



Marine
Stewardship
Council



Whitefish Market Analysis 2025: Sweden

Market Analysis: Swedish whitefish

THE YEAR 2025 MARKS AN IMPORTANT milestone for MSC Sweden: 15 years since the opening of its local office in Stockholm. However, the journey began much earlier when the very first MSC-certified product was introduced in Sweden in 2003 — a breaded hoki product from Findus.

Since then, whitefish has remained a cornerstone of the Swedish sustainable seafood market, accounting for 43% of all MSC-certified volumes. In the last financial year (1 April 2024 – 31 March 2025), 15,557 metric tonnes of MSC-certified whitefish were sold in Sweden — on par with the previous year. This analysis focuses exclusively on pure whitefish products and excludes those containing mixed species.

Key species and trends

For many years, Alaska pollock and Atlantic cod have dominated the Swedish whitefish market, representing 76% of volumes in 2024/25. While still significant, this was a decline from 82% the year before. The main driver was a 19% drop in pollock volumes (6,281 metric tonnes), while cod volumes (5,581 metric tonnes) remained stable.

Brands and producers of cod-based caviar spread could again after years of suspension by the end of 24/25 deliver MSC-certified products to grocery stores. This reintroduction is already reflected in the “mixed whitefish” category, which nearly doubled in volume compared to the previous year.

Beyond pollock and cod, diversification is slowly gaining momentum. Saithe is emerging as the main growth driver, with volumes increasing more than 200% since 2020/21, though from a small base.

A broader whitefish supply would strengthen the resilience of Sweden’s sustainable seafood market. Achieving this requires close coordination and, importantly, the willingness of major brands and retailers to introduce products based on a wider range of species. Encouragingly, half of the new MSC-certified products registered for launch in 2025 feature species other than Alaska pollock and Atlantic cod.

Product categories

The Swedish whitefish market is dominated by frozen products (80.7%). Within this category, 57% are sold as prepared products such as fish fingers, and 42% as plain fish. Other whitefish segments include:

- Chilled products: 5.8% (both prepared and plain, e.g. caviar spread)
- Preserved products: 4.4% (e.g. fish balls, caviar spread)
- Surimi: 3.7% (+21% year-on-year growth)
- Ready meals: 3.5%
- Other: 1.9%

Market enablers

The strong presence of MSC-certified whitefish in Sweden is made possible by the commitment of leading retailers such as ICA, Axfood, Lidl, and Coop, as well as well-established brands and producers including Findus, Orkla, Feldt’s, and Marenor. Today, more than 330 MSC-labelled whitefish products are available from around 50 different brands. MSC encourages all actors in the Swedish seafood market to continue expanding the range of MSC-certified whitefish products. It takes all of us to create change on the water and strengthen Sweden’s role as a leader in responsible sourcing. ●



Market Data: Swedish whitefish

Findus continue to lead the way in sustainable whitefish seafood



Over 20 years after launching Sweden’s first MSC-certified product, they remain the country’s largest brand for wild-caught whitefish, with a 100% MSC commitment. Loved by Swedish consumers, Findus’ Fish & Crisp was crowned Sweden’s Favourite MSC Product 2025. The winning slogan says it all: “I save the oceans one fish finger at a time”.

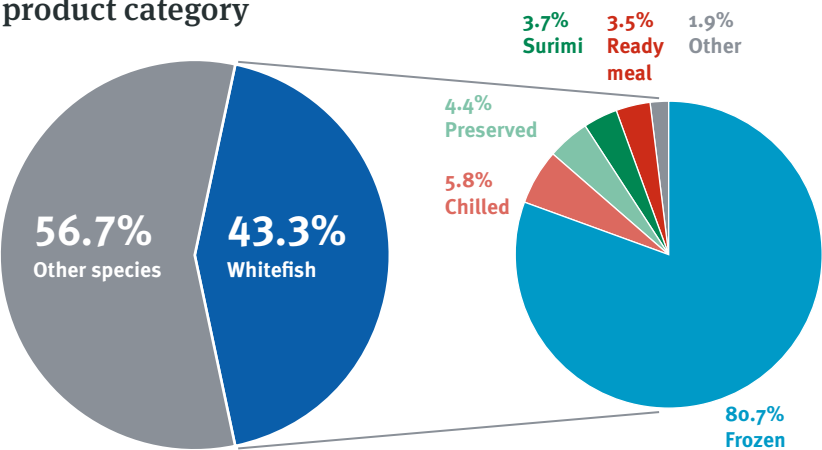
78%

of global whitefish catch is MSC certified

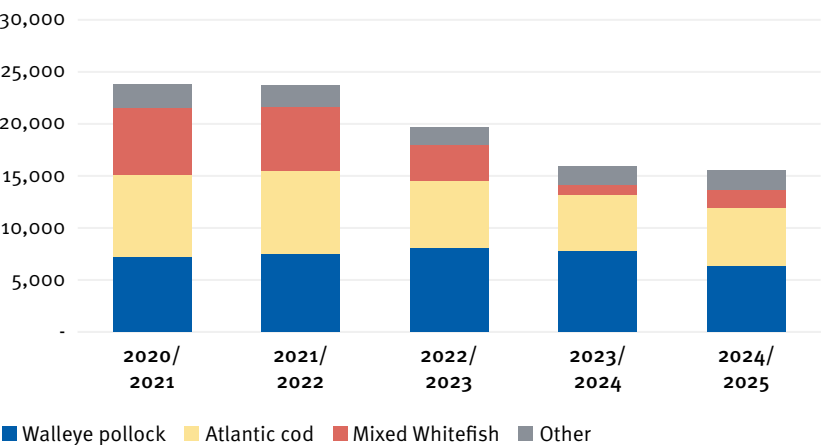
6 million+

metric tonnes of certified whitefish is in the MSC program

Volume of MSC labelled whitefish sold in Sweden by product category



MSC labelled whitefish sold in Sweden by volume (metric tonnes) and species





**Marine
Stewardship
Council**

Find out more: www.msc.org/se/vitfisk
Contact us: balticsea@msc.org



@MSC Sverige - Blå fisk



/marine-stewardship-council



MSC_sverige

All images copyright of the MSC unless otherwise stated. Cover image: iStock.
All data in this report is correct as of 30 June 2025 unless otherwise stated. Forecast data included in 2024/2025.
Registered Charity number: 1066806. Registered Company number: 3322023.
© Marine Stewardship Council 2025.