



WHAT DO WE KNOW ABOUT WILD SALMON?

MSC report on global salmon fisheries
and the market for sustainable salmon
in the Baltic & Central Europe region

March 2026



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INTRODUCTION

FROM INSIGHT TO IMPACT: MSC WILD SALMON IN BALTIC & CENTRAL EUROPE



Salmon is one of the most important seafood species across the MSC Baltic & Central Europe region, valued by consumers and central to many businesses across the value chain. Yet it is also one of the most complex. Behind a single product on the shelf lies a wide range of origins, production methods and supply chains. In my conversations with partners across the region – from Helsinki to Bucharest – one question keeps returning: how can we meet growing consumer demand for salmon while ensuring it remains a sustainable choice in a changing market?

Our region is far from homogeneous. The Nordic markets are mature, highly developed and deeply embedded in seafood culture. In Central and Eastern Europe, salmon consumption is growing rapidly from a lower base, shaped by different traditions, price sensitivities and retail structures. This diversity is not a challenge to overcome – it is a strategic strength. It creates space for shared learning, cross-market inspiration and regional synergies that can accelerate responsible growth across the entire category.

While farmed salmon continues to dominate overall supply, wild salmon plays an increasingly important role in differentiation, trust and long-term resilience. Consumers consistently express a preference for wild salmon when price and availability are not barriers. At the same time, many remain uncertain about the origin of the salmon they purchase. This gap between preference and understanding represents both a responsibility and a clear opportunity for businesses.

MSC-certified wild salmon offers a credible, independently verified solution. Pacific salmon fisheries have been part of the MSC programme for more than 25 years, and today MSC-certified fisheries represent 62% of the global wild salmon catch. This provides businesses with access to a dependable, traceable and responsibly sourced supply – supporting both commercial performance and ocean stewardship.

This report brings together consumer insights and market evidence from six key salmon markets in our region – Poland, Sweden, Denmark, Finland, the Czech Republic and Romania. By combining data with practical examples, we aim to provide a comprehensive view of the category and identify where the greatest opportunities lie.

I hope this publication not only supports better decision-making, but also inspires stronger collaboration across our diverse markets. By working together – fisheries, brands, retailers, foodservice partners and consumers – we can ensure that wild salmon remains not just a product category, but a symbol of responsible sourcing and long-term commitment to healthy oceans.

A handwritten signature in black ink that reads "Anna Dębicka".

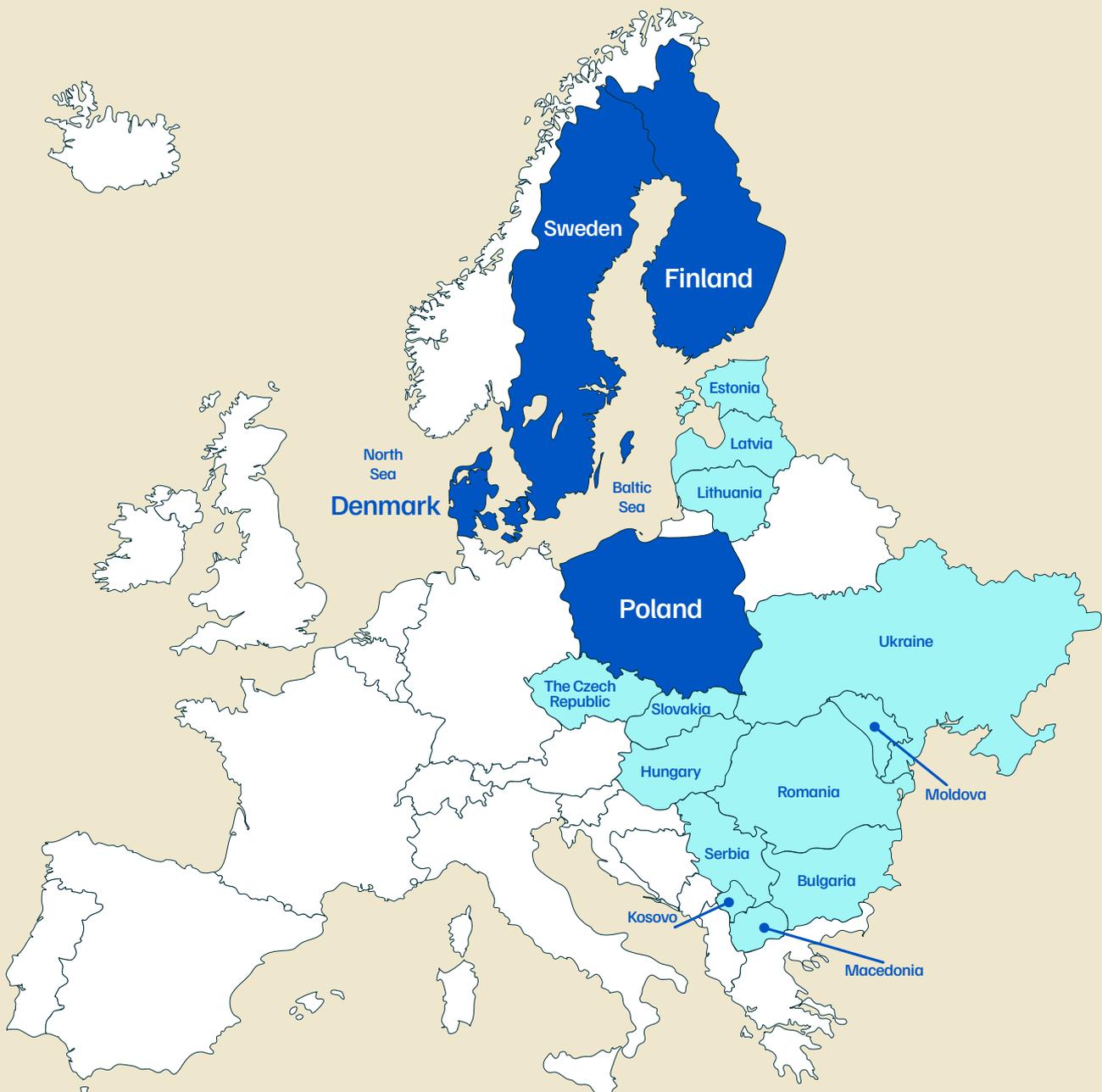
Anna Dębicka
MSC Program Director
Baltic and Central Europe

REPORT CONTENT AND METHODOLOGY

MSC BALTIC & CENTRAL EUROPE REGION

The MSC Baltic & Central Europe (BCE) region spans a broad set of markets across the Nordics, the Baltic states and Central and South-Eastern Europe. It covers 17 countries: Bulgaria, the Czech Republic, Denmark, Estonia, Finland, Hungary, Kosovo, Latvia, Lithuania, North Macedonia, Moldova, Poland, Romania, Serbia, Slovakia, Sweden and Ukraine.

MSC supports this region through one integrated team that brings together expertise from Denmark, Finland, Poland and Sweden, and works across all 17 countries. While the region is diverse in size and market maturity, many countries share similar salmon dynamics – strong consumer demand, a major role for retail in shaping purchase choices, and high reliance on imported and processed supply.



SCOPE OF THE REPORT

This report provides a combined view of the salmon category from two complementary angles:

- **A regional market perspective for Baltic & Central Europe**, focusing on category structure, consumer expectations and how salmon is purchased across formats and product types.
- **A global wild salmon perspective**, explaining wild salmon species diversity and catch dynamics, and placing regional developments in the context of global supply and fisheries.

While the report takes a regional view, it focuses in particular on six key salmon markets – **Poland, Sweden, Denmark, Finland, Romania and the Czech Republic** – including dedicated consumer research across these countries. The report also includes selected country spotlights to add depth to the regional picture and to illustrate differences in market development.

DATA SOURCES AND ANALYTICAL APPROACH

1) Consumer research

Consumer insight is based on a survey commissioned by MSC and carried out by SW Research across the Czech Republic, Denmark, Finland, Poland, Romania and Sweden (total sample N=3,654). The study used an online survey methodology and was conducted between 15 and 30 December 2025, with samples structured to reflect national age and gender distributions.

2) Salmon consumption trends

To capture consumption trends over time, the report draws on official statistics sources used in European market analysis, including data from EUMOFA and Eurostat, compiled for MSC by the Institute of Agricultural and Food Economics – National Research Institute (IAFE-NRI) in Poland. These figures cover overall salmon consumption and include both wild and farmed salmon.

3) Retail market (household panel data)

To complement trade and consumption statistics, the report uses household purchase data compiled for MSC by YouGov, based on a panel that regularly reports retail purchases.

This approach helps describe how salmon is bought in practice and supports analysis by product format and category segments. Coverage varies by market: detailed data were available for Poland; Denmark, the Czech Republic and Romania were covered in aggregated form; data for Finland were not available; and a separate Swedish analysis was prepared using NIQ RMS data, RISE reports and Norwegian Seafood Council statistics.

4) MSC salmon products in the BCE market

This chapter is based on analyses conducted by MSC using annual sales reporting submitted to MSC by licence holders (companies that have signed a licence to use the blue MSC label) and is used to describe the presence and development of MSC-certified wild salmon across product categories and segments in the BCE region.

5) Global wild salmon catches and MSC fisheries

For global context, the report uses FAO catch data (available up to 2023) to illustrate long-term catch patterns and explain year-to-year variability (including the cyclical impact of pink salmon), supplemented with MSC data on the engagement of wild salmon fisheries in the MSC program.



SPECIES DIVERSITY EXPLAINED

Wild salmon occur in the waters of the North Pacific and the North Atlantic, including the Baltic Sea. The North Atlantic is inhabited by the species *Salmo salar*. Unfortunately, due to dams and other river barriers, the degradation of natural habitats, and pollution, the spawning migrations of Atlantic salmon have been severely restricted. As a result, wild Atlantic salmon populations have drastically declined.

Today, Atlantic salmon available in stores is mainly farmed, originating primarily from aquacultures in Chile, Norway, Canada, and Scotland.

In contrast, Pacific salmon (*Oncorhynchus spp.*) includes a dozen or so species from the *Oncorhynchus* family. These fish live along the northern coasts of North America, around Alaska (often referred to as Alaskan salmon), and in the northwestern Pacific.

BALTIC SALMON

In recent decades, many Baltic salmon (*Salmo salar*) river stocks have remained weak due to a combination of pressures, including habitat fragmentation (dams and other river barriers), degraded spawning habitats and pollution. Monitoring across the region continues to track smolt production and adult returns to assess stock status.

For 2026, the International Council for the Exploration of the Sea (ICES) advises that no more than 30,000 Atlantic salmon should be caught within SDs 22–31 (Baltic Sea, excluding Gulf of Finland), and only within Åland Sea and Gulf of Bothnia (SDs 29N–31) between 1 May and 31 August.

For the Gulf of Finland (SD 32) where most catches consist of reared salmon, no more than 11,800 salmon should be caught in 2026. As a result, wild-caught Baltic salmon is rarely available on retail markets, and any permitted fishing is tightly managed (e.g., spatial/temporal or river-specific measures) to safeguard weak populations.

Note:

The Baltic Sea also hosts sea trout (*Salmo trutta trutta*), which is similar in appearance to salmon and may be misidentified in catches without careful verification.

Sources:

<https://doi.org/10.17895/ices.advice.27202842>

<https://doi.org/10.17895/ices.advice.27202839>

<https://indicators.helcom.fi/indicator/salmon-abun>

THE MOST COMMON SPECIES OF WILD SALMON



PINK / HUMPBACK SALMON

Oncorhynchus gorbuscha

DK: Pukkellaks

FI: Kyttyrälohi

PL: Łosoś gorbusza / różowy

SE: Puckellax

RO: Somon roz / gorbuşa

CZ: Losos gorbuša



CHUM / KETA SALMON

Oncorhynchus keta

DK: Ketalaks

FI: Koiralohi

PL: Łosoś keta

SE: Hundlax / keta

RO: Somon keta

CZ: Losos keta



COHO / SILVER SALMON

Oncorhynchus kisutch

DK: Sølvlaks

FI: Hopealohi

PL: Łosoś kiżucz / coho

SE: Silverlax

RO: Somon coho

CZ: Losos kišuč / stříbrný



SOCKEYE / RED SALMON

Oncorhynchus nerka

DK: Rødlaks

FI: Punalohi

PL: Łosoś nerka

SE: Rødlax / sockeyelax

RO: Somon nerka / roşu / sockeye

CZ: Losos nerka / červený / sockeye



CHINOOK / KING SALMON

Oncorhynchus tshawytscha

DK: Kongelaks

FI: Kuningaslohi

PL: Łosoś czawycza / królewski

SE: Kungslax / chinook

RO: Somon chinook / rege

CZ: Losos čavyča



ATLANTIC SALMON

Salmo salar

DK: Atlantisk laks

FI: Lohi

PL: Łosoś atlantycki / szlachezny

SE: Lax

RO: Somon atlantic

CZ: Losos atlantsky

* Photos of Pacific salmon courtesy of the Alaska Seafood Marketing Institute: <https://www.alaskaseafood.org/alaska-seafood-101/types-of-seafood/>

** Photo of Atlantic salmon courtesy of the Aquaculture Stewardship Council (ASC)

HOW TO DISTINGUISH BETWEEN WILD AND FARMED SALMON?

CHECK THE NAME ON THE LABEL

- The label may state “farmed” or “wild”.
- Terms such as “Pacific” or “Alaskan” usually indicate wild-caught salmon, although some of these species are also farmed.
- Terms such as “Atlantic”, “Norwegian”, “Scottish”, “Islandic” usually refer to farmed salmon.
- The Latin name listed on the packaging reveals exactly which species of salmon was used (see species overview above). However, remember that even some Pacific salmon species are now farmed.

LOOK FOR ECOLABELS

Credible ecolabels help consumers distinguish between wild-caught and farmed fish and also provide assurance of responsible sourcing.



The MSC (Marine Stewardship Council) ecolabel always indicates wild salmon caught from sustainable fisheries.



The ASC (Aquaculture Stewardship Council) ecolabel always indicates farmed salmon raised in responsible, environmentally certified aquaculture.



WHAT DO CONSUMERS EXPECT?

This section is based on a consumer survey commissioned by the Marine Stewardship Council (MSC) and carried out by the research agency SW Research across six markets in North and Central Europe: Czech Republic (N=607), Denmark (N=610), Finland (N=610), Poland (N=607), Romania (N=610) and Sweden (N=610) (total N=3,654).

The study was conducted using the CAWI method (Computer-Assisted Web Interview) between 15 and 30 December 2025. In total, 3,654 online interviews were completed. In each country, a minimum of 600 respondents aged 18+ were surveyed, with samples structured to reflect the national distribution of gender and age.

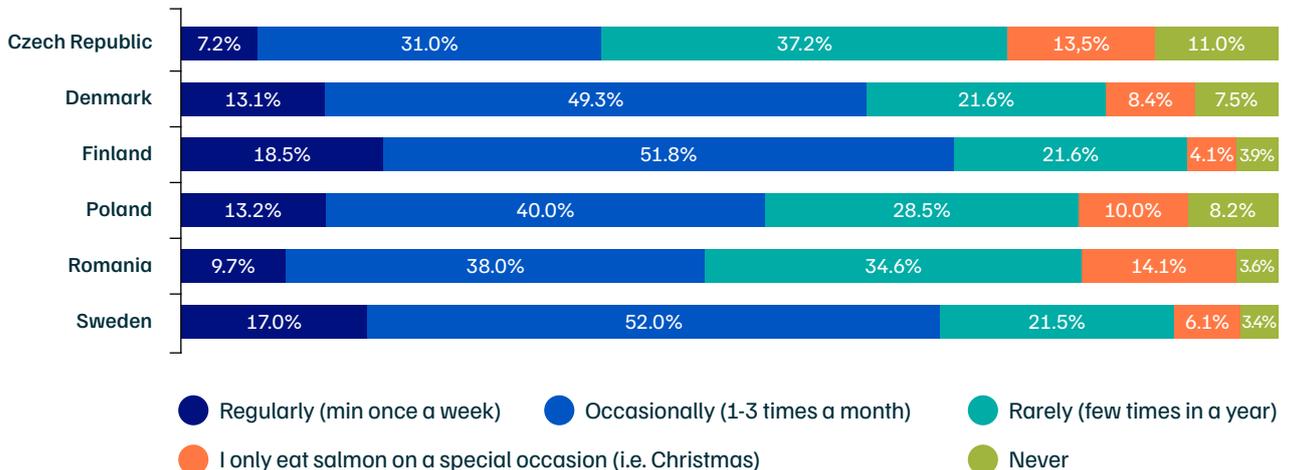
HOW OFTEN DO YOU EAT SALMON?

FREQUENCY OF SALMON CONSUMPTION

Across all six markets, a clear majority of respondents report eating salmon. Consumption is highest in Sweden, Romania and Finland (each above 96%), followed by Denmark and Poland (around 92%), while the Czech Republic records the lowest share at 89%.

In terms of frequency, salmon is most often consumed 1–3 times per month across the region. The Czech Republic is the main exception, where the most common pattern is eating salmon only a few times a year.

Regular consumption is concentrated in the Nordic markets: 19% of Finns and 17% of Swedes eat salmon at least once a week, compared with 13% in Poland and Denmark, 10% in Romania, and 7% in the Czech Republic.

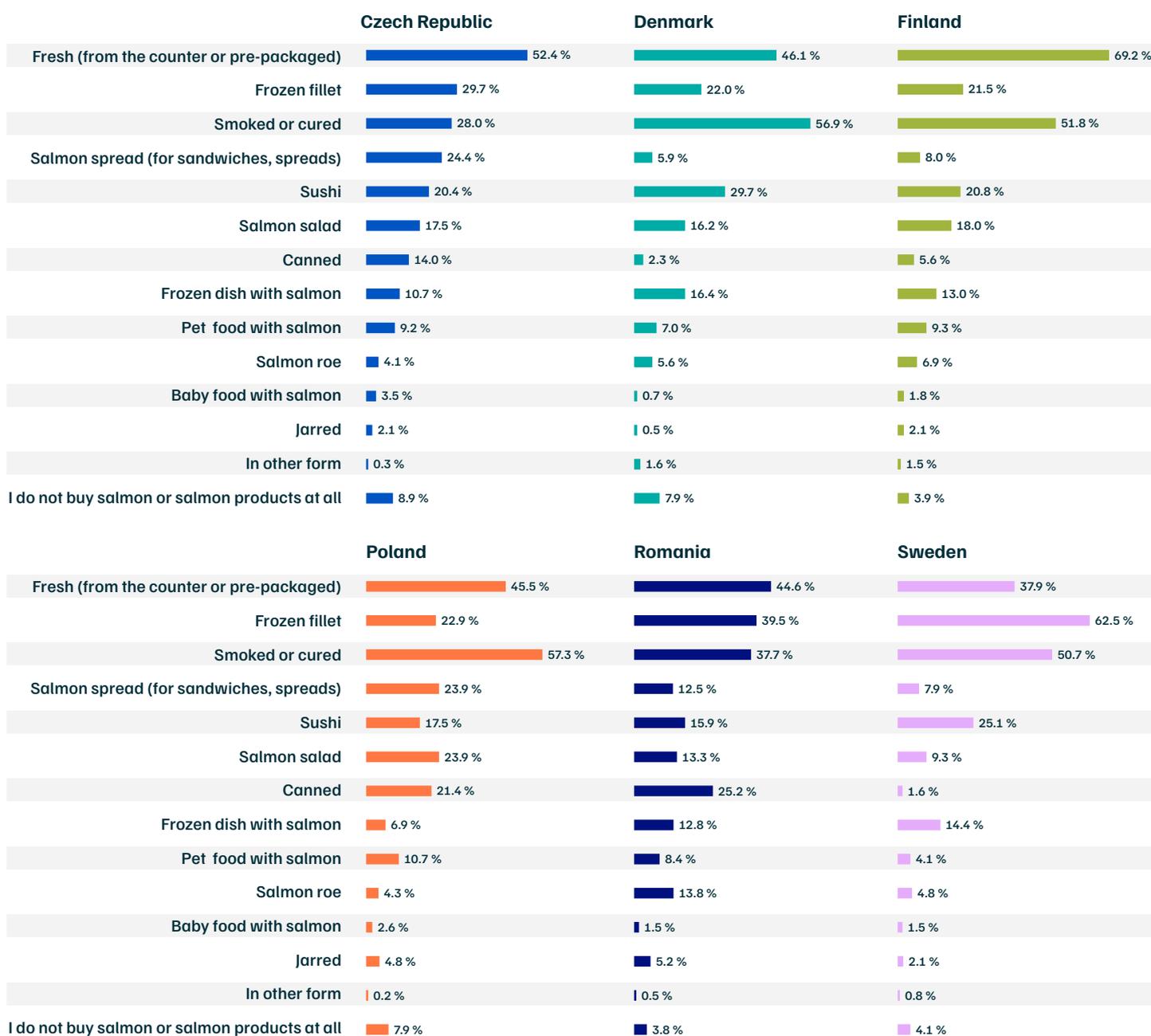


FORM OF STORE-BOUGHT SALMON

Consumers across the region declare buying salmon in formats that match different usage moments: quick breakfast/sandwich options, dinner-ready fillets, and “special occasion” products.

- Fresh salmon is an important baseline format in all markets, especially in Finland (69%) and the Czech Republic (52%).
- Smoked or cured salmon is an important choice in Denmark (57%), Poland (57%), Finland (52%) and Sweden (51%).
- Frozen fillets stand out particularly in Sweden (63%).
- In several markets, consumers also reach for “ready-to-use” or “snackable” forms (e.g., sushi—mentioned as a common purchase in multiple countries, salmon spread in Czech Republic and Poland).

IN WHAT FORM DO YOU BUY SALMON IN STORES?

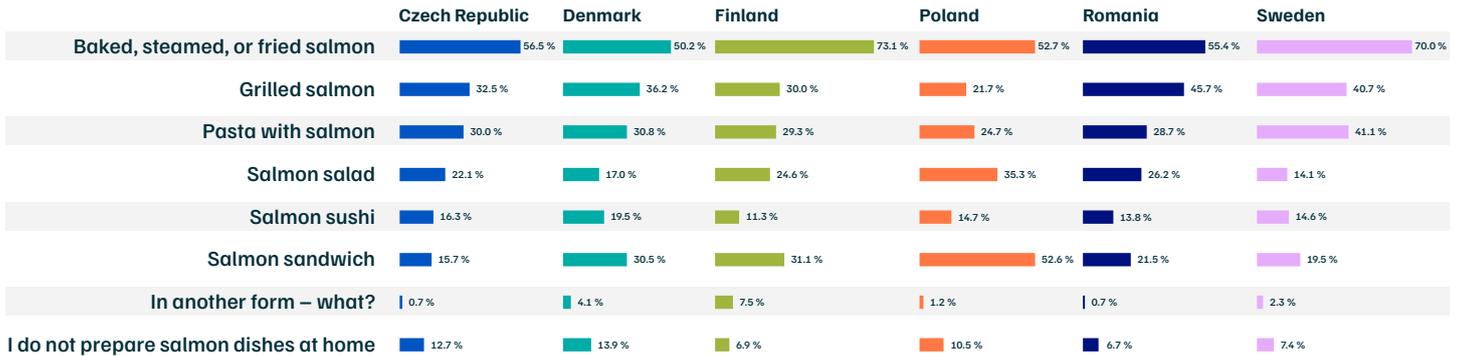


PREPARATION METHODS AT HOME

At home, salmon is primarily expected to work well with simple, reliable cooking methods. The **dominant preparation is baking/frying/steaming** (ranging from 50% in Denmark to 73% in Finland and 70% in Sweden).

Beyond that, consumers integrate salmon into familiar meals (grilled salmon, pasta, sandwiches, salads), with notable country differences—for example, salmon sandwiches are particularly common in Poland (53%).

IN WHAT FORM DO YOU PREPARE SALMON AT HOME?



ATTENTION TO ECOLABELLS

A significant proportion of consumers view independent sustainability and responsible farming certifications as a meaningful factor in their purchasing decisions.

The highest share of consumers who actively pay attention to certification marks is in Sweden, where **44.2% say they look for sustainability or responsible farming certifications always or often when buying**

salmon. Strong results are also seen in Romania (36.5%), Finland (35.7%), Poland (34.9%) and Denmark (32.2%) – in each of these markets, approximately one in three shoppers regularly notices certification labels. The share is lower in the **Czech Republic (27.8%)**, but still represents more than one in four consumers.

WHEN BUYING SALMON, DO YOU PAY ATTENTION TO WHETHER IT HAS CERTIFICATION FROM INDEPENDENT ORGANIZATIONS INDICATING SUSTAINABLE FISHING (E.G., MSC) OR RESPONSIBLE FARMING (E.G., ASC)?



PREFERENCES – WILD OR FARM?

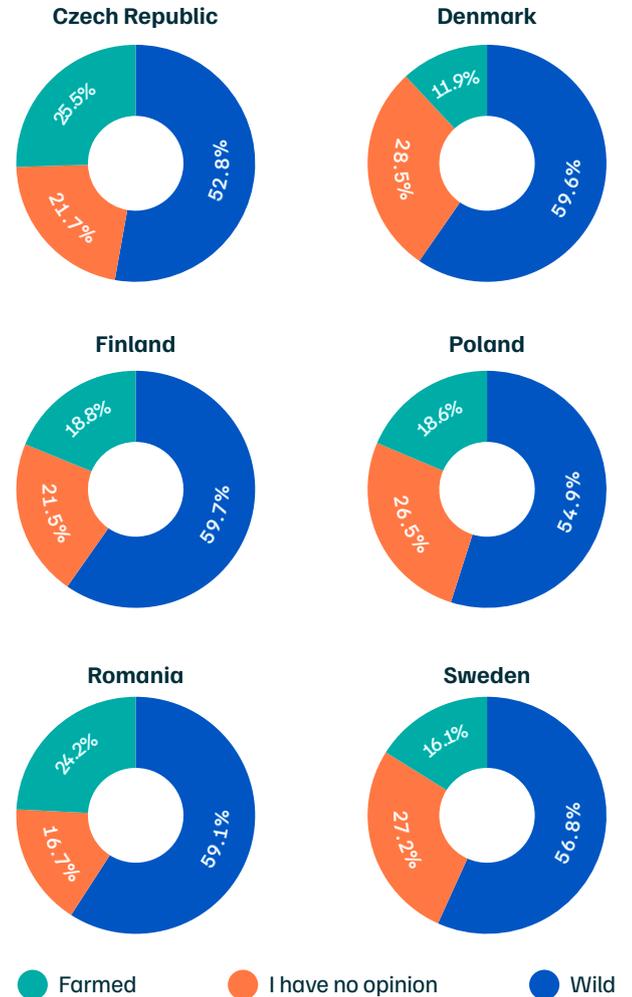
Across all six markets, consumers more often report eating farmed rather than wild salmon. Finland stands out as the market where farmed salmon is mentioned most frequently, while Denmark has the lowest share and the most balanced split between farmed and wild. Mentions of wild salmon are generally low across markets, with Denmark again the most notable exception.

A sizeable share of consumers cannot say whether the salmon they eat is wild or farmed, with “don’t know / hard to say” responses forming a notable proportion across markets.

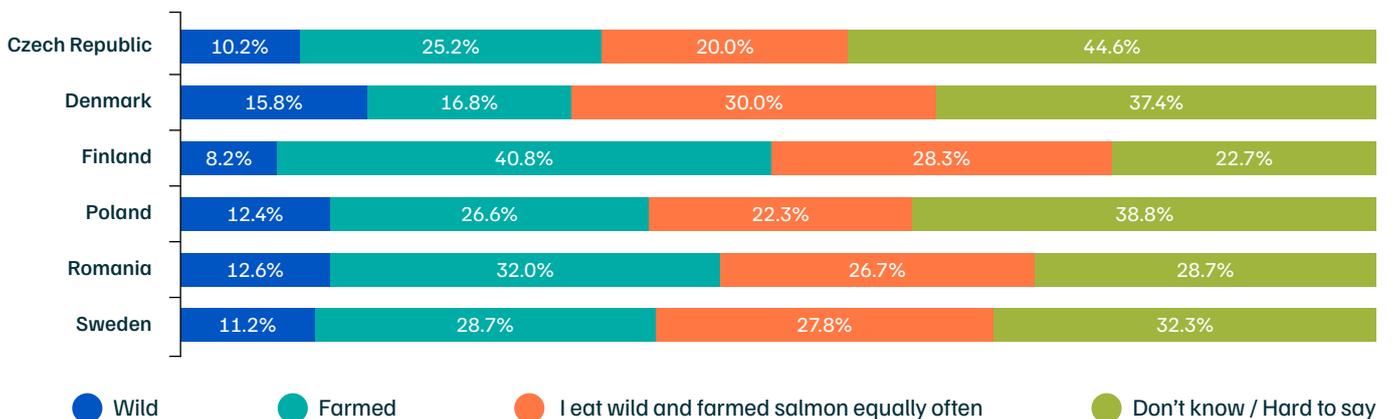
Actual reported behaviour does not fully align with stated preferences. When salmon buyers are asked what they would choose regardless of price or availability, wild salmon is the clear first choice in every market, while farmed salmon is selected by a minority and a further group remains undecided or has no clear preference.

When asked why they would prefer wild salmon, consumers most often cite better taste and the perception that it is more natural and associated with better living conditions. Health-related reasons are particularly prominent in Poland and Romania, while environmental considerations are mentioned more frequently in Denmark, Finland and Sweden.

IF YOU COULD CHOOSE REGARDLESS OF PRICE OR AVAILABILITY, WOULD YOU PREFER TO BUY WILD OR FARMED SALMON?



IS THE SALMON YOU MOST OFTEN EAT WILD OR FARMED?



SALMON MARKET IN BALTIC AND CENTRAL EUROPE REGION

Salmon is a cornerstone species in the Baltic and Central Europe region — not only in terms of volume, but even more so in terms of value. This is particularly true in the Nordic markets, where salmon has long been embedded in food culture and remains one of the most important seafood products in retail and foodservice.

Historically, salmon in the region came from wild stocks. In the early part of the last century, wild salmon from Baltic river systems was part of everyday diets across many countries. Over time, however, Baltic salmon populations declined sharply due to ecosystem pressures and human impacts on rivers and habitats. As local wild supplies diminished, farmed salmon — largely sourced from Norway — became the main alternative and gradually came to dominate markets across the region.

Today, this strong reliance on farmed salmon brings both opportunities and challenges. A market that depends heavily on a single supply base can be vulnerable to issues around raw material availability, price volatility and product consistency — affecting consumers, processors and retailers alike. For these reasons, there is growing interest in diversification, and **wild salmon is increasingly seen as one route to broaden supply options and offer consumers greater choice.**

This section brings together two complementary perspectives. It starts with **salmon consumption trends** over time based on official consumption data (EUMOFA, Eurostat) compiled for the MSC by the **Institute of Agricultural and Food Economics – National Research Institute (IAFE-NRI)** in Poland. This shows how consumption levels and growth patterns have evolved across the region in recent years.

It then introduces a **retail perspective** based on household purchase data compiled for the MSC by **YouGov**. This shows what people are actually buying in stores, including how the category is split between fresh, smoked, frozen and other processed formats in selected markets.

The analysis also includes closer looks at individual markets. It highlights **Poland**, where salmon has grown rapidly in both volume and value and where wild salmon is increasingly contributing to category growth. A separate spotlight on **Sweden** complements the regional picture and provides additional insight from one of the region's most established salmon markets.

SALMON CONSUMPTION

Salmon continues to be one of Europe’s most popular seafood choices. Its strong position is supported by a “healthy” image, its versatility across different cuisines, and the fact that salmon is widely available in many formats — including fresh, smoked, frozen and further processed products.

Between 2018 and 2024, salmon consumption in the European Union increased overall, although the pace of change varied from year to year. Growth was most visible up to 2021, before slowing in 2022–2023. This temporary slowdown is likely linked to cost-of-living pressures and higher price sensitivity among consumers. The 2024 figures, however, suggest a return to growth and confirm salmon’s strong place in Europe’s seafood basket. In 2024, average salmon consumption in the EU reached 2.29 kg per person.

At the same time, there are clear differences across European markets — both in consumption levels per person and in how quickly consumption is changing. The following sections provide a detailed look at trends in: **Denmark, Sweden, Finland, Lithuania, Latvia, Estonia, Poland, the Czech Republic, Hungary, Romania and Slovakia.**

The salmon consumption data presented in this section were compiled for the MSC by the **Institute of Agricultural and Food Economics – National Research Institute (IAFE-NRI)** in Poland, using **EUMOFA and Eurostat data for EU countries**. The figures cover **total salmon consumption** and include both wild and farmed salmon.

DENMARK, SWEDEN AND FINLAND: MATURE, HIGHLY SATURATED MARKETS

Denmark, Sweden and Finland are among the highest salmon-consuming countries in the European Union. In 2024, salmon consumption reached **6.26 kg per person in Denmark, 5.29 kg in Sweden and 4.24 kg in Finland** – all well above the EU average.

This reflects long-established seafood-eating habits, good availability of salmon across retail and foodservice, and strong consumer familiarity with salmon as an everyday choice.

Across 2018–2024, consumption in **Sweden and Finland remained fairly steady**, with a brief dip in 2022–2023 followed by a recovery in 2024. **Denmark stands out for**

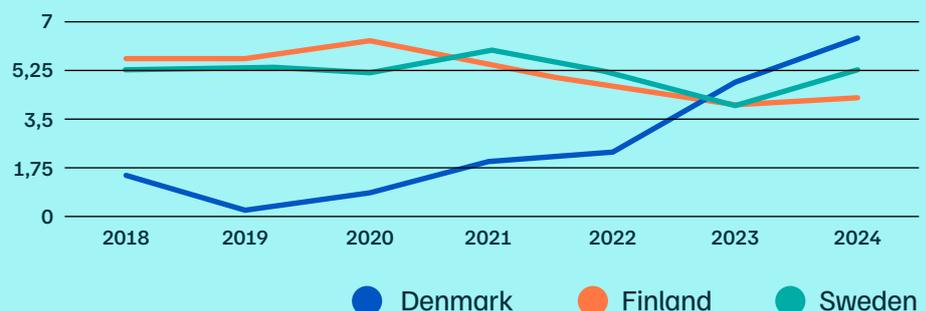
particularly strong growth in recent years and recorded the highest per-person salmon consumption in the EU in 2024.

With consumption already very high in these markets, future growth is most likely to come from higher-value products – such as more processed options and convenient ready-to-eat or ready-to-cook meals.

Consumers are also paying increasing attention to where salmon comes from, how transparent the supply chain is, and whether seafood is produced and sourced responsibly — all of which are becoming more important factors in purchasing decisions.

SWEDEN, DENMARK, FINLAND SALMON CONSUMPTION (KG / PER CAPITA)

Source: MSC chart based on data from IAFE-NRI



BALTIC STATES: RELATIVELY HIGH CONSUMPTION, GREATER YEAR-TO-YEAR VARIATION

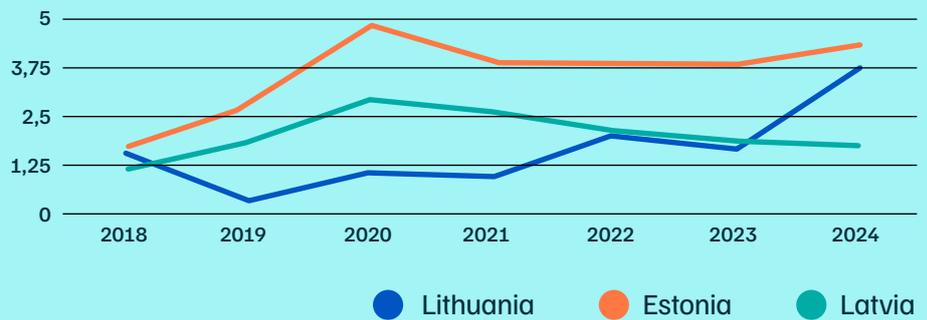
Estonia, Lithuania and Latvia show a slightly different profile: in some years, consumption is relatively high, but it can fluctuate more.

Among the Baltic States, **Estonia** recorded the highest salmon consumption in 2024 at **4.33 kg per person**. Since 2020, Estonia has maintained consistently high consumption levels, underlining salmon's strong role in everyday diets and suggesting steady underlying demand.

Lithuania has seen clear growth in recent years (despite some fluctuations), rising from **1.49 kg per person in 2018 to 3.73 kg in 2024**. This may indicate that the market is gradually catching up with higher-consuming countries. Latvia, by contrast, has shown a decline since 2020 after earlier growth. This could reflect greater sensitivity to price changes and shifts between species or product formats. In 2024, salmon consumption in **Latvia** was **1.73 kg per person**.

BALTIC STATES SALMON CONSUMPTION (KG / PER CAPITA)

Source: MSC chart based on data from IAFE-NRI



CENTRAL AND EASTERN EUROPE (CEE): GROWING CONSUMER POTENTIAL

Poland, the Czech Republic, Slovakia, Hungary, Romania and Bulgaria all have lower salmon consumption per person than the EU average. However, these markets show a clear long-term upward trend.

In 2024, the highest consumption levels in the region were recorded in the **Czech Republic (1.46 kg per person)** and **Slovakia (1.30 kg)**.

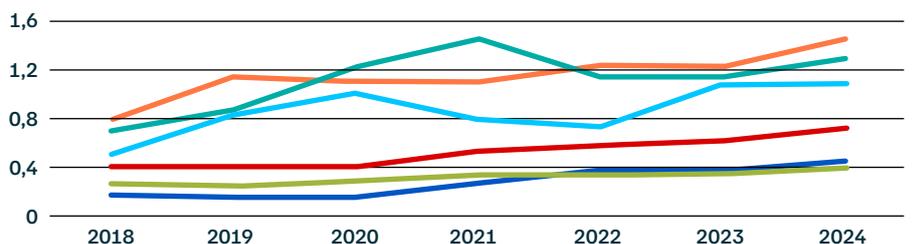
Poland reached **1.10 kg per person**, while remaining the region's largest market by volume (around **40,000 tonnes per year**).

Romania, Bulgaria and Hungary were still below **1 kg per person**, but all three continue to show gradual growth in consumption.

Growth across CEE has been particularly noticeable since 2020, linked to changing food habits, more seafood eaten at home, and improved availability of salmon through modern retail channels. Salmon is still often bought for special occasions in many CEE markets, but the data suggest it is becoming a more regular choice over time.

CEE COUNTRIES SALMON CONSUMPTION (KG / PER CAPITA)

Source: MSC chart based on data from IAFE-NRI



● Bulgaria ● Czech Republic ● Hungary ● Poland ● Romania ● Slovakia

WILD AND FARMED SALMON RETAIL MARKET

YouGov consumer data, commissioned by MSC, add a valuable consumer perspective to official market statistics based on production, imports and exports (EUMOFA, Eurostat), which mainly describe product flows along the supply chain.

Based on a household panel that regularly reports retail purchases, the YouGov dataset makes it possible to assess the salmon market through **real shopping behaviour**. For this report, detailed data were available for **Poland**, while **Denmark, the Czech Republic and Romania** were covered only by aggregated data, without a split by salmon origin (wild vs farmed). Data for **Finland** were not available. A separate analysis of the **Swedish market** was prepared in cooperation with **Nielsen**.

Looking at consumer purchase data in relation to total salmon volumes highlights clear **differences in market scale between Poland, the Czech Republic, Denmark and Romania**. Poland remains the largest market, with a total volume of around 14,500 tonnes yearly, well above the other countries included in the analysis. By comparison, the volume is around 5,000 tonnes in Romania, 4,651 tonnes in the Czech Republic and 4,481 tonnes in Denmark.

Across all analysed countries, fresh salmon remains the dominant category. However, its share – and the role

of other segments – differs significantly between markets (see chart).

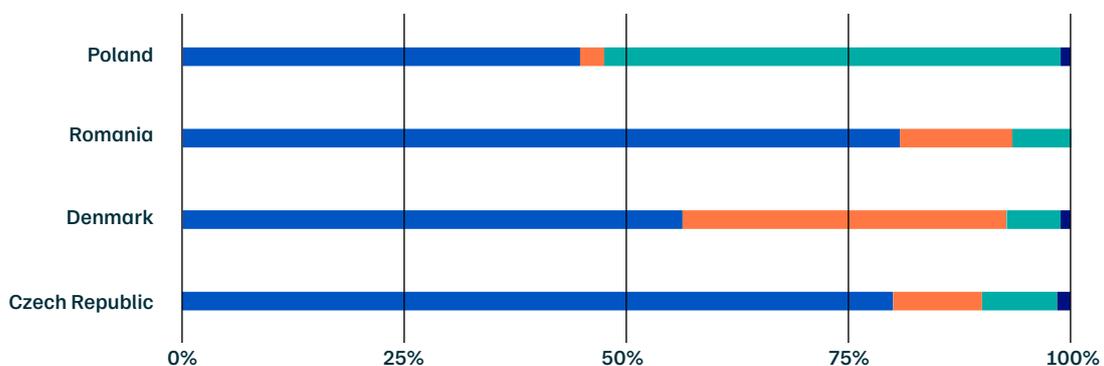
The highest share of the fresh segment is seen in the Czech Republic (around 80% of volume) and Romania (around 75–76%). In the Czech Republic, frozen salmon accounts for around 10% and smoked salmon for around 9%, with frozen remaining larger than smoked in volume terms.

Denmark has the most diversified market structure. Fresh salmon accounts for around 56% of volume, while smoked salmon represents around 36%, alongside a relatively small share for frozen products (around 6–7%).

Poland is characterised by a relatively even distribution between fresh salmon and processed products. Fresh salmon represents around 45% of volume, while the combined share of smoked salmon and other processed formats exceeds 50% – the highest level among the markets analysed. Frozen salmon plays only a marginal role.

In Romania, fresh salmon dominates, but the “other” category plays a comparatively larger role than in most markets. This segment includes, for example, marinated products and other processed formats, and together accounts for more than 6% of total basket volume.

SHARE OF CATEGORIES IN SALMON RETAIL BASKET



Source: MSC chart based on data from YouGov

● Fresh ● Frozen ● Smoked ● Other

SPOTLIGHT ON SWEDEN

While farmed salmon from Norway continues to dominate the market, wild salmon from other origins is gaining ground. Although still small in absolute terms, this segment is growing and is gradually gaining market share.

SWEDISH MARKET DEVELOPMENT

Sweden seafood market remains highly dependent on imports, with almost two-thirds of total seafood consumption sourced from abroad. In total, around 35,000 tonnes of salmon is imported from Norway annually, over half of the volume is fresh/chilled while frozen fillets accounts for about 25%.

Salmon accounts for 23 percent of the total seafood market volume in Sweden, corresponding to approximately 45,000 tonnes in whole weight equivalent. Since 2019, salmon consumption has declined by 17 percent, primarily due to rising prices. This decrease has been a major contributor to the broader decline in overall fish consumption in Sweden.

Norwegian export of salmon to Sweden declined from 2022 to 2025, largely due to sharp price increases. For example, prices for frozen farmed salmon rose by nearly 50% between 2021 and 2024. More recently, the market has shown clear signs of recovery, with Import volumes moving back toward 2021 levels while prices have decreased by approximately 7%. According to NIELSEN data fresh salmon sales in Swedish grocery stores increased from 2024 to 2025 with 16% and frozen salmon with 12% to 7599 ton.

THE RISE OF WILD SALMON

In contrast to the decline in of total salmon consumption, MSC-certified wild salmon has grown rapidly, with volumes tripling over a three-year period. Volumes increased from 137 tonnes in 2021/22 to around 490 tonnes in 2024/25. While volumes remain small compared to farmed salmon, the growth rate is significant.

In the Swedish market, wild salmon is primarily sold as frozen fillets, mainly of pink and chum salmon.

Sources:

Ref.no. 06870808 date: 2026-02-12, based on NIQ RMS data, Grocery Total, Total Fresh Fish&Shellfish resp Total Frozen Fish&Shellfish, Volume (KG) % Change vs YA, Calendar year, 2025 W52 (Copyright © 2026, NIQ)

MSC data

RISE Svensk sjömatkonsumtion 2023 report, <https://urn.kb.se/resolve?urn=urn:nbn:se:ri:diva-78286>

RISE Svensk konsumtion av sjömat 2021 report, <https://urn.kb.se/resolve?urn=urn:nbn:se:ri:diva-56764>

Norwegian Seafood Council statistics, <https://en.seafood.no/market-insight/norwegian-trade/year/>



SPOTLIGHT ON POLAND

Over the past five years, Poland's salmon market has expanded significantly. Household penetration has increased, alongside a steady rise in sales value. Salmon has become one of the most important fish species on the market and is helping to drive growth across the multiple seafood categories – including fresh, smoked, marinated and frozen products.

While farmed salmon still accounts for most of the market, wild salmon is playing a growing role and is gradually shifting the market structure.

GROWTH OF THE SALMON MARKET

In 2020, 70.8% of households purchased salmon. By 2025, this figure had risen to 79.1%, meaning **the buyer base increased by close to one million households** over the period analysed. This growth was gradual and consistent, pointing to sustained development of the category.

The expansion in the buyer base has been accompanied by an increase in overall market size. **Total salmon volume** grew from 25.6 thousand tonnes to 32.4 thousand tonnes, an **increase of 26.6% over five years**.

Over the same period, **market value grew much faster** – from PLN 0.7 billion in 2020 to PLN 1.68 billion in 2025 (**+137.5%**) – indicating a substantial rise in consumer spending within this category.

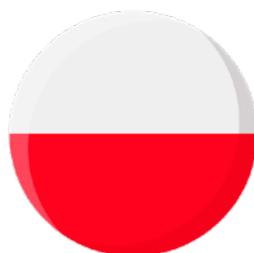
THE RISING IMPORTANCE OF WILD SALMON

Within the overall market, the **wild salmon segment has grown particularly fast**. The **volume of products clearly labelled as wild salmon** increased from 2.0 thousand tonnes to 4.5 thousand tonnes over five years – a rise of **+125%**, compared with 26.6% growth for the total salmon category.

The value of wild salmon segment grew even more sharply, from PLN 127.3 million to PLN 446.1 million, representing an increase of **+250%** over the period analysed.

Rapid growth is also reflected in the number of buyers. In 2019–2020, wild salmon was purchased by 22.9% of households. By 2024–2025, this share had increased to around 37.9%.

This indicates that, despite the dominant position of farmed salmon, wild salmon is steadily gaining importance among Polish consumers.



SALMON PRODUCTS WITH MSC ECOLABEL

The **MSC Baltic & Central Europe (BCE)** region covers a broad spectrum of markets across the Nordics, the Baltics and Central and South-Eastern Europe. It covers **17 countries**: Bulgaria, the Czech Republic, Denmark, Estonia, Finland, Hungary, Kosovo, Latvia, Lithuania, North Macedonia, Moldova, Poland, Romania, Serbia, Slovakia, Sweden and Ukraine.

While these markets differ in both scale and maturity, they share many of the same underlying dynamics when it comes to salmon. Consumers value salmon, supermarkets shape most purchasing choices, and limited access to local marine fisheries means supply

increasingly depends on imported and processed products. **MSC-certified wild salmon** is increasingly part of this picture, bringing together a **reliable supply** with **quality** and clear assurance of **sustainable sourcing**.

Although wild salmon still represents a small share of the MSC Program in the BCE region – around **4% of total MSC volume** – it is growing quickly. Today, MSC-certified wild salmon is already present in **over 100 brands**, and **more than 90 suppliers** hold an MSC licence to use the MSC ecolabel on their products. This shows strong and growing interest from both retailers and producers.



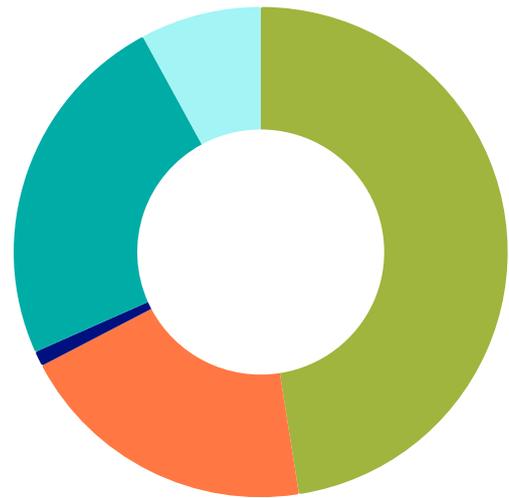
Over the past decade, volumes of the MSC-ecolabelled wild salmon products in the BCE region have shown **sustained growth, with momentum strengthening in the years following 2020/21**. Recent expansion has been driven mainly by **Central Europe**, where volumes increased by around **+150%** over the last five years, making it the main source of growth in the region. The **Nordic** part of the region also expanded over the same period, with volumes up by around **+50%**. Overall, the highest volumes were recorded in 2023/24 and 2024/25, **particularly in Poland, Sweden and the Czech Republic**.

Looking at product types, the **MSC salmon market in BCE region is built mainly on chilled and frozen products**, including MAP and smoked formats, which have shown stable, long-term growth. At the same time, **pet food has become the fastest-growing category**. In 2024/25, pet food already accounted for 27% of total volume, making it the second-largest category, just behind chilled products (31%) and on par with frozen products (27%).

Other categories present in the BCE region include preserved products (such as canned fish) and ready meals, which currently remain niche in scale. This limited presence, however, highlights a significant opportunity for future development within the region. In terms of **salmon species used in MSC-certified products**, the biggest change over the past five years has been **the growth of the “mixed” category**. Its share increased from around 10–15% to around 30–35% of all MSC salmon products in the BCE region.

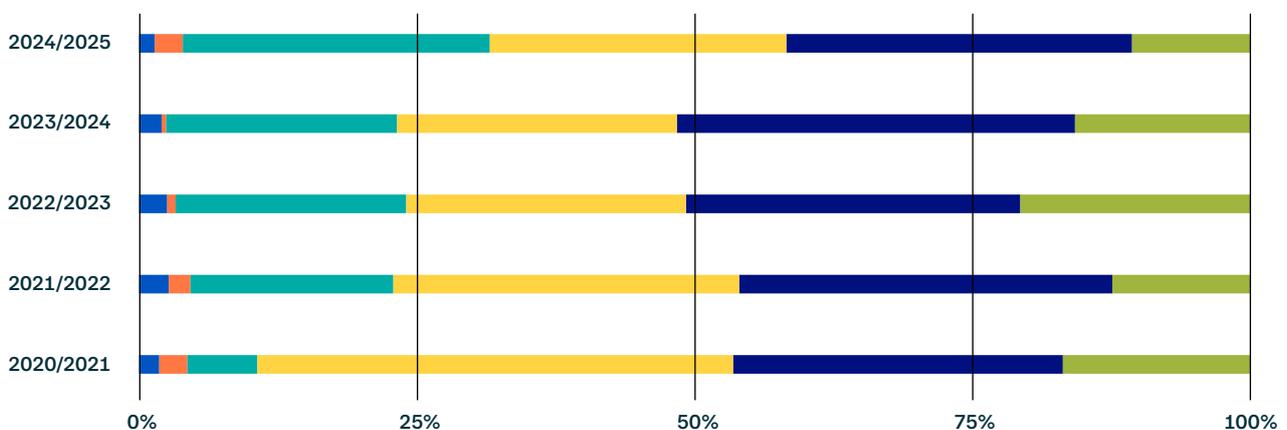
This shift is closely **linked to the expansion of pet food**, where mixed species help support scale and provide more stable supply. Single-species salmon (pink, chum, sockeye and coho) remain important, but their share has declined in relative terms as mixed salmon category has become more prominent.

SPECIES IN MSC SALMON PRODUCTS (2024/25)



- 48% Mixed salmon species
- 24% Pink salmon
- 20% Chum salmon
- 8% Sockeye salmon
- 1% Coho salmon

MSC SALMON PRODUCTS BY CATEGORIES 2021-2025



- Ready meal
- Preserved (including canned & dried goods)
- Pet food
- Frozen
- Chilled
- Baby food

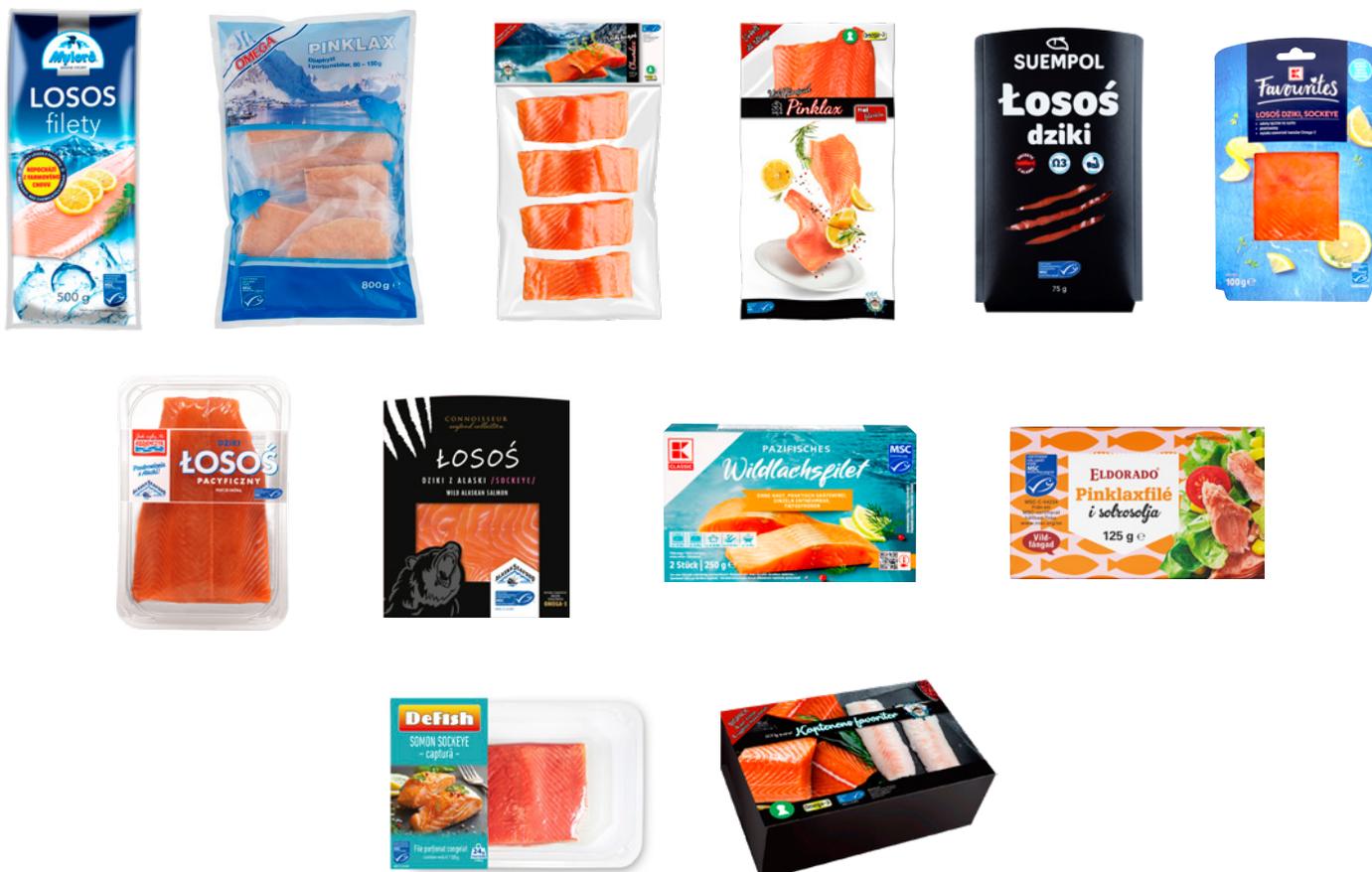
MSC FROZEN AND CHILLED WILD SALMON

The largest category in the 2024/25 season was **chilled products**, which accounted for **31% of total volume** and have **grown more than 2.5 times over the last five years**. A key driver of this growth across the entire region has been products' volumes in brands of **Lidl**, which introduced MSC-certified wild salmon fillets and whole fish packed in MAP, as well as smoked salmon slices, in Poland and across Central Europe. A good example of product innovation is also **salmon roe sold under the Lidl Deluxe brand**, available among others in Lithuania, Hungary, Romania and Bulgaria.

Other MSC-certified wild salmon brands active in the chilled segment include **Abramczyk** (Poland), **Suempol** (Poland), **Connoisseur** (Poland), **Kaufland** (Central Europe), **Albert** (Czech Republic), **MyLord** (Czech Republic) and **Mieszko** (Poland).

In total, there are currently **over 50 different chilled products** available on the market, supplied by **more than 20 suppliers from the BCE region**, all licensed to use the MSC logo.

Another important category within the MSC Program is **frozen products**, which represent around **27% of the total market**. After several years of stagnation, this segment recorded a **strong rebound in 2024/25, with growth exceeding 40%**. This increase was driven mainly by the expansion of newer brands, such as Royal Foods in Sweden and MyLord in the Czech Republic, supported by long-standing MSC partners including **Rema 1000**, **FROSTA**, **Nowaco** and Lidl. Today, the frozen category includes **over 30 different products**, supplied by **nearly 30 licensed suppliers** using the MSC ecolabel.



UNLOCKING THE POTENTIAL OF MSC-CERTIFIED WILD SALMON IN PROCESSED SEAFOOD

Processed products made with MSC-certified wild salmon are most established in Anglosphere markets, particularly the United States, Canada, the UK and Australia, where consumers can choose from over 300 different products. Global seafood leaders such as Thai Union play a major role in this category and are also present in Europe; however, they currently do not offer any wild salmon products in the Baltic & Central Europe (BCE) region.

In BCE, availability remains limited to a small number of multi-country, multilingual products, which are often reported across several European markets and therefore difficult to analyse in detail. The most visible examples include seasonal Lidl Deluxe products, Lidl Nixe canned salmon in several flavours, selected ALDI

Süd offerings under Almare, Eldorado brand in Sweden and niche brands such as Fish4Ever and Fish Tales sold through specialist retailers and online, alongside German-labelled products in Kaufland.

While canned fish remains a consistently popular category across the BCE region, MSC-certified wild salmon accounts for just 0.3% of all preserved seafood products. This stands in sharp contrast to Northern Europe (3.5%) and North America (15.2%). As supply chains actively seek alternative, responsibly sourced species alongside traditional canning raw materials such as Atlantic mackerel, herring and sprat, expanding the use of MSC-certified wild salmon represents a clear and timely opportunity for growth.



NEW LEADER: PET FOOD WITH MSC-CERTIFIED WILD SALMON (BCE)

Pet food products made with **MSC-certified wild salmon** represent a **fast-growing and increasingly important category** in the Baltic & Central Europe (BCE) region. While still emerging, this segment has already reached **a meaningful market scale**. Over the past four to five years, the number of active certified products has **more than doubled**, indicating sustained market growth rather than short-term trials.

The development of this category is **structural rather than pilot-driven**. Pet food products containing MSC-certified wild salmon are now available across **all BCE markets** and are offered by a wide range of **branded manufacturers** such as Mars (whole region), Vitakraft (Central Europe), Biltema (Scandinavia), Smart Pets (Scandinavia), Yarrak (whole region), First Price (Denmark) as well as **retailer private labels** including Coshida in Lidl, Louisa in Penny, Cachet and Topic in ALDI, Rema 1000 and K-Classic in Kaufland. The category is mainly based on **mixed wild salmon**, which supports **scalability, consistent volumes, and a stable supply base**.

For retailers aiming to increase MSC-certified volumes, pet food offers a **practical and relatively low-risk entry point**.

It allows volumes to scale quickly and aligns with growing consumer demand for responsible sourcing and ingredient transparency.

At a regional level, several structural factors further strengthen the role of pet food:

- **Poland** is one of the fastest-growing pet food markets in Europe, outperforming the EU average, with strong domestic production, high export capacity and an increasing role as a supplier to both EU and global markets.
- **Denmark** provides a strong industrial backbone through its well-established feed and animal nutrition sector, supporting scalable pet food production across the region.
- In **Denmark, Sweden and Finland**, where retailer engagement with the MSC program is already high, MSC certification in pet food has not yet been adopted at scale, creating a **clear opportunity** to expand certified pet food assortments using **MSC-certified wild salmon**.



MSC BABY FOOD - A CLEAR OPPORTUNITY

In the Baltic & Central Europe (BCE) region, baby food products with fish are mainly made with wild salmon and whitefish. For many years, salmon has been the leading species, representing around 70–85% of fish-based baby food products. The remaining products usually contain whitefish, such as cod or pollock.

This is notable when compared with the wider MSC program. In most MSC-certified seafood categories, whitefish represents more than half of total volumes, followed by tuna and small pelagic species. Wild salmon, by contrast, remains a relatively small category overall. In baby food, however, the situation is different — wild salmon plays a much stronger role.

The baby food category is most developed in Scandinavia, especially in Sweden and Finland, which are global leaders in MSC-certified baby food. These markets offer a wide range of products from well-known brands such as HiPP, Nestlé, Piltti and Semper (Hero) with recipes based on both salmon and whitefish and carrying the MSC ecolabel.

In Central Europe, the category is still at an early stage. Apart from a limited number of products in selected retailers — for example Rossmann, which currently offers only whitefish-based baby food — MSC-certified baby food products are largely not yet available.

For retailers, this represents a clear growth opportunity. Baby food is a highly trust-sensitive category, where consumers care strongly about product safety, ingredient origin, and independent certification.

MSC-certified wild salmon fits well with these expectations and can clearly stand out on the shelf.

For retailers, this category offers the opportunity to:

- expand MSC-certified products into a high-trust, high-relevance category,
- work with baby food brands or develop private-label products using MSC-certified wild salmon,
- take an early leadership position in a category that is still underdeveloped across much of the BCE region.



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



FOCUS ON MSC WILD SALMON PARTNERS

Baru

Salmon and Cod Balls Rp55.000

Disajikan dengan kentang tumbuk, brokoli, dan saus dill.



Salmon and cod from a MSC-certified sustainable fishery. www.msc.org MSC-C-54739

Informasi alergen:
Mempunyai gluten, ikan, dan susu



IKEA

“In 2022, IKEA Indonesia became the first food service in Indonesia to achieve MSC certification for our salmon menu, reinforcing our sustainability commitment while strengthening our market leadership in responsible sourcing. The MSC ecolabel assures that our wild-caught salmon meets sustainability standards, enhances supply chain transparency, and builds consumer confidence. Through MSC-certified salmon, we deliver quality, trust, and sustainable choices to our beloved Indonesian customers.”

Padma Rizki
Food Safety Manager, IKEA Indonesia

REMA 1000

Rema 1000 is a Norwegian retail chain, that has been on the Danish market since 1994. They pride themselves in being a discount store with values.

Part of those values translate into a strong commitment to sustainable seafood. 72% of the sales value of seafood sold in Rema 1000 stores in Denmark is MSC or ASC certified. Rema 1000 has set itself apart on the Danish retail market, by being a thought leader when it comes to sustainable seafood.



ABRAMCZYK

ABRAMCZYK is a Polish family business and one of the leading suppliers of fish and seafood in Poland. Operating for over 30 years, the company understands the importance of sustainable fishing.

It consistently puts its experience and knowledge in this area into practice, delivering over 120 different MSC-certified products to the Polish and Central European markets in the past year alone, both under the ABRAMCZYK brand and under the brands of leading retail chains.

PILTTI

All PILTTI baby food products have been produced in Turku, Finland since 1952. The goal from the beginning has been to produce healthy food that fits the modern lifestyle and that Finnish children love to eat. PILTTI fish dishes offer several wild salmon-based meals for babies and toddlers of all ages. Popular options include Little Fisherman's Treat (5 months), Mashed Potatoes and Salmon (8 months) and Pasta and Salmon (1-3 years).



SUEMPOL

Suempol is a Polish food company founded in 1989 in Bielsk Podlaski, specializing in fish processing, particularly salmon. It is one of the largest producers of smoked salmon in Poland and exports its products to many countries worldwide. In 2023, Suempol Wild Salmon won the award for the Best MSC-certified Product - customer choice.

MARS

Mars Petcare is a global company owned by Mars, Incorporated, specializing in pet food production, veterinary services, and pet health solutions. The company is one of the world's largest pet food manufacturers and under its brand SHEBA® also offers selected products containing MSC-certified wild salmon, supporting sustainably sourced seafood.



ROYAL FOOD

Royal Foods is a family-owned company and Sweden's largest importer of MSC-certified wild salmon.

The company offers pink and chum salmon in fillet portions and whole sides, available to consumers in the frozen food segment.

CHAIN OF CUSTODY CERTIFIED PARTNERS WITH WILD SALMON IN SCOPE

THE CZECH REPUBLIC

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

DENMARK

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

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

ESTONIA

1. Avektra
2. M.V. Wool

FINLAND

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

HUNGARY

1. Hering-Trade
2. HiPP
3. Nestlé Purina (*Bük*)
4. Partner in Pet Food Hungária

LATVIA

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

LITHUANIA

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

POLAND

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

19. Thai Union
20. Tiernahrung Deuerer GmbH
21. Yantai Liming Aquatic Products Co., Ltd

ROMANIA

1. Bistromar La Timona

SWEDEN

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

UKRAINE

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

RETAILERS WITH WILD SALMON IN OWN-LABEL BRANDS

ALBERT

Albert

ALDI NORD

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

ALDI SÜD

Cachet

AXFOOD

Omega and Eldorado

BIEDRONKA

Marinero

CARREFOUR

Targ Świeżości

COOP (DK / NORDICS)

Coop, Irma

KAUFLAND

Blue Bay, K-Classic, K Favourites, K Exquisit

LIDL

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

METRO

Fine Life

NETTO

Navito Seafood, Premier

NORMA

Fjordkrone

PENNY

Louisa

REMA 1000

Rema 1000

RIMI

Rimi

SALLING GROUP

Princip!, Vores, Salling

TESCO

Tesco Finest

More info about MSC salmon products in Poland, Sweden, Denmark and Finland available here:



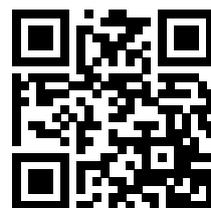
msc.org/pl/losos



msc.org/se/lax



msc.org/dk/laks



msc.org/fi/lohi

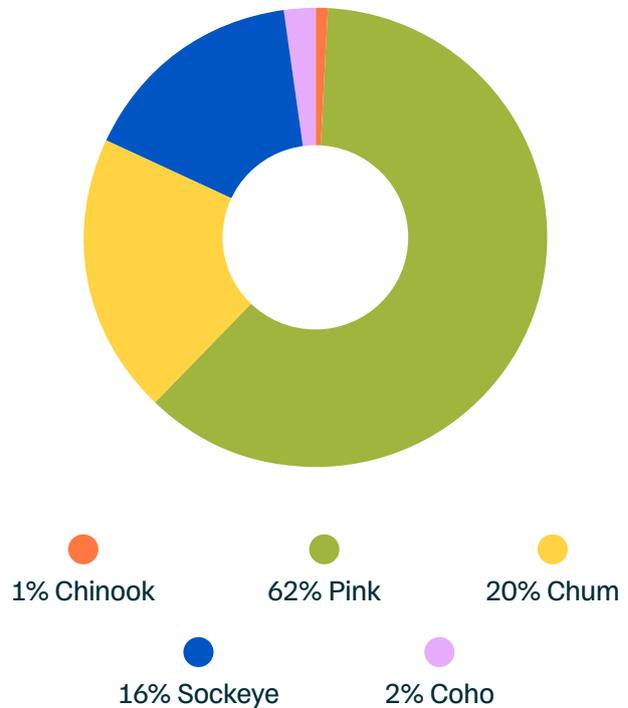
GLOBAL WILD SALMON CATCHES

Over the past 45 years, **global wild salmon catches have increased significantly**. Average annual catches in the 21st century have been almost **20% higher** than those recorded between 1980 and 1999. In 2023, the global wild salmon catch reached **almost 1.1 million tonnes**.

It is important to note the cyclical fluctuations observed in annual total catch volumes. These natural variations stem primarily from the two-year spawning cycle of pink salmon (*Oncorhynchus gorbuscha*), a species that typically represents 30–60% of the global wild salmon catch. Because pink salmon return to spawn only in odd-numbered years, their abundance contributes to predictable peaks and troughs in annual harvest levels.

Commercial wild salmon fisheries include both Pacific species (FAO areas 61 and 67) and Atlantic salmon (FAO 27). **Pacific salmon account for almost all wild-caught salmon globally** (over 99%) with **pink salmon** comprising the largest portion of landings, followed by chum and **sockeye salmon**.

GLOBAL WILD SALMON PRODUCTION PER SPECIES



GLOBAL WILD SALMON CAPTURE PRODUCTION (TONNES)



Source: MSC chart based on FAO data:
<https://www.fao.org/fishery/en/aqspecies/search>

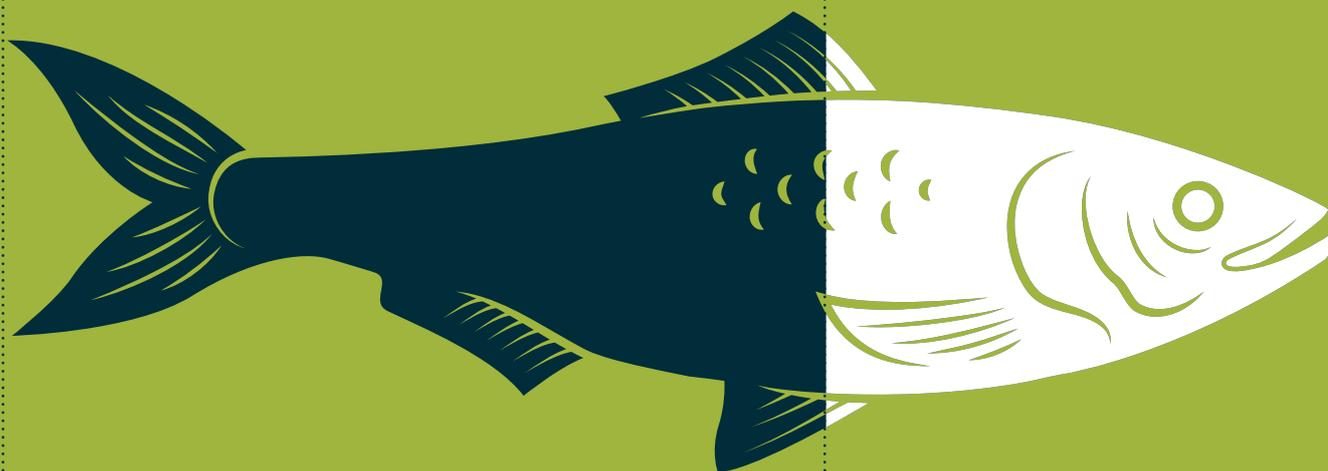
WILD SALMON FISHERIES IN THE MSC PROGRAM

All fisheries engaged in the MSC program undergo rigorous assessments and annual surveillance audits, consistently demonstrating strong management and a commitment to continuous improvement in line with the strict requirements of the MSC Fisheries Standard. MSC certification is granted following a detailed, multi-month assessment that examines the fishery's impact on wild salmon populations, its interaction with the marine ecosystem, and the overall quality of its governance and management systems. Certification is valid for five years, during which fisheries must show ongoing progress through yearly audits.

47 wild salmon fisheries engaged in MSC Program

678,280 tonnes of wild salmon supplied annually by MSC-certified fisheries

62% of the global wild salmon catch is MSC certified



As global demand for salmon continues to rise, ensuring that salmon fisheries operate sustainably has become increasingly important. In the regions where Pacific salmon fisheries are active, fishing has supported local economies and communities for centuries. This long-standing relationship with the ocean has fostered a strong understanding among fishers of the need for responsible, science-based management that maintains healthy salmon stocks and ensures their availability for future generations.

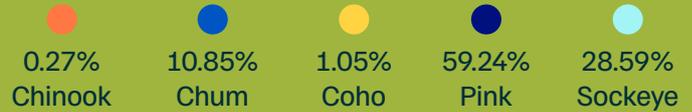
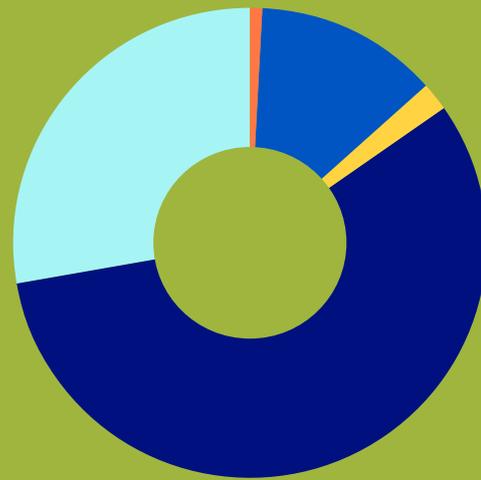
To help achieve this, the North Pacific Anadromous Fish Commission (NPAFC) was established as an intergovernmental organisation dedicated to safeguarding North Pacific salmon. Thanks to the high level of stewardship shown by Pacific salmon fisheries, most stocks are in good condition.

The responsible practices and effective management demonstrated by these fisheries have been recognised by independent conformity assessment bodies (CABs), resulting in MSC certification.

Pacific salmon fisheries have been **part of the MSC programme for over 25 years**, supplying certified sustainable salmon to markets worldwide. Over this time, the annual volume of **wild salmon from MSC-certified fisheries increased by approximately 85%**, from 367,417 tonnes in 2020 to **678,280 tonnes today**.

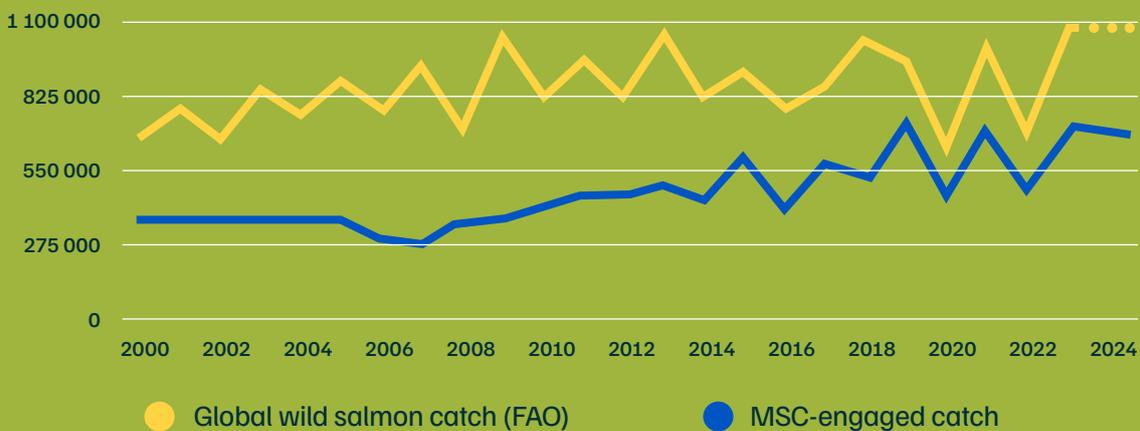
Currently, **47 salmon fisheries are engaged in the MSC programme**, including **45 certified fisheries and 2 in assessment**. Together, these fisheries account for **62% of the global wild salmon catch**. Pink salmon represents the largest share of MSC-certified and MSC-engaged catches (59%), followed by sockeye salmon (29%) and chum salmon (11%).

MSC SALMON CATCHES BY SPECIES 2024-25



Source: MSC data

MSC-ENGAGED WILD SALMON CATCHES COMPARED WITH GLOBAL VOLUMES (TONNES)



Source: MSC chart based on MSC and FAO data. FAO data available up to 2023.

INSPIRING EXAMPLES OF MSC-CERTIFIED FISHERIES

Alaska salmon fishery

Since 2000, the Alaska salmon fishery has maintained its MSC certification for environmentally responsible and sustainable fishing. It was one of the first MSC certified fisheries in the world and is admired as a pioneer and role model for many others.

The MSC certified Alaska salmon fishery includes all five species of native Pacific salmon: chum, chinook, coho, pink, and sockeye which are harvested by a variety of gear types including nets, trolling and fishwheels. The fishery delivers over 170,000 tonnes of sockeye salmon and around 110,000 tonnes of pink salmon each year, along with smaller volumes of the other species.

Operating at this scale requires a forward-looking approach: the fishery has introduced robust harvest strategies that enable to respond rapidly to changing environmental conditions and to adjust fishing effort according to stock health. These measures help ensure that salmon populations remain abundant and resilient, safeguarding the resource for generations to come.

With its fifth certification in 2025, it became the first USA fishery and only the third worldwide to mark 25 years in the MSC program. This milestone reaffirms Alaska's leadership in sustainable fisheries.

Annette Islands Reserve salmon

Managed by the Metlakatla Indian Community, the fishery targets chum, coho, chinook and pink salmon in the productive waters off the Annette Islands Reserve in southeast Alaska.

In this fishery, the conditions set at certification have been consistently met, with targeted improvements implemented to safeguard salmon stocks for the future. One of the key measures introduced was a shift toward more selective fishing methods in open-water areas. As a result, the fishery now takes over 85% of its catch using purse seine gear. Purse seine is considered relatively selective compared with other methods, as it operates in the water column and is aimed specifically at the target salmon species.

The fishery is actively monitored and managed on a weekly and daily basis to make sure enough salmon escape to reach the local spawning grounds. In response to the depletion of sockeye salmon populations in the Annette Islands, a stock recovery strategy has been implemented, and the fishery is committed to ensuring these efforts are not impaired through incidental catch of this species. This is one of a number of improvements the fishery is undertaking to reduce potential negative impacts.

The local community – whose way of life depends on salmon and who possess a deep understanding of Pacific salmon species – has taken care to ensure that enough fish return to spawn and sustain healthy populations for the future.





A BIT OF BIOLOGY

Understanding the biology and physiology of commercially harvested fish species is essential for managing their exploitation responsibly.

This is particularly evident in salmon fisheries. Through the close cooperation of **fisheries, scientists, and the Marine Stewardship Council (MSC)**, salmon fisheries are managed to ensure that **wild salmon populations remain healthy** and that the fishing process is carefully planned and controlled.

Moreover, **knowledge of the basic aspects of salmon life cycles and growth strategies** can support **more efficient production planning**, for example by securing raw material supplies during natural low-catch periods, which cyclically occur in salmon populations.

Salmon are **fascinating fish** — not only because of their **diverse reproductive strategies** but also because of their **remarkable long-distance migrations**. During these journeys, they must swim upstream, overcoming numerous obstacles in rivers.

They belong to **anadromous species** – fish that **spend part of their life in the ocean and return to rivers and streams to spawn**.

Pacific salmon display striking transformations during spawning. While young individuals are silvery in colour, during the spawning season their bodies turn **bright red**, and males develop a **hooked lower jaw** as a distinctive feature of the breeding phase.

LIFE IN FRESHWATER

In spring or autumn, salmon begin their **upstream migration to spawn**, often without feeding during the journey.

Depending on the species, spawning grounds may be located near the sea, but some, such as chum salmon (*Oncorhynchus keta*) and chinook salmon (*Oncorhynchus tshawytscha*), **travel as far as 3,200 kilometres** up the Yukon River (Alaska) to reach their headwaters. Every year, **millions of salmon return to their natal rivers**, creating **one of the most spectacular natural phenomena** – particularly visible in Alaska’s rivers.

Remarkably, salmon return to the very rivers where they were born, guided by their **acute sense of smell**. They remember the “scent” of their home stream and navigate back to it using a process known as **chemoreception** – the ability to detect chemical compounds dissolved in water through **specialised sensory receptors**.

During their migration, salmon must **overcome strong currents, rapids, and waterfalls**. They are capable of leaping over obstacles, including small dams, but **large river constructions often prevent them from reaching their spawning grounds**, reducing their reproductive success. **After spawning, many salmon die from exhaustion and lack of food**.

The **juvenile salmon**, called fry and later smolts, **undertake the long journey downstream from freshwater spawning grounds to the ocean**, where they mature. At the river estuary, smolts pause to feed and adapt to saline conditions before entering the open sea.



Wyatt Rhea-Fournier
Alaska Fisheries Outreach Manager
Marine Stewardship Council

LIFE IN SALTWATER

Once in the ocean, salmon migrate northward and **spend between one and seven years at sea**, depending on the species.

In the wild, salmon **feed on crustaceans, insects, and smaller fish**. This natural diet, combined with their **constant movement**, results in **well-oxygenated muscle tissue rich in astaxanthin** – a natural antioxidant responsible for the **red colour of salmon flesh** – as well as **high levels of Omega-3 fatty acids in optimal balance with Omega-6**.

An interesting aspect of salmon biology is the **two-year life cycle of pink salmon (*Oncorhynchus gorbuscha*)**. Pink salmon return to spawn only in odd-numbered years, causing natural fluctuations in annual catch volumes. **Well-managed MSC-certified fisheries adapt their harvesting strategies to these natural cycles**.

They develop accurate return forecasts and ensure that **salmon are allowed to complete their spawning migrations before commercial fishing begins, ensuring the sustainability of stocks**.



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

More than 700 fisheries globally are engaged in the MSC program representing 20.7% of wild marine catch, with MSC certified products available on shelves in over 70 countries.

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 mislabeling.

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 20,000 products with the MSC ecolabel on the market sold in over 70 countries, 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 – 50% 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.

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