

Turning the tide: The future of sustainable herring



Skåne has a rich history

● **1200s** Skanör market becomes the Baltic's main trade fair

● **1300s** Salted herring feeds Catholic Europe during Lent

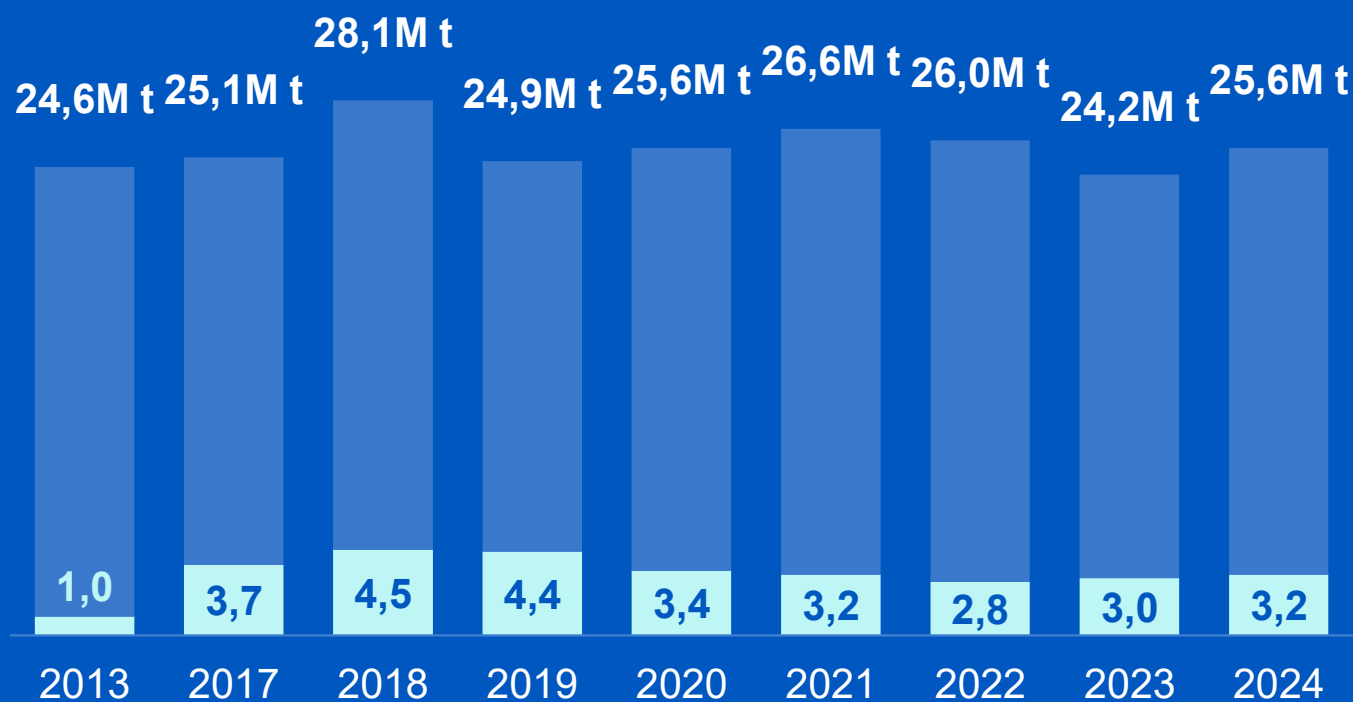
● Legend says the herring were so dense an axe could stand upright in the shoal.



Herring fishing in Øresund. Woodcut by Olaus Magnus, 1555

Certified Small Pelagics

Global small pelagic catch, million tonnes (MSC certified highlighted)



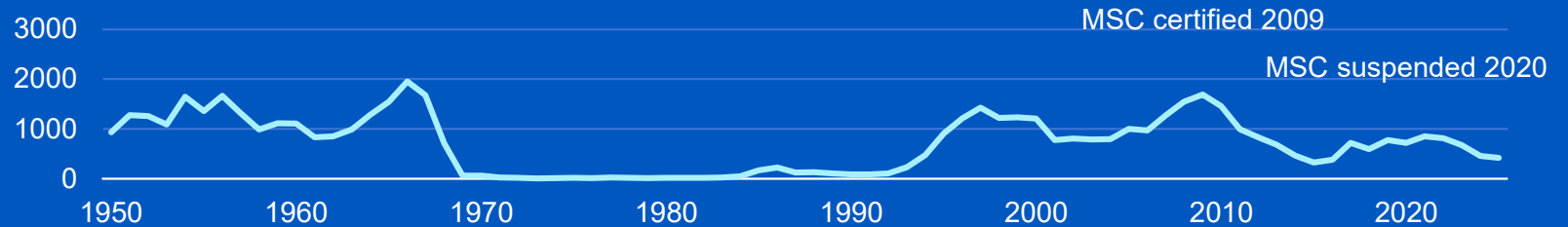
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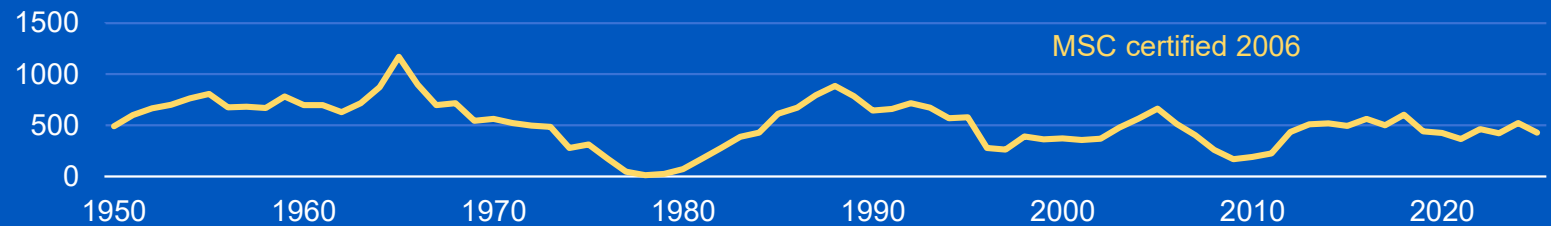
Herring history – North Atlantic

Annual catches of three North Atlantic herring stocks, thousand tonnes, 1950–2024

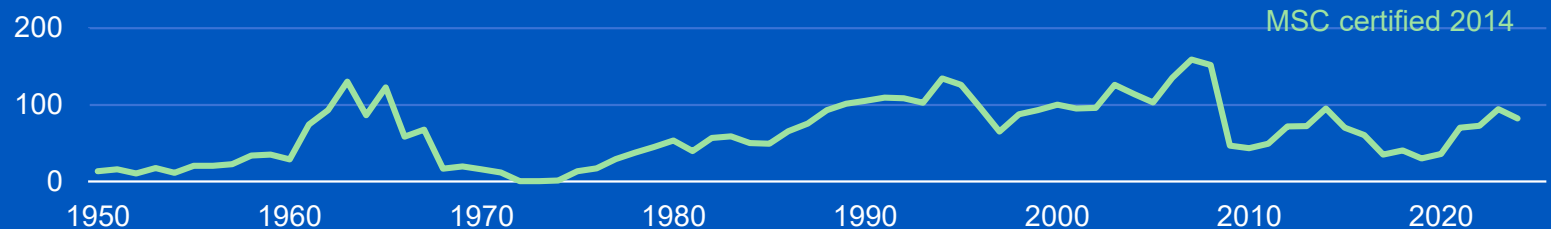
Atlanto-Scandian herring



North Sea herring



Icelandic summer-spawning herring



Source: Atlanto-Scandian: ICES ACFM 2004 (1950–1987); ICES SAG 2025, key 21106 (1988–2024)
North Sea: ICES SAG 2025, key 19373 (1950–2024)
Icelandic summer-spawning: Jakobsson 1980 (1950–1971); MFRI 2024 (1972–1979); ICES SAG 2025, key 19539 (1980–2024)

ICES advice Atlanto Scandian Herring

+10%

Advice for 2027 vs 2026, as the 2021–22 year classes join the spawning stock

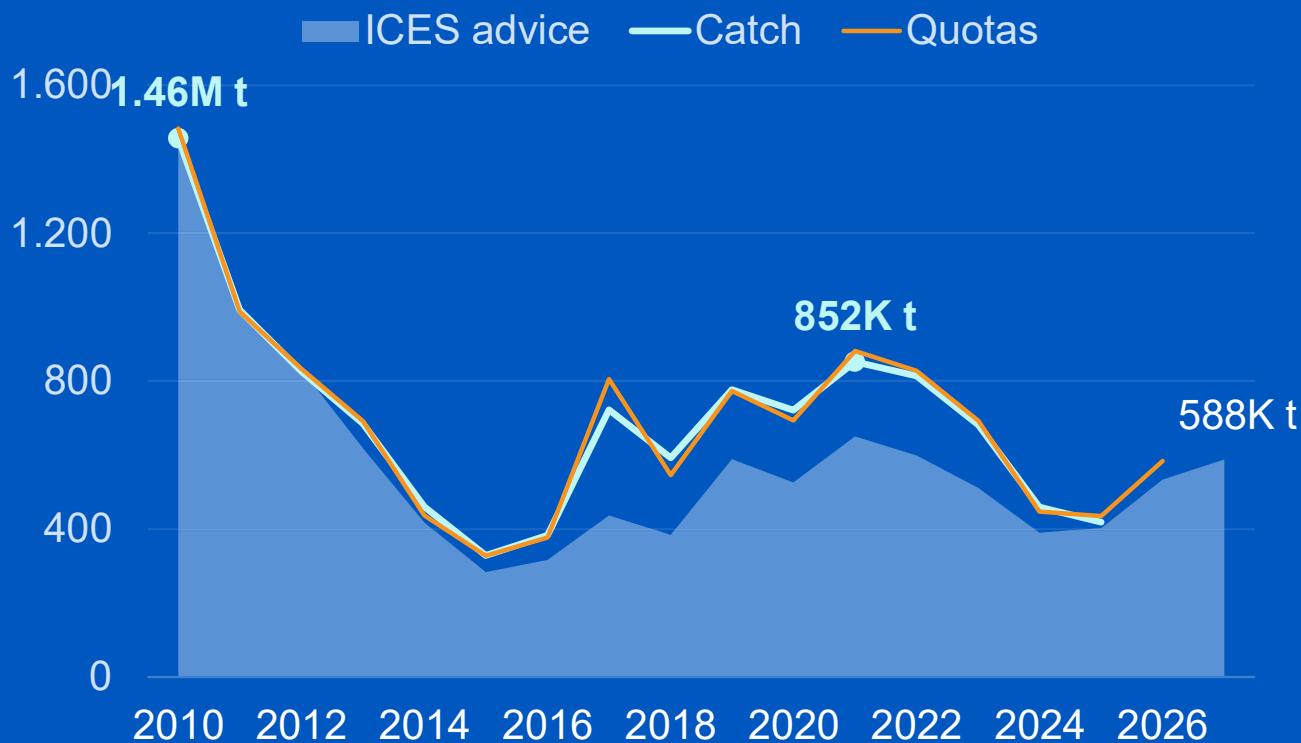
1.27M t

Caught above ICES advice, 2018–2025,

Below MSY Btrigger

Spawning stock between B-trigger and Blim,
Estimated to be above B-trigger 2027

Atlanto-Scandian herring, catch, quotas and ICES advice, thousand tonnes



Source: ICES advice her.27.1-24a514a, 30 Sept 2026

Baltic Herring

Gulf of Bothnia certified 2018

Gulf of Riga certified 2020

Scientific advices 2026



Source: MSC, 2026





The market for MSC labelled herring

Morten Fristrup, MSC Country Manager for Denmark



Markets for MSC-labelled herring

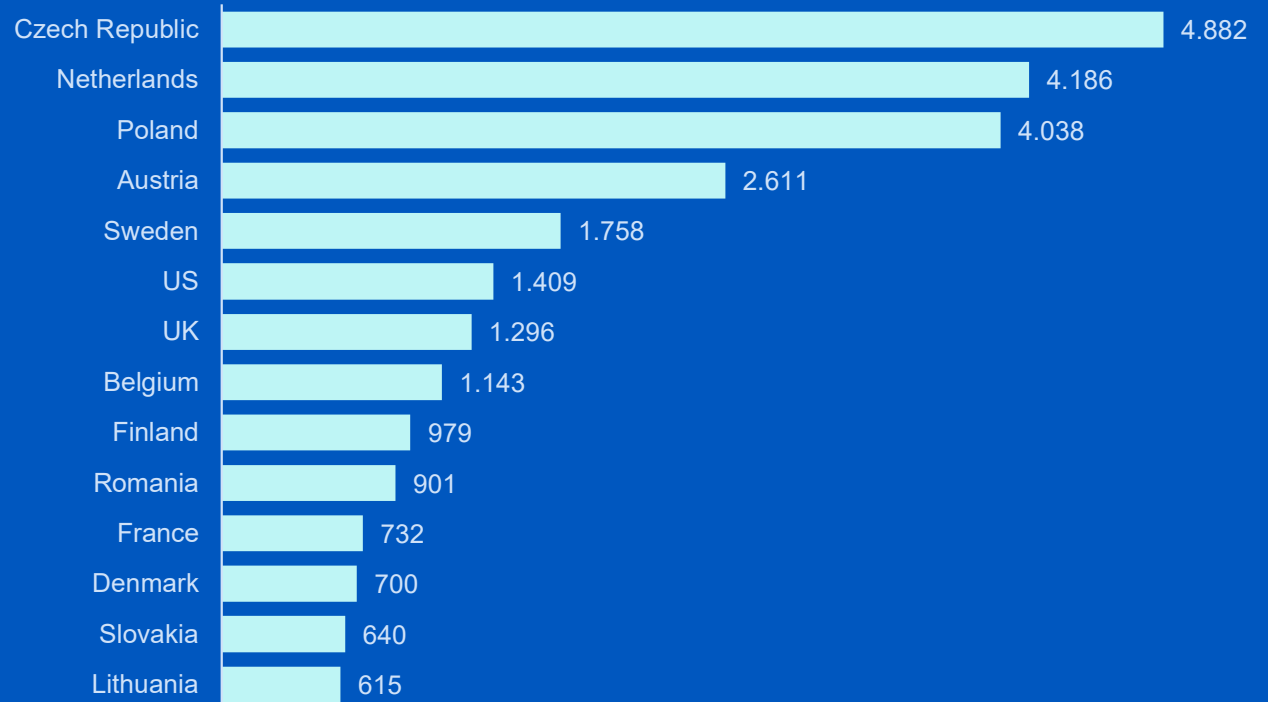
Central Europe

DACH and Central Europe are the main markets for MSC-labelled (North Sea) herring

Germany

is by far the largest single market: 44,060 in volume, 61% of the total 72,328

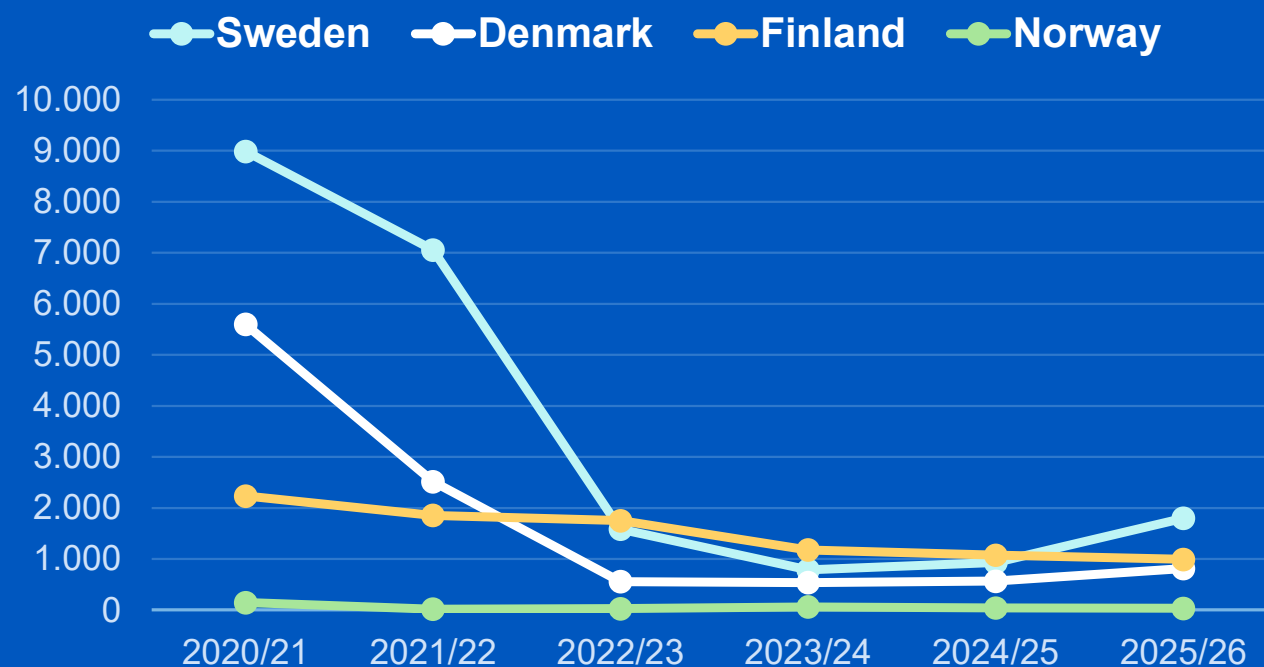
Other leading markets by volume, excl. Germany (FY 2025/26)



Nordic overview

Back to growth after a steep decline

DEVELOPMENT PER COUNTRY · 2020/21 – 2025/26



CHANGE 2024/25 → 2025/26

+39%

Nordics in total

3,635 in 2025/26, 79% below 2020/21

	2025/26	Change
Sweden	1,798	+94%
Denmark	809	+43%
Finland	993	-8%
Norway	36	-13%

Product format

MSC-labelled herring products by format

52%

Preserved

45%

Chilled prepared

3%

Other formats

chilled prepared
45%

other
3%

Preserved
52%

71 306t
total volume

Popular herring products

Examples of MSC-labelled herring products on the Nordic market



Future of sustainable herring



Quotas

Need for a quota sharing agreement for Atlanto Scandian herring



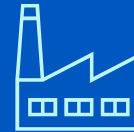
Consumers

Adjusting consumer preferences in the Nordic countries



Supply

Supply of MSC-certified raw material from the North Sea and Iceland



Competition

Competition for raw material from fishmeal/oil sector – linked to catches of Peruvian anchovetta

Turning the tide

The future of sustainable herring

PANEL



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