



# MSC UK and Ireland Market Report 2024

5th Edition





# Contents

<b>Executive Summary</b>	<b>3</b>	<b>Focus on Anchovy</b>	<b>22</b>
<b>Introduction</b>	<b>4</b>	<b>Focus on Ireland</b>	<b>23</b>
<b>Methodology</b>	<b>5</b>	Irish Consumer Insights 2024	
<b>UK Consumer Insights 2024</b>	<b>6</b>	<b>Focus on Tuna</b>	<b>25</b>
<b>Market Overview</b>	<b>8</b>	Partner in Focus: Princes	
<b>UK Supermarkets</b>	<b>10</b>	<b>Pet Food</b>	<b>27</b>
Label Coverage by Species	12	Partner in Focus: Lidl	
Partner in Focus: SSMG		<b>Supplements</b>	<b>29</b>
Label Coverage by Product Category	14	Sector in Focus: Marine Collagen	
Fish Counters	15	<b>Foodservice</b>	<b>31</b>
Chilled and Frozen	16	Partner in Focus: Costa Coffee	
Species in Focus: Silver Smelt		<b>Growth in Sustainable Seafood Consumption</b>	<b>33</b>
Ready Meals & Food to Go	18	<b>Looking Forward: 2025 Outlook</b>	<b>35</b>
Partner in Focus: Crosta and Mollica			
Product in Focus: YO! Crispy Californian Rolls			
Preserved and Canned	20		





# Executive Summary

This fifth edition of the MSC UK and Ireland Market Report recognises the growing coalition of businesses in both the UK and Irish markets that are committed to sourcing and selling sustainable seafood. It highlights the key findings of our latest consumer research in the UK and Ireland, and the progress that has been made in increasing the availability of certified sustainable seafood products and menu items for those consumers. It profiles trends in MSC labelled product sales and also identifies new and emerging sectors where there are opportunities to grow the availability of sustainable seafood choices further. Market data analysed and presented in this report is provided to the MSC by businesses using the ecolabel on products and menus.

## Key findings:

- Consumers in the UK and Ireland spent a **record £1.5bn on products and menu items carrying the blue MSC ecolabel** last year (2023/24), a 12% increase on the previous year and the largest jump during a single year since 2017/18-2018/19
- Within UK retail, MSC labelled products accounted for an estimated **61% of the value and 58% of the volume** of all wild caught fish and seafood, up from 54% and 51% two years prior
- **49 unique species** were sold with the blue MSC ecolabel last year, including silver smelt for the first time
- **Two thirds of the growth** in consumer spending on MSC labelled products can be attributed to increased purchases across the frozen, preserved, and ready meal categories alone
- In 2023/24, **Irish consumers** spent an estimated €77 million on 350 MSC labelled products and menu items, a near 50% increase from two years prior and a new record for the Irish market
- Last year, shoppers bought just **over 23,500 tonnes of MSC certified tuna** products, accounting for an estimated 38% of all tuna sold in UK supermarkets, by volume. Current projections from the MSC suggest this figure could rise to over 40,000 tonnes in 2024/25
- Only 3.55% of fish and seafood sold in UK **foodservice** last year carried a blue MSC ecolabel, highlighting a significant opportunity for this sector to adopt MSC certification and meet consumer expectations in the UK
- In 2023/24, UK and Irish shoppers spent a total of £5.87m on MSC labelled **supplements**, a rise of 17% on the preceding year.

Over the past year, the sustainable seafood movement in the UK and Ireland has made tremendous progress in many areas. This 2024 edition of our Market Report highlights these successes, and but also outlines where further MSC labelling opportunities still exist. Analysing the latest consumer insights, the Market Report examines the role of certification in supporting increased consumption of and demand for a wider variety of sustainably sourced fish and seafood.





# Introduction

The seafood industry in the UK and Ireland has made exceptional progress in bringing more certified sustainable choices to consumers who, according to research conducted on behalf of the MSC, are increasingly pessimistic about the future of our oceans. The progress is driven by a number of brands and retailers making great strides toward meeting their targets for sustainable sourcing, particularly on tuna. As one of the big five most-consumed species (alongside cod, haddock, salmon, and prawns), tuna has long been a popular choice for the UK and Irish consumer, but availability of certified sustainable tuna products has trailed behind other countries. Rapid growth in the number of tuna fisheries engaged in the MSC programme worldwide in recent years has encouraged brands and retailers in the UK and Ireland to start rewarding these fisheries and their commitment to sustainability. With more certified products to choose from, shoppers in the UK and Ireland also spent more on MSC labelled fish and seafood than ever before.

There have also been a number of notable achievements made by MSC certified fisheries in the UK and Ireland in the past year that have enabled brands and retailers to continue to offer a range of local and sustainably sourced products. The Northern Ireland and Republic of Ireland bottom grown mussel fisheries, and Falkland Island toothfish fishery were all successfully recertified, while the Thames cockle fishery, the Wash brown shrimp fishery, and Ireland rope grown mussel fishery have also all committed to re-assessment.<sup>1</sup> Three other fisheries – the Shetland and Scottish mainland rope grown mussel enhanced fishery, the Scottish Pelagic Sustainability Group North Sea herring fishery, and the UK Fisheries Ltd Northeast Arctic cod, haddock and saithe fishery - also received grants to support part of their recent recertification and auditing costs from [MSC's Ocean Stewardship Fund \(OSF\)](#). Funded by royalties generated from MSC certified product sales and third-party donations, the OSF is becoming an important mechanism for supporting fisheries on their sustainability journey, and recognising those that have made a long-term commitment to MSC certification.

In the pre-certification space, this year also saw the completion of [Project UK Rounds 1 and 2](#), a set of Fishery Improvement Projects (FIPs) working directly with fisheries in the UK to help them become more sustainable over time. The outcomes of the project are detailed in the [Project UK Summary Report 2024](#), published in October. While the fisheries engaged in the project are at different stages of readiness to meet the MSC Standard, the structure of the project, which brought together the fishing sector, academia, NGOs and the retail/supply chain, created a framework for driving continuous improvements in fishing activities in the UK. With the recent launch of the MSC's [Improvement Program](#), there is an opportunity for these fisheries to continue their journey to certified sustainability on a structured, measurable path with independent verification of the improvements being made. For retailers, brands and restaurants looking to continue expanding their range of MSC certified products, the Improvement Program also offers a pipeline of potential source fisheries that have demonstrated their commitment to achieving certification.

The MSC UK and Ireland Market Report profiles leadership in the sustainable seafood movement and highlights opportunities for growth. It provides insights that can help support the MSC's theory of change, designed to ensure more fisheries, both in the UK and Ireland and around the world, are operating sustainably. We hope that you enjoy this fifth edition. If you have any questions or queries reach out to your key contact at the MSC, or if you would like to make a general enquiry, you can find our contact details listed at the end of the report.

<sup>1</sup>As of December 11, 2024. All information on fishery re-certifications and reassessments is available on MSC's Track a Fishery website.





# Methodology

## MSC Labelled Product Sales Data

- The market data used in this report is provided to the MSC quarterly, semesterly, or annually, by businesses using the MSC ecolabel on products and menus. The reporting period is aligned with the last financial year: April 1, 2023 – March 31, 2024. Each product or menu item is registered and reported based on the market in which it is sold, with the weight, cost-value and number of units recorded.
- 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.

## UK Retail and Foodservice Seafood Sales Data

- Seafood sales data for the UK retail and foodservice sectors presented in this report has been sourced from various reports published by [Seafish](#). The underlying data in those reports is provided by Nielsen.

## UK and Irish Consumer Insights

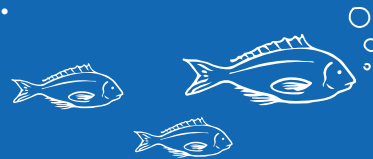
- The consumer research presented in this report is based on surveys conducted by GlobeScan in the UK and YouGov in Ireland, on behalf of the MSC.
- The 2024 GlobeScan online consumer survey was conducted between January and March in 23 countries worldwide. In the UK, 1,378 consumers were surveyed, of which 1,073 identified themselves as seafood consumers (e.g. consumers in a household where someone has purchased seafood in the past 2 months and/or who regularly eat seafood at home or in a restaurant).
- The 2024 YouGov online consumer survey was conducted in Ireland between May 1-6. A representative sample of 1,000 consumers were surveyed across the country, of which, 749 identified themselves as seafood consumers (e.g. consumers who purchase seafood at home, at restaurants or on-the-go, etc., at least once a month).





# UK Consumer Insights 2024

The findings of our bi-annual independent consumer research survey conducted by GlobeScan show that over half (54%) of UK seafood consumers now recognise the blue MSC ecolabel, continuing the upward trend in awareness of our programme for UK shoppers.



## Attitudes to Ocean Sustainability



Anxiety about the state of the world's oceans among seafood consumers is on the rise with

**94%**

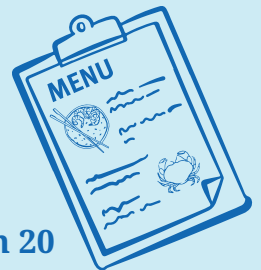
of respondents saying they were worried, up from 91% two years ago



**42%**

don't think their favourite seafood will be available in 20 years' time (up from 33% in 2022).

For those aged 18-34, the figure rises to 52%, showing greater concern among younger people

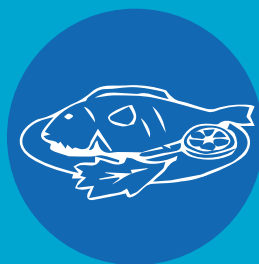


## Consumer Action and Diet



Only  
**21%**

of UK adults surveyed say they eat the NHS-recommended two portions of seafood a week or more

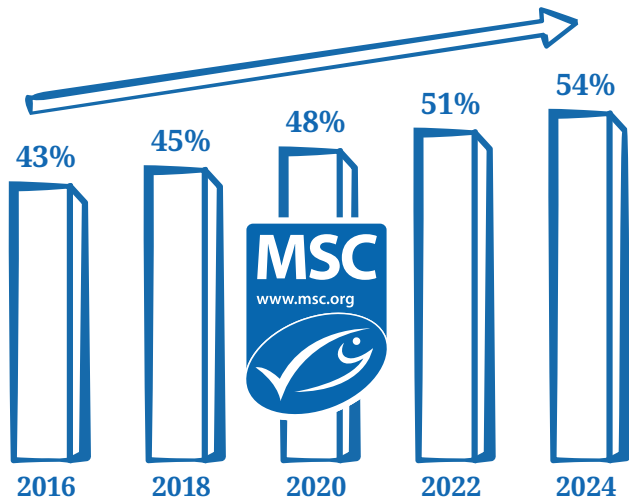


**14%**

of UK seafood consumers said they have purchased more seafood with an ecolabel on the packaging over the past year, while 40% they would be willing to do so in the future

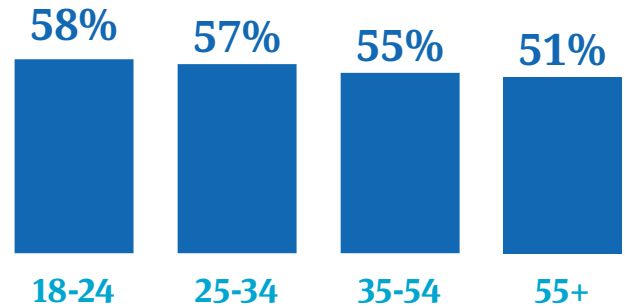


## MSC Awareness and Understanding



Awareness of the MSC ecolabel amongst UK seafood consumers (e.g. respondents have seen the label often or occasionally)

Amongst UK seafood consumers, awareness of the blue MSC ecolabel was highest amongst 18-24 (58%) and 25-34 (57%), year olds, and lowest amongst 35-54 (55%) and those over 55 (51%)



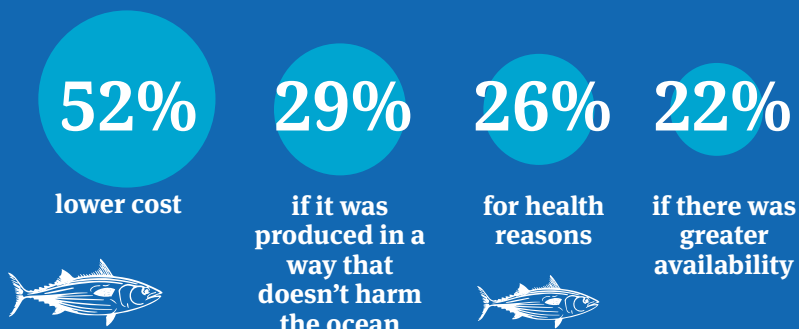
# 39%

of seafood consumers have at least some understanding of the MSC label, spontaneously associating it with either ocean sustainability or certification, up from 33% in 2022 and 25% in 2016



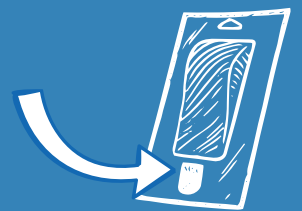
## Motivators for Purchase and Ecolabels

UK seafood consumers say they would eat more seafood for the following reasons:



# 77%

of UK seafood consumers agree supermarkets' and brands' claims about sustainability and environment need to be clearly labelled by an independent organisation



# Over half (55%)

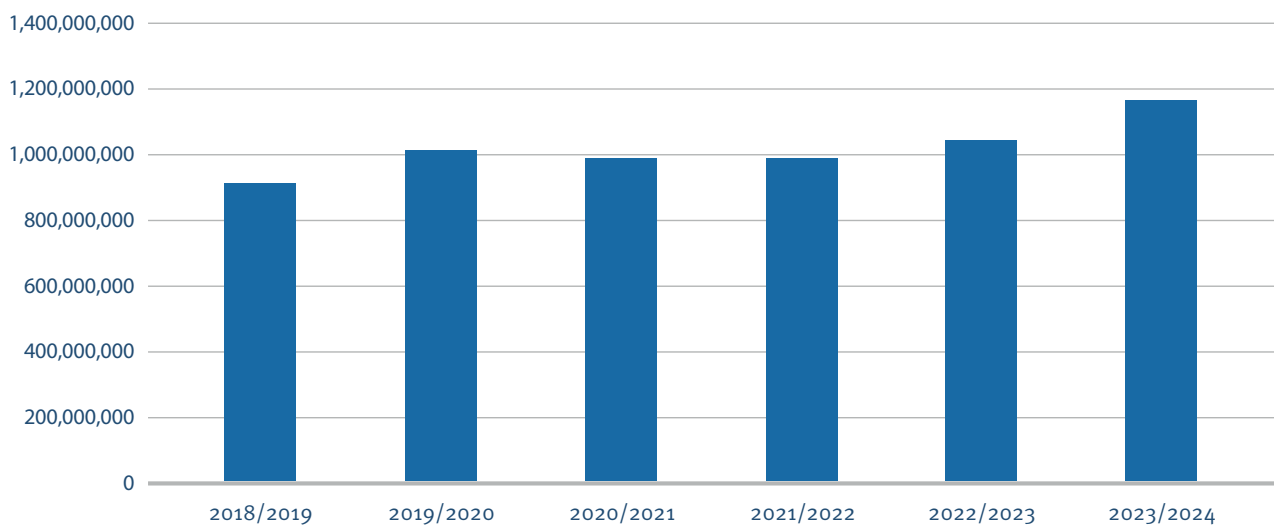
of UK seafood consumers say seeing the blue MSC ecolabel would make them more likely to purchase a product, and 53% say that they are prepared to pay more for products that come from a certified sustainable fishery



# Market Overview

Understanding how and why consumer attitudes towards sustainability in seafood are changing is key to explaining what is driving the market for MSC labelled fish and seafood products, and what more can be done to encourage more sustainable seafood consumption. Consumer research has shown that concern about the state of the world's oceans has continued to rise amongst seafood consumers in the UK and Ireland in recent years. In the UK, only a third (34%) of seafood consumers believe that in 20 years' time we will have saved the oceans from irreparable damage from humans (down from 50% in 2022). Despite this increasingly pessimistic outlook on the future of our oceans, the research also found that seafood consumers want to do their part to protect fish and seafood for the future. In the UK, 14% of UK seafood consumers said they have purchased more seafood with an ecolabel over the past year, while over half (55%) say seeing the blue MSC ecolabel would make them more likely to purchase a product. In Ireland, 72% of consumers surveyed by YouGov agreed that the choices they make about eating fish/seafood can make a difference to the health of our oceans, up from 63% in 2021.

This feeling of individual empowerment amongst consumers has been recognised by retailers and brands who are enabling their customers to make more ocean-friendly choices by increasing the availability of MSC labelled products. As a result, for the second year in a row, consumer spending on MSC certified fish and seafood in the UK and Ireland hit a new record high in 2023/24. Across both countries, consumers spent an estimated £1.5bn on products and menu items carrying the blue MSC ecolabel, a 12% increase on the previous year and the largest single year jump since 2017/18 to 2018/19.



Graph 1. MSC Product Cost-Value (£) in the UK/Irish Market<sup>2</sup>

In the UK retail sector specifically, total seafood sales also grew over the past year, although not quite to the same extent as that of MSC certified seafood. Between June 2023 and June 2024, shoppers in the UK spent £4.356bn on 387,463 tonnes of fish and seafood, a 4.8% increase in value and 2.5% increase in volume over the previous year.<sup>3</sup>

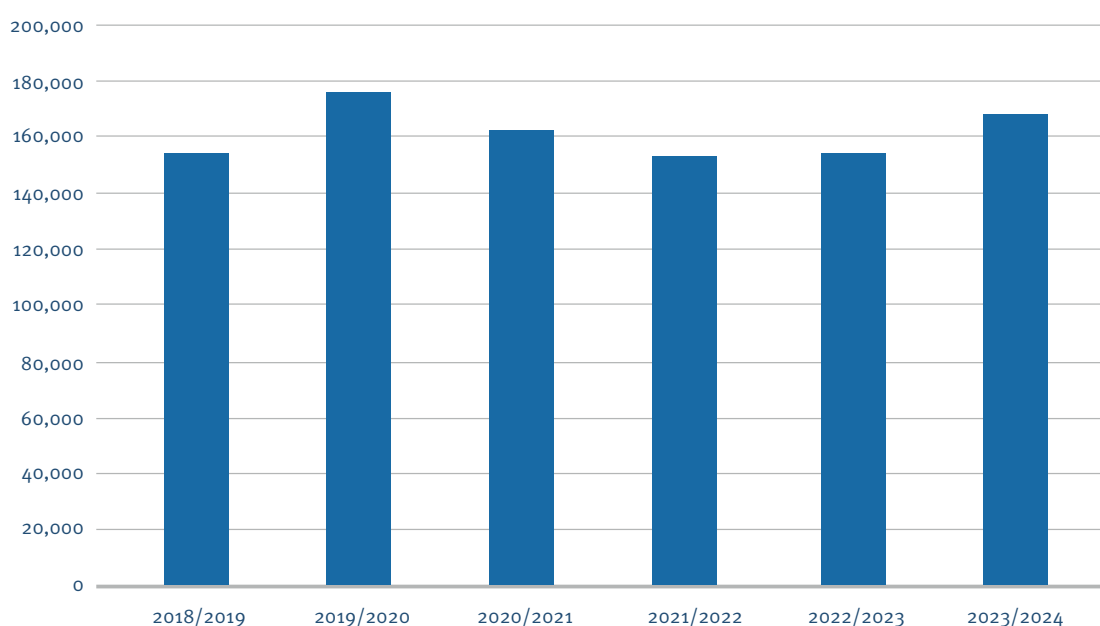
<sup>2</sup>Data collected on the cost-value of consumer-facing MSC registered products demonstrate strong continued growth over the past six years in the UK/Irish market (see Graph 1). A 30% mark-up is applied to these cost-value figures to estimate consumer spend.

<sup>3</sup>Data taken from [Total Seafood in Multiple Retail \(2024 Update\)](#). Sales data cited in the report runs from June 15, 2023 to June 15, 2024 and includes both farmed and wild-caught fish and seafood.



Within this, MSC labelled products accounted for an estimated 61% of the value and 58% of the volume of all wild caught fish and seafood, up from 54% and 51% two years prior.<sup>4</sup> Despite the challenges the cost-of-living crisis has posed in recent years, this growth demonstrates that retailers, brands and consumers have remained committed to making sustainable and affordable choices available to customers, when buying and selling fish and seafood.

These volume increases of MSC labelled fish and seafood purchased in the UK and Ireland have been significant, growing to 167,512 tonnes in 2023/24 (representing a 13,558 tonne or 9% increase from 2022/23). This takes the total of MSC products sold closer to the pre-pandemic high of 175,309 tonnes recorded in 2019/20. For a second year in a row, the rise in volume was driven primarily by growth in MSC certified skipjack tuna which grew by 55% between 2022/23 and 2023/24 (see Focus on Tuna). With many retailers and brands continuing to make progress on their public commitments to sustainable sourcing, purchases of MSC labelled products in the UK and Ireland are currently on track to surpass 178,000 tonnes in 2024/25, which would set a new all-time high for the two markets.



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

The growth in consumer purchases of MSC labelled products over the past year is particularly impressive amidst the ongoing cost-of-living crisis, and market disruption caused by the continued conflicts in Ukraine and the Middle East. The sustainable seafood movement has once again demonstrated its resilience in the face of these challenges and shown consumers that environmentally-friendly options are available across a wide range of product categories and at varying price points.

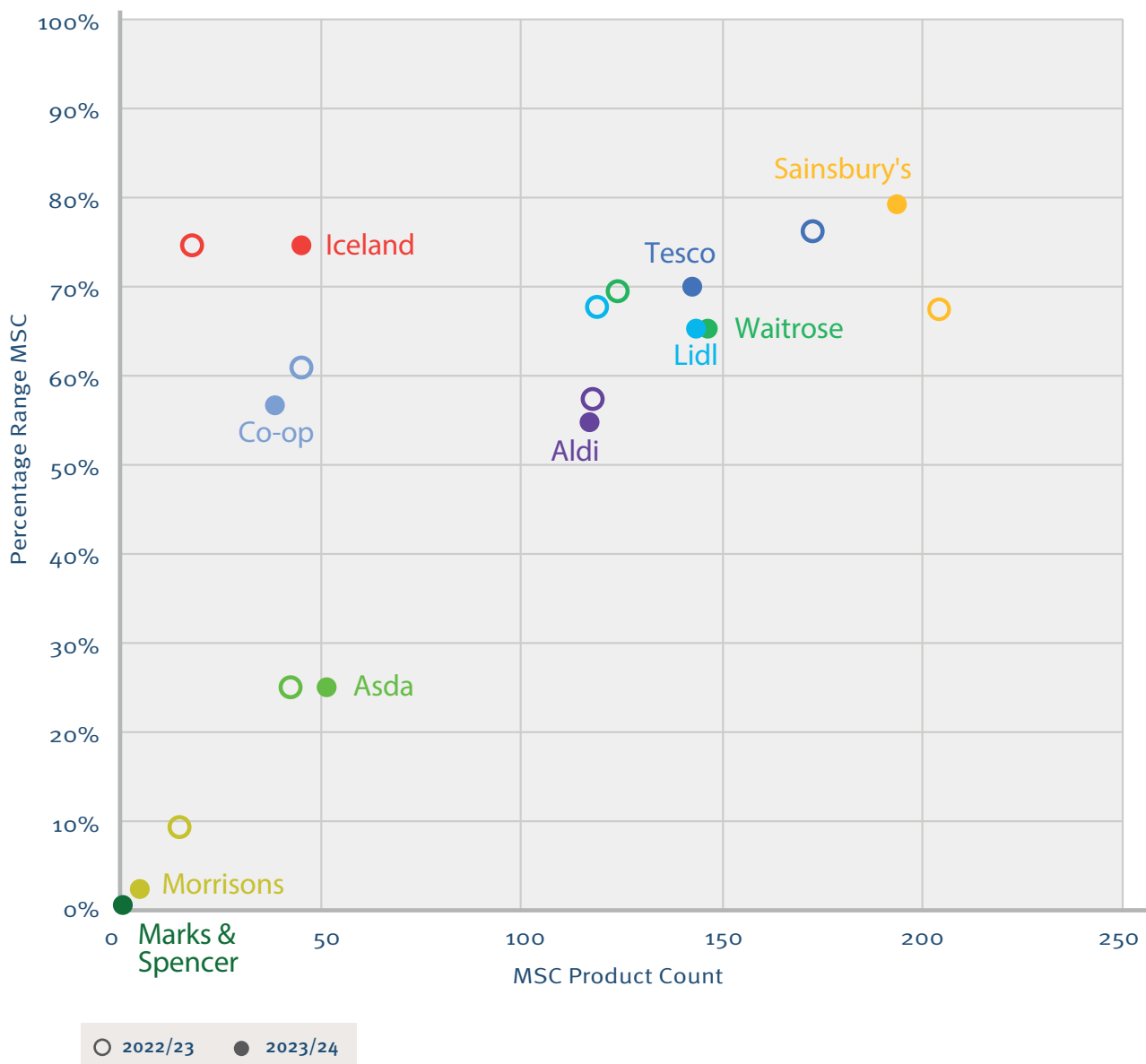
Retailers, brands and restaurants have also continued to offer a wide range of MSC certified species to consumers in the UK, with 49 unique species sold with the MSC label in 2023/24. This included, for the first time, silver smelt from the Northeast Atlantic used to make Birds Eye fish fingers, a great innovation and diversification within the seafood category. The types of MSC certified products available to UK and Irish consumers is also changing, with several marine collagen brands launching labelled products and Costa Coffee becoming the latest high street foodservice outlet to introduce the blue MSC ecolabel onto its menu (see section on Foodservice).

It is encouraging to see a growing coalition of businesses in the UK and Ireland engaged in the sustainable seafood movement. Their commitment to recognising and rewarding fisheries that are operating sustainably is what will enable the MSC to meet its target for engaging over a third of the world's marine catch by 2030.

<sup>4</sup>Calculated using Seafish, [Farmed Seafood in Multiple Retail \(2024 Update\)](#).

# UK Supermarkets

The UK retail sector continues to demonstrate global leadership in its commitment to sourcing and selling certified sustainable seafood. In 2023/24, nine of the 10 leading UK supermarkets sold 121,383 tonnes of MSC certified seafood under their own brands, an 8% increase on the previous year and a new all-time high. In terms of sales value, UK shoppers spent £1.128 billion on MSC fish and seafood under retailer own-brand products, a 13% increase from 2022/23, equivalent to an additional £129 million. It was also the first time that figure surpassed the one billion pound mark.



Graph 3. UK retail landscape, showing progress against previous year on number of MSC products and percentage of wild seafood range labelled

Over the past year, many of the UK's leading supermarkets grew their MSC labelled own-brand product range or the percentage of their total wild seafood range sold as certified (see Graph 3). Seven of the 10 continue to use the blue MSC ecolabel on more than 50% of their own wild seafood range.



Sainsbury's, winner of **Supermarket of the Year 2024 - Gold Award** at the 11th annual MSC UK Awards, sold the most MSC labelled products with 187, and had the highest percentage of its wild seafood range bearing an MSC ecolabel at 79%. This was thanks to, in large part, their tuna range returning to 100% MSC certified. Iceland, winner of **MSC UK Supermarket of the Year 2024 - Silver Award**, increased their MSC labelled product count from 30 to 46, and continued to hold the second highest percentage range of all UK supermarkets at 73%. Tesco had the third highest percentage range carrying an MSC ecolabel at 70%, while Waitrose grew their total labelled product count from 125 to 147. Lidl, winner of **MSC UK Supermarket of the Year 2024 - Bronze Award**, overtook Tesco to become the UK retailer with the third most MSC labelled products, with the range growing from 121 to 146. Although their total certified product counts were not as high as the previous year, both Aldi and Co-op continued to have strong label coverage across their wild seafood range at 55% and 56% respectively. Asda introduced 10 additional MSC labelled products under their own range, taking their total from 41 to 51, whilst Morrisons' MSC certified product count dropped from 14 to six. Marks and Spencer remains the only top 10 major UK retailer not to offer any MSC labelled products under their own brand.

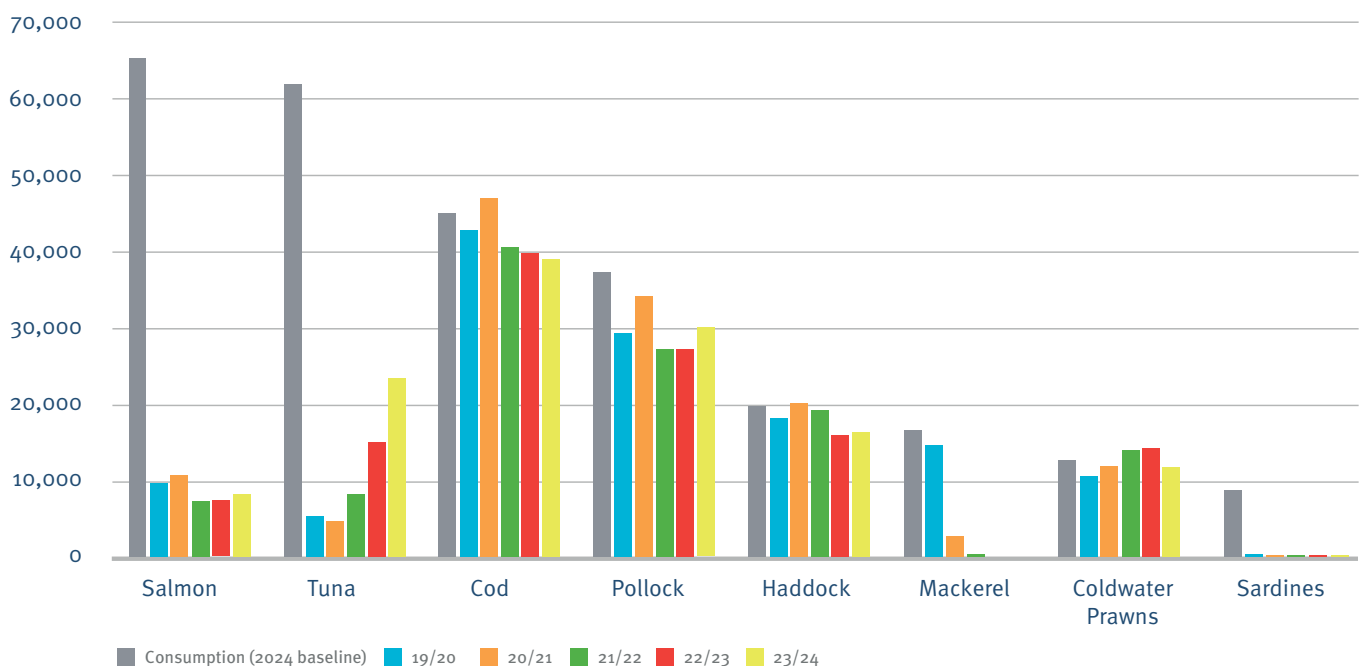


## Label Coverage by Species

The availability of MSC certified products in UK retail continues to vary considerably by species and product format. The ‘big five’ species – cod, haddock, prawn, salmon and tuna – remain a core component of supermarkets’ MSC ranges, and together accounted for 69% of all labelled product sold by volume.

Comparing sales data of MSC certified products to total UK retail seafood sales (£) provided by Seafish, found that ecolabel coverage remains strong amongst the main whitefish species; 87% of cod, 83% of haddock and 81% of pollock products sold in supermarkets last year carried a blue MSC ecolabel (see Graph 4).<sup>5</sup> Despite having the highest label coverage, the volume (tonnes) of MSC certified cod sold last year dropped 2% compared to the previous year, while haddock volumes rose by 3% and pollock volumes rose by nearly 11%, as price and affordability of certain species was increasingly front-of-mind for shoppers. Among other whitefish species, the volume of MSC labelled yellowfin sole notably grew by 55% last year. With some significant quota reductions announced for major MSC certified cod and haddock fisheries in the Northeast Atlantic and Arctic, the decreased availability may prompt retailers and brands to further diversify their whitefish species offering. This could provide opportunities for these businesses to explore alternatives like Pacific cod, pollock, coley and hake, which could help meet customer demand for products from sustainable, well-managed fisheries.

Like cod, haddock and pollock, MSC label coverage of coldwater prawn products has been, and continues to remain strong in UK supermarkets. Eight of the 10 leading retailers have offered certified coldwater prawn products as part of their own range for a number of years, and last year, Ocado joined the group by introducing two MSC labelled products of its own.



Graph 4. MSC coverage of top species in UK retail by volume of MSC labelled product sold (tonnes), compared to Seafish benchmarks

For a second year in a row, MSC certified tuna saw the greatest growth amongst the top species sold in retail, with a 53% jump in the volume sold between 2022/23 and 2023/24. As a result, MSC labelled tuna accounted for 38% of all tuna sold in UK supermarkets last year, compared to just 7.5% in 2020/21 (see Focus on Tuna). While the majority of salmon sold in UK retail is farmed, wild Pacific salmon, particularly red and pink salmon, remain important species for many retailers and brands, especially for canned and frozen products. In 2023/24, 21 different brands sold 8,579 tonnes of MSC certified Pacific salmon, 12% more than in 2022/23.

<sup>5</sup>Data taken from [Total Seafood in Multiple Retail \(2024 Update\)](#) – Seafish.



Beyond these ‘big five’ species, MSC label coverage is more variable. Small pelagic species like mackerel and sardine remain major gaps in all UK retailers’ MSC certified ranges. There is no longer any MSC labelled Atlantic mackerel on the market following the fisheries’ suspension in March 2019, and although certified jack mackerel has been introduced as an alternative in European markets, it has yet to reach the UK. The availability of MSC labelled sardine products is also limited, despite having the world’s only currently certified European pilchard (*Sardina pilchardus*) fishery in Cornwall. With an additional fishery – the Iberian sardine purse seine fishery – currently in assessment, it is possible that there will be new labelling opportunities available if it is successful in becoming certified.

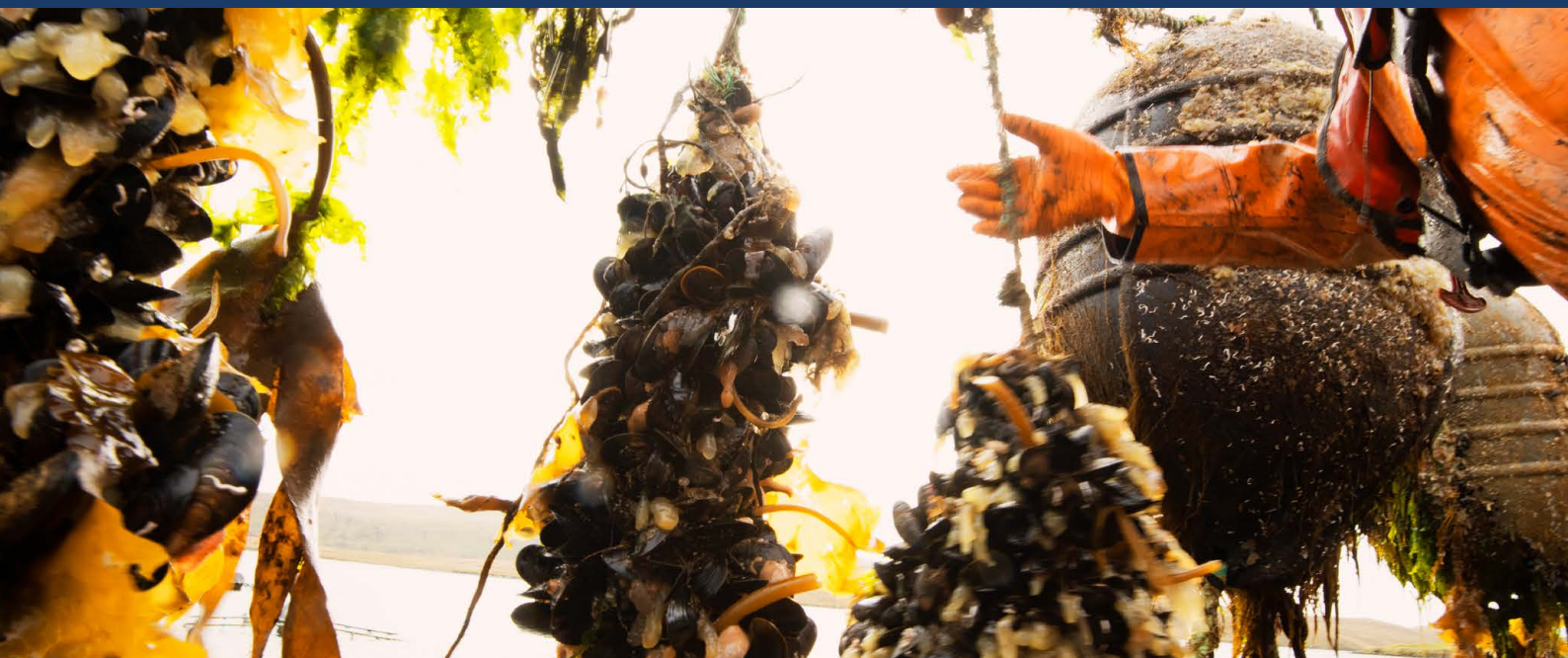
Amongst other pelagic species, label coverage is stronger. The volume of MSC certified herring and anchovy grew by 18% and 58% respectively in the past year (see Focus on Anchovy). Growth was also strong for certain shellfish species. Just over 3,500 tonnes of MSC labelled mussels were sold last year, an 18% jump from 2022/23. Thanks to this increase, now nearly 82% of all mussels sold in UK supermarkets carry the blue MSC ecolabel.<sup>6</sup> Sales of certified scallop, made up primarily of Patagonian scallops (*Zygochlamis patagonica*), also grew by 7.6% as nine retailers (Aldi, Asda, Lidl, Morrisons, Ocado, Tesco, Sainsbury’s, Waitrose and Whole Foods Market) offered at least one labelled product.

<sup>6</sup>Note: some mussels sold in UK retail are farmed, and therefore would not be eligible to carry a blue MSC ecolabel. 82% of all mussels (farmed and wild) sold in UK retail carried a blue MSC ecolabel last year.

## Partner in Focus: Scottish Shellfish Marketing Group (SSMG)

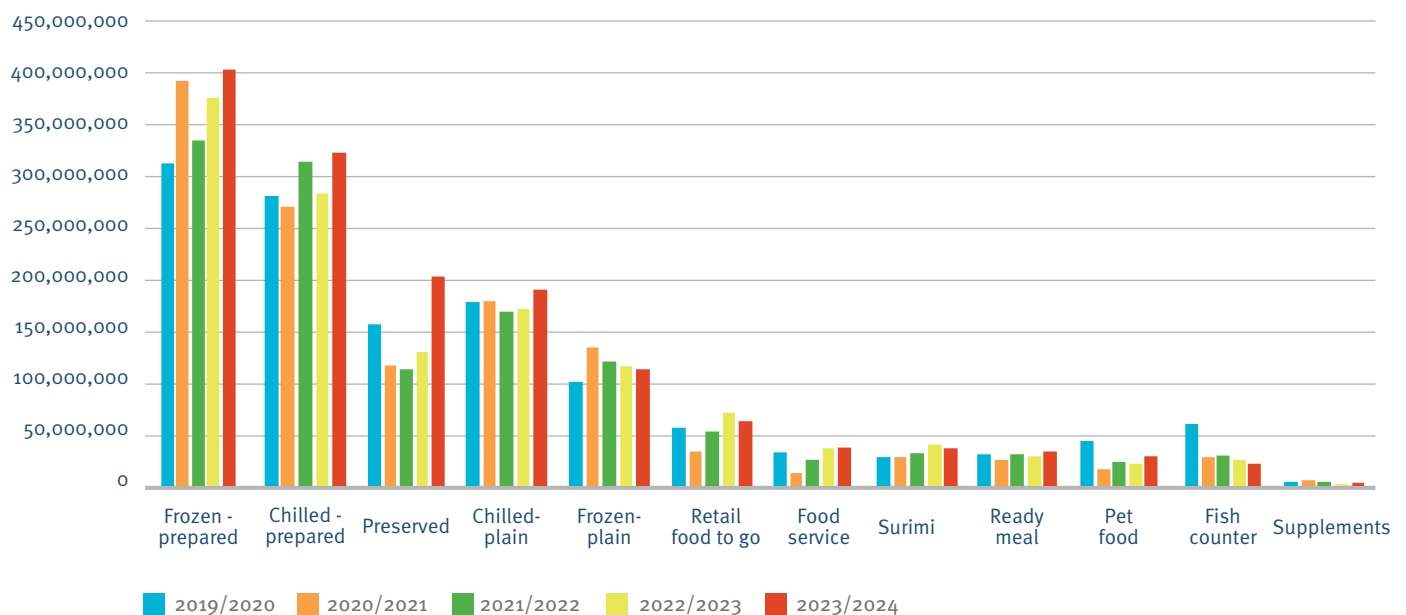


At the 2024 MSC UK Awards, the Scottish Shellfish Marketing Group (SSMG) was named **MSC UK Retail Supplier of the Year** following a nomination from one of its retail customers. As a cooperative representing mussel and oyster farmers across Scotland, SSMG has been a leader in championing responsibly sourced shellfish. The Shetland and Scottish mainland mussel fishery, which is a key supplier to SSMG, was recertified to the MSC Standard in 2023, reaffirming its commitment to the highest environmental standards—a milestone first achieved in 2012. SSMG has also played a key role in increasing the availability of mussels in UK retail. Thanks to them, mussels are now widely available with an MSC label in most UK retailers. Winning the MSC UK Retail Supplier of the Year was great recognition for SSMG’s leadership in the UK seafood sector and its longstanding commitment to making sustainable, low-carbon seafood more accessible to consumers across the UK.



## Label Coverage by Product Category

For British shoppers in 2023/24, buying habits continued to be shaped by ongoing economic difficulties. Consumer spending patterns on MSC labelled products showed a clear preference for affordable, convenient products, particularly those with a long shelf life. Two-thirds of the growth in consumer spending on MSC labelled products can be attributed to increased purchases across the frozen, preserved, and ready meal categories, all of which provide convenience and affordability during the ongoing cost-of-living crisis. Within these categories, the most impressive growth came amongst MSC labelled preserved products, with consumer spending in this category rising from £131m in 2022/23 to £203m in 2023/24 - a 55% increase.



Graph 5. UK market labelled product sales (£) by category

For preserved products, the rise is not only a result of changing consumer habits. Recently, the UK retail sector has expanded its range of MSC labelled canned tuna. Cans of tuna are popular consumer goods in the UK, since they are affordable and ready to eat. Thanks to retailer commitments to sell sustainable tuna, there are more certified sustainable tuna products available in the UK than ever before. 45% of the growth in consumer spending on MSC labelled products in the UK in 2023/24 is from purchases of canned or jarred tuna alone.

Frozen product sales (£) grew by 5% overall, with cod, haddock, and pollock continuing to dominate frozen sales, whilst chilled product sales rose by 12%, the fastest growth rate for the chilled category since 2018/19. Having returned to its pre-pandemic levels last year, the foodservice sector experienced a modest rise of 0.1% in MSC consumer spend, whilst surimi sales dipped by 7% after an impressive jump the previous year. Pet food and supplements both witnessed promising growth rates of 30% and 17% respectively.





## Fish Counters

The fish counter offering in UK supermarkets has changed in recent years. While a number of major retailers have closed their counters, they do still remain a valued offering in certain supermarkets. Waitrose and Whole Foods UK are the only retailers to offer MSC certified fish and seafood on their fish counters. In 2023/24, 25 MSC labelled species were sold at fish counters, down from 28 the previous year, but still higher than the 23 species sold in 2019/20. The volume of MSC labelled seafood sold at fish counters saw a significant decline in 2023/24, with a decrease of approximately 22% compared to the previous year, as the impact of Tesco closing its remaining fresh fish, meat, and deli counters in February 2023 was realised.

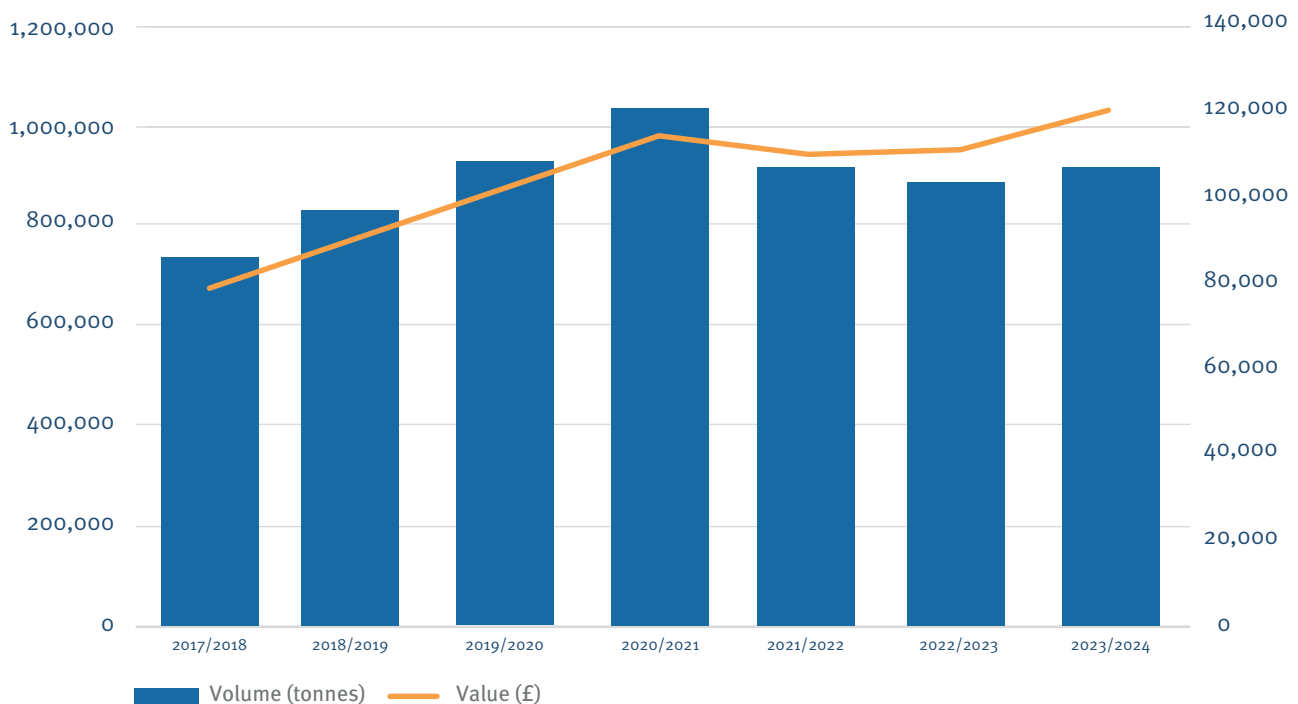
Despite this decline in the UK market overall, variety is still a key offering at MSC certified fish counters, with Western rock octopus and longfin squid being sold with an MSC label for the first time at Whole Foods Market fish counters last year. Waitrose also continues to show its longstanding support for local UK fisheries, including Shetland scallops, Poole Harbour clams and cockles, Cornish sardines and European hake, which have all been available on their counters for a number of years. This highlights a continued consumer interest in sustainably sourced seafood, that is being provided for by both Waitrose and Whole Foods.

While the closure of fish counters at retailers like Sainsbury's and Tesco reflect a broader trend of consumers opting for more convenient and accessible options like pre-packaged and frozen fish products, fish counters still serve an important segment of the market looking for a diverse range of sustainably sourced, and often local, fish and seafood. Retailers like Waitrose and Whole Foods UK are delivering on this demand and giving shoppers in the UK the ability to buy MSC certified species not available anywhere else in the market with an ecolabel.



## Chilled and Frozen

Chilled and frozen product sales accounted for 71% of all MSC labelled fish and seafood sold in the UK and Ireland last year. Whilst this is slightly below the preceding year's figure of 72%, that is a consequence of other categories – in particular preserved products – growing particularly fast. The chilled and frozen categories have shown promising growth in 2023/24, with British consumers spending £1.03b on MSC labelled products in both formats in the last financial year. This is a rise of 9% on the preceding year, and the first time that consumer spending on chilled and frozen MSC products has surpassed the one billion mark.



Graph 6. Value and Volume of MSC Labelled Chilled and Frozen Products in the UK over time

Arguably the more impressive development, however, is that the volume of MSC labelled product sold in these formats has risen, having declined for two consecutive financial years prior to that. Over 106,000 tonnes of chilled and frozen product was sold in the UK with an MSC label in the last financial year, a rise of 3% that brings volumes back to the levels of 2021/22. This growth across both metrics demonstrates MSC labelled products' ability to adjust to the current market conditions of shrinkflation, and remain relevant to consumers during difficult economic conditions, with plenty of affordable and sustainable options.

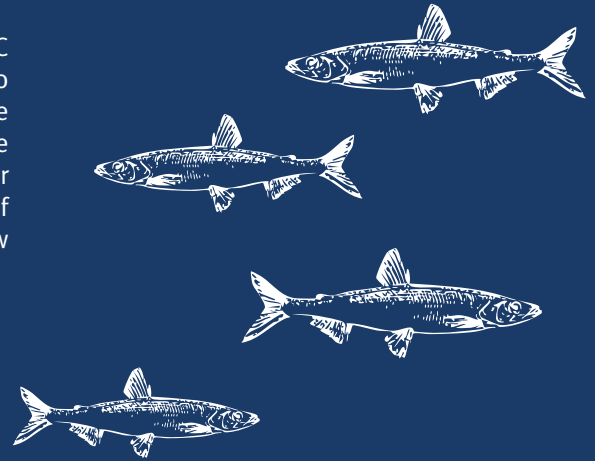
In terms of availability, 435 different frozen products were sold with a blue MSC ecolabel last year, up from 404 the previous year. This category continues to be dominated by frozen whitefish, with cod, haddock, and pollock making up 85% of frozen MSC product sales by volume. A further 5% of the total volume is coldwater prawns, which are available in frozen format with an MSC label in eight out of the 10 major UK brick-and-mortar retailers under their own brands. Despite this dominance from certain species, the range of species sold in frozen MSC products remains diverse. 26 species were sold with an MSC ecolabel in a frozen format last year, up from 23 the prior year. Species sold as frozen for the first time in the UK as MSC products include skipjack tuna (see section on Ready Meals & Food to Go for discussion of the specific product) and silver smelt, as highlighted below.



## Species in Focus: Silver Smelt

Silver smelt (*Argentina silus*), also known as the greater Argentine, is a species within the wider Argentinidae family. It is caught in the Northeast Atlantic, and currently there are two MSC certified fisheries that target silver smelt.

No silver smelt product had ever been sold in the UK with a blue MSC ecolabel before last year, when Birds Eye became the first brand to launch MSC labelled silver smelt as part of its fish finger range. One of these products, *Birds Eye's Mini 20 Fish Fingers*, which is made from 100% silver smelt and coated in breadcrumbs, was a contender for the MSC UK Product of the Year 2024. Following the launch of these new products, MSC certified silver smelt products are now available in several major retailers, as well as online.



## Ready Meals and Food to Go

Although they account for a minority of retail seafood sales, ready meals and food to go are both important categories within supermarkets, valued by consumers for their convenience and affordability.

MSC labelled food to go products often take the form of ready-made sandwiches, pastas and salads, as well as sushi selections, that are generally available as part of a supermarket meal deal. Tuna and prawns dominated the MSC labelled species sold as food to go products, as has been the case for many years. Because of the sudden decline in office work during the Covid-19 pandemic, consumer spend in this category fell to £35.7m in 2020/21, almost 40% below the preceding year. As the pandemic eased and workers returned to the office, spending on food to go began to grow again, rising to a new high of £73m, but in 2023/24 spending fell back down to £64.8m. This may be a result of hybrid working becoming more established in many workplaces, leading to reduced demand for food to go products.

Consumer spending on MSC labelled ready meals, by contrast, did not decline as rapidly during the pandemic, and has continued to rise in 2023/24, hitting a new high of £35.8m, a 15% increase on the preceding year. With ongoing economic difficulties shaping consumer habits in the UK, the affordability and ease provided by ready meals makes them an attractive choice for shoppers who are affected by the cost-of-living crisis, but are still seeking certified sustainable seafood.

This building relevance of the MSC ecolabel in ready meals has led to some exciting new innovations in the category. Lidl launched a Nordic style potato salad containing herring, the first ready meal containing herring to ever carry the MSC ecolabel in the UK, whilst the brand Crosta & Mollica launched the first ever MSC labelled frozen pizza to be sold in the market.

## Partner in Focus: Crosta & Mollica



In May 2023, London-based Italian food brand Crosta & Mollica launched the first ever MSC labelled frozen pizza in the UK and Ireland. The *Tonno Sourdough Pizzetta* with the MSC tuna and red onion contains two small pizzettas made with skipjack tuna from an MSC certified fishery. This was the first ready meal in the UK and Ireland to contain MSC labelled frozen tuna, so Crosta & Mollica's product has broken new ground on multiple fronts. In recognition of the innovation, Crosta & Mollica were awarded **Newcomer of the Year 2024** at the MSC UK Awards.





## Product in Focus: YO! Crispy Californian Rolls

Seafood sushi has become increasingly popular amongst consumers in the UK. Over the past decade, the category has seen the highest value and volume growth of all 10 major seafood segments sold in UK retail.<sup>7</sup> High street foodservice chains like YO!, Itsu and Wasabi are now household name and are starting to expand their footprint in the retail sector with a growing range of pre-pack products being sold under their own brand. Last year, YO! became the latest sushi brand, and the first of those three foodservice chains, to launch an MSC labelled pre-pack sushi product in the UK – YO! Crispy Californian Rolls. Products like this are now important components of many retailers' meal deal offers. Thanks to brands like YO! leading the way, it is becoming easier to find a wider variety of convenient, sustainably sourced food to go options.



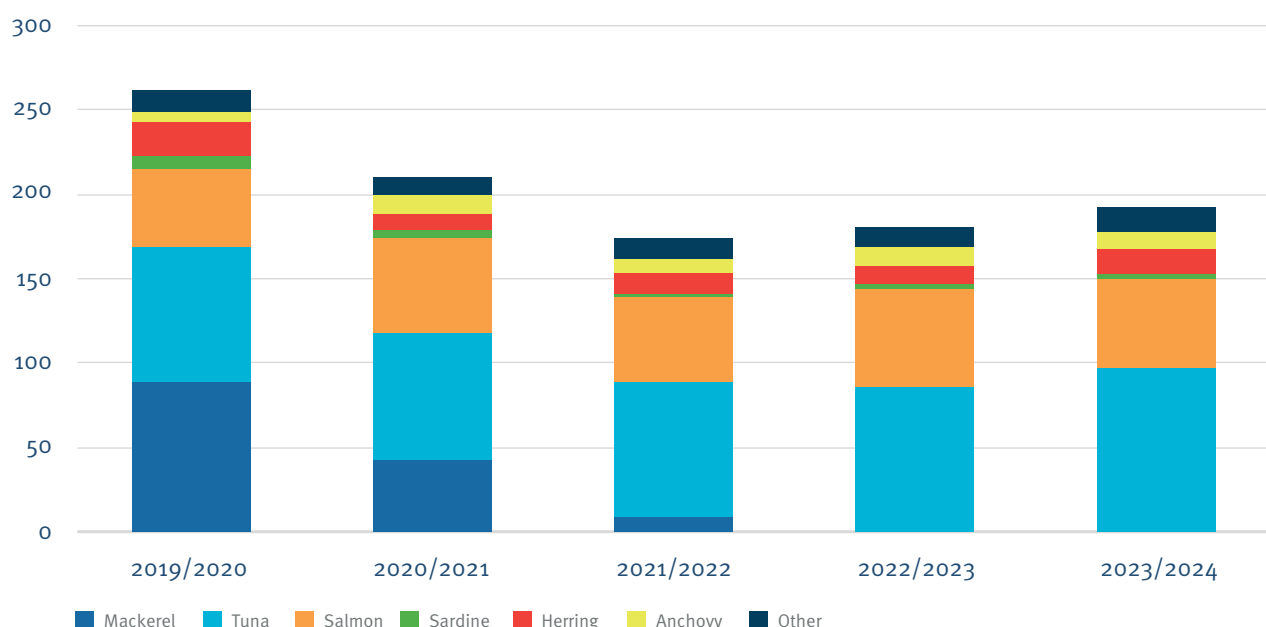
<sup>7</sup>Data taken from [Sushi in Multiple Retail 2024](#) — Seafish



## Preserved and Canned

The UK canned seafood market has experienced notable growth, driven by changing consumer preferences for convenient, sustainable and healthy food options. According to data from Seafish, shoppers spent £581 million on ambient seafood products last year, a 5.5% increase from the previous year.<sup>8</sup> In volume terms, 81,309 tonnes of these products were purchased, a 1.9% increase from the year before. MSC certified preserved and canned products accounted for 31% of this total volume.<sup>9</sup> In terms of MSC label coverage, the ambient category has seen impressive growth of 46% over the past five years. Last year, 25,108 tonnes of MSC labelled product was purchased, driven largely by growth in tuna.

As a household staple, tuna is the star of the canned fish aisle. And it has become more widely available with an MSC ecolabel, with volumes of certified product increasing tenfold from 2,009 tonnes in 2019/2020 to 20,398 tonnes in 2023/2024. This growth has been driven by brands like Princes, winner of **MSC UK Seafood Brand of the Year 2024** at the MSC UK Awards, who is well on its way to offering 100% MSC certified canned tuna, and Aldi and Lidl, who have both expanded their sustainable tuna offering. Last year, the availability of MSC certified tuna products in the UK reached an all-time high (see Graph 7). With 98 MSC labelled canned tuna products available in the market (up from 86 the previous year), consumers had more sustainable options to choose from than ever before.



Graph 7. MSC Labelled Preserved Product Count by Species in the UK

In contrast, other species, such as mackerel and sardines, have seen declines in availability of certified options, or slower growth. Mackerel, in particular, was impacted by the suspension of the North East Atlantic mackerel fisheries in 2019, which led to a complete drop in sales. It now cannot be found with the blue MSC ecolabel. The UK retail sector has campaigned to see mackerel fisheries regain their MSC certification, and publicly called for Coastal States to agree catches in line with scientific advice via the North Atlantic Pelagic Advocacy (NAPA) group. However, the sector has yet to introduce currently available sustainable alternatives like jack mackerel, which are now being offered by supermarkets in Europe. With Atlantic mackerel quotas continuing to exceed the limits recommended by scientific advice, and stocks declining in recent years, UK brands and retailers should look for potential alternatives to ensure they are meeting the expectations of their customers and providing sustainable options for the long-term.

<sup>8</sup>Data taken from [Total Seafood in Multiple Retail \(2024 Update\)](#) – Seafish.

<sup>9</sup>Data taken from [Total Seafood in Multiple Retail \(2024 Update\)](#) – Seafish.



Sardines are still celebrated for their incredible cultural and historic significance to parts of the UK. However, only 10 MSC labelled products were available in the UK market last year, three of which were sold in a canned format. *Tesco's Finest Cornish Sardines in Rich Tomato, Olive & Caper Sauce* remained a staple at the UK's largest supermarket and was awarded the coveted title of **MSC UK Product of the Year 2024** at the MSC UK Awards, following a hotly contested public vote.

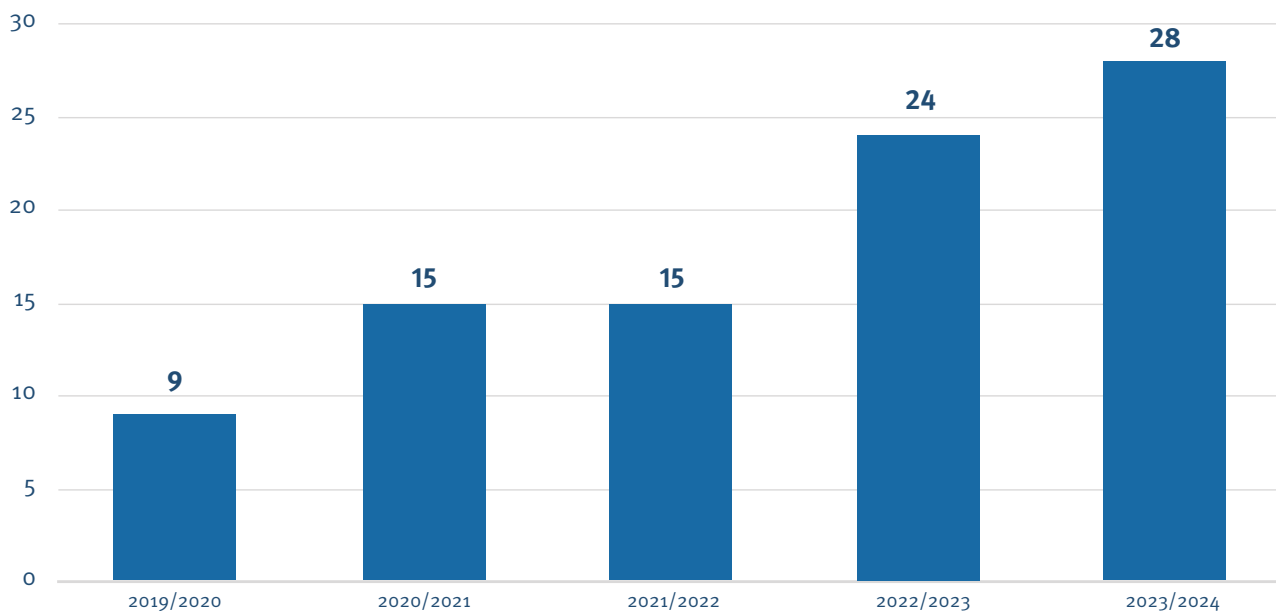
In recent years, although it is widely available, MSC labelled canned salmon has seen a gradual decline, dropping from 3,008 tonnes sold in 2019/2020 to 2,046 tonnes in 2023/2024. Other species like herring and anchovies are also important components of many retailers' and brands' sustainably sourced canned seafood ranges. Lidl remains the only retailer to currently offer MSC labelled herring products under its own brand, while canned and jarred MSC labelled anchovies can now be found under retailers' own brand at Sainsbury's, Tesco, Waitrose and Asda (see Focus on Anchovies) as part of their permanent ranges. Beyond retailers' own brand, Princes, John West and Loch Fyne also offer MSC labelled herring, with Loch Fyne launching its first two MSC certified products last year: *Herring Fillets in Dill Marinade* and *Sweet Marinated Herring*.

Although dominated by tuna, salmon and small pelagic species, consumers can also find MSC labelled canned shellfish, primarily under the Ocean Crown brand. Ocean Crown significantly expanded its MSC certified range last year with the introduction of four new jarred mussel products. These flavoured mussels are entirely unique in the market and include mussels in Thai green curry, spicy paprika, smoked mussels in rapeseed oil, and mussels in tomato & red pepper pasta sauce. These products mark a notable development, as jarred mussels with the blue MSC ecolabel are currently unavailable from any other brands in the market.



# Focus on Anchovy

Sales of MSC labelled anchovies in the UK and Ireland have grown substantially in recent years. British and Irish consumers spent £10.7m on MSC labelled anchovies in 2023/24, up from £6.9m in 2022/23 and £3.4m five years ago. This growth has been driven by increased availability, with 28 MSC labelled anchovy products sold last year, compared to just nine in 2019/20.



Graph 8. Number of MSC Labelled Anchovy Products in the UK & Ireland, 2019-2024

Despite this clear consumer demand, currently only four major retailers (Asda, Sainsburys, Tesco and Waitrose) sell MSC labelled anchovies under their own brand permanent ranges, leaving plenty of potential for growth.

Anchovies are often bought in the preserved format, such as cans or jars, in the UK and Ireland; while this has also been the case for MSC certified sales, there is also a growing quantity of chilled anchovies available with a blue MSC ecolabel. Waitrose, for example, launched two new MSC labelled chilled anchovy products in 2023/24 - *Cantabrian Anchovies in Herb & Citrus Dressing*, and *Summer Marinated Anchovies & Olives* – whilst The Good Tide Seafood Company entered their new *Simply Marinated Anchovy Fillets* product into the MSC's 2024 Product of Year Award category.

Currently, there are only two MSC certified anchovy fisheries, only one of which, the Cantabrian Sea purse seine fishery, targets European anchovies (*Engraulis encrasicolus*). However, with demand for certified anchovies clearly high in the market, there is a significant opportunity for other anchovy fisheries that choose to enter the MSC programme to be recognised for their commitment to operating sustainably.





# Focus on Ireland

The sustainable seafood market in the Republic of Ireland has continued to grow steadily in recent years. In 2023/24, Irish consumers spent an estimated €77 million on 350 MSC labelled products and menu items, a near 50% increase from two years prior and a new record for the country.<sup>10</sup> The boom in certified seafood sales has been propelled by retailers and brands expanding their MSC labelled product ranges to meet the expectations of Irish consumers, who are increasingly concerned about the state of the world's oceans. According to a YouGov poll conducted in May 2024 on behalf of the MSC, 80% of Irish consumers believe that in order to save the oceans, we have to consume fish and seafood only from sustainable sources, up from 75% in 2021. At the same time, consumers appear more empowered to affect change with their purchasing decisions, with 72% agreeing that the choices they make about eating fish/seafood can make a difference to the health of our oceans, compared to 63% in 2021.

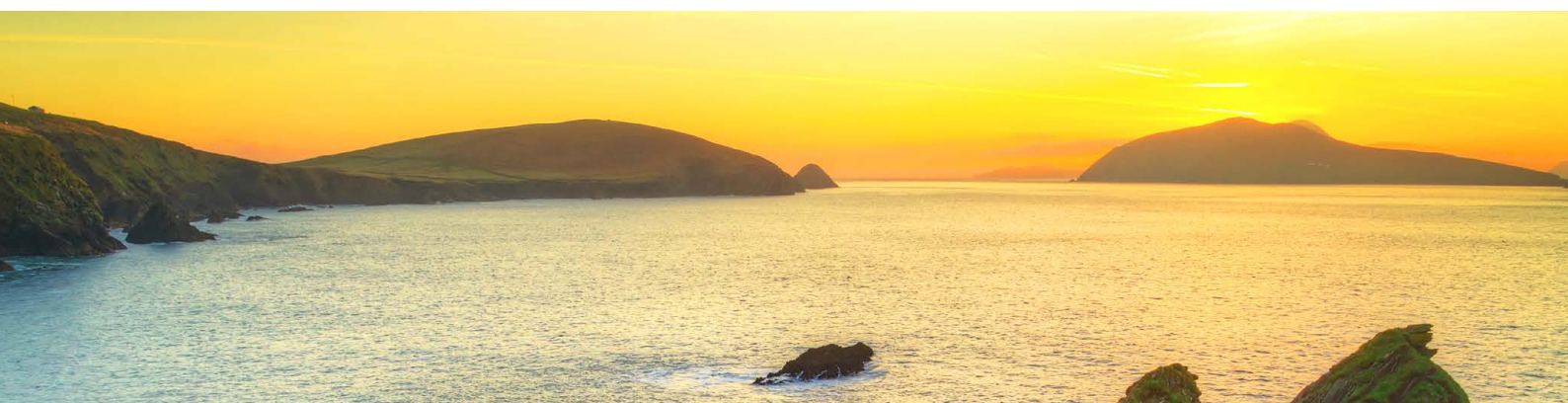
Many of Ireland's leading seafood supply chain businesses, retailers and brands have recognised this changing consumer landscape and worked to expand their ranges of sustainably sourced products. Aldi, Iceland, Lidl and Tesco have led the market in offering a wide variety of MSC labelled products under their own brand, while SuperValu added a third product - pollock fish fingers – to its MSC certified range last year. In the frozen aisle, Birds Eye has continued to champion sustainability with its extensive MSC certified range, while in the food cupboard, Irish shoppers can find John West kippers and canned salmon with a blue MSC ecolabel in many supermarkets. Beyond fresh fish, and canned and frozen seafood, Naturalife has remained one of MSC's longest standing partners in Ireland. The business, which sells certified krill oil supplements under its brand, Cleanmarine, launched its first product with an MSC ecolabel in 2011 and continues to be a leader in championing sustainability in the sector. For environmentally-conscious Irish pet lovers, both Mars-owned Sheba brand and Lidl's Coshida range offer a selection of MSC labelled products.

Outside of the supermarket, Irish diners can also find the blue MSC ecolabel on menus at McDonalds, IKEA and the Dublin-based fish and chip chain Beshoff Bros. While the foodservice and retail sectors in Ireland have made some progress in increasing the availability of certified sustainable seafood in the market, there remains significant opportunity for growth. Currently, only 8% of Ireland's national landings come from fisheries that have met the MSC Standard (see [MSC UK and Ireland State of the Water Report 2023](#)), and all are mussel fisheries. These fisheries have demonstrated a strong and continued commitment to operating sustainably, with two fisheries – the Ireland and Northern Ireland bottom grown mussels – achieving certification for a third time in August 2024, and another – the Ireland rope grown mussel fishery – currently undergoing reassessment. Products from these fisheries are important for brands like Bantry Bay Premium Seafoods and retailers like Lidl looking to offer locally-sourced, sustainable options.

Yet with many other Irish brands and retailers also sourcing a wide range of local fish and seafood, opportunities to introduce the MSC ecolabel onto products is limited. A number of Irish fisheries are currently engaged in Fishery Improvement Projects (FIPs), working to improve their sustainability to a place where they could achieve MSC certification. These cover albacore tuna, brown crab, haddock, hake, megrim, monkfish, nephrops, saithe, and whiting.<sup>11</sup> The Irish market – retailers, restaurants, brands and suppliers – have an important role to play in supporting these fisheries on their journey to sustainability. MSC's aim is to increase the number of fisheries engaged in the programme and have at least one third of the UK and Ireland's catch certified, in assessment or transitioning into the programme by 2030. In Ireland, achieving that goal will only be possible with the commitment and ambition of our partners and other stakeholders across the industry.

<sup>10</sup>Data on the cost-value of consumer-facing MSC products is provided quarterly, semesterly or annually by suppliers of all labelled products. A 30% mark-up is applied to these cost-value figures to estimate consumer spend. Irish consumer spend is estimated using sales data for products sold exclusively in Ireland, as well as sales for products distributed in both the UK & Ireland whereby the Irish component is measured using the relative population size of Ireland compared to that of the UK.

<sup>11</sup>List taken from [Fishery Improvement Projects](#). Note: not all of these FIPs are currently listed on FisheryProgress.org





# Irish Consumer Insights 2024

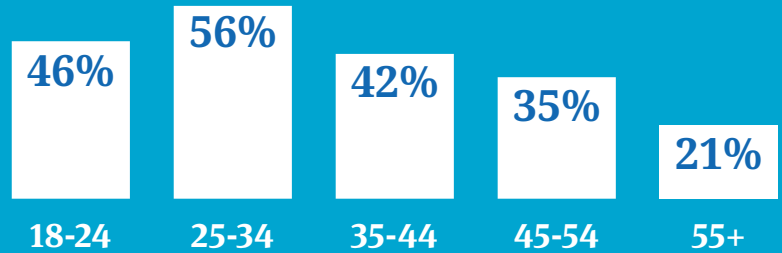


## 37%

of Irish adults surveyed were aware of the MSC ecolabel



## MSC Ecolabel Awareness by Age Group



Respondents were shown versions of the MSC ecolabel and asked if they had ever seen it. They could select from 'Yes, often', 'Yes, occasionally', 'No, never seen', or 'Don't know/can't recall'. The figures above reflect the percentage of respondents who answered 'Yes, often' or 'Yes, occasionally'

Only

## 18%

of those surveyed eat fish or seafood two or more times a week. This figure was higher (21%) amongst the 55+ demographic but much lower (11%) in the younger 18-24 year old age group

## 2/3

of respondents look for eco-labelled fish and seafood products when shopping or dining out



## 83%

of respondents think supermarket/brand claims about sustainability and the environment need to be clearly labelled by an independent organisation



## 80%

of Irish consumers believe that in order to save the oceans, we have to consume fish and seafood only from sustainable sources (up from 75% in 2021)



## 72%

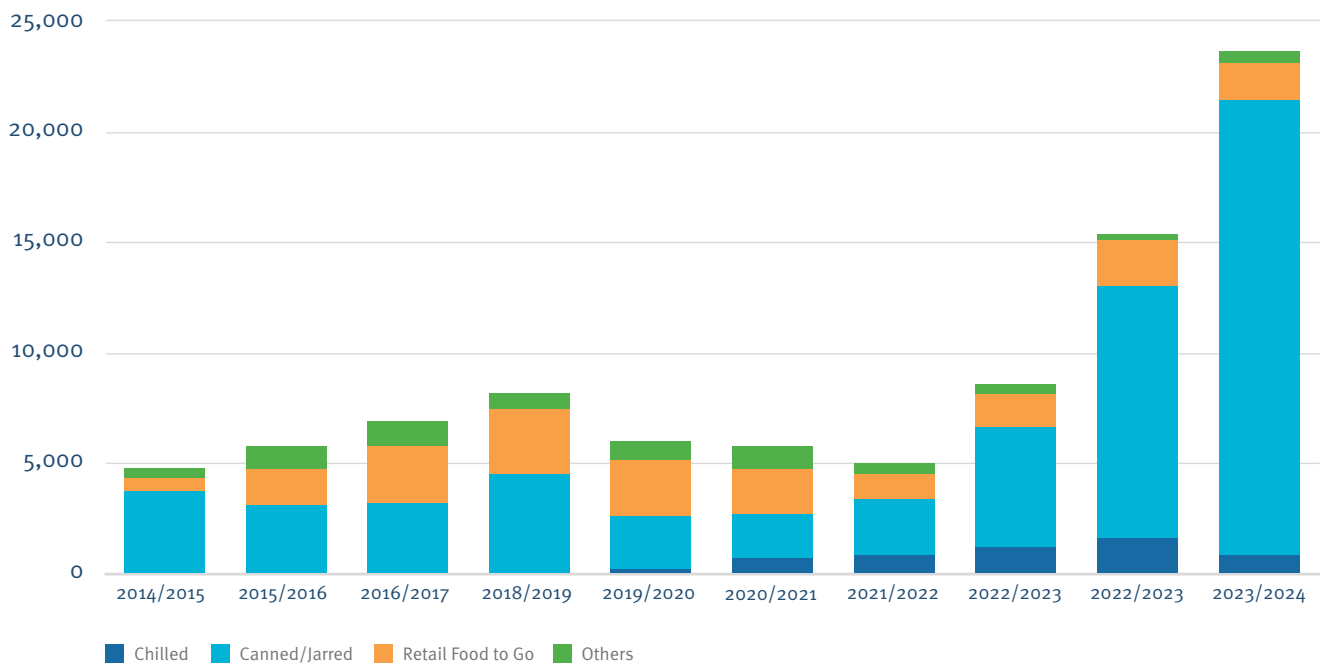
of Irish consumers agree that the choices they make about eating fish/seafood can make a difference to the health of our oceans (up from 63% in 2021)





# Focus on Tuna

Tuna remains one of the most popular species amongst shoppers and diners in the UK and Ireland. Between June 2023 and June 2024, supermarkets in the UK sold nearly 62,000 tonnes of tuna, making it the most widely purchased wild-caught seafood species.<sup>12</sup> In the foodservice sector, 110 million servings of tuna were sold between June 2023 and June 2024 in the UK, making it second only to cod (178 million servings) in popularity.<sup>13</sup> Over the past three years, brands and retailers have ensured more of this tuna is coming from MSC certified sources, with a four-fold increase in the amount of labelled tuna purchased over that period. Last year alone, consumers bought just over 23,500 tonnes of certified tuna, accounting for an estimated 38% of all tuna sold in UK supermarkets. Current projections from the MSC suggest this figure could rise to over 40,000 tonnes for 2024/25.



Graph 9. Volumes of MSC labelled tuna 2014-24 by product format<sup>14</sup>

Recent growth in sales of MSC labelled tuna has been driven primarily by increased availability of certified canned products (see Graph 9). Sainsbury's' own-brand canned tuna range returned to being 100% MSC certified, joining Waitrose as the only other retailer to offer 100% sustainably sourced canned tuna. Aldi and Lidl made progress in introducing the blue MSC ecolabel onto more of their permanent canned tuna range, offering seven and four products respectively last year. Princes also played a critical role in driving the growth in MSC labelled canned tuna options last year, as the brand continued delivering on its commitment to source and sell 100% MSC certified tuna by 2025.

<sup>12</sup>Data taken from [Total Seafood in Multiple Retail \(2024 Update\) — Seafish](#). Sales data cited in the report runs from June 15, 2023 to June 15, 2024.

<sup>13</sup>Data taken from [Seafood Trends in Commercial Foodservice \(2024\) — Seafish](#). A serving size is estimated to be 140g.

<sup>14</sup> 'Other' includes tuna sold on fish counters, frozen, in ready meals, pet food and foodservice.



## Partner in Focus: Princes



In August 2022, Princes announced a commitment to source and sell 100% of its UK Princes branded tuna from MSC certified sustainable fisheries by the end of 2025. At the time, the brand sold three MSC labelled tuna products, available in select retailers. Since then, the company has made incredible progress towards hitting its target, expanding its MSC labelled tuna range to 18 products last year. With additional certified products continuing to hit the market, Princes has been a major driver in increasing the availability of MSC labelled tuna options amongst environmentally-conscious consumers. The brand's leadership in sourcing and selling sustainable tuna was recognised at the MSC UK Awards where it was crowned the **Seafood Brand of the Year 2024**.

While MSC label coverage on canned tuna products has expanded rapidly, progress is also being made in other product formats, particularly food to go and ready meals. In a step towards achieving its goal of 100% MSC certification across its own brand tuna range by 2025, Tesco launched three labelled tuna sandwiches earlier this year, while Iceland introduced its first certified tuna product with an MSC labelled tuna & sweetcorn sandwich filler. With these additions, the two retailers joined Aldi, Amazon, Sainsbury's and Waitrose in offering sustainably sourced food to go tuna options. Tesco and Aldi also introduced MSC certified tuna pasta bakes, becoming the second and third retailers, behind Sainsbury's, to sell the popular ready meal with an ecolabel. New commitments from the foodservice sector have also given consumers more choices when it comes sustainable tuna. Costa Coffee, the UK's largest coffeehouse group, introduced an MSC labelled tuna melt in August 2024, becoming the first high street chain in the country to do so.

The growing availability of sustainably sourced tuna products and menu items is only possible as a result of an increasing number of tuna fisheries engaging in the MSC programme. This year saw a number of major developments within tuna fisheries and the organisations tasked with managing them. The OPAGAC fishery became the first in the world to achieve MSC certification for skipjack tuna from all four oceans, while the Kyowa-Meiho fishery became the first Japanese purse seine tuna fishery to achieve certification. Senegal's Atlantic tuna fishery, represented by Compagnie Africaine de Pêche au Sénégal S.A. (CAPSEN) and Grand Bleu S.A., made history by becoming the first in West Africa to meet the MSC Standard, while the South African albacore tuna pole and line fishery became the first fishery in MSC's In-Transition to MSC program (now called the [MSC Improvement Programme](#)) to successfully achieve certification.

The Ghanaian Atlantic Ocean purse seine and pole and line skipjack and yellowfin fisheries also entered assessment which, if successful in getting certified, could open up new labelling opportunities in the UK and Irish markets. Major milestones in sustainable fisheries management were also achieved in the Western Central Pacific Ocean for skipjack and North Pacific albacore, as the Regional Fishery Management Organisations (RFMOs) overseeing both stocks successfully implemented rigorous harvest strategies, ensuring the long-term health of these tuna populations. With a growing number of tuna fisheries engaged in the MSC programme, and some significant advancements in sustainable management for these fisheries, there is more opportunity than ever for brands, retailers and foodservice businesses to recognise and reward the progress that has been made.



**Currently, an estimated 2.33 million tonnes of MSC certified tuna is being landed annually, accounting for 47% of the global tuna catch.<sup>15</sup>**

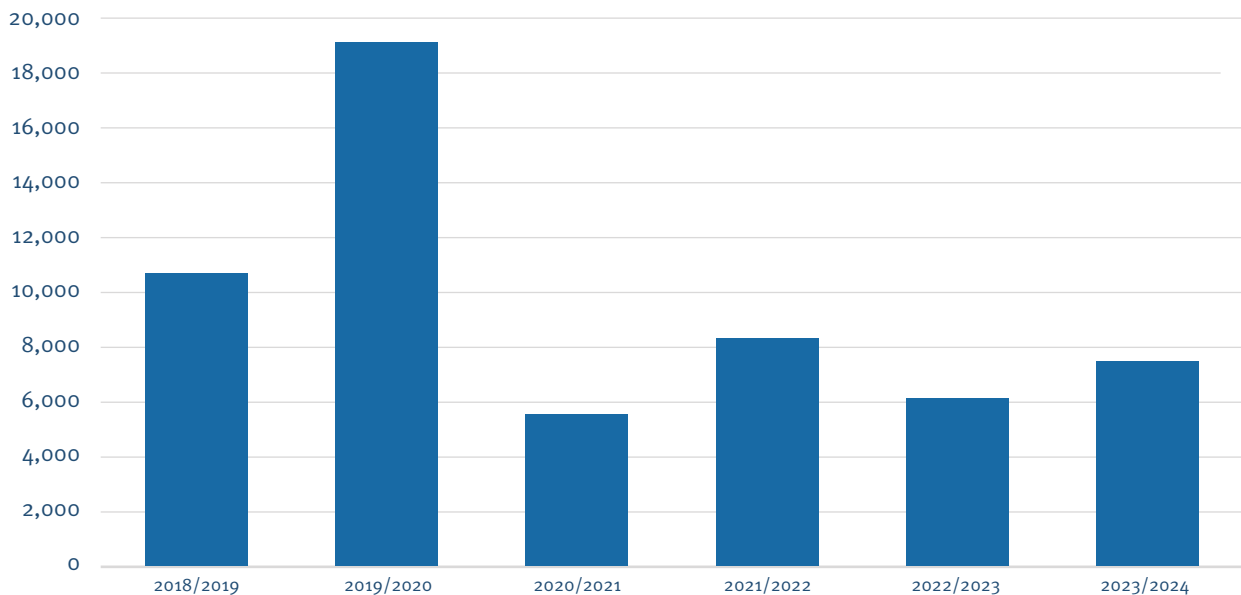


<sup>15</sup>MSC data updated in November 2024 and taken from [Sustainable Tuna Updates](#) | Marine Stewardship Council. MSC certified tuna catch as a percentage of the global tuna catch was calculated using UN FAO data for the global tuna catch.



# Pet Food

Sustainable pet food is becoming increasingly important to pet owners, driven by a growing awareness of environmental issues and a desire to make more eco-friendly choices for their pets. Yet, sales of MSC labelled pet food products have not grown in the way other traditional seafood retail categories have. The volume of MSC labelled pet food sold in the UK and Ireland has fluctuated significantly over the past six years. It peaked in 2019/2020 with a sharp 79% increase compared to the previous year, reaching 19,117 tonnes. However, there was a dramatic drop in 2020/2021 (-71%) to just 5,561 tonnes. While this can be attributed to several factors, key among them was changes in the packaging and range of Sheba and Whiskas brand pet food. The discontinuation of high-performing products such as *Whiskas Fish Selection in Jelly 12x100g* and Sheba Fresh Choice ranges, had a significant impact as they previously contributed significantly to overall sales volumes. Additionally, while new product variations have been introduced, they often target niche segments, such as kitten-specific products or premium offerings, which do not fully compensate for the volume loss from discontinued lines. As a result, MSC labelled pet food sales have fluctuated since 2020/21 and are yet to return to the level seen in 2019/20.



Graph 10. Volume of MSC Labelled Pet Food Sold, 2018-24



Recent years have shown continued fluctuation: volumes rebounded by 49.7% to 8,322 tonnes in 2021/2022 but declined again in 2022/2023 (-27%) to 6,077 tonnes. Last year, 2023/2024, saw a further 23.8% growth to 7,524 tonnes, although volumes remained well below their 2019/2020 peak (see Graph 10). With this increase, the UK is now the fourth largest market globally for MSC labelled pet food, behind Germany, France, and the Benelux region (Belgium, Luxembourg and Netherlands), surpassing the USA, which had held a higher position in the 2022/23 financial year. The most common MSC certified species used across the broader certified portfolio in pet food include pollock, tuna, cod and salmon.

Mars, a key MSC partner, remains the market leader in the UK, offering the largest range of certified pet food products through its Sheba brand. Among the nine major UK retailers selling pet food last year, only Aldi, Lidl and Coop offered their shoppers options with a blue MSC ecolabel. In UK retail, it appears that supermarkets have prioritised sustainability for higher-profile categories like fresh or canned seafood for human consumption, where the MSC ecolabel use is much more mature and aligns with customer expectations. Pet food, thus far, has not been seen as a key area for showcasing sustainability efforts for many.

This lack of attention raises the question: why are retailers not extending the same sustainability commitments to their pet food ranges, especially when many pet owners are environmentally conscious? With widespread availability of MSC certified raw material, supermarkets have an opportunity—and a responsibility—to do more. By labelling pet food with credible certifications like MSC, they can demonstrate a comprehensive approach to sustainability while meeting growing consumer demand for responsible choices across all product categories.

## Partner in Focus: Lidl

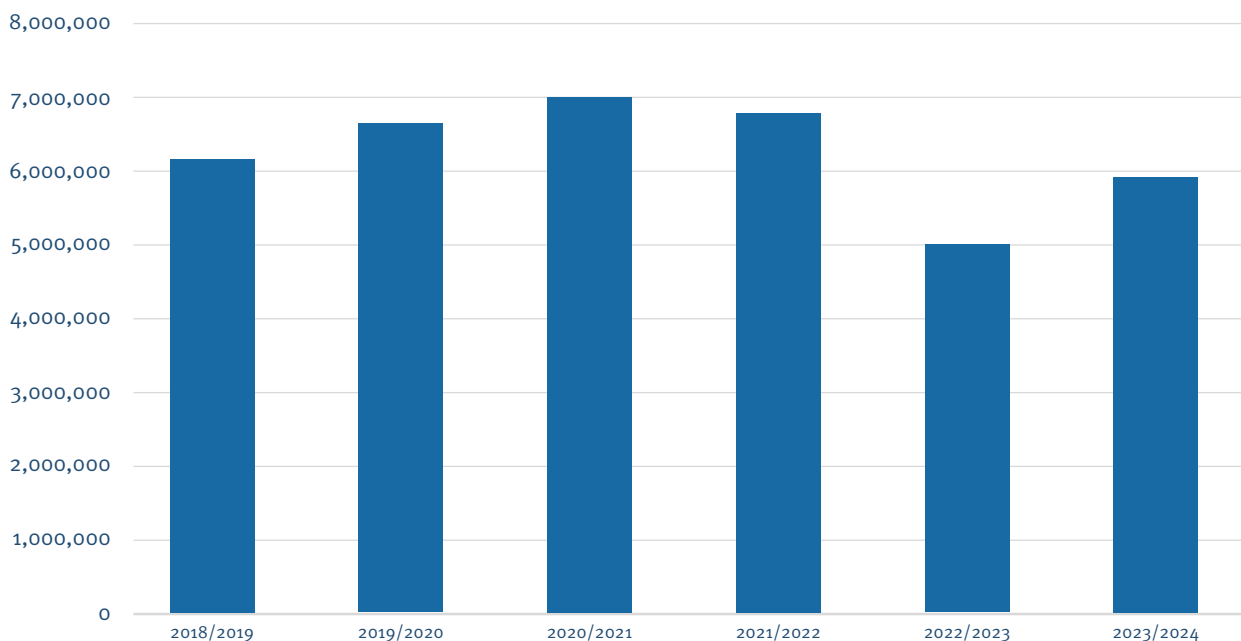
Lidl has emerged as a trailblazer in sustainable pet food, offering the highest number of MSC labelled pet food products ever sold by a UK retailer under its own brand. With 12 MSC labelled products in their range, Lidl has set the benchmark for sustainability in this category. Furthermore, extending their commitment to sustainable sourcing to their pet food range played a significant role in helping the discounter to win the **Supermarket of the Year 2024 – Bronze Award** at the MSC UK Awards. By bringing more sustainable pet food options to the market, Lidl is not only catering to the growing environmental awareness among shoppers, but also championing the health of our oceans. Its leadership highlights the untapped potential in the pet food category and will hopefully inspire other retailers to prioritise sustainability across a broader range of product areas.





# Supplements

The UK and Ireland is the third largest market for MSC supplements in the world, behind the USA and China. MSC certified supplements are available for consumers to buy in two major retailers – Tesco and Morrisons – and were sold under 11 brands in total last year. Longstanding sustainable supplements champions Wiley's Finest continued to sell a wide range of MSC certified fish oils sourced from Alaska, whilst Healthspan and Cleanmarine both provided UK and Irish shoppers with MSC labelled krill oil for the 14th consecutive year. Amongst the rest of the market, American brand Dr. Mercola continued to offer an MSC labelled herring caviar oil product to consumers in the UK and Ireland, demonstrating the wide range of species and fisheries that supplements can be derived from.



Graph 11. Consumer Spend on MSC Labelled Supplements in the UK and Ireland

In 2023/24, UK and Irish shoppers spent a total of £5.87m on MSC labelled supplements, a rise of 17% on the preceding year. Whilst this is a promising development, there is scope for even greater growth. MSC's internal forecasts predict that 2024/25 will be a record year for British and Irish consumer spending on MSC supplements by a substantial margin, largely thanks to several brands planning to launch their first MSC labelled supplements products. However, many of the key small pelagic fisheries that supply the supplements sector remain threatened by interconnected climate and management issues; in this context, the growing interest in MSC labelled supplements demonstrates the importance of sustainable management in these fisheries.



## Sector in Focus: Marine Collagen

For a long time, the term ‘marine supplements’ was predominantly taken to refer to omega-3 fish oils; marine collagen, by contrast, is a relatively new sector for MSC certification. Yet interest in the blue MSC ecolabel has grown rapidly in recent years within the marine collagen sector.

Marine collagen is made from fish by-products, such as the skin, which would otherwise go to waste. It therefore contributes to the circular economy within the food sector, ensuring that the maximum use is derived from wild-caught fish. Providing independent verification that the product originates from a certified sustainable fishery therefore often naturally aligns with the ethos of collagen businesses.

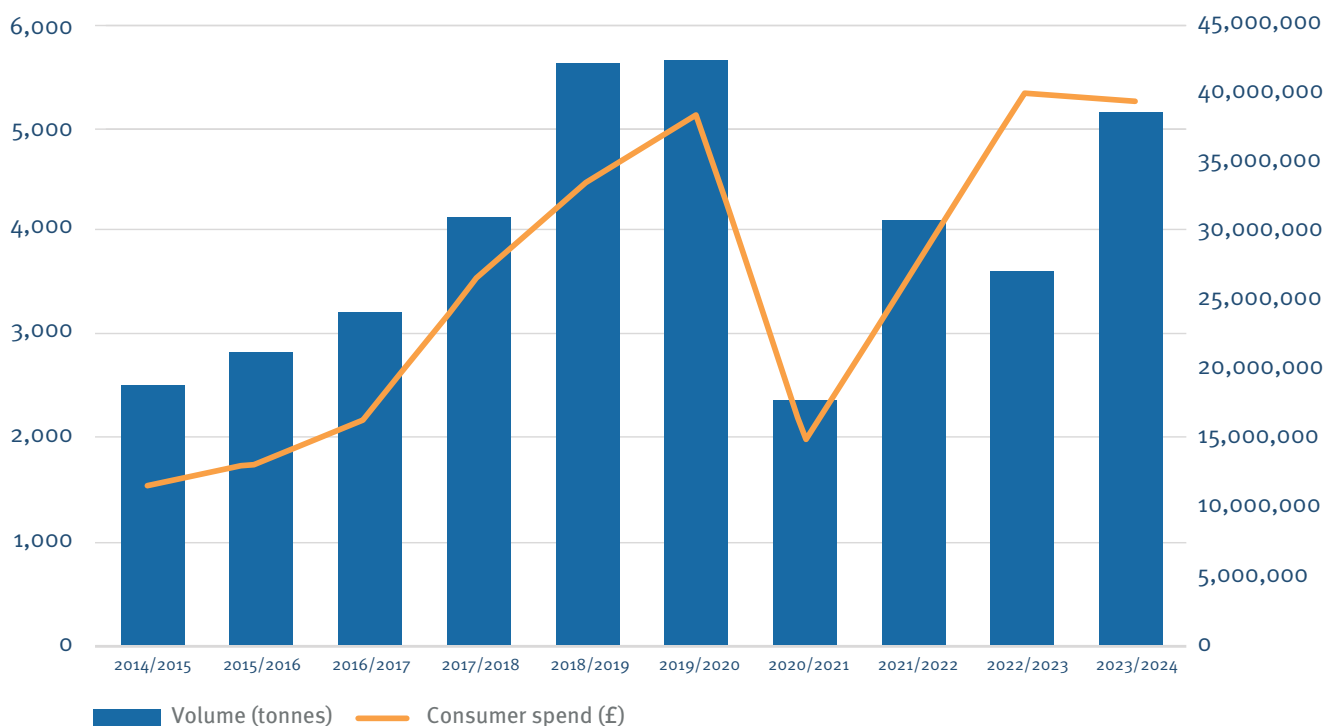
In 2022, Planet Paleo became the first British brand to sell MSC labelled marine collagen, and was presented with the **Newcomer of the Year Award 2023** at the MSC UK Awards. It was joined in 2023/24 by Bare Biology, a Brighton-based supplements business offering marine collagen powders in both neutral and strawberry flavours. MSC labelled collagen products under two newly certified brands are soon expected to also be available to British and Irish shoppers, joining the growing sustainability movement within the health and beauty space.





# Foodservice

The foodservice sector was among the hardest hit during the Covid-19 pandemic, with lockdowns and restrictions causing a significant decline in activity. This is reflected in the sharp drop in MSC labelled seafood volumes sold in 2020/21 (see Graph 12), as restaurants, pubs and catering services scaled back operations or closed entirely. Despite these challenges, the sector has shown resilience, with volumes of MSC seafood served gradually recovering and nearing pre-pandemic levels by 2023/24. This recovery signals the resurgence of foodservice and its potential to drive positive change in sustainability practices.



Graph 12. Volume and Value of MSC Product Sold in Foodservice in UK & Ireland, 2014-24

Consumer spend on seafood rose rapidly during the pandemic due to inflation, but this growth is now stalling, reflecting economic pressures. For foodservice outlets, price competitiveness is of course essential for operators navigating tight margins. However, the relatively stable consumer spend on MSC labelled products during the pandemic indicates that sustainability credentials retained importance even during market downturns, and research commissioned by the MSC in 2024 indicated that 64% of seafood consumers feel that the choices they make about eating seafood make a difference to ocean health.<sup>16</sup> This suggests an opportunity for foodservice providers to leverage sustainability as a differentiator and a tool for long-term customer loyalty.

The pre-pandemic years (2014/15 to 2019/20) saw a general upward trend in MSC labelled seafood volumes, indicating increased adoption of sourcing sustainable fish and seafood across foodservice. However, the pandemic caused a sharp decline, underscoring the sector's vulnerability to external shocks. Post-pandemic recovery has been encouraging, with volumes climbing steadily since 2021/22 and stabilising close to pre-pandemic levels by 2023/24. However, despite this recovery, MSC labelled fish and seafood still only accounts for 3.55% of all the fish and seafood sold in the UK foodservice sector.<sup>17</sup> This highlights a significant gap in the adoption of MSC certification in the sector when compared to retail. This underlining of the contrast between the retail sector's adoption of MSC certified products and the relatively slow uptake in foodservice presents an opportunity for restaurants, pubs and catering outlets to catch up and align with the growing consumer demand for sustainably sourced seafood.

<sup>16</sup>Data taken from a research survey conducted by GlobeScan on behalf of the MSC using reliable national consumer research panels to recruit respondents. Sample size for this figure was 1,073 and was a representative sample of all UK adults (18+).

<sup>17</sup>Data on total seafood sales in foodservice taken from [Seafood Trends in Commercial Foodservice \(2024\) — Seafish](#). A serving size is estimated to be 140g. Volumes of MSC labelled fish and seafood sold in foodservice are reported to the MSC by businesses using the ecolabel on their menu.

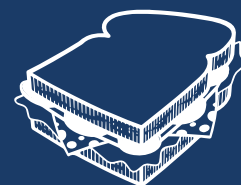
Key players in the foodservice sector, such as McDonald's, JD Wetherspoons, Premier Inn, IKEA, Rockfish and Lussmanns, have been instrumental in driving the sales of MSC labelled fish and seafood in the UK. McDonald's iconic Filet-O-Fish and Fish Fingers have long carried the blue MSC ecolabel, while Lussmanns, the 2024 **MSC UK Foodservice Champion of the Year**, has demonstrated that smaller, more regional restaurant groups can also be leaders in sustainability in the industry. In Northern Ireland, the team at Fish City in Belfast were recognised for their longstanding contribution to promoting sustainable seafood both in their restaurant and to the wider community, winning both the **Foodservice Champion of the Year 2023** and **Marketing Champion of the Year 2023** at the MSC UK Awards. The Pantry, one of three restaurants in the Titanic Belfast museum, also became the latest independent foodservice outlets to introduce the blue MSC ecolabel onto its menu after getting certified in November 2022. Notably, Costa Coffee recently became the latest high street chain to join the MSC programme when it introduced an MSC certified tuna melt. Their commitment further demonstrates the increasing mainstream appeal of certified sustainable seafood products to diners in the UK.

Looking ahead, the foodservice sector is well positioned to champion sustainability. Offering MSC certified seafood not only helps protect marine ecosystems but also serves as a compelling marketing tool to attract eco-conscious customers and enhance brand loyalty. With consumer demand for transparency and sustainable practices on the rise, foodservice outlets that prioritise sustainability can align with broader environmental, social and governance (ESG) goals while differentiating themselves in a competitive market.

## Partner in Focus: Costa Coffee

Costa Coffee, the UK's largest coffee house chain, began using the MSC ecolabel on their tuna melt panini in August 2024. The sandwich, made with skipjack tuna sourced from an MSC certified fishery, is now being sold with the blue MSC ecolabel across the group's sites in the UK. Costa is the first major high street café chain to sell MSC labelled tuna, giving consumers the confidence to enjoy their lunch safe in the knowledge that they are making a sustainable choice.

Costa's move to certified sustainable fish, in collaboration with its suppliers, demonstrates that major high street brands are responding to growing consumer demand for certified sustainable seafood, and its shift to using the blue MSC ecolabel should encourage higher sustainability standards across the wider sector.





# Growth in Sustainable Seafood Consumption?

Over the past decade, seafood consumption in the UK has declined significantly, dropping 22% from 2006 to 2022.<sup>18</sup> Although sales of MSC labelled products have increased in the last two years, the decline in general seafood consumption appears only to have accelerated post Covid, according to Seafish's 'Fish as Food' report. The result is national seafood consumption levels being significantly lower than dietary advice, which has been confirmed by consumer research. In a GlobeScan study conducted on behalf of the MSC in early 2024, only 21% of UK adults surveyed said they eat two or more portions of fish a week, the National Health Service (NHS) recommendation for a healthy, balanced diet.

In November 2024, MSC published an analysis of these GlobeScan study results in a [Super Seafood](#) report which examined consumer perceptions on environment, diet, health and seafood.<sup>19</sup> The report highlighted that in the UK, 79% of respondents said they had changed their diet in the past two years. The key drivers for dietary changes amongst this group was health, with 65% citing a desire 'to be healthier' (up from 58% in 2022) followed by having less impact on the environment with 45% (down from 50% in 2022). Looking specifically at what might encourage people to eat more fish and seafood, it is clear that concerns about the sustainability of products can influence the decisions consumers make. According to the GlobeScan research, the top motivators for purchasing fish and seafood were a desire for 'lower cost' (52%), 'fish produced without harming the ocean' (29%), 'knowing it could lead to a longer and more active life' (26%) and 'more availability of fish when I shop' (22%). One in five (20%) UK consumers said 'more information on the health benefits of fish and seafood' and 'knowing that eating fish or seafood is better for the environment than red meat' would encourage them to eat more. 55% of UK seafood consumers also said that seeing the MSC label would make them more likely to purchase a product. For those looking to promote increased fish and seafood consumption, there is a clear opportunity to better leverage the health benefits and environmental credentials of products within the category that would resonate with consumers. For brands, retailers and restaurants, the blue MSC ecolabel offers a tool to do just that.

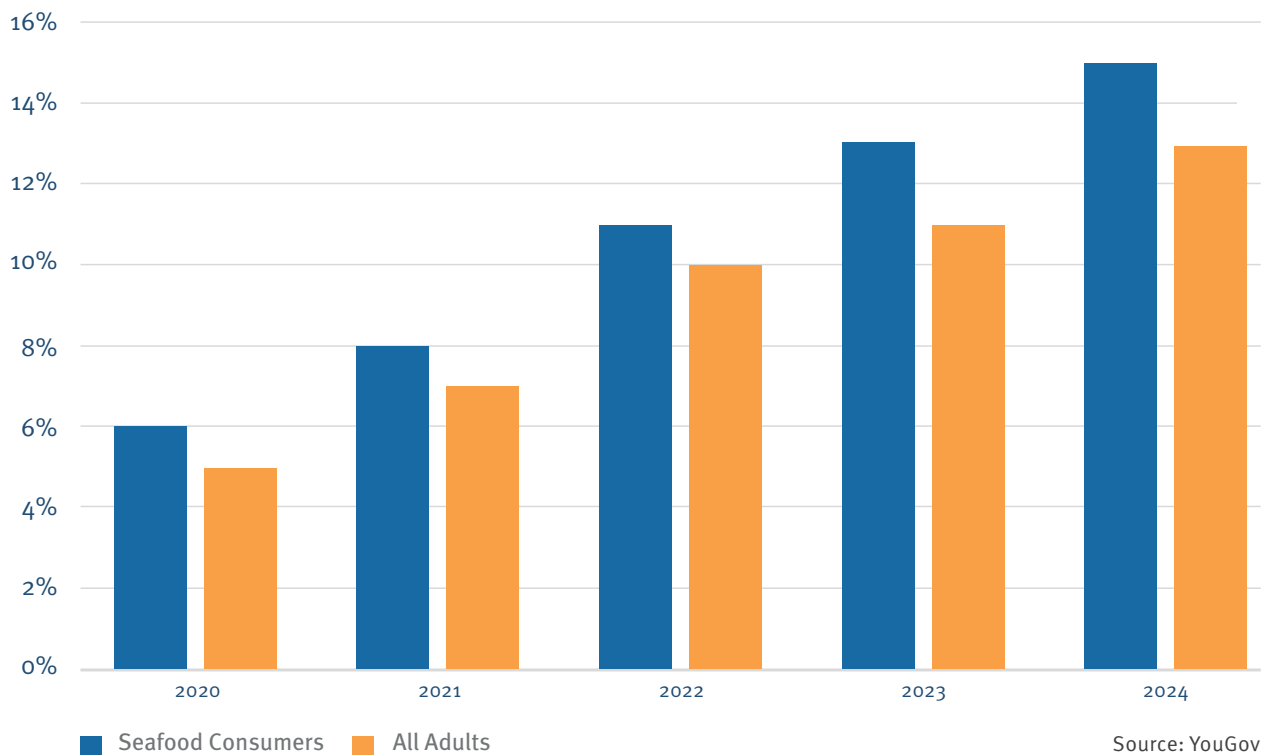
Public awareness campaigns, like MSC's [Sustainable Seafood September](#), have become important opportunities for these businesses to promote their certified sustainable seafood ranges. For the MSC, it has also become a key moment in the year to raise the profile of the ecolabel and increase consumer understanding about what it means. The campaign, which recently completed its fifth year in September 2024, has grown in prominence. Post-campaign YouGov surveys have shown that amongst UK seafood consumers, awareness of Sustainable Seafood September has increased by nine percentage points over the past five years, with 15% of those surveyed having seen the campaign last year (see Graph 13).<sup>20</sup> Within that group of seafood consumers, younger people were far more likely to have been aware of the campaign, with 29% of 25-34 year olds and 28% of 18-24 year olds saying they had seen it.



<sup>18</sup> Seafish, Fish as Food review (2024 update). [Fish as Food review \(2024 update\)](#) — Seafish

<sup>19</sup> Consumer research data presented in the Super Seafood report was taken from a survey conducted by GlobeScan on behalf of the MSC between January and March 2024.

<sup>20</sup> Post-campaign evaluations have been conducted by YouGov, on behalf of the MSC, over the past 5 years. In the most recent YouGov survey conducted in October 2024, 2,049 adults in Great Britain were surveyed, 1,500 of which identified themselves as seafood consumers (eat seafood once a month or more).



Graph 13. MSC Sustainable Seafood September campaign awareness amongst seafood consumers and all adults surveyed

As MSC's Sustainable Seafood September grows in prominence and national recognition, it can play an increasingly important role in emphasising the benefits of fish and seafood. However, in order to do that successfully, the [MSC Super Seafood report](#) emphasises taking a holistic approach to dietary recommendations which account for environmental sustainability concerns, as well as health and affordability. Addressing these in conjunction with one another, rather than in isolation, offers the industry the best opportunity for better engaging seafood consumers of today and the future.

<sup>18</sup>Seafish, Fish as Food review (2024 update). Fish as Food review (2024 update) — Seafish





# Looking Forward: 2025 Outlook

The positive trends of the past year look set to continue in the year ahead, thanks to a number of retailers and brands making commitments to increase their ranges of MSC certified seafood by 2025. For environmentally-conscious consumers in the UK and Ireland, this means there will be more opportunity to use their purchasing power to affect positive change than ever before. This will be particularly true in the canned aisle, where availability of MSC labelled tuna is expected to grow significantly. However, there is also potential for retailers to increase MSC label coverage across a number of other categories, particularly supplements and pet food.

For retailers, brands and foodservice businesses that are committed to sourcing and selling MSC certified fish and seafood, there is also opportunity to help bridge the gap on current NHS dietary recommendations for fish and seafood consumption (two portions per week) and what the UK public currently do eat (one per week). Consumer research from GlobeScan presented in MSC's [Super Seafood report](#), suggests that the top ways to encourage more seafood consumption is through lower prices, more reassurance around the environmental impact of the products, better understanding of their health benefits and providing more choice. The blue MSC ecolabel is a tool that can help to support communicating these, but has not always been used by brands, retailers and restaurants to its full potential. The Super Seafoods report also stresses the need for fish and seafood to be caught sustainably, to meet the nutritional and health needs of the nation without risking further overfishing. In turn, this can help in meeting the UK Government's aims on Food Security, supporting a thriving UK fishing and seafood industry and becoming a world leader in sustainable fishing.

Five years ago, the MSC started an annual UK consumer campaign to provide businesses with an opportunity to promote their commitment to selling certified fish and seafood. The month-long Sustainable Seafood September campaign is now fixed as a key moment in the calendar. In the years ahead, we hope to see more of our partners utilise the campaign to champion the sustainability of the products or dishes they offer to the UK public, and inspire them to enjoy the benefits that fish and seafood offer, as part of a healthy and sustainable diet.

The coming years will also be critical to making progress towards achieving MSC's goal of engaging over one third of the world's marine catch in our programme by 2030. With 19.3% of the wild marine catch currently engaged in the programme, there is a lot of work to be done.<sup>21</sup> Retailers, brands and restaurants in the UK and Ireland will need to continue to do their part to reward fisheries that have committed to certification. As more fisheries enter assessment, there may be new opportunities to apply the MSC ecolabel to species or products in recognition of the effort of these fisheries.

Retailers, brands and restaurants will also need to continue to use their position in the market to encourage other fisheries to demonstrate they are operating sustainably. The MSC Improvement Program will become an increasingly important vehicle to support that; by its design, the Improvement Program will incentivise better, faster improvement, towards a level where fisheries can confidently enter the MSC certification program, and give the supply chain stronger assurance that fisheries are progressing toward sustainability.

The sustainable seafood movement in the UK and Ireland has made tremendous progress over the past year and shown incredible support for the MSC programme, despite economic and geopolitical challenges. Looking towards the year ahead, there are promising signs that once again exceptional progress will be made by an ever-growing group of committed businesses and organisations. We are grateful for the continued support of all our MSC partners across the UK and Ireland and are once again looking forward to building on the successes of the past year in 2025.

We welcome all partners and stakeholders to get in touch with any questions or comments regarding the contents of this report, and discuss how we can achieve a sustainable fishing future for the UK and Irish seafood industries, together.

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<sup>21</sup>Data taken from the MSC Annual Report 2023-2024. [msc-annual-report-2023-2024.pdf/](https://www.msc.com/annual-report-2023-2024.pdf/)





## Contact us

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All data in this report is correct as of 18 December 2024, unless otherwise stated. The reporting year is 1 April 2023 to 31 March 2024.

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### Find out more:

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