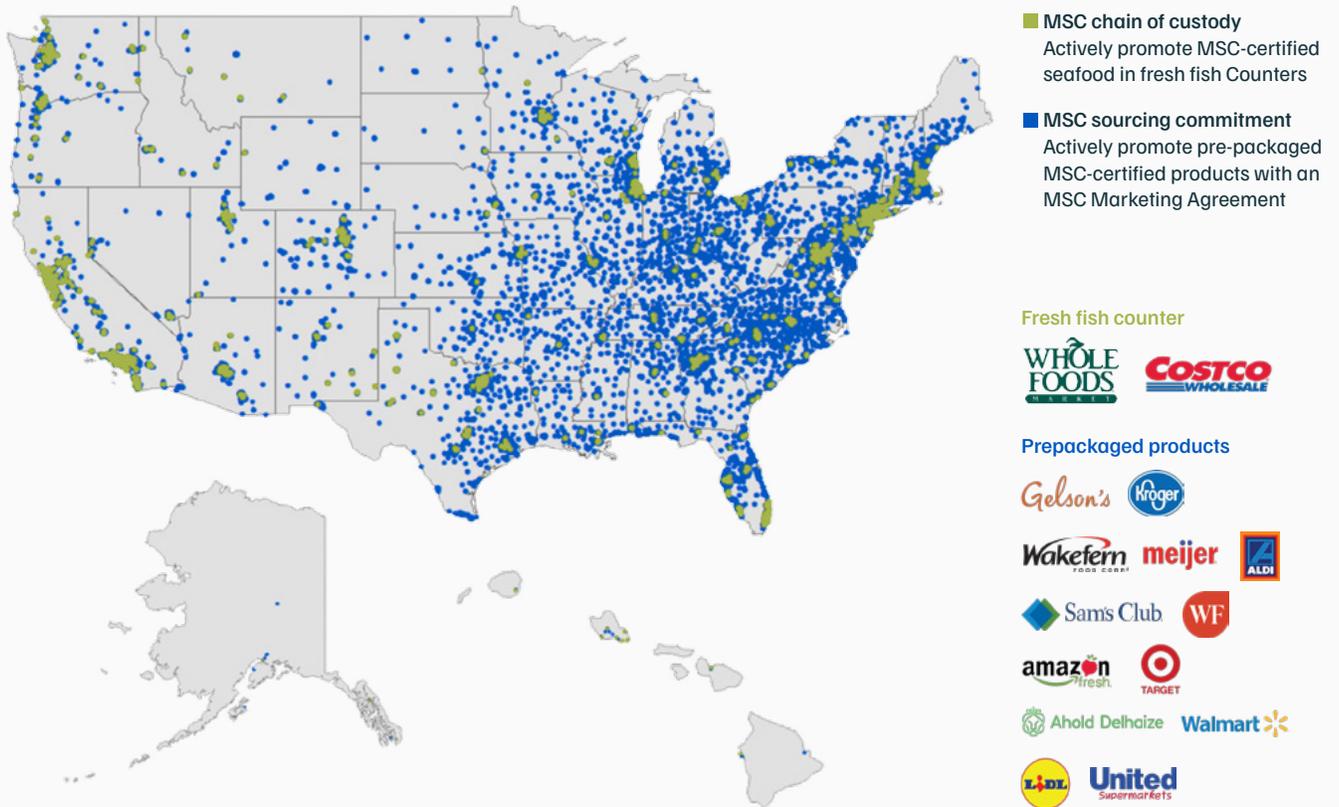
Further, Walmart's decision to source 100% MSC-certified tuna for its private-label shelf-stable offerings drove a dramatic increase in certified volume, underscoring the impact that large-scale sourcing commitments can have on accelerating market transformation toward sustainable seafood.



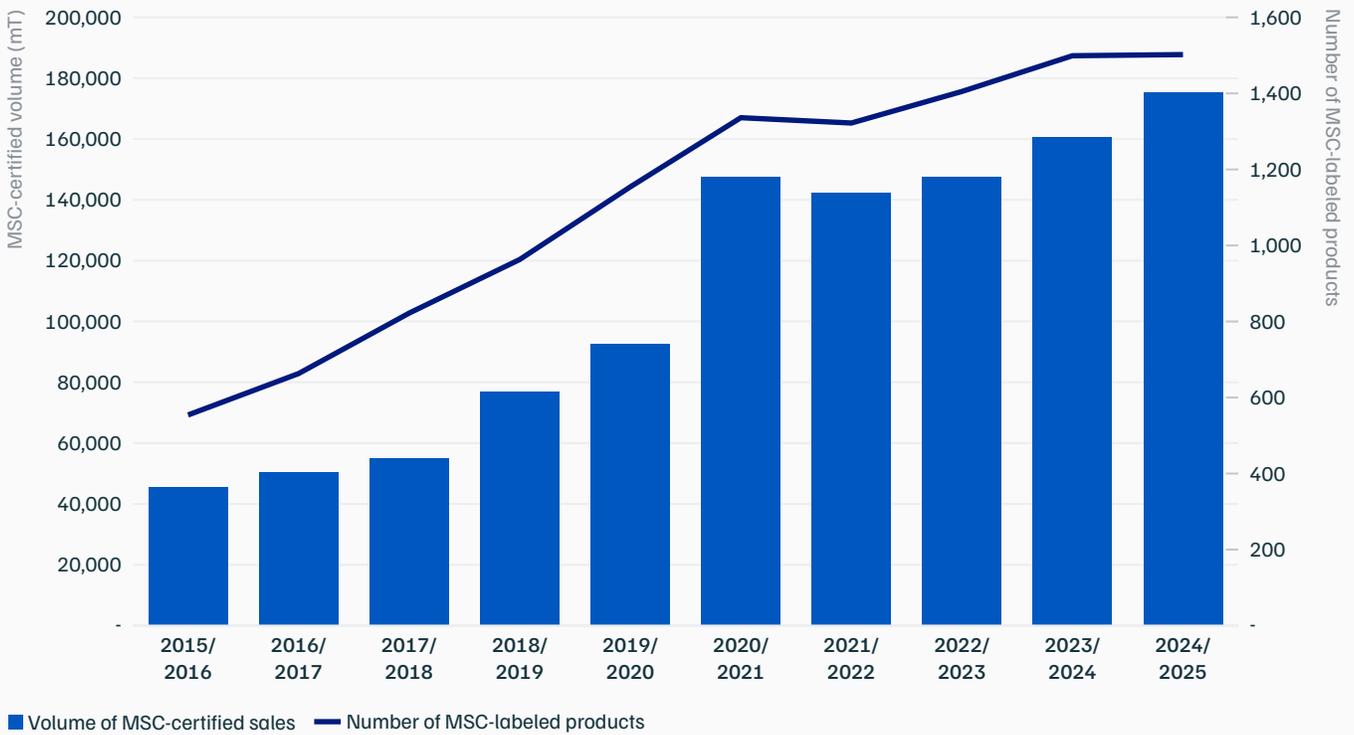
MSC-certified Private Label Growth in the U.S. over the last 10 years



MSC retail partners



Volume of MSC-certified sales and number of MSC-labeled products



MSC certification is best known for its fit in the retail landscape. In the United States, there are two retailers with MSC Chain of Custody certification for their fresh fish counters – Costco and Whole Foods Market – and 13 with Marketing Agreements, committed to sourcing and promoting MSC-certified offerings to their customers.

Beyond U.S. retailers that formally partner with the MSC, many more have commitments to sourcing MSC-certified products or have included MSC certification on their private label brands. Many of these commitments span multiple categories of the store including shelf-stable, frozen, refrigerated, and fresh, but may also include supplements and pet products. Major U.S. retailer commitments to sustainable seafood have significantly

contributed to the growing demand and awareness for sustainability in the U.S. market, not just as a best-case business practice but by meeting expectations of U.S. seafood consumers today. Over the last decade, use of the MSC label on retail private label products has increased by 328%, representing just over 42% of MSC labeled products in the U.S. market.

In order by number of products, Walmart, Whole Foods Market, ALDI, Meijer, and LIDL are the top five retailers in the U.S. for private label, followed by H-E-B, Ahold Delhaize, Target, Kroger, and Costco. MSC-certified private label in regional and national stores helps keep sustainable seafood offerings accessible to U.S. consumers. ●



LABEL COVERAGE BY SPECIES

SINCE 2019/20, THERE HAS BEEN an increase in MSC-labeled product offerings across a variety of seafood species in the U.S. market.

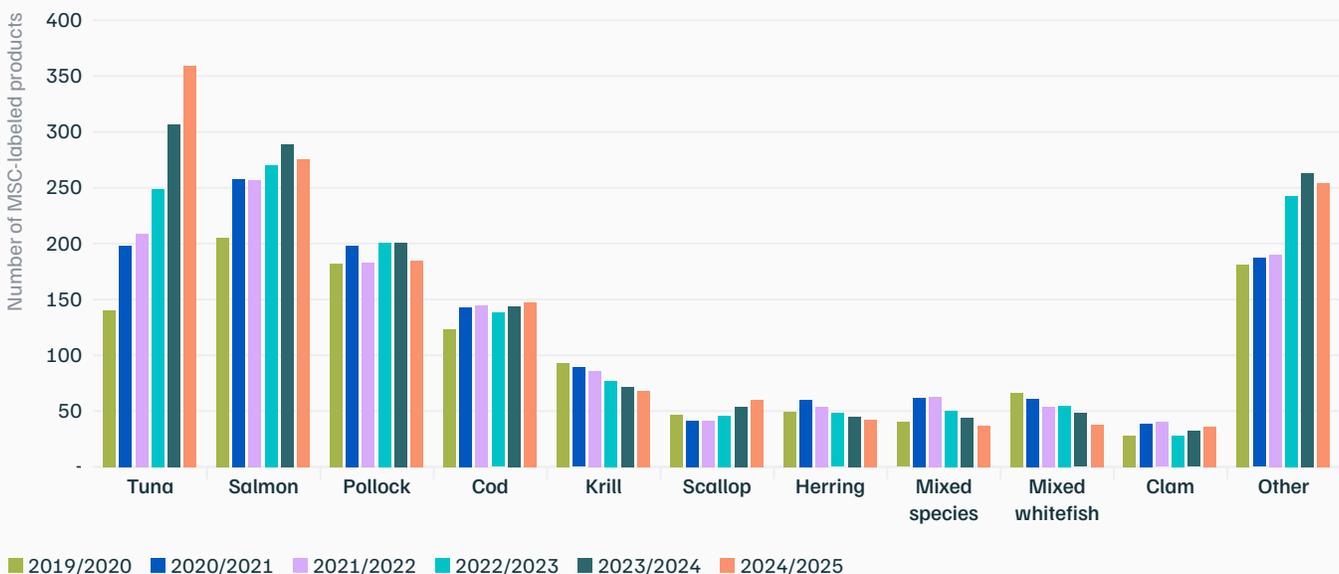
MSC-certified tuna is the fastest-growing species group by number of products in the U.S, with consistent year-over-year growth. In 2019/20, the tuna category included 140 products, and in 2024/25 there were over 350, overtaking both salmon and pollock to become the species with the largest range of MSC-labeled products and accounting for nearly a quarter of all MSC-labeled products in the country. The volume of MSC-certified tuna sold has also grown a considerable 1100% since 2019/20 from less than 5,000t in 2019/20 to nearly 60,000t in 2024/25.

A number of other species have seen increases in their MSC-labeled range over the past six years, with the most significant increases being salmon, cod and scallops, growing by 71, 24 and 13 products, respectively. This increase in labeled products has seen mixed translation

into volume of MSC-certified sales, with salmon and cod seeing increases of ~4,500t and ~2,000t, respectively, while scallops' volumes of sale have declined by ~250t since 2019/20.

Although U.S. consumers typically favor a limited number of species, there has been an increase in certified products in the U.S. market aimed at expanding consumer palettes. 'Other' is comprised of 26 additional species groups that made up the category in 2024/25. As a result of the MSC certification of long and shortfin squid on the East and West coasts over the last five years, MSC-labeled squid products have increased since 2019/20, from four to 33 products. Tinned fish, typically small pelagics, have also been gaining in popularity. MSC-labeled anchovies were not available in the U.S. six years ago and have since grown to have 20 products. This suggests that there is a strong demand from U.S. consumers for MSC-certified seafood across a range of species and price points. ●

Number of MSC-labeled products by species



FOCUS ON TUNA

Retailers are driving MSC-certified tuna growth: Shelf-stable tuna remains the primary growth engine for MSC-certified tuna in the U.S.

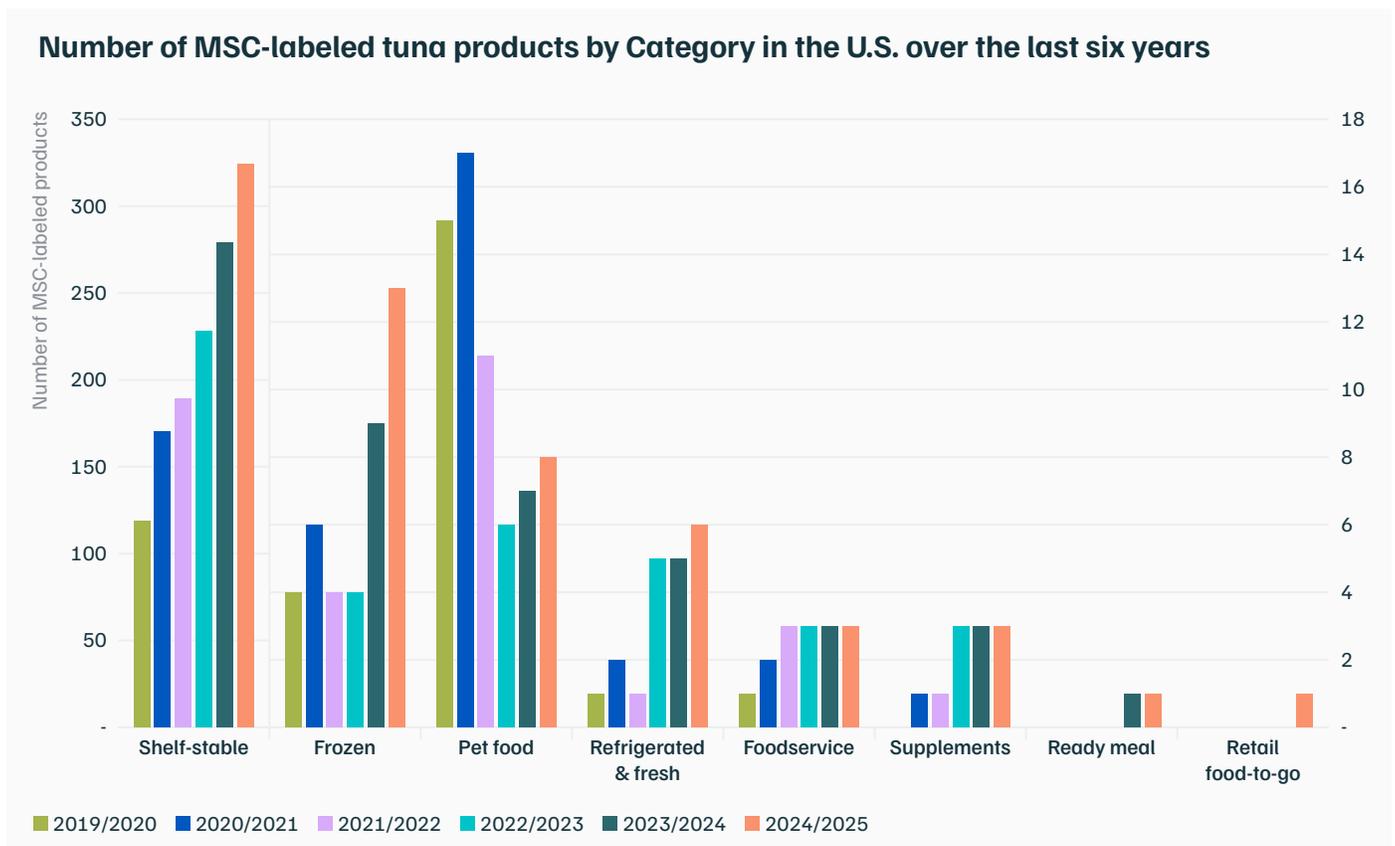
Retailers and national brands are leading market transformation: ALDI, Bumble Bee, H-E-B, and Walmart account for a substantial share of MSC-certified shelf-stable tuna volume and dramatically increase consumer access to certified products.

Growth is expanding beyond shelf-stable into adjacent categories: Frozen, refrigerated, foodservice, supplements, ready meals, and food-to-go, are signaling a rise in consumer demand for MSC-certified tuna across multiple grocery aisles and dining occasions.

TUNA HAS THE LARGEST ASSORTMENT of MSC-labeled products in the U.S., having overtaken salmon in 2023/24. The species has seen significant year-over-year growth in its variety of products available to consumers and has become the first species in the U.S. to have more than 300 MSC-labeled products for sale.

Almost every category has seen increases in tuna product assortment since 2019/20, with the exception of pet food. Shelf-stable products are the most significant category for MSC-labeled tuna in the U.S., and there has been consistent year-over-year growth since 2019/20, now accounting for 90% of all MSC-labeled tuna products for sale in the U.S. MSC-certified volumes of shelf-stable tuna product sales have grown proportionally with increased label use, accounting for 95% of the ~60,000t sold in 2024/25.

The top 10 brands for MSC-labeled tuna have seen increases in their assortment since 2019/20, with the



exception of Whole Foods Market. A number of brands launched their first MSC-labeled tuna products over the past six years, with Bumble Bee, H-E-B, Meijer, Real and SeaTales in the top ten. Bumble Bee launched its first 26 MSC-labeled tuna products in 2021/22 and as of 2024/25 has the largest assortment, with 48 products available. The “Other” brands category has also continued to grow, demonstrating that brands of all sizes remain committed to expanding sustainable tuna options.

While the shelf-stable category has emerged as the primary growth channel for tuna in the U.S., it is retailer-led commitments that are driving the expansion of MSC-certified offerings. Major U.S. retailers are taking a leadership role by increasing the availability of MSC-certified tuna.

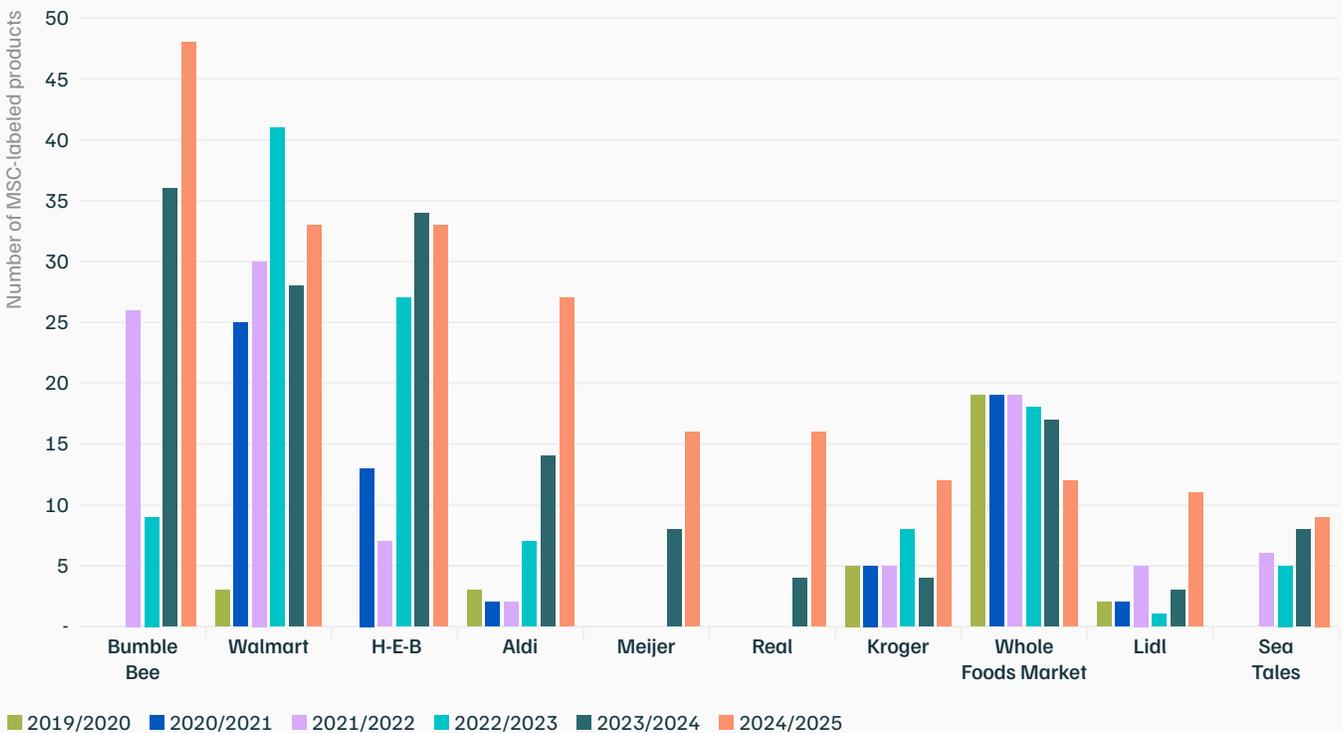
Retailers such as Walmart (31 products), H-E-B (33 products), and ALDI (18 products) have significantly expanded their MSC-certified tuna assortments, collectively offering a range of options across the grocery store. These expansions have translated into meaningful volume impact. In 2024/25, total U.S. shelf-stable MSC-

certified tuna volume reached 56,146 metric tons. The U.S. market has also realized meaningful gains across several adjacent categories. These developments highlight increasing demand for MSC-certified tuna beyond traditional center-of-store formats.

Over the past five years, the frozen category has tripled its number of MSC-certified tuna products, reflecting growing consumer interest in alternative formats. Availability accelerated further in 2024/25, driven in part by JFC International’s introduction of five new frozen MSC-certified tuna items, which significantly expanded category presence.

Additional categories—including refrigerated, foodservice, supplements, ready meals, and food-to-go—have emerged recently and are demonstrating strong momentum. Expansion in these segments indicates evolving consumer purchasing behavior, with demand for MSC-certified tuna extending into multiple grocery aisles, as well as restaurants. Collectively, these trends underscore the broadening footprint of MSC-certified tuna across the U.S. market and its increasing relevance across diverse consumption occasions. ●

Number of MSC-labeled tuna products by Brand in the U.S. over the last six years



FOCUS ON SALMON

Overall growth with recent dip: MSC-labeled salmon products in the U.S. increased by 71 since 2019/20, driven largely by shelf-stable and pet food categories, though there was a small product decline and a 7% volume drop from 2023/24 to 2024/25.

Category shifts and concentration: Shelf-stable salmon nearly doubled to become the largest product category, dominated by ALDI, Bumble Bee and Thai Union. Frozen and shelf-stable volumes previously peaked above 12,000t but have since declined.

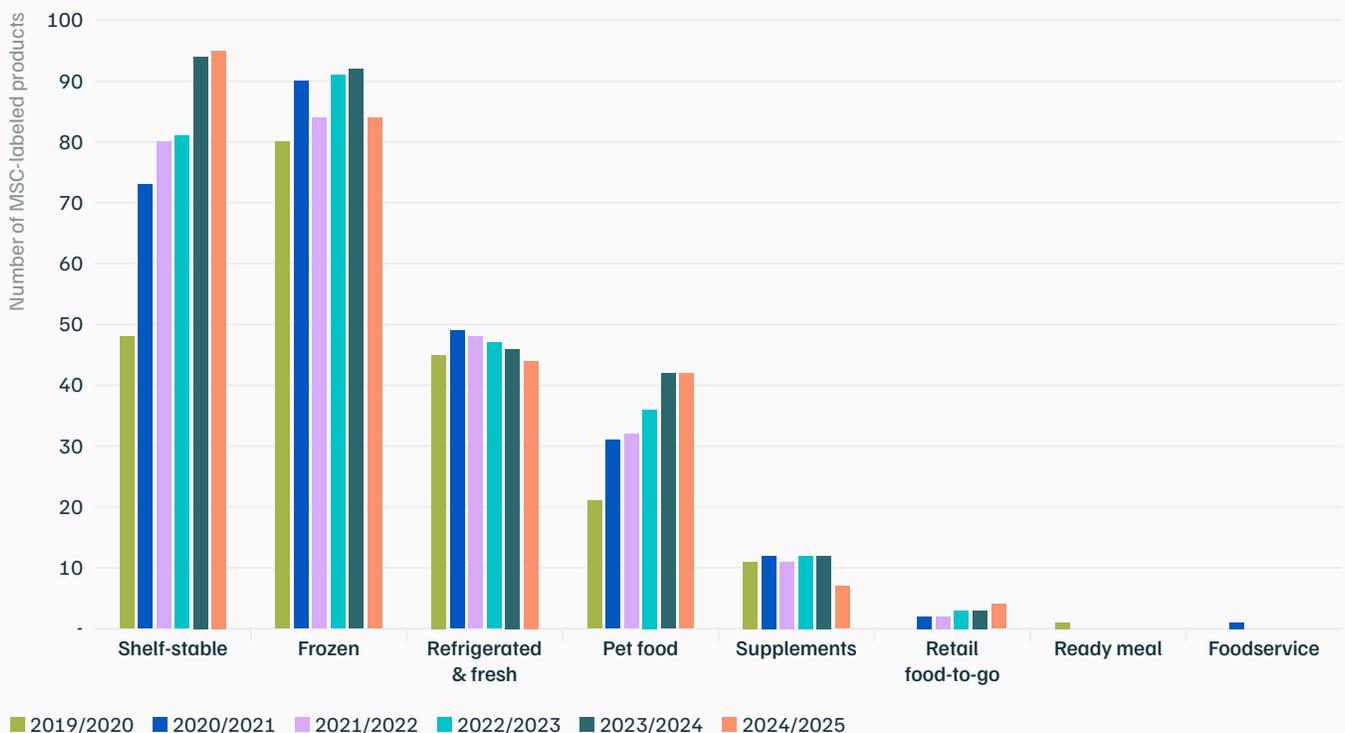
Brand and channel dynamics: SeaBear leads in number of MSC-labeled salmon products, overtaking Walmart. Nestlé and Bumble Bee have expanded into the top 10, and pet food—led by Nestlé Purina—grew 17% year-over-year.

SALMON REMAINS A SIGNIFICANT SPECIES for the MSC ecolabel in the U.S., having been the most labeled species until being overtaken by tuna in 2023/24. There has been an increase of 71 MSC-labeled salmon products between 2019/20 and 2024/25, although there was a decline of 13 products from 2023/24 and 2024/25.

The majority of the growth seen in MSC-labeled salmon since 2019/20 has been driven by increased labeling in the shelf-stable and pet food categories. MSC-labeled shelf-stable salmon products have almost doubled since 2019/20 to become the largest product category for this species.

While the pet food category remains the fourth largest salmon product category, it has also doubled in its number of products and is now just two products behind the refrigerated fresh product category. Both the shelf-stable and frozen categories peaked in volume of MSC-certified salmon sales over 12,000t (shelf-stable

Number of MSC-labeled salmon products by Category in the U.S. over the last six years



in 2021/22 and Frozen in 2020/21), however both have since seen declines in volume to sit at ~10,000t and ~8,500t, respectively.

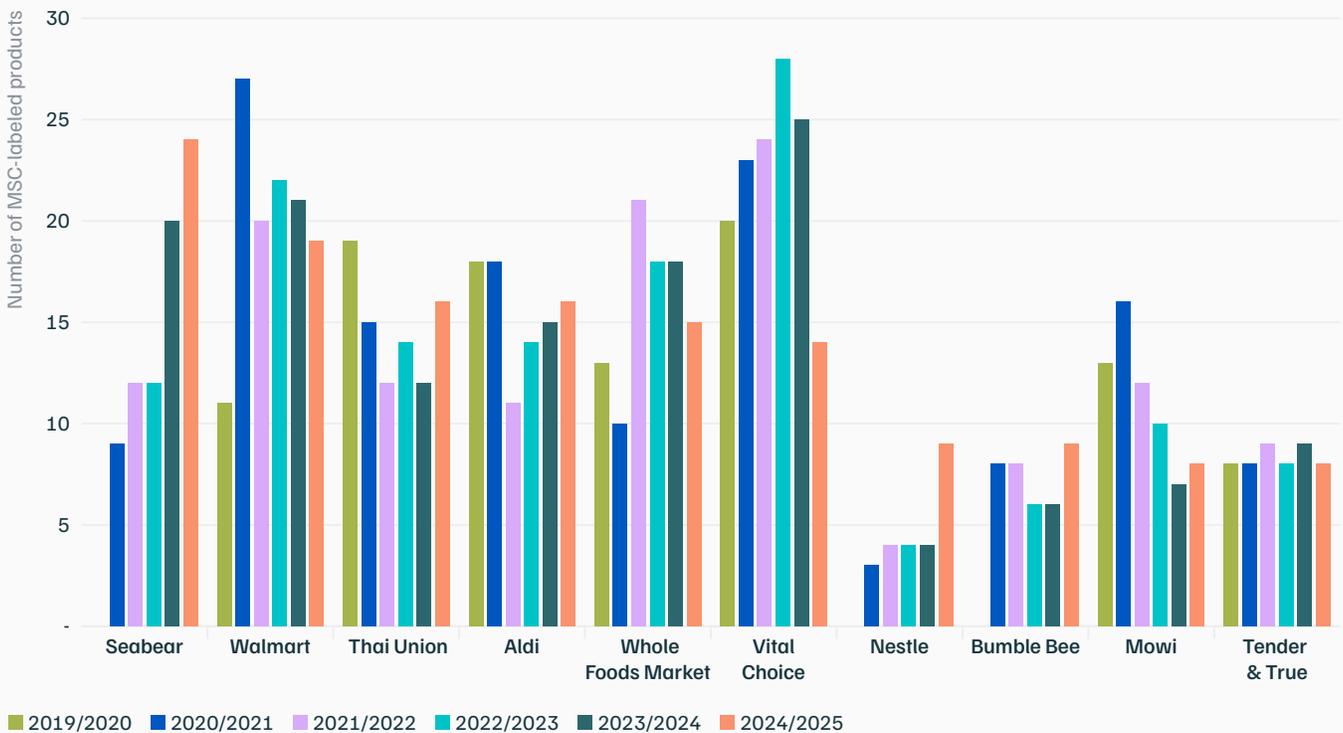
SeaBear, the brand with the largest assortment of MSC-labeled salmon products for sale in the U.S. in 2024/25, launched the first of these products in 2020/21 and only overtook Walmart this year. Nestlé and Bumble Bee also launched their first MSC-labeled salmon products in 2020/21 and have grown this variety to gain a place in the top 10. Walmart, despite leading for MSC-labeled salmon products since 2020/21 until this year, have seen their range of products slowly decline over this time from 27 to 19. Four brands, ALDI, Mowi, Vital Choice and Thai Union, have seen declines in their ranges of MSC-labeled salmon products from 2019/20 to 2024/25.

MSC-certified salmon continues to serve as a dependable indicator of ecolabel strength and long-term stability in the U.S. market. Over the past five years, the category has demonstrated consistent volume performance, reinforcing salmon’s role as a cornerstone species for certified seafood growth.

Mirroring trends observed in tuna, shelf-stable salmon has emerged as a key growth driver within the category. Shelf-stable salmon accounts for 45% of MSC-certified salmon in the U.S. market, highly concentrated between Thai Union, Aldi, and Bumble Bee, underscoring the influence of a small number of major players in shaping category performance.

At the same time, the pet food sector is increasingly embracing MSC-certified salmon as a value-added ingredient. This momentum is highlighted by five companies adding new salmon products for the first time in 2024/25, while Nestlé Purina added five itself. As a result, volume in the pet food segment increased by 17% year-over-year. This growth demonstrates the expanding role of non-human consumption channels in driving demand for certified salmon. ●

Number of MSC-labeled salmon products by Brand in the U.S. over the last six years



FOCUS ON POLLOCK

Stable product range, fluctuating volumes: MSC-labeled pollock products in the U.S. have remained relatively steady since 2019/20, consistently ranking as the 3rd largest species by product range.

Category and brand shifts amid post-peak normalization: No category has achieved consistent year-over-year product growth, though supplements and pet food have expanded the most. The frozen category experienced a major surge in 2020/21 before declining in 2024/25, while refrigerated fresh products fell.

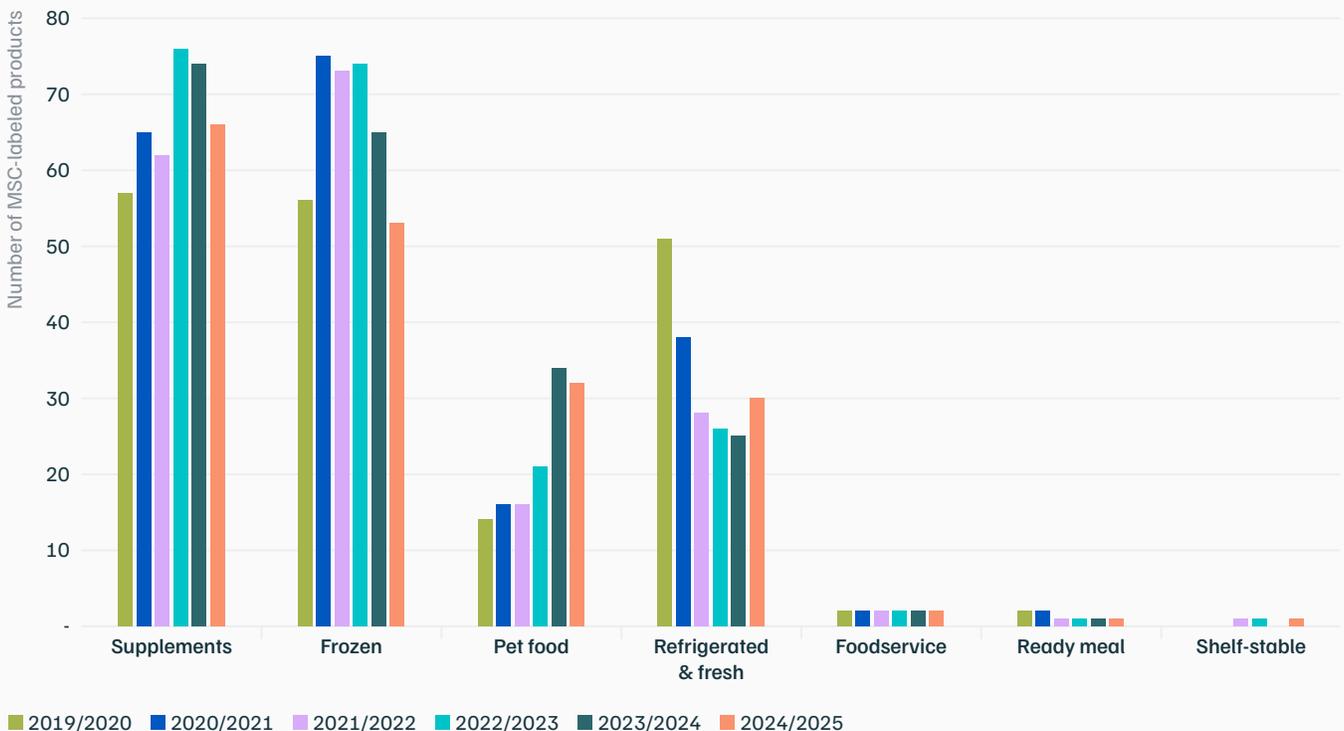
Foodservice dominance and diversification into wellness: McDonald’s remains the largest driver of MSC-certified pollock sales. Surimi has remained stable, led by Trans-Ocean, while fish oil and supplements have emerged as a leading growth area.

THE U.S. MARKET FOR MSC-CERTIFIED pollock products continues to demonstrate both resilience and evolution, with category performance reflecting shifting consumer behaviors and product availability over the past five years.

The number of MSC-labeled pollock products for sale to U.S. consumers has fluctuated between 180 and 200 since 2019/20, but has remained the third largest species by range of labeled products over this time period. Despite the number of products remaining relatively stable, the volume of sales have increased by over 10,000t to approximately 48,000t in 2024/25. It should be noted that volume of sales peaked with nearly 60,000t in 2020/21, and have declined to current rates since.

Pollock is the only MSC-certified species with volume driven by the food service category representing 41% of U.S. volume. Surimi remains stable with 20% of total

Number of MSC-labeled pollock products by Category in the U.S. over the last six years



pollock volume, while fish oil and supplements have emerged as a leading growth area—peaking at 74 products in 2022/23 and holding 61 in 2024/25, led by Wiley’s Finest and supported by major retailers such as CVS and Meijer.

The number of MSC-labeled pollock products for sale in the U.S. by category has fluctuated year to year, with supplements and pet food seeing the largest growth over the last five years (growing by nine and 18 products respectively since 2019/20).

The number of MSC-labeled refrigerated fresh pollock products has declined from over 50 in 2019/20 to 30 in 2024/25, although volumes have actually increased by ~1,300t over this time period. Similarly, the frozen category has seen fluctuations in number of products and volume of associated sales, with significant year-over-year increases between 2019/20 and 2020/21, before almost universal year-over-year declines since.

Despite this, volume of MSC-certified sales for frozen pollock is up by over 11,000t to approximately 17,000t in 2024/25 (volume sales were record at their highest at

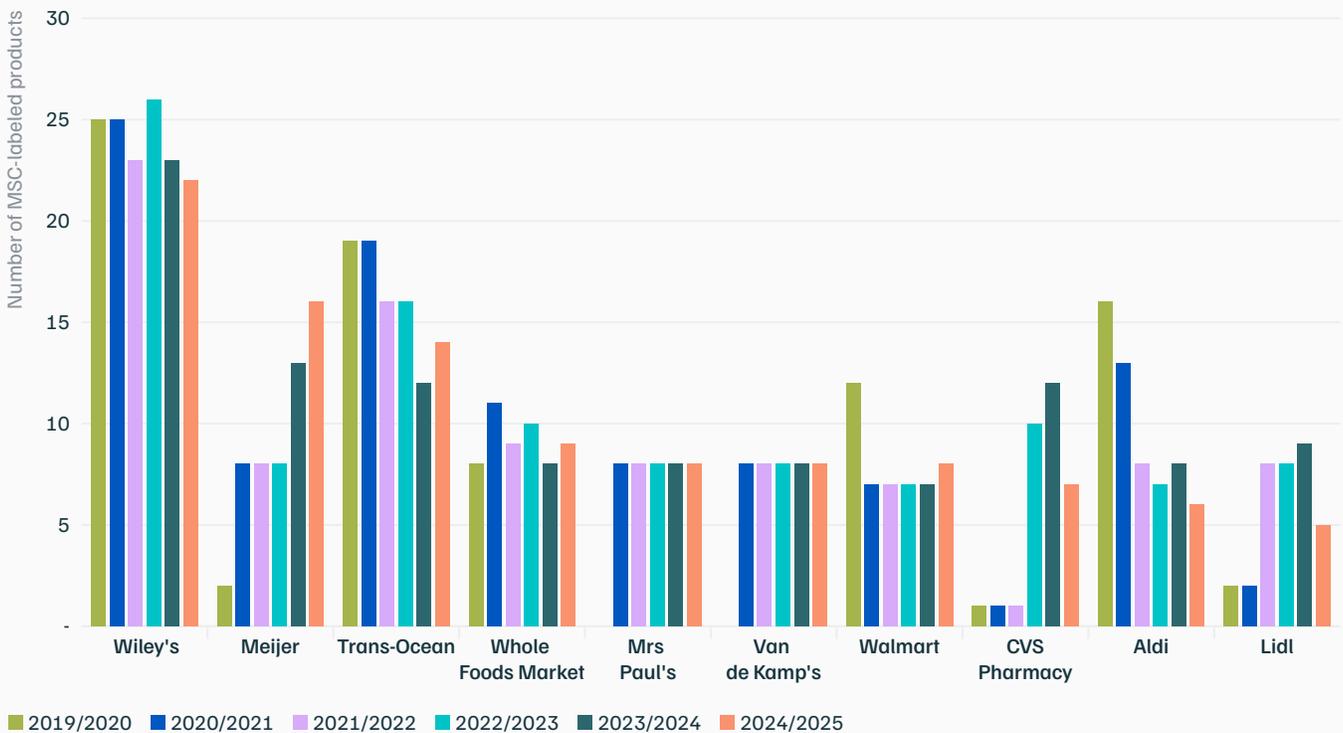
over 25,000t in 2020/21).

There has been similar fluctuation in the variety of MSC-labeled pollock across the top 10 brands, with six brands increasing the number of products while the other four have seen reductions. Meijer has increased its range from just two MSC-labeled pollock products in 2019/20 to 16 in 2024/25, growing to the 2nd largest company for MSC-certified pollock in the U.S. Both Mrs Paul’s and Van de Kamp’s launched their first eight products in 2020/21 and have maintained this range since. There were four major brands that have reduced their ranges over the last six years, with ALDI’s range declining by 10 and falling from the third largest brand by range to ninth.

Though not appearing in the top 10 by number of products, McDonald’s remains the dominant force in MSC-certified pollock sales, anchored by its longstanding Filet-O-Fish menu item. McDonald’s influence and commitment to sourcing MSC-certified pollock represents a substantial baseline for pollock in the broader marketplace.

The retail frozen category tells a different story—one

Number of MSC-labeled pollock products by Brand in the U.S. over the last six years



marked by a surge followed by normalization. In 2020/21, the category experienced a dramatic 76% year-over-year increase in both MSC-certified products and volume, fueled largely by the addition of brands such as Mrs. Paul's and Van de Kamp's. That year represented a high-water mark, with total category volume reaching 25,087 metric tons. Since then, volumes have steadily declined, settling at 17,380 metric tons in 2024/25. While this represents a meaningful contraction from peak levels, the category remains significantly elevated compared to years prior.

MSC-certified surimi has delivered consistent performance over the past five years. Stability rather than volatility characterizes this segment, with steady product presence and dependable retail distribution. Trans-Ocean, leveraging its reach with national retail, dominates the category with 14 available products in the U.S. As consumers continue to look for convenient, value-added pollock products, surimi's position in the U.S. market has remained consistent over the last five years. This sustained performance reflects both brand strength and the ongoing consumer appeal of convenient, value-added pollock products.

Notably, fish oil and supplement products have emerged as the leading growth category for MSC-certified pollock over the past five years. The number of certified products peaked at 74 in 2022/23 and, while leveling to 61 products in 2024/25, remains robust.

Wiley's Finest leads the segment with 22 MSC-certified products, representing the largest portfolio in the U.S. market. Major retailers such as CVS Pharmacy and Meijer have also responded to consumer demand for environmentally sustainable supplements, offering seven and six certified products respectively. This expansion highlights a shift in consumer engagement with certified seafood—from center-of-plate consumption to health and wellness applications—broadening the relevance of MSC-certified pollock beyond traditional seafood categories.

Collectively, these trends illustrate a market that continues to demonstrate broad market support, brand leadership, and diversified product innovation. MSC-certified pollock remains a significant and strategically important segment within the U.S. ●



LABEL COVERAGE BY CATEGORY

THE MOST COMMON PLACE MSC-CERTIFIED products can be found is in grocery stores across the country, in categories across the store – the fresh fish counter, the deli, refrigerated, frozen, shelf-stable, supplements, and pet products. In addition, the MSC label can be found in some restaurants and foodservice establishments.

The shelf-stable and frozen categories of the grocery store are the most common locations to find the MSC label on seafood products, accounting for just over two-thirds of all MSC-labeled products sold in the U.S. last year.

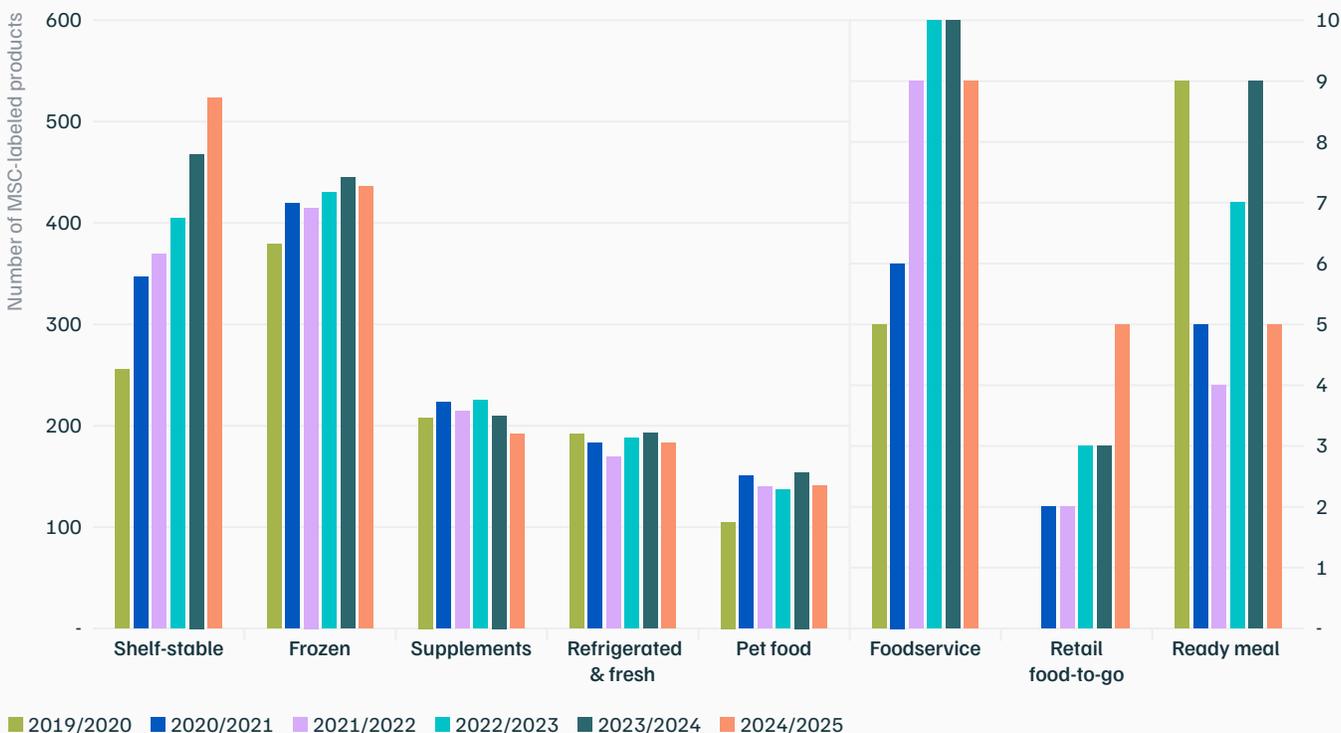
Specialty categories, although smaller in volumes, have been available to U.S. consumers for many years ahead of other countries globally. Pet food and pet products have seen significant growth in the last five years, growing by

around a third in products available. The retail food-to-go category also saw its first two MSC-labeled products launched in the U.S. in 2020/21, growing to five in 2024/25.

The U.S. was the first country to have MSC-certified fish oils and other supplements available, with two products launched in 2009/2010 by Vital Choice. That number has since increased and held steady with around 200 products on the market.

The ability to find the MSC blue fish label in many categories across the grocery store has helped broaden consumer awareness and retailer support. MSC-certified items can now be found in specialty retailers like drug, convenience, and pet stores. ●

Number of MSC-labeled products by category in the U.S. over the last six years



FOCUS ON SHELF-STABLE

Shelf-stable leads MSC growth in the U.S.: MSC-certified shelf-stable seafood represents 43% of MSC volumes sold in 2024/25, with product count more than doubling from 256 to 523 over six years—surpassing the frozen category in size by 2023/24.

Tuna dominates; salmon and other species expanding: Tuna accounts for 75% of the volume of shelf-stable MSC products, with 200+ new items added in five years. Shelf-stable salmon has doubled in product count and grown 53% in volume. Ocean quahog clams and other species are emerging in the U.S. in this category.

Brand and private label momentum accelerating: Competition has driven strong assortment growth from Bumble Bee, Walmart, and SeaBear, alongside new MSC launches from H-E-B, Meijer, Kroger, Lidl, and others.

MSC-CERTIFIED SHELF-STABLE ITEMS – primarily canned tuna and salmon – have become the most prevalent MSC-certified products available in the U.S. market, representing approximately 43% of MSC-certified volumes sold in 2024/25. The number of MSC-labeled shelf-stable products on sale to U.S. consumers has more than doubled over the last six years, growing from 256 products in 2019/20 to 523 in 2024/25. This significant, year-over-year growth has led to the category overtaking frozen as having the largest variety of MSC-labeled products in 2023/24.

Tuna is by far the largest species within the MSC-labeled shelf-stable category, accounting for over 62% of shelf-stable products carrying the MSC label on shelves last

year and 75% of volume sold in the category. Within the last five years, more than 200 new MSC labeled shelf-stable tuna products entered the U.S. market driven by major retailers and beloved tuna brands.

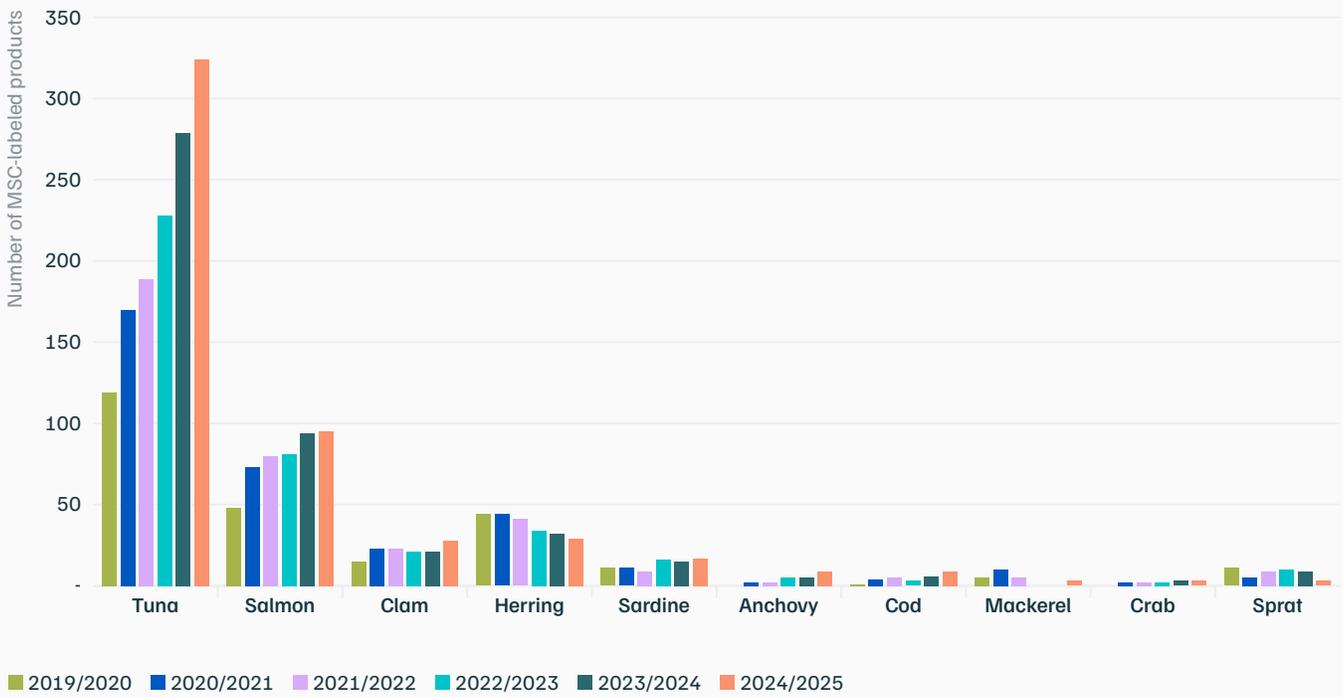
Shelf-stable salmon products also saw an increase in the last five years, doubling from 48 to 97 MSC-certified products available and volumes sold increasing by 53%. Thai Union, ALDI, Bumble Bee, and Walmart lead the way for most products sold in the U.S. for MSC-certified shelf-stable salmon.

Clams, specifically ocean quahogs, are another U.S.-specific addition to this category with brands like Bar Harbor and Snows leading the way on canned clams, clam juice, and soups and broths. There are a few other species that have gained in popularity with premium tinned fish brands, like herring, mackerel and sardines, however access to MSC-certified supply is limited affecting opportunities for growth.

The lineup of brands with the MSC ecolabel in the shelf-stable category has changed dramatically in the last five years. In 2019/20, Thai Union had the largest range of MSC-labeled shelf-stable products, with 46, however this range has reduced to 30 in 2024/25, and has fallen to third place. The three brands with largest growth in their MSC-labeled shelf-stable ranges are Bumble Bee with 52 new additions, Walmart with 27, and SeaBear with 22.

Several brands launched their first MSC-certified shelf-stable offering in the last five years, such as Bumble Bee, SeaBear, Safe Catch, H-E-B., and Meijer. Major retailers have added the MSC label to their private label. In the last five years Walmart added 33 new products, ALDI added 17, and Kroger and Lidl each added eight. ●

Number of MSC-labeled shelf-stable products by species in the U.S. over the last six years



Top ten brands in the U.S. for shelf-stable MSC-labeled products (2019/20)

Rank by volume

Thai Union	1
Bar Harbor Foods	2
Vital Choice	3
Wild Selections	4
Whole Foods Market	5
ALDI	6
Crown Prince	7
Genova	8
Blue Harbor Fish Co.	9
Raincoast Trading	10

Top ten brands in the U.S. for shelf-stable MSC-labeled products (2024/25)

Rank by volume

Bumble Bee	1
Walmart	2
Thai Union	3
SeaBear	4
Safe Catch	5
ALDI	6
Bar Harbor Foods	7
H-E-B	8
Nirsa	9
Snow's	10

FOCUS ON FROZEN

Frozen now second category in the U.S.: MSC-certified frozen products grew modestly from 379 to 435 SKUs over five years and still represent about 25% of U.S. MSC volumes, though the category was overtaken by shelf-stable in 2023/24.

Whitefish and salmon dominate frozen MSC sales: Whitefish accounts for 67% and salmon 20% of all MSC-certified frozen volumes sold, meaning these two core species together represent nearly 90% of category sales and anchor consumer demand.

Significant growth in the last five years: The volume increase in this category has been significant, driven by participation of major brands like Mrs. Paul's, PanaPesca, Thrive Market, Van de Kamp's, Vital Choice, and Whole Foods Market.

THE FROZEN PRODUCT CATEGORY REMAINS a steady mainstay for U.S. consumers looking for MSC-certified products. In 2019/20, 379 products were available on the market which increased modestly to 435 in 2024/25. Frozen was the biggest category in the U.S. until 2023/24 when it was overtaken by the shelf-stable category. Regardless, it still represents a quarter of volumes sold in the U.S. in the last year.

Despite the almost universal year-over-year growth in the range of MSC-labeled frozen products for sale to U.S. consumers, the volume of certified sales has seen significant fluctuations. Although 2024/25 sales volumes are ~10,000t higher than five years ago, MSC-certified volumes peaked in the frozen category in 2020/21 with

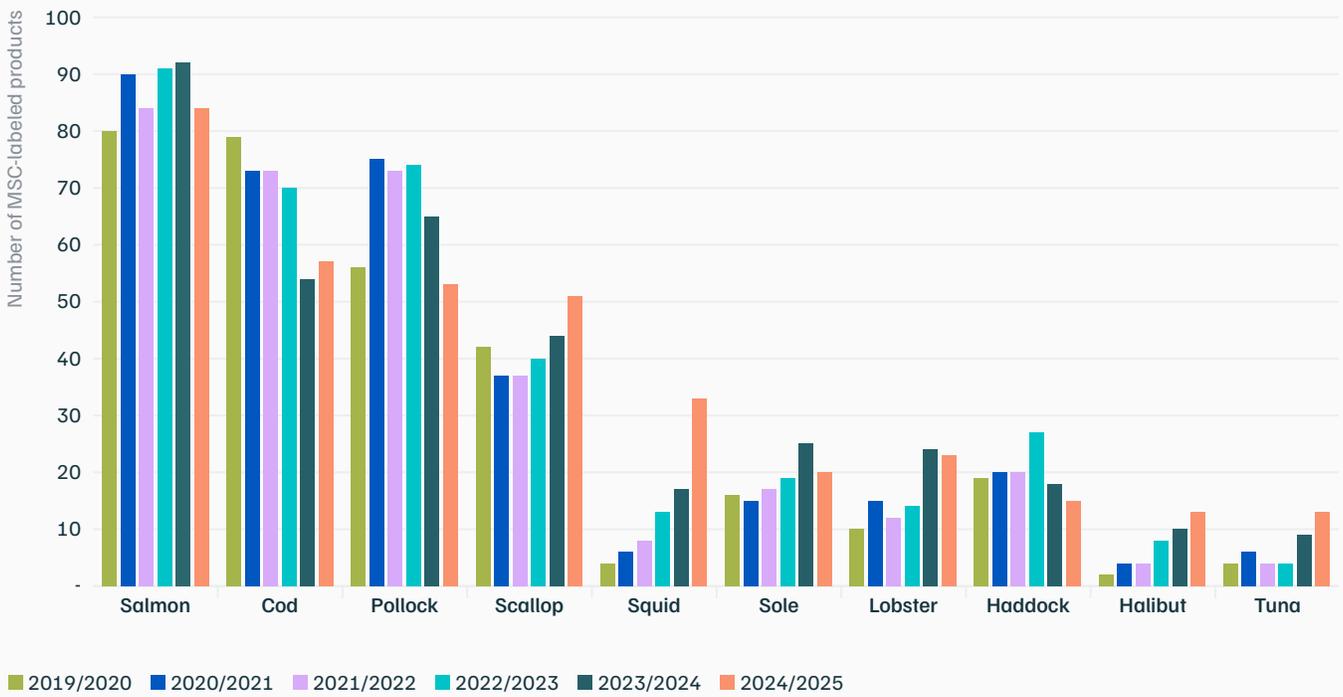
over 60,000t of product sold. This has since declined to approximately 45,000t – largely due to fluctuations in whitefish species availability like pollock and cod. This has largely been due to wider adverse economic impacts, rather than a reflection of dwindling interest in sustainability from U.S. consumers; a pattern also reflected in European markets.

Salmon maintains the largest range of MSC -labeled frozen products for sale to consumers in the U.S., with numbers remaining relatively stable between 80 and 90 products available per year. The number of MSC-labeled frozen squid products has grown from four to 33, as a result of the U.S. Northeast squid fishery becoming certified in 2018 and the U.S. California market squid fishery gaining certification in 2023 – the first and only squid fisheries in the world to become MSC-certified.

The lineup of brands with the MSC ecolabel in the frozen category has shifted in the last five years, though not as dramatically as we've seen in the shelf-stable category. In 2019/20, Walmart had the largest range of MSC-labeled frozen products at 39, however this range has reduced to 29 in 2024/25, and has fallen to third place. ALDI overtook the lead spot by largely maintaining their product assortment of 36 available last year. The three brands with largest growth in their MSC-labeled frozen assortment are Vital Choice with 16 products added, Whole Foods Market with 14 products added, and Panapesca with 13 products added.

A few brands have launched their first MSC-certified frozen offering in the last five years, including Mrs. Paul's, Pacific Seafoods, Thrive Market, Van de Kamp's, and Vital Choice. ●

Number of MSC-labeled frozen products by species in the U.S. over the last six years



Top ten brands in the U.S. for frozen MSC-labeled products (2019/20)

Rank by volume

Walmart	1
ALDI	2
Whole Foods Market	3
Lidl	4
Ahold	5
Dr. Praeger's	6
Aqua Star	7
GO WILD	8
MOWI	9
Meijer	10

Top ten brands in the U.S. for frozen MSC-labeled products (2024/25)

Rank by volume

ALDI	1
Whole Foods Market	2
Walmart	3
Vital Choice	4
Aqua Star	5
PanaPesca	6
Meijer	7
Ahold	8
Costco	9
Pacific Seafood	10

FOCUS ON REFRIGERATED & FRESH

Higher volume with fewer products: MSC-certified refrigerated and fresh items are the third largest category by volume in the U.S. even with a declining number of products

Surimi statement: Driving volume for whitefish, surimi accounts for 55% of MSC-certified volumes sold in the fresh and refrigerated category.

Five years of steady growth: Driven by continued commitments from early adopters like Trans-Ocean and Whole Foods Market, and new commitments from brands like ALDI, Aquamar, Costco, Fresh Island Fish, Gadre, Sam's Club, and Walmart are helping to give consumer plenty of options.

THE REFRIGERATED AND FRESH product categories include fresh fish counters, refrigerated seafood, refrigerated value-added seafood, and surimi. The category boasts the third largest assortment of MSC-labeled products for sale to U.S. consumers representing 18% of MSC labeled products sold last year. However, this category has seen a decline in product diversity. This has been consistent across the board with surimi, fresh seafood, and fish counters. Refrigerated prepared products have seen an increase, which aligns with consumer demand for quick, ready-to-eat or cook meals that are healthy and require low effort. Despite this decline in number of products, the volume of those that

remain in the market have increased significantly. MSC-certified surimi sales have increased by 53% over five years and refrigerated sales have increased by 124%.

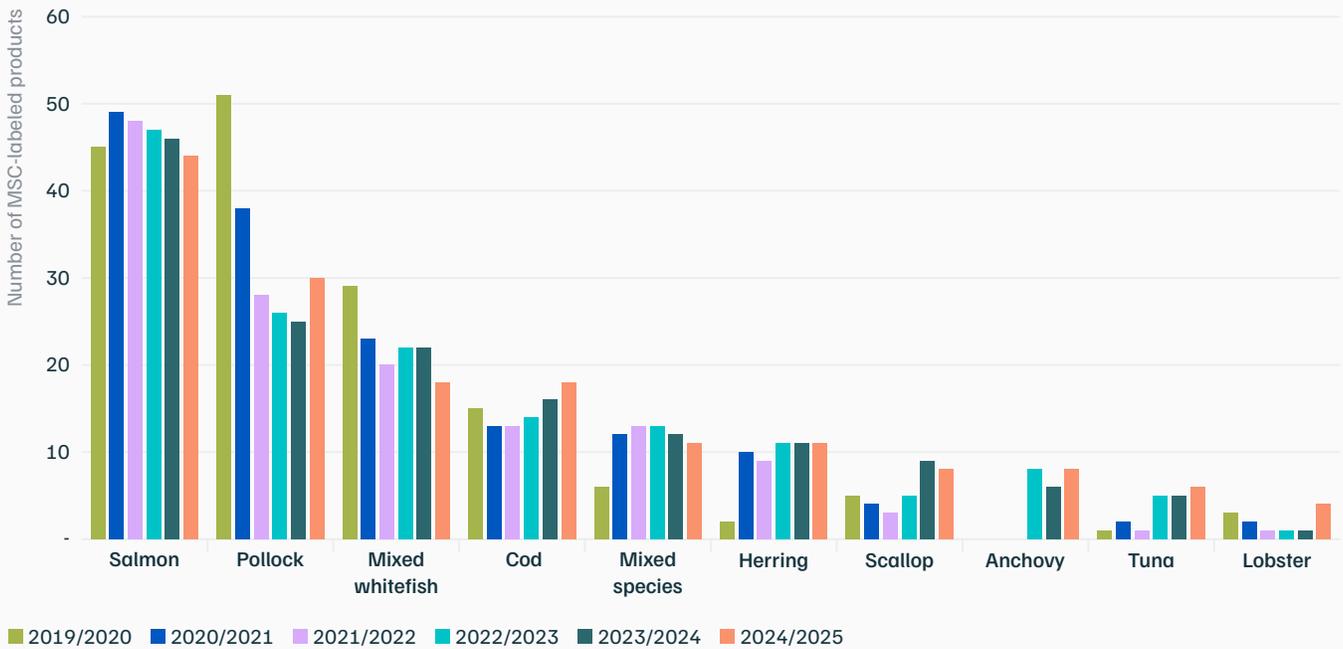
The three most significant species for the refrigerated and fresh categories are salmon, pollock and mixed whitefish. Pollock and mixed whitefish have increased in volume of sales, largely attributed to sales of surimi. However, sales of refrigerated salmon have doubled in the last five years as well.

Additional species like anchovies, cod, herring, lobster, scallops, are available on the U.S. market. Though somewhat limited, they can be found at retail stores across the U.S.

The lineup of brands with the MSC ecolabel in the refrigerated and fresh category hasn't changed dramatically in the last five years. In 2019/20, Whole Foods Market had the largest range of MSC-labeled shelf-stable products at 39, and still holds this rank with 23 products in the last year. Growth in this category has been limited, but a few brands have contributed such as Blue Hill Bay with eight new products, Aquamar with seven new products, Walmart with three new products, and Lidl with two new products in the last five years.

Blue Hill Bay is the only new entrant using the MSC label in the last five years and should be recognized for their efforts to drive sustainability in a category that hasn't progressed significantly otherwise. ●

Number of MSC-labeled refrigerated & fresh products by species in the U.S. over the last six years



Top ten brands in the U.S. for refrigerated & fresh MSC-labeled products (2019/20)

Rank by volume

Whole Foods Market	1
Trans-Ocean	2
ALDI	3
Market Street United	4
GO WILD	5
MOWI	6
Kanimi	7
Salads of the Sea	8
Walmart	9
Vici	10

Top ten brands in the U.S. for refrigerated & fresh MSC-labeled products (2024/25)

Rank by volume

Whole Foods Market	1
Trans-Ocean	2
ALDI	3
Market Street United	4
Walmart	5
Aquamar	6
Blue Hill Bay	7
Lidl	8
Mowi	9
Costco	10

LABEL COVERAGE BY BRAND

SINCE 2019/20, MOST MAJOR BRANDS with MSC-labeled products in the U.S. have increased their ranges, with only two of the top 10 having a smaller assortment in 2024/25 than in 2019/20. Whole Foods Market, which has seen its variety of MSC-labeled products fluctuate between a high of 82 in 2022/23 and a low of 73 in 2020/21, with 75 products in 2024/25, making Whole Foods Market the brand with the third largest assortment of MSC-certified products available to U.S. consumers. Thai Union has also seen its variety of labeled products decline since 2019/20, with over a third fewer labeled products sold in the U.S. in 2024/25.

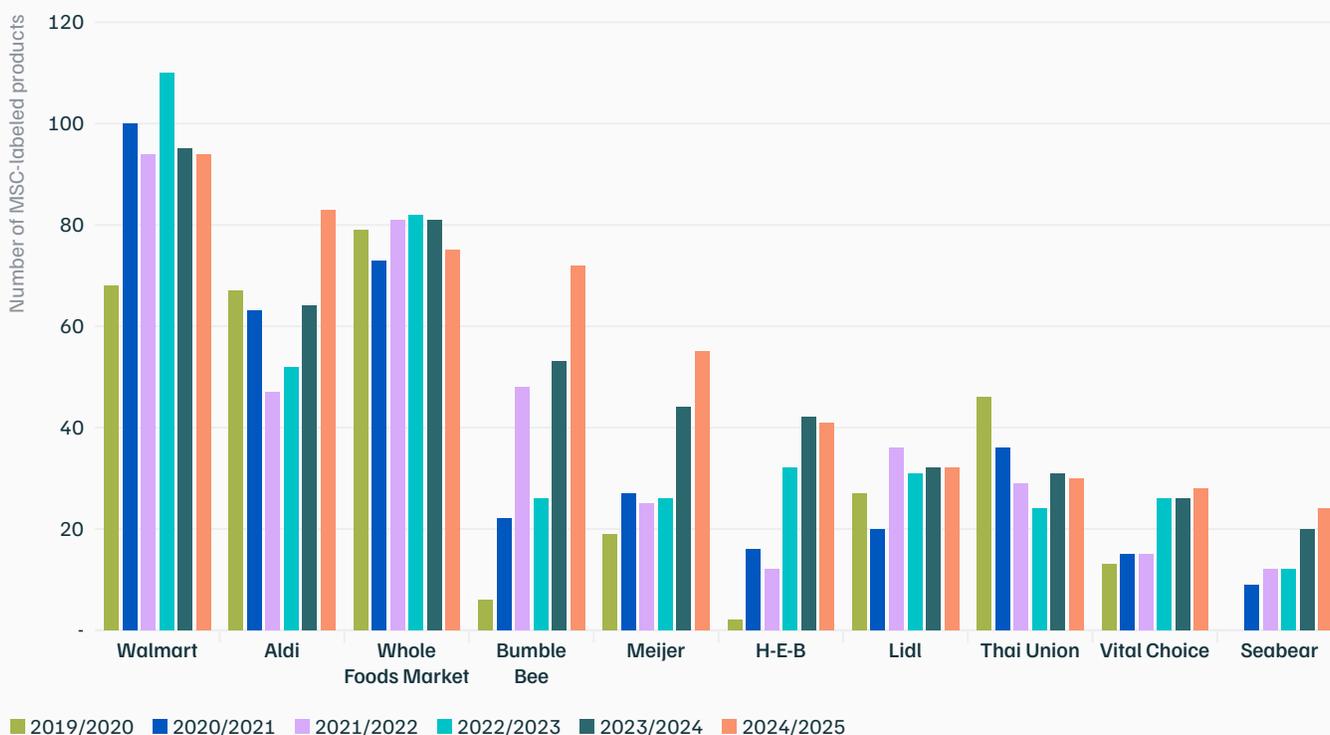
H-E-B's private label brand has seen the largest increase, by percentage, growing from just two products available with the MSC label in 2019/20 to over 40 in 2024/25, an

increase of nearly 2,000%. Many other brands have seen significant increases, with Bumble Bee (1,100%), Meijer (private label) (189%) and Vital Choice (115%) being the most impressive.

SeaBear is the only brand within the top 10 that began using the MSC label in the last six years. The first SeaBear nine products carrying the MSC label were for sale to U.S. consumers in 2020/21, with this number growing to 24 in 2024/25.

The number of MSC-labeled products available to U.S. consumers has grown not only amongst the top 10 largest brands, but also across the other brands in the U.S. In total, there are now 141 more MSC-labeled products across these other brands sold in 2024/25 than there were in

Number of MSC-labeled products by brand in the U.S. over the last six years



2019/20, showing that both larger and smaller brands are keen to provide their customers with assurance that the products that they buy come from MSC-certified sustainable sources.

Over the past five years, retail brands have moved decisively to the forefront of sustainable seafood leadership, projecting their MSC commitments through the rapid expansion of private label offerings. Retailers now account for six of the top ten brands with the highest number of labeled products, underscoring the growing influence of private label portfolios.

Among the most prominent retail brands, Sam's Club and Walmart reached a notable milestone in 2020/21, surpassing 100 MSC-labeled products. The company's private label portfolio peaked two years later with 110 products before closing 2024/25 with 94 products in the U.S. market. In 2024/25, whitefish species—including cod and pollock—represented 29% of their total assortment. That same year marked a significant sourcing achievement: 100% of Walmart-branded shelf-stable tuna products were MSC-certified, accounting for 35% of the company's labeled product total. This milestone demonstrates how strategic category alignment and sustainability commitments lead to meaningful improvements at the fishery level.

ALDI has also demonstrated consistent upward momentum. Since 2021/22, ALDI expanded its MSC-

certified range by 88%, increasing from 47 to 83 products available in market. Tuna has been a primary driver of this growth, with 25 new tuna items introduced during the period. The retailer's focused expansion signals a deliberate investment in high-volume, accessible categories that resonate with everyday consumers.

Additional retailers have contributed meaningfully to overall category growth. Meijer expanded its MSC-certified portfolio from 19 products in 2019/20 to 49 in 2024/25—an addition of 30 new products. H-E-B also demonstrated notable progress increasing its certified assortment from two to 41 products over the same timeframe.

National brands have also played a significant role in advancing MSC availability. Bumble Bee Foods introduced 66 new MSC-certified products over the past five years. Its expansion spans tuna, salmon, and clams, with all offerings in the shelf-stable category. This growth illustrates how established seafood brands continue to integrate sustainability into core product lines, reinforcing consumer access to certified sustainable options.

Collectively, these developments signal a broader market shift: sustainability is no longer peripheral but embedded within mainstream retail strategy. Through sustained portfolio growth, category-specific milestones, and expanded species coverage, retailers and brands alike are strengthening their role in delivering MSC-certified seafood at scale. ●





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