



MSC UK and Ireland Market Report 2020

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Executive Summary

The first edition of the MSC UK and Ireland Market Report showcases the leadership of the UK and Irish markets in sustainable seafood. It highlights the growing number of certified products and menu offerings available to consumers and profiles emerging sectors in the sustainable seafood space. The data analysed and presented in this report is provided to the MSC by businesses using the ecolabel on products and menus.

Key findings:

- Consumer spend on certified sustainable MSC fish and seafood in the UK and Ireland hit £1.3 billion in 2020.
- Increasing sales of white fish like cod, haddock and pollock, and chilled-prepared, frozen-prepared and pet food product categories have driven market growth in recent years. In 2019/20, chilled-prepared and frozen-prepared products accounted for 48.6% of the total volume of MSC certified product sales in the UK and Irish market, with cod, haddock and pollock representing nearly 80% of sales in these two categories.
- The sale of MSC labelled preserved and canned products in the UK and Ireland have declined since 2018/19. The suspension of all Northeast Atlantic mackerel fisheries will have a significant impact on the UK/Irish market, as the species accounts for over 50% of MSC canned sales by volume.
- Historically a high performing market with regards to MSC labelled tuna products, the UK/Irish market has now fallen behind Germany, Switzerland and the Netherlands, with a 2,511 tonne reduction since 2017/18 despite a growing volume of certified supply.
- MSC labelled pet food and supplements are both emerging sectors. The number of labelled pet food products has more than doubled in the past five years while consumer spend on certified sustainable supplements topped £6.5 million in 2019/20.
- Ireland is a growing MSC market with the number of products on sale to Irish consumers increasing nearly six-fold over the past five years.

The UK and Irish markets continue to demonstrate deep commitment to the MSC programme. This report is designed to profile the impact of these commitments, made across the supply chain, and highlight opportunities for future growth in response to growing consumer demand for sustainably sourced fish and seafood.



Introduction

Welcome to the first edition of the MSC UK and Ireland Market Report which showcases the leadership of the UK and Irish markets in sustainable seafood, across our many strong partnerships and sectors.

Growing consumer awareness of the pressures overfishing puts on fish populations and our oceans has led to an increasing demand for certified sustainable seafood products. Results from a consumer survey, conducted by independent insights consultancy GlobeScan¹, revealed that 72% of UK consumers recognise the importance of only consuming fish and seafood that comes from sustainable sources, and 83% are willing to take action to protect fish and seafood in the future.

Customers and diners want to be able to buy and eat their fish and seafood with a clear conscience; in fact, more than half of UK seafood shoppers (52%) have made changes to the way they choose and buy seafood in the last year, with 1 in 5 switching to a brand or product which says it helps the oceans or fish. Over the past year, British and Irish consumers have spent more on MSC certified products than ever before.

In this report, we will outline how MSC certified businesses continue to expand their selection of certified sustainable products to meet the needs of their customers as well as offer a deeper dive into specific sectors that are expanding, or in some cases declining.

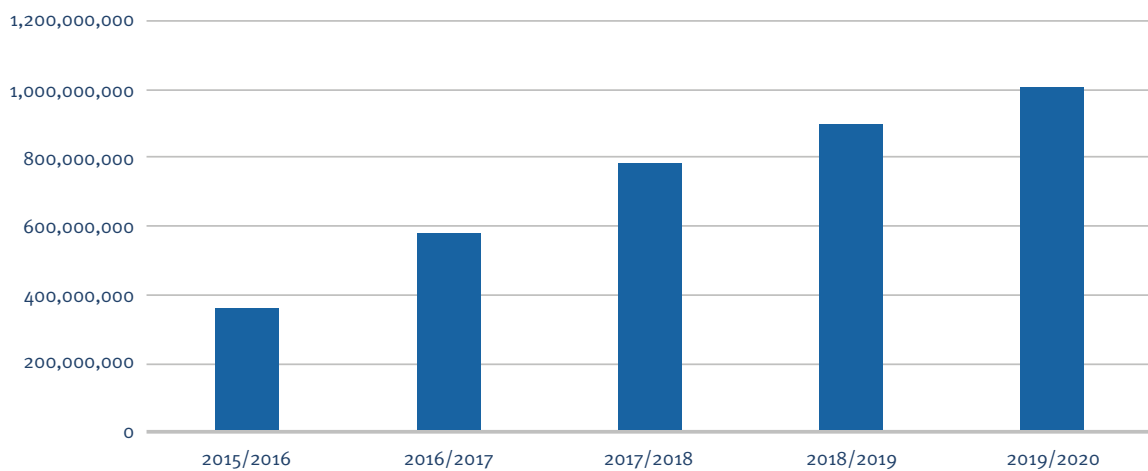
We hope that you enjoy this very first edition. If you have any questions or queries for your key contact at MSC, or if you would like to make an enquiry, you can find our contact details listed at the end.

Note on data: The data used in this report is provided to the MSC quarterly, semesterly or annually, by businesses using the ecolabel on products and menus. Each product or menu item is registered and reported based on the market in which it is sold. This report includes data from the following regions: the United Kingdom, Ireland, and UK/Ireland (where the same product is sold into both markets). All data presented is from the aforementioned regions unless otherwise specified.

¹This consumer research survey was conducted by GlobeScan on behalf of the MSC. In the UK, a representative sample of 1,313 consumers across the country were surveyed, of which, 1,046 identified themselves as seafood consumers.

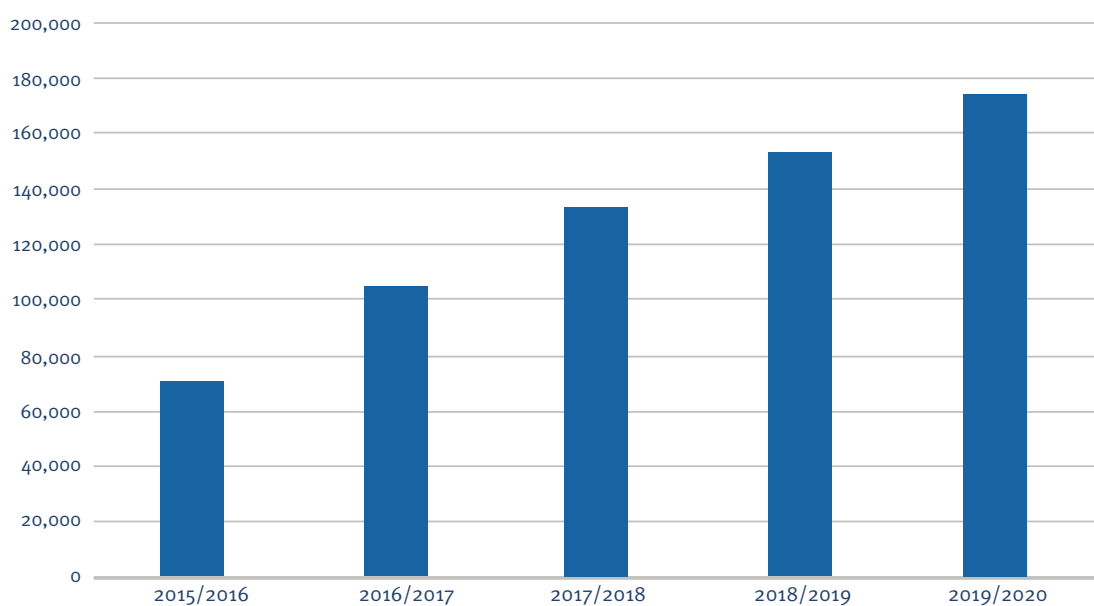
Market Overview

This last decade has seen incredible growth in MSC certified seafood consumption in the UK and Ireland, increasing more than tenfold between 2009 and 2019. British and Irish consumers have an ever-expanding array of sustainably caught fish and seafood products to choose from, across many sub-categories and sectors. In 2019, for the very first time, consumer spend on MSC certified seafood products in the UK and Ireland exceeded £1bn, increasing by 12% from 2018 to £1.12bn. In 2020, consumer spend on certified sustainable MSC fish and seafood in the UK and Ireland has grown a further 16%, to £1.3 billion.



Graph 1. MSC Product Cost-Value (£) in the UK/Irish Market²

As the sales of MSC labelled products have grown, so too has the volume, which surpassed 174,000 tonnes in 2019/20, and is now approaching 180,000 (mt).



Graph 2. Volume of MSC Labelled Product (tonnes) Sold in UK/Ireland

²Data collected on the cost-value of consumer-facing MSC registered products demonstrates strong growth over the past five years in the UK/Irish market (see Graph 1). A 30% mark-up is applied to these cost-value figures to estimate consumer spend.

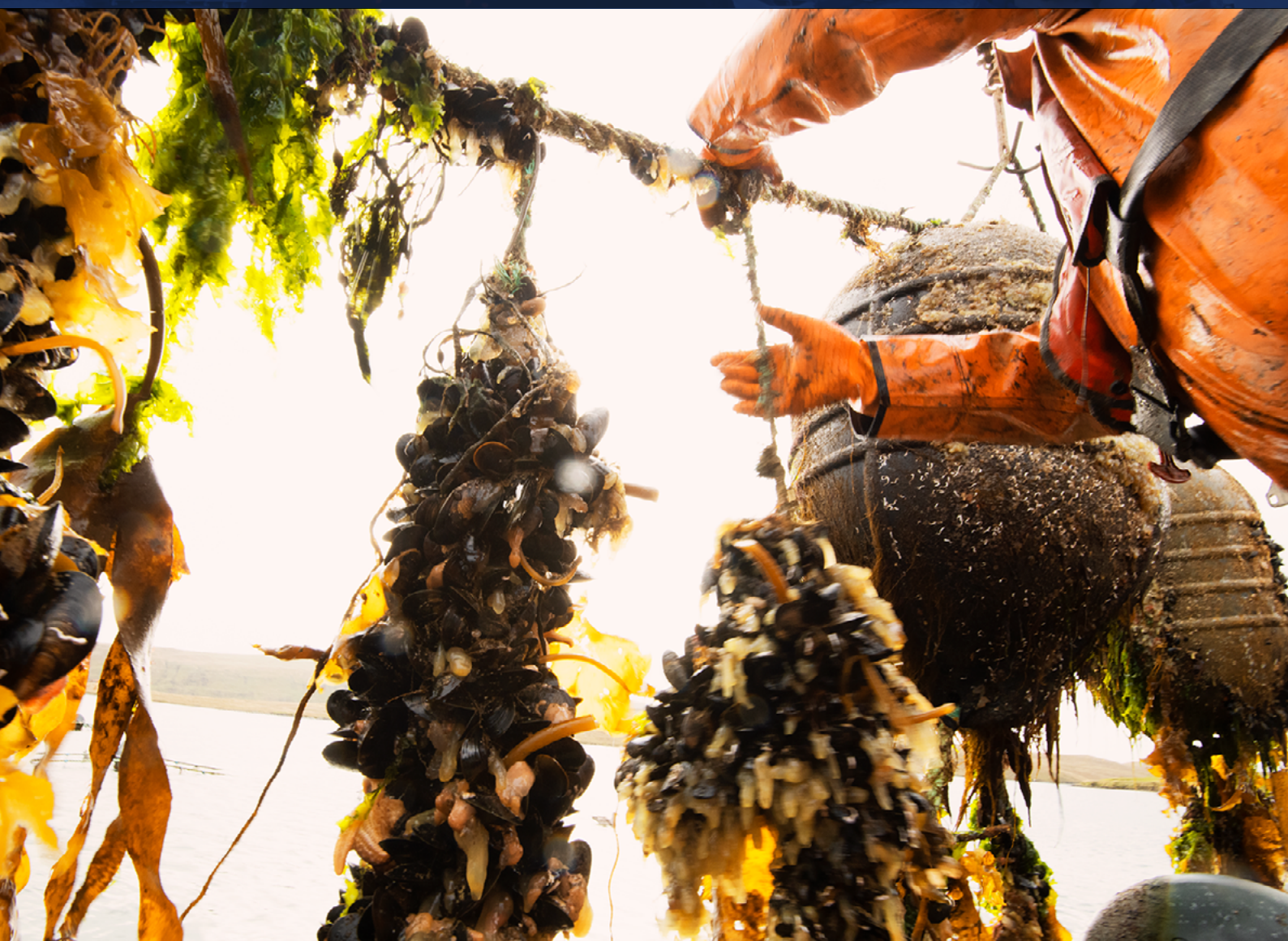
This growth in MSC labelled product sales has been driven by increased engagement with the MSC programme across UK and Irish supply chains. Between January 2015 and January 2020, the number of businesses in the UK and Ireland certified to MSC's Chain of Custody Standard increased from 230 to 300.

Supplying more MSC labelled products into the UK and Irish market has been made possible by an increasing number of certified source fisheries, both in the UK and Ireland and across the globe. These fisheries represent an ever-expanding diversity of species, which is reflected in the range of sustainable seafood options now available to consumers; in the last 5 years the number of species sold bearing the blue ecolabel increased from 33 to 47, while the number of certified consumer-facing products doubled from 807 to 1629.

In the UK and Ireland, there are more than 20 certified fisheries in the MSC programme, catching 13 different species of fish including haddock, plaice, coley, sardines and hake; and shellfish such as scallops, crab, cockles, clams and mussels. Many of these are sourced by retailers, in particular haddock, mussels, sardines, coley, plaice and hake, with new product launches of Poole Harbour clams and cockles just this year.

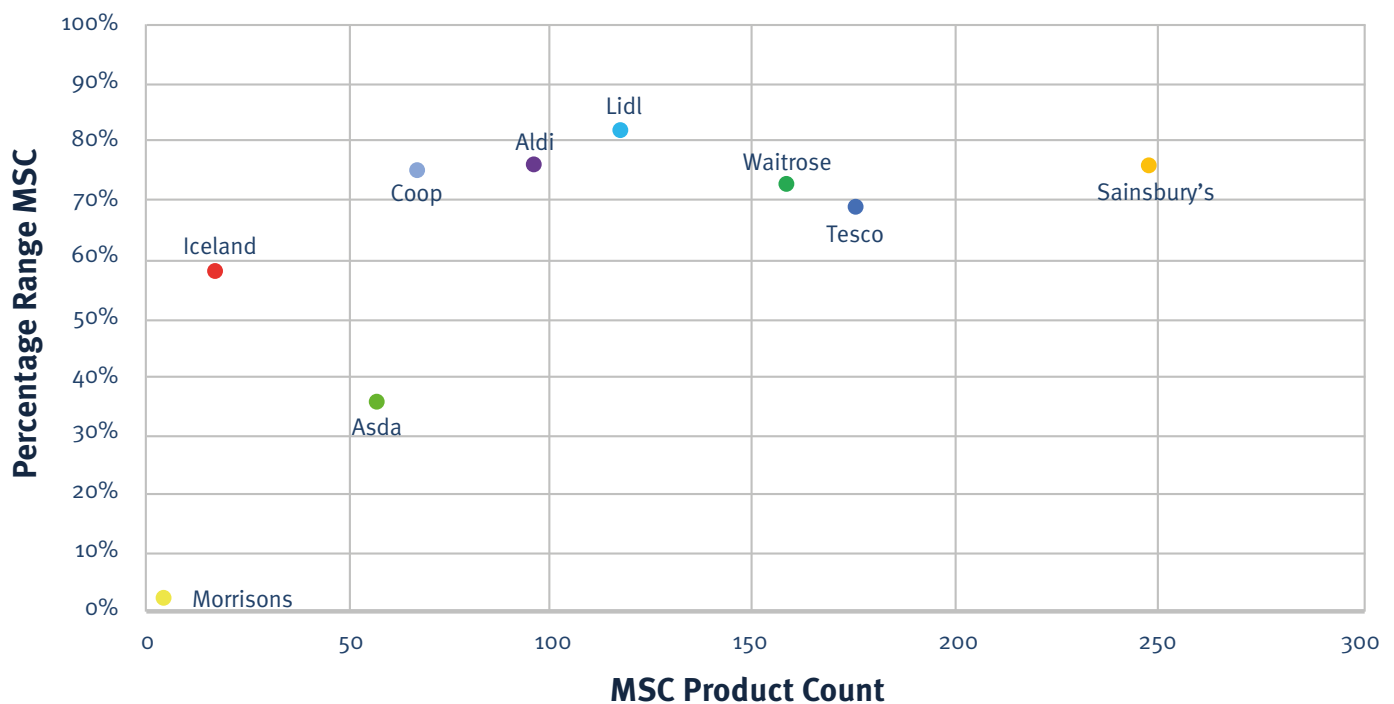
Despite this progress, gaps remain, particularly in tuna and sardines, both of which have limited label coverage in the preserved category. While there has been considerable growth in the availability of MSC certified tuna from an increasing number of fisheries, the conversion of this improved availability of labelled products for consumers remains scarce (see Focus on Tuna section below). The Cornish sardine fishery remains the only European pilchard (*Sardina pilchardus*) fishery certified to the MSC Standard. Although retailers in mainland Europe have sourced canned products from the fishery, so far the same pattern has not been seen in the UK and Ireland.

Future pipeline opportunities for labelled products are squid, nephrops (scampi) and crab. **Project UK**, a collaboration between the supply chain and fisheries to drive fisheries improvements, plays a critical role in assisting fisheries towards a status where entering an MSC assessment could be viable. This, in turn, could improve the availability of other species in the UK and Irish market.



UK Retail

In 2019/20, MSC labelled products accounted for over a third of all UK fish and seafood retail sales, including product from farmed sources, according to benchmarking against [Seafish data](#)³. Responding to growing consumer demand for sustainably sourced fish and seafood, UK retailers collectively doubled the number of certified own-brand products available to shoppers between 2015/16 and 2019/20. Last year, there were over one thousand MSC labelled products available across all ten leading retailers (see Graph 3) and own-brand labelled product sales topped 110,000 tonnes, representing nearly 63% of all sales across all sectors.



*Total wild range of seafood could not be determined for Marks & Spencer, who had a total MSC product count of 24 in FY 19-20

Graph 3. UK MSC Retail Landscape

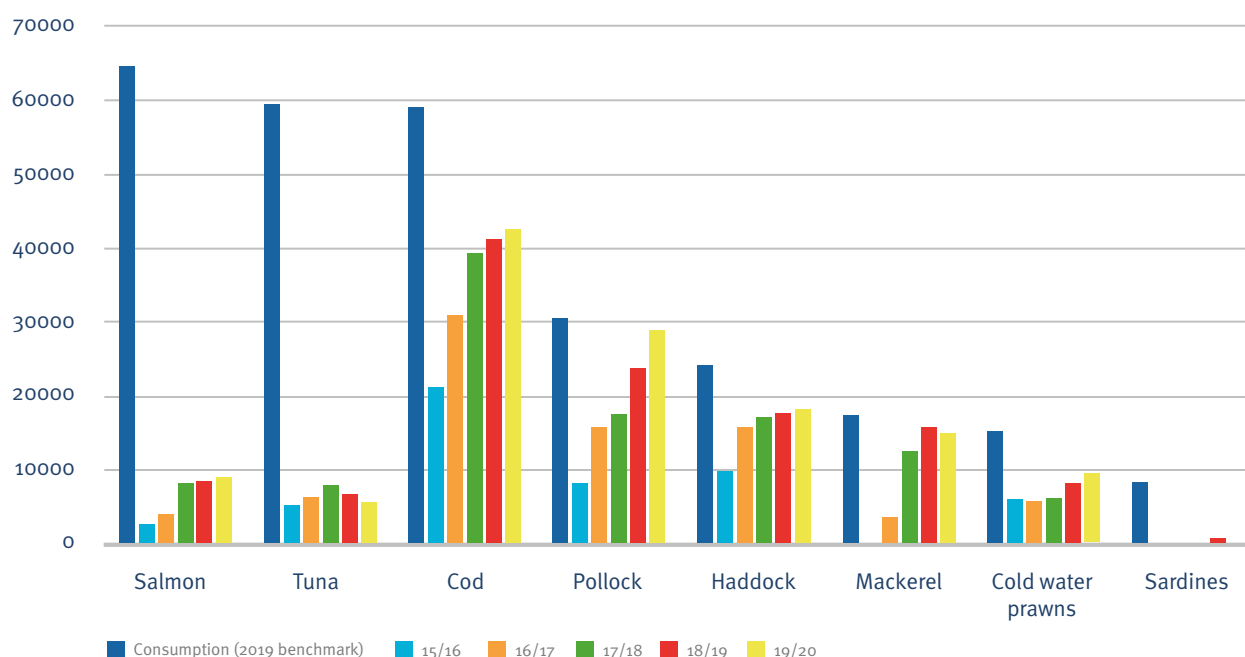
Sainsbury's, winner of MSC UK Supermarket of the Year 2020, offered the highest number of MSC certified products across all retailers in the UK last year, while Aldi sold the largest volume (metric tonnes) of labelled product. Lidl, MSC Mid-Size Store Retailer of the Year 2020, led retailers with the highest percentage of its wild range of seafood MSC certified at 82%, followed by Aldi and Sainsbury's at 76% in second place and Coop at 75% in third. The top 6 MSC Retailers in the UK were confirmed to be selling around 70% or higher of their range of wild fish and seafood products with the MSC label. These were: Aldi, Coop, Lidl, Waitrose, Tesco and Sainsbury's.

The MSC UK Awards 2020 also saw Iceland scoop Newcomer of the Year, following a blue revolution at the frozen food specialist. Iceland was honoured for investing heavily in expanding its range of MSC labelled products last year, increasing the percentage of its wild MSC seafood product from 34% to 58% since 2019.

³Seafish. Market Insight Factsheet: Seafood in multiple retail (2019) <https://www.seafish.org/document/?id=23ao4ee2-5293-4c99-8881-a14e960e7dfb>

Label Coverage by Species⁴

The strong growth in MSC labelled products available in UK retail has been more pronounced for certain species compared to others. Using [Seafish data](#)⁵ on seafood sales in retail (2019) as a baseline and comparing it to MSC volumes sold, an estimated 72% of all cod and 76% of all haddock eaten at home in the UK carries the blue fish ecolabel (see Graph 4). Label coverage of other white fish, particularly pollock, is also high.



Graph 4. MSC Coverage of Top Species in UK Retail by Volume of MSC Labelled Product sold (tonnes), compared to Seafish benchmarks

While there has been growth in sales of MSC labelled salmon, there is a limit on the number of products that are eligible to bear the ecolabel because the majority sold in retail come from farmed sources. There has been a decline in certified sustainable tuna products in the UK market, despite a growth in certified fisheries and increases in labelled product elsewhere in Europe (see section on Focus on Tuna pg. 15). The initial impact of the suspension of all certified mackerel fisheries in March 2019 can already be seen in the decline in sales volume between 2018/19 and 2019/20 (above). However, the full effect will only be seen by consumers in the coming year, as businesses continue to sell the remains of their current supply of certified product. Availability of MSC labelled product is already scarce for both canned and pre-pack chilled mackerel products.

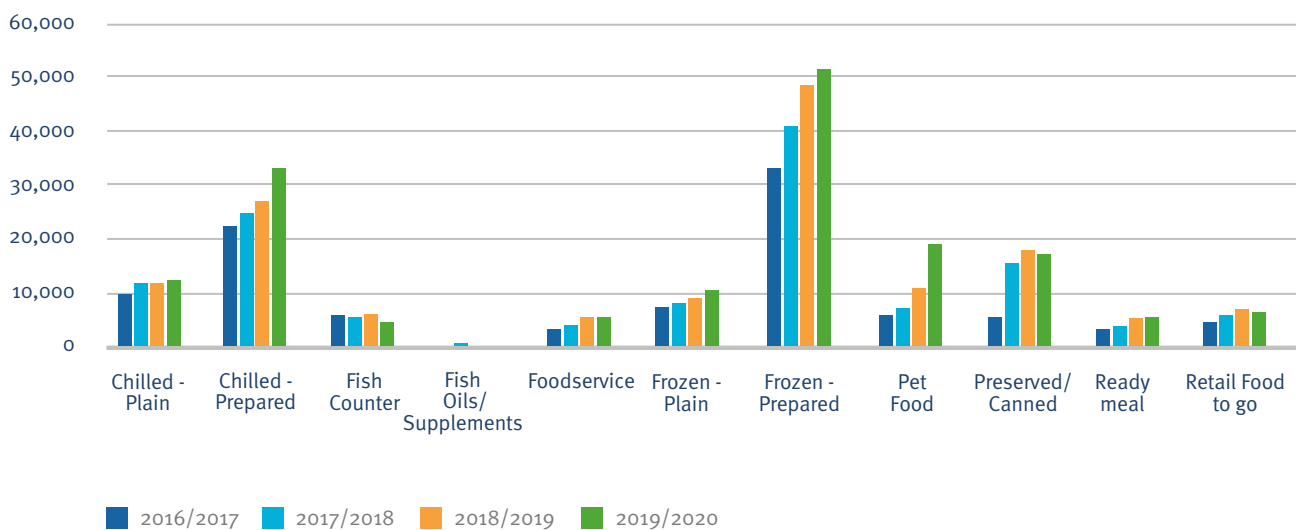


⁴Note: Seafood consumption in retail data was provided by non-departmental public body Seafish specifically for the UK market. Label coverage by species analysis was therefore estimated specifically for the UK market, Ireland was not included in this case

⁵Seafish. Market Insight Factsheet: Seafood in multiple retail (2019) <https://www.seafish.org/document/?id=d7954b16-74de-42ed-92b6-fa96dc75b268>

Label Coverage by Product Category

The growth in MSC product sales has not been uniform across different categories (see Graph 5). Chilled-prepared, frozen-prepared and pet food have all grown consistently over the past years, while sales of MSC labelled fish counter and preserved products have declined slightly, reflecting the lack of progress in tuna, suspension of mackerel and shifts in approach to counters for some major retailers. Although the impact of the Covid-19 pandemic may have affected sales of MSC products in the final quarter of 2019/20, it is worth noting that the graph below will look noticeably different in 2020/21, when the full impact becomes evident, and after next year's data set is analysed. We look forward to providing these insights in the updated UK and Ireland Market Report next year.



Graph 5. UK/Irish Market by Category (Volume in Tonnes)

Fish Counters

Over the past year, several UK retailers have announced the closure of a number of their in-store fish counters. The impact of Covid-19 this year was profound in certain areas of the seafood supply chain, including supermarket fish counters where some retailers took the decision to close or limit this offer. The effect of both can already be seen in the dip in sales of MSC product on fish counters (see Graph 5).

Despite this, there have been some bright spots. Across the retailers with counters open during the 2019/20 financial year (Waitrose, Tesco, Sainsbury's, Whole Foods and Selfridges) UK consumers were given the choice of 16 different MSC certified species, including various white fish and shellfish, as well as more niche species like octopus, sablefish, golden redfish and Chilean seabass. There has been strong demand for Cornish sardines at supermarket fish counters this season according to Waitrose, [citing sales up 128%](#)⁶, with Tesco and Sainsbury's also offering sardines on their fresh counters, when open.

⁶Grocery Trader. October 12, 2020. <https://grocerytrader.co.uk/waitrose-sales-showcase-british-seafood-revival/>

Partner in focus: Waitrose Clams and Cockles

Waitrose, winner of the MSC UK Fish Counter of the Year 2020, became the first major UK supermarket chain to sell MSC certified British clams, which are now available on counters across 150 of its stores. The move to sell the shellfish provided a lifeline for specialist supplier the Dorset Shellfish Company and the small-scale fishing community based in Poole Harbour. The company works with some of the top restaurants in the UK and had seen trade dwindle following the coronavirus-led collapse in demand from the foodservice and hospitality sectors.

The only major retailer in the UK to source this particular variety of clams, Waitrose continues its responsible sourcing strategy to sell the widest range of British and MSC certified seafood of any supermarket on its counters, with 12 species available according to the MSC's Fish Counter of the Year Award judging process.

In stocking these new shellfish items from Poole Harbour, Waitrose became the first large national retailer to offer fresh sustainable live clams on their fish counters, with the blue MSC label. The stores have reportedly been selling over double the projected volumes and have rolled out live cockles from the same fishery as well.

Chilled-Prepared & Frozen-Prepared

Sales of MSC labelled chilled and frozen-prepared fish and seafood have seen the strongest growth across product categories since last year, with 12% and 14% increases respectively. In both product categories, sales were three times higher than they were five years ago (see Graph 5). In 2019/20, these two categories alone accounted for 48.6% of the total volume of MSC certified product sales in the UK and Irish markets. Although cod, haddock and pollock account for nearly 80% of sales in these two categories, 28 different species were sold last year across these prepared categories and sales of both prepared yellowfin sole and pink salmon have more than tripled since 2015/16. UK fisheries have also featured heavily, with 22 different Scottish mussel products available to consumers last year. Earlier in 2020, Iceland also launched a new range of certified Irish mussel products.

While breaded, battered and smoked fish have been longstanding staples in the chilled-prepared and frozen-prepared categories, over the past five years there has been considerable growth in the range of MSC labelled fishcakes. With cod, haddock, salmon, prawn, crab and hake varieties all on offer, UK and Irish consumer spend on MSC labelled fishcakes surpassed £70 million for the first time last year.

**MSC labelled
chilled-prepared
product sales
grew by**

12%

over the past year



**MSC labelled
frozen-prepared
product sales
grew by**

14%

over the past year



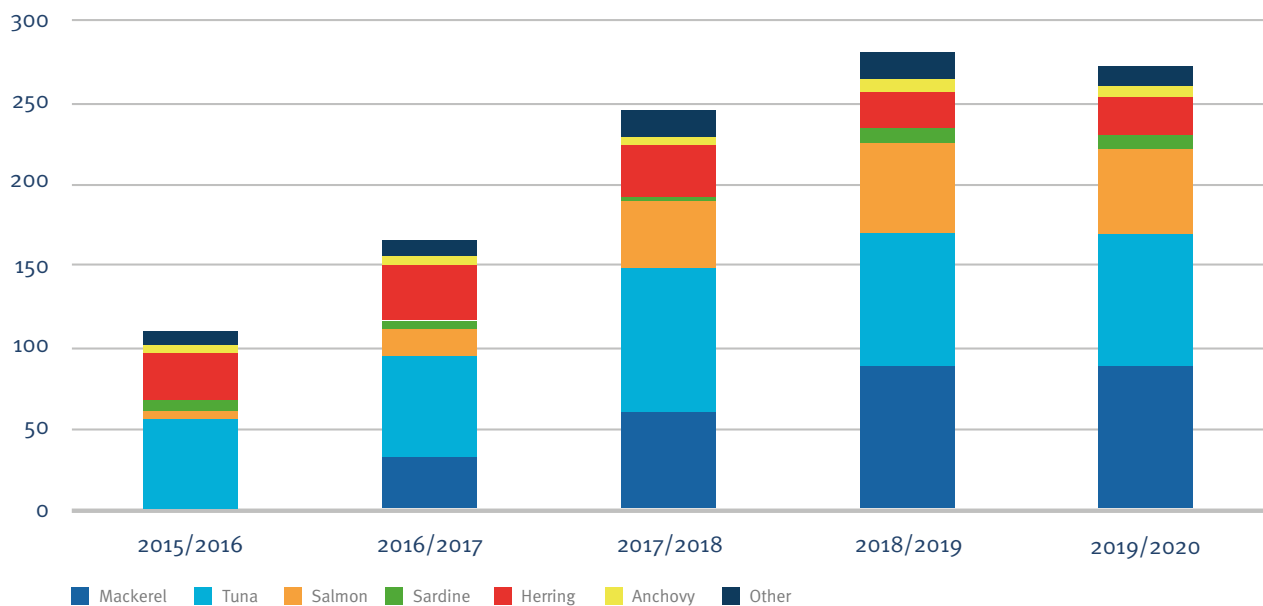
Partner in Focus: Birds Eye

Since becoming a founding member of the MSC in 1997, Birds Eye has committed to continuously increase the amount of MSC certified fish that it sources for its frozen fish products. From classic fish fingers to fish cakes, today 100% of the Birds Eye product range portfolio carries the blue MSC label. This milestone, achieved in 2019, has made Birds Eye the biggest brand in the UK for certified sustainable seafood. The family favourite has also scooped Frozen Brand of the Year at the MSC UK awards every year since the awards began, demonstrating its commitment to providing customers with certified sustainable frozen seafood products across the entire range.

Preserved/Canned

After several years of consistent growth, the volume of MSC labelled preserved product sold in the UK and Ireland peaked at just over 18,000 tonnes in 2018/19 and has since started to decline (see Graph 5). While the growth was largely driven by increased labelling on tuna, salmon and mackerel, the number of certified skipjack tuna products in the market has declined since 2017/18.

The suspension of all Northeast Atlantic mackerel fisheries in March 2019, which account for over 50% of MSC preserved sales by volume, will lead to further retraction in this category next year, limiting consumer choices for certified sustainable seafood in the canned aisle.



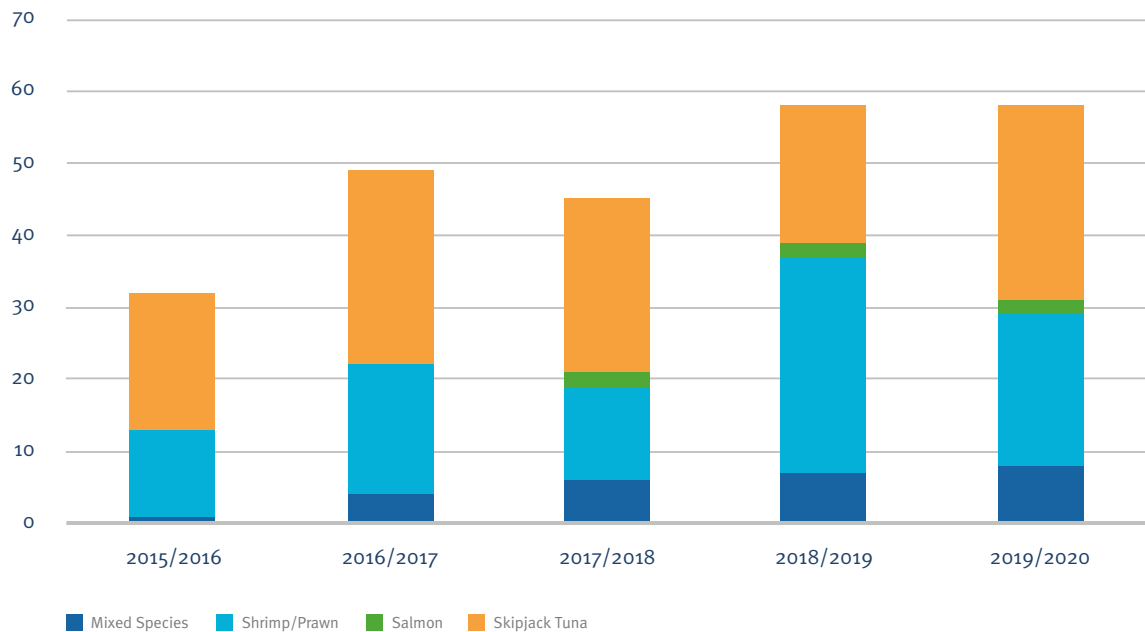
Graph 6. MSC Labelled Preserved Product Count by Species in the UK/Ireland

Currently, Waitrose is the only British supermarket to sell 100% of their own-brand tuna cans with the MSC ecolabel, while the artisanal brand The Pilchard Works remains the only company to offer MSC labelled canned sardine products from the Cornish sardine fishery. Label coverage on both species lags behind that in several European markets. Sales of canned Cornish sardines in Switzerland and the Netherlands were a combined fifteen times higher than that of tinned labelled product in the UK in 2019/20. After some major retailers and big brands switched their tuna lines to MSC last year, labelled product sales in Germany, Switzerland and Netherlands all surpassed that of the UK (see section on Focus on Tuna).



Retail Food to Go

From sushi selections to sandwiches and salads, availability of MSC certified retail food to go products grew steadily between 2015/16 and 2018/19. Over the period, the number of products bearing the MSC blue ecolabel at Aldi, Coop, Lidl, Sainsbury's, Tesco and Waitrose, increased from 32 to 58. During the first semester of 2019/20 it appeared the volume of these products would keep pace with that of the previous year (see Graph 5).



Graph 7. MSC Labelled Retail Food to Go Product Count by Species

However, when the Covid-19 pandemic hit in early 2020 and businesses and offices were forced to close, there was a noticeable impact on sales of lunchtime staples carrying the MSC ecolabel, such as tuna sandwiches and prawn salads. While the long-term effects remain to be seen, the pandemic continues to pose a risk to the retail food to go category owing to major alterations in the way workforces are currently able to operate.



Watch this space: Ready meals that use a mix of farmed and wild-caught seafood are only eligible to apply an ecolabel to the front of pack if all components are certified to either the MSC or ASC Standards. In such cases, both labels may be applied side-by-side. Last year, four of these co-labelled products were available to British consumers:

- Birds Eye King Prawn & Risotto Croquettes
- Waitrose King Prawn, Mussel and Clam Tagliatelle
- Waitrose Clam, King Prawn, Coley and Mussel Cassoulet
- ALDI King Prawn and Pollock Masala

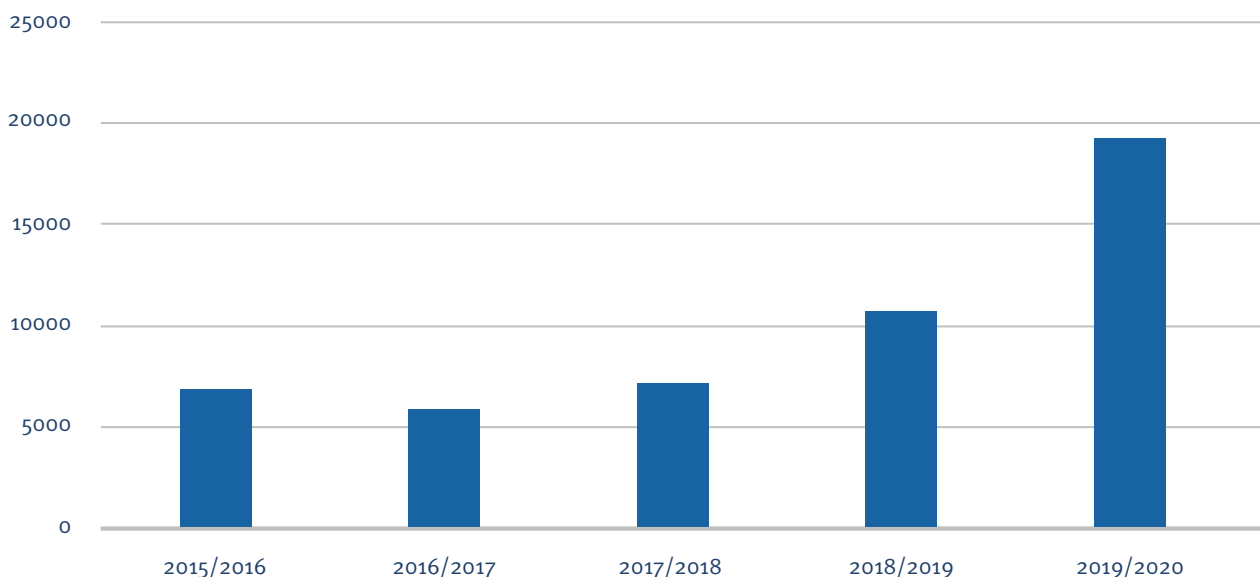


While these products are a small percentage of the 11,000 tonnes of co-labelled product sold globally, with a growing number of farms certified as responsible by the ASC and with our shared Chain of Custody, there is increasing opportunity for co-labelled MSC/ASC products in the UK and Irish markets.

Pet food

Consumers are increasingly looking for products that are good for their pets and the ocean too. With the ever-growing popularity of pets as an extension to the family, owners are paying more attention to the food they give them and are looking at both the quality, and sustainability, of the ingredients. Retailers and brands have huge scope and responsibility in providing sustainably sourced pet food to meet the growing demands of conscious pet owners.

MSC labelled pet food products are becoming increasingly popular in UK households, as sales continue to increase. MSC pet food products have more than doubled in the UK in the last 5 years with the number of products bearing the MSC ecolabel in the UK and Ireland increasing by 70%. There is significant opportunity for labelling of pet food in the UK and Irish market, for both high street supermarkets as well as brands, particularly for dog food, which has relatively limited label coverage compared to cat food. Fish is widely known for its health benefits for humans and it offers many of the same benefits for cats and dogs. As the pet food industry has seen a growing demand from consumers for sustainably sourced products, the MSC label can be used to put greater emphasis on the environmental credentials of these products.



Graph 8. UK and Ireland Pet Food Product Growth (Volume in Tonnes)

As Mid-Size Store Retailer of the Year for the fifth time running, Lidl offers the largest range of MSC certified pet food out of any UK supermarket, with seven MSC cat food products, including species such as salmon, pollock and cod.

MARS Petcare have launched MSC labelled products in the UK as part of the company's commitment to use only sustainably sourced fish in all products by 2020. The Sheba and Whiskas brands, which sit within the MARS portfolio, offer a range of MSC labelled products using sustainably sourced fish. Sales of labelled Sheba and Whiskas products account for the majority of labelled petfood sales in the UK and Ireland.



Watch this space: Fish oil for your cat, MSC labelled protein bars for your dog? There is growing opportunity to label pet food of all kinds, and just like food for humans, ensuring the ingredients are from sustainable sources is becoming a greater concern for consumers in the UK and Ireland.

Supplements

Since 2014, there has been a 200% increase in the availability of MSC certified raw material for reduction, where the fish catch is used to produce fishmeal or fish oil. From krill fisheries in the Antarctic to herring fisheries in the Irish Sea, the supply of certified sustainable material for the supplements industry is greater than ever before. Between 2014 and 2019, the number of MSC certified Omega 3 products available worldwide more than tripled. In early 2019 Orkla Health announced that all of their Möllers brand cod oil products would carry the blue ecolabel, delivering over 5 million bottles of the product to consumers around the world over the course of the year.

In the UK and Ireland, consumer spend on MSC labelled health supplements has more than doubled in the past five years, passing £6.5 million⁷ last year alone. Since 2018, 100% of Tesco's own brand fish oil supplements have been certified sustainable while Holland and Barret, Healthspan and Naturalife all offer MSC labelled krill oil supplements. Wiley's Finest has also offered MSC labelled Alaskan fish oil in the UK and Ireland for several years, and at the end of 2019, Amazon launched its first own brand product with an MSC ecolabel: Amfit Sustainable Fish Oil capsules.



Watch this space: The growing number of reduction fisheries certified to the MSC Standard is opening up new product development opportunities. Might we see an MSC certified marine collagen product enter the UK market in the near future?

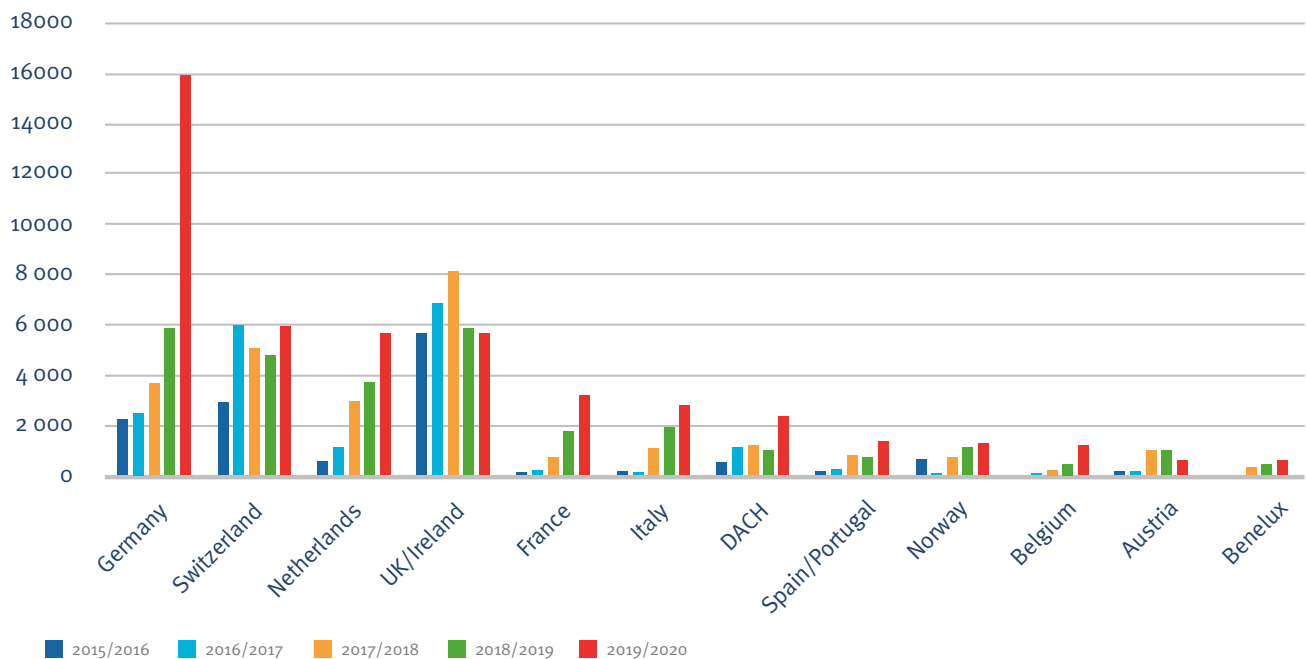


⁷Data is collected on the cost-value of consumer-facing MSC and total spend by consumers is calculated by applying a 30% mark-up to that cost-value.

Focus on Tuna

Historically, the UK had been a high performing market with regards to MSC labelled tuna volumes. But in recent years, there has been a decline in certified sustainable tuna products in the UK market, despite some 25% of global tuna catch is now certified with 11% currently in assessment, following the successful transition of several major Fishery Improvement Projects (FIPs).

The UK and Ireland lags behind Australia and was recently overtaken by Germany, Switzerland and the Netherlands in terms of availability to conscious consumers, where previously it was the global market leader (see Graph 9).



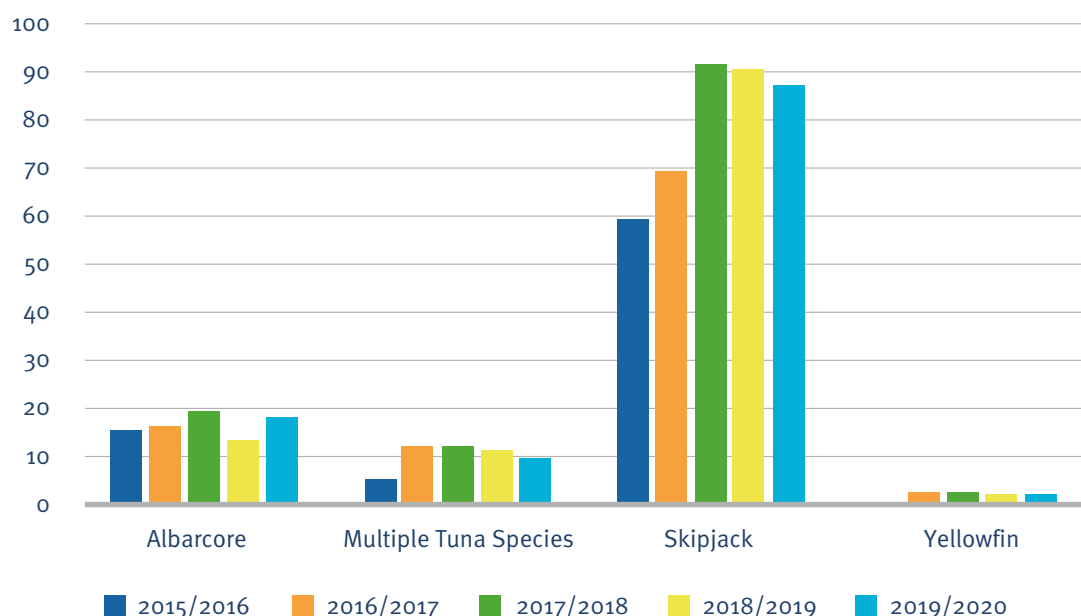
Graph 9. MSC Tuna Sales in Europe by Volume (tonnes)⁸

In March 2020 German retailer Edeka announced that it was switching its entire private label tuna range to MSC certified product sourced from the [PNA fishery](#). There have also been notable commitments made to sustainable tuna sourcing across the Atlantic; Walmart announced that as of July 2020 it is moving to source all of its U.S. stores' Great Value canned tuna as either MSC certified or from a time-bound Fishery Improvement Project (FIP) actively working toward certification and Bumble Bee announced plans to source 100% of its light meat tuna from MSC certified fisheries by 2022.



⁸Data on MSC labelled tuna sales by volume is presented for the UK and Ireland as a combined market, however, other regions with multiple distribution countries such as DACH (Germany, Austria, Switzerland) and Benelux (Belgium, Netherlands, Luxembourg) were kept separate

Between 2017/18 and 2019/20, the volume of MSC labelled tuna sold in the UK and Ireland decreased from 8,173 tonnes to 5,662 tonnes while the number of labelled products dropped from 124 to 115 (including 5 pet food products). Waitrose is the only retailer to label 100% of their canned tuna. It launched the UK's first MSC labelled albacore on a fish counter last year. Lidl and Whitbread remain the only businesses to offer certified yellowfin to their shoppers and diners, while Sainsbury's maintains the highest number of MSC labelled tuna products of any retailer or brand in 2019/20.



Graph 10. MSC Labelled Tuna Products in the UK/Ireland by Species⁹

Despite a recent dip in the number of labelled tuna products in the UK and Ireland, the global supply is improving with 25% of the global tuna catch now certified and another 11% currently in assessment. With less than 10% of the 59,500 tonnes of tuna purchased in UK retail ([Seafish data¹⁰](#)) bearing the MSC blue fish, and a growing availability of certified supply, there are more and more opportunities for labelling across species and product formats, to suit the variety of purchasing policies out there.



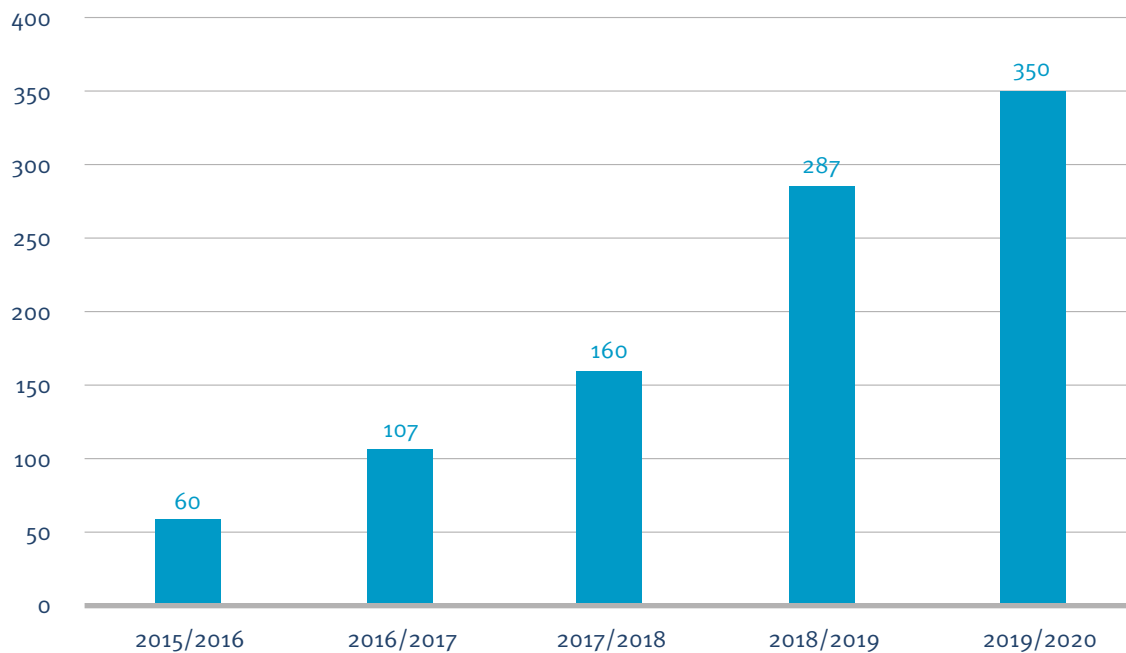
Watch this space: In 2019, the MSC UK and Ireland team developed the first edition of our Sustainable Tuna Handbook with input from major tuna producers and brands from around the country. In July 2020, the MSC released a global edition of this [Handbook](#) which offers a comprehensive summary of the state of global tuna stocks, the issues surrounding its sustainable harvest, global market demand and certified sustainable tuna fisheries. Look out for further updates to this Handbook next year.

⁹Mixed or multiple species includes products which may contain multiple species, such as pet food, pates and pastes

¹⁰Seafish. Market Insight Factsheet: Seafood in multiple retail (2019) <https://www.seafish.org/document/?id=23a04ee2-5293-4c99-8881-a14e960e7dfb>

Focus on Ireland

The Irish market has seen exceptional progress and engagement with the MSC programme over the last five years. The number of certified Chain of Custody holders in Ireland grew from 11 to 31 between January 2015 and January 2020, with the number of products on sale to Irish consumers increasing nearly six-fold (see Graph 11).



Graph 11. MSC Labelled Products Sold in Ireland

In 2019/20, Tesco, Aldi and Lidl Ireland branded products accounted for 54% of all those sold with the MSC blue fish. Cork-based Keohane Seafoods, one of Ireland's largest seafood processors and fresh and frozen suppliers, also obtained MSC Chain of Custody certification in 2019 and has since launched several own-brand labelled products.

Irish fisheries have also made great progress in the past year. Bord Iascaigh Mhara (B.I.M), the Irish state agency responsible for developing the Irish seafood industry, holds three MSC mussel certificates. The Ireland bottom grown mussel fishery became MSC certified in 2013, alongside its Northern Ireland counterpart. The third fishery, certified in July 2019, is for Ireland rope grown mussel fishery. Combined collection and cultivation from these fisheries is over 40,000 metric tonnes of mussels each year, a true success story for the shellfish industry in Ireland and the reason B.I.M. were awarded MSC's Ocean Hero Award at this year's MSC UK Awards.



Focus on Luxury

UK shoppers sometimes find it difficult to venture beyond the ‘big five’ - salmon, tuna, cod, prawns and haddock - but with sustainable, luxury favourites like lobster, scallops and caviar all on sale carrying the MSC ecolabel, it’s an ideal time for consumers to broaden their horizons. As the demand and interest for indulgent items on a high street budget has peaked, so too has retailer and brand product offerings, making it much easier for consumers to be a bit more adventurous with their sustainable seafood suppers.

Customers wanting to add a bit of luxury to their shopping basket have been able to do so with Iceland, Waitrose, Lidl, Tesco and Asda all offering whole cooked lobster. This has given home cooks access to pre-cooked lobsters meaning customers only need to defrost and serve. We always see a peak in these luxury MSC options before Christmas.

Sales of scallops have doubled over the last 5 years, with Atlantic and Patagonian scallops proving to be the most popular. In both frozen and fresh formats, UK shoppers can take high end items and cook them in the comfort of their home, thanks to a wide selection of plain and prepared options.

Wild smoked salmon also remains prevalent on shelves at Waitrose and from brands like Leap, providing an alternative to the usual smoked salmon produced from farmed sources.

There are a huge variety of sustainable luxury fish and seafood products available on the high street, and with even lumpfish caviar available, by John West, consumers can choose sustainable options for those special occasions.

Focus on Small-Scale Fisheries

In 2019, MSC’s [Making Waves](#)¹¹ report reviewed the collective impact of small-scale fisheries in the MSC programme across the globe. It identified 62 small-scale certified fisheries, defined as such based upon vessel length, gear type and fishing method, as well as on-board processing capabilities. Together they represent 16% of all MSC certified fisheries and span 22 different countries, including a number in the UK: Cornish sardines, Poole Harbour clam and cockles, SSMO Shetland Inshore brown crab and scallop, Dee Estuary cockles and Burry inlet cockles.

In 2019/20, nearly 4,300 tonnes of labelled product from 8 different MSC certified small-scale fisheries were sold in the UK and Ireland. In two UK firsts, Whole Foods introduced octopus from Australia and Waitrose added clams and cockles from Poole Harbour to their fish counters during the past year.

Cornish sardines have also been a staple on the Tesco, Sainsbury’s and Waitrose fish counters for the past four years and are available in canned format under The Pilchard Works brand. Falfish also launched own-brand butterfly sardine fillets from the fishery last year. Other shelf-stable products from small-scale fisheries include a range of canned Alaskan salmon and lumpfish roe from Greenland.

16%

**of MSC certified
fisheries are
small-scale**



4,300 tonnes

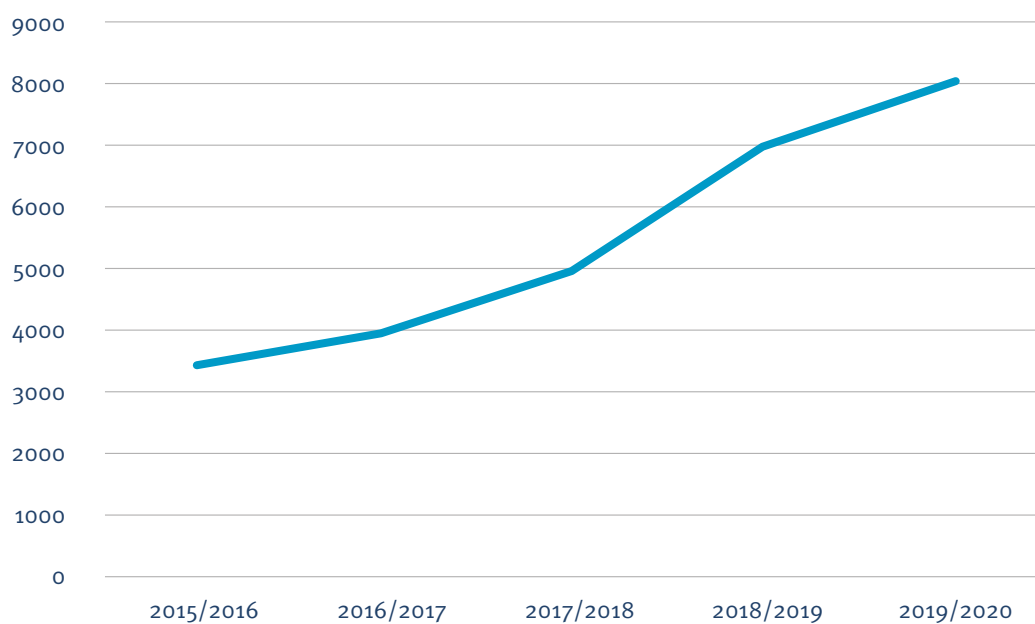
**of labelled product from
small-scale fisheries sold
in UK/Ireland in 2019/20**



¹¹Report available at: <https://www.msc.org/docs/default-source/default-document-library/what-we-are-doing/msc-small-scale-fisheries-report-2019.pdf>

Foodservice

The MSC label is increasingly popular in the UK and Ireland foodservice sector, as more businesses achieve MSC Chain of Custody certification for their menus. Using the MSC ecolabel next to fish and seafood dishes allows these committed businesses to confidently and credibly inform their customers that they are making the sustainable choice when dining out. The volume of certified seafood sold peaked at just over 7,000 tonnes in 2019/20 equating to over 47,652,941 portions of fish¹², with species like hoki, cod, pollock, mussels, hake, prawns, sprats, scallops, plaice, monkfish and even ling being labelled as MSC on menus across the UK and Ireland. High street establishments like McDonalds and Wahaca, local fish and chip shops, and national hotel chains Premier Inn and Hilton, continue to demonstrate that full supply chain traceability and seafood sustainability can be delivered at scale in restaurants across the UK and Ireland.



Graph 12. Volume of MSC Labelled Products Sold Foodservice in the UK/Ireland (tonnes)

Watch this space: With growing availability of MSC certified tuna, there will be more opportunities for quick service restaurants, such as sushi and sandwich chains, to label their menu offerings. In October 2020, parent-company Kelly Deli successfully certified its Sushi Daily kiosks across over 260 stores within retailers France. Will we see more MSC labelled sushi and tuna sandwiches in UK foodservice?



Partner in focus: JD Wetherspoon

JD Wetherspoon has been MSC-certified since 2018 and is the largest pub chain in the UK to use the MSC ecolabel on its menu, demonstrating the company's commitment to preserving our oceans. Fish and chips are one of the nation's best loved pub meals and **6 million fish and chip meals**¹² are served by the chain every year. JD Wetherspoon claims to be the biggest fish and chip shop every Friday, since launching their 'Fish Friday' in 2013. Customers can enjoy their fish supper at their local Wetherspoon with a clear conscience, knowing that the cod and haddock they are enjoying is certified sustainable.

¹² The number of portions was estimated using 170g/6 ounces as a standard portion size

¹³ Hospitality and Catering News, October 2018. <https://www.hospitalityandcateringnews.com/2018/10/jd-wetherspoon-largest-pub-chain-uk-earn-blue-fish-label/>

Partner in focus: Lussmanns Sustainable Fish & Grill Restaurants

In November 2014, [Lussmanns](#) became the first small restaurant group outside of London to use the MSC ecolabel on their menus. Their aim? To bring sustainability to the high street. It is owner Andrei Lussmanns' long-standing commitment to serving sustainable seafood that keeps him winning big. Having been awarded MSC Menu of the Year at the MSC UK awards in 2019 and 2020, Lussmanns continues to make sustainable dining accessible to all.

And, in April 2019, every fish and seafood item on the Lussmanns menu was sourced from an MSC certified fishery, resulting in a 100% MSC ecolabelled menu. The menu included nine dishes in total with the first MSC monkfish and ling on offer to diners in the UK. Other species to feature include plaice, Manx kipper, cod cheeks and hake. Lussmanns has worked tirelessly with its supplier Stickleback, another MSC Award winner in 2020, to ensure it is a market leader in sustainable fish and seafood restaurant dining, and as a result, a worthy leader in the industry. By using the blue fish ecolabel on all of its dishes, Lussmanns ensures everybody can play a part in securing a healthy future for our oceans.

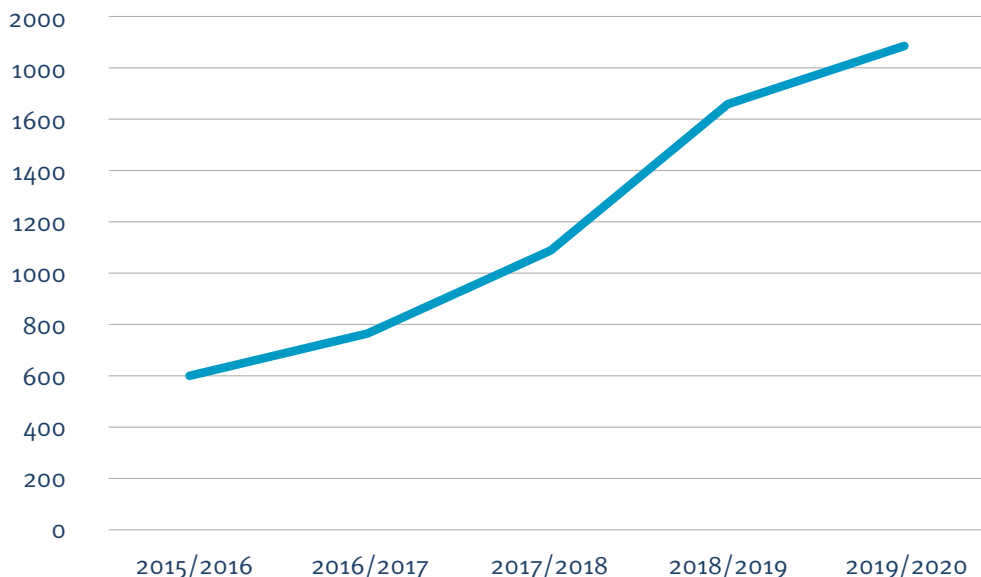


Fish and Chips

Fish and chips are as popular as ever in both the United Kingdom and Ireland. More than 167 million servings are enjoyed from chip shops every year across the UK, and this has a genuine impact down through the supply chain and onto our shared fish stocks. However you enjoy your chips, doused in salt and vinegar, smothered with mushy peas or dipped in tartar sauce, more consumers than ever are demanding that they are served with a side of sustainable fish. In fact, a study conducted by Globescan on behalf of the MSC in 2018 found that chippy diners choose sustainability over price when dining out¹⁴.

Fish and chip shops are the backbone of the UK takeaway sector and make a huge contribution to the overall takeaway market. In the UK and Ireland, the MSC's iconic blue fish ecolabel was found in over 120 fish and chip shops as of April 2020. When thinking about the fish frying industry and fish as a core component, it is no longer possible to ignore the sustainability of the fish being used and the standards that customers now expect from their favourite chippy. Without fish, there are no fish and chips. And with many fish and chips businesses relying on regular customers in a competitive fast-food sector, going that extra mile on sustainability helps make those businesses stand out. Since 2015, a staggering 11,105,882 portions¹⁵ of MSC certified fish and chips have been sold with the blue MSC label. Fish and chips represent 23% of the MSC total foodservice market, in volumes terms (metric tonnes).

They say variety is the spice of life, but that doesn't seem to be true when it comes to fish and chips. Look inside the wrapper and you're almost guaranteed to find haddock or cod. However, MSC certified chippies are serving up a greater variety of species to customers these days. Cornish hake, Poole Harbour clams and Scottish mussels, to name but a few, can all now be found on the menus of our chippies around the UK and Ireland.



Graph 13. Volume of Certified Fish sold at MSC Fish and Chip shops (in tonnes)

¹⁴The survey was conducted by research agency Globescan, using reliable national consumer research panels to recruit respondents. Fieldwork was undertaken between 12th January and 10th March 2018. Total sample size was 1,315 and are representative of all GB adults (aged 18+).

¹⁵The number of portions was estimated using 170g/6 ounces as a standard portion size

Partner in Focus: National Federation of Fish Friers (NFFF)

NFFF is a trade organisation representing the fish and chip industry. First established in 1913, throughout its long history the NFFF has worked towards protecting and promoting the interests of the UK's fish friers. They are a national organisation that can speak and act on behalf of fish friers, and the views of the NFFF are sought throughout the catering and associated industries, as well as by local and central government agencies and authorities.

The NFFF has identified sustainability as a key business area the fish frying industry can embrace, both to improve business practices and to safeguard the future of the industry, while protecting fish stocks and their environment. The MSC work closely with the NFFF, who facilitate MSC certification among their membership, reducing barriers to entry for shops who want to work with the MSC programme.

Partner in Focus: Pete Fraser

Pete Fraser, owner of award-winning Harbour Lights and Fraser's Fish and Chips in Cornwall, was named Foodservice Champion at MSC UK's Annual Awards 2020. Pete believes a major part of his business growth has resulted from taking environmentally-friendly fish buying decisions early on, having been certified since 2010. Both of Pete's businesses clearly inform customers about the sustainable credentials of their menu, including the journey of fish from catch to plate. Responsible sourcing, including promoting MSC certified species, is key to their business ethos and the team will always endeavour to have at least three MSC certified fish on the menu. Fraser's Fish and Chips also often host sustainability workshops with their neighbouring primary schools.



Universities and Education

Now more than ever, students are some of the most environmentally conscious consumers around. And with 22 MSC certified Universities in the UK and Ireland, educational institutions are leading the way for a sustainable seafood future, helping students make choices that have a positive impact on the world's ocean.

Partner in Focus: The University Caterers Organisation (TUCO)

Back in 2013, TUCO began offering its members a fast-track way to put MSC certified fish on the menu, by setting up an MSC Group Chain of Custody certificate in the UK. With 8 members now within the group, the system makes MSC certification simpler, quicker and more affordable for members, many of whom want to serve fish that is sustainably sourced. By providing access to the scheme, TUCO have opened the MSC programme to hundreds of thousands of students who eat in university cafeterias and restaurants every day. With students forming the next generation of informed consumers, they have enormous power to support sustainable fishing practices and to help transform the fish and seafood market into a sustainable one.

Partner in Focus: Durham University

Durham University scooped University of the Year at the Marine Stewardship Council's UK Awards 2020 for the third time. The university's commitment to the MSC programme, spanning the last decade, has meant thousands of students have been able to eat their fish and seafood suppers, knowing that they are from certified sustainable fisheries. Choosing the MSC blue fish label ensures fish stocks are protected for future generations, and with so many dishes served, Durham were deserving winners of MSC University of the Year 2020.

According to MSC-commissioned research by Globescan in 2020, awareness levels of the ecolabel are significantly higher among 18-34 year olds (52% of those surveyed) compared to 44% among all UK consumers.

MSC certified contract caterers like Compass Group UK & Ireland, WSH, Sodexo, Aramark, and the AiP Group, also play an important role in bringing over 20 different certified sustainable fish and seafood species to students from primary schools to universities across the UK and Ireland.



Looking Forward: 2021 outlook

The Covid-19 pandemic has and continues to challenge communities and businesses across the globe and will undoubtedly have a lasting impact well into the future in the UK and Ireland. It has disrupted international trade of seafood and led to additional uncertainty about the future, as the UK fishing industry prepares for the post-EU era. Despite this, the UK and Irish fishing industry has proven to be resourceful and resilient. Businesses across the supply chain have also adapted, developing online sales channels and delivering direct to home to address our changing environment, and rationalising ranges at a time of heightened and unpredictable demand.

Consumers have also had to change the way they shop and this will likely continue to affect how consumers purchase their fish and seafood. Online retail platforms and recipe box businesses have grown in popularity, reaching new groups of customers around the country. With consumer demand for seafood remaining strong, and sustainability still a high priority for the UK and Irish consumer, we are committed to supporting our partners as they explore new ways of bringing MSC products and ingredients into homes and restaurants.

As the world begins to face the daunting task of rebuilding communities and economies, we have an incredible opportunity to invest in sustainability. Recovery plans can be made that both revitalise sectors of society that have been most affected and incentivise stewardship and proper management of our natural resources. Recognising and rewarding efforts to protect oceans and safeguard seafood supplies for the future is the essence of our work here at the MSC. Over the past year, the MSC UK and Ireland team has taken steps to understand the impacts of certification beyond those made on the water. Research, conducted by New Economics Foundation (NEF) on behalf of the MSC, on the Cornish hake and sardine fisheries, determined that there were socio-economic benefits for both following certification. The final report, [MSC Certification in the UK – Motivations and Market Benefits¹⁶](#), is available on our website and is the start of an ongoing body of work to better understand how certification affects coastal communities. With an ongoing pandemic, there are still many big challenges ahead for the communities and businesses we work with. However, the response of the seafood industry to our new and changing reality has been truly impressive, a testament to the resiliency of sustainable fisheries and supply chains.



¹⁶Report is available on the MSC website at: https://fishery-certification-benefits-uk.msc.org/?_ga=2.267671689.661507035.1606739421-628465187.1604999677

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All data in this report is correct as of 1 December 2020, unless otherwise stated.
The reporting year is 1 April 2019 to 31 March 2020.

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