

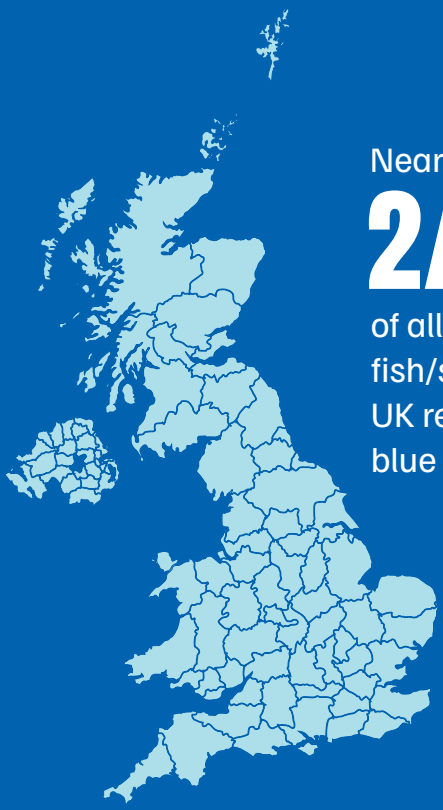
MSC UK AND IRELAND MARKET REPORT 2025

6th Edition

Marine Stewardship Council

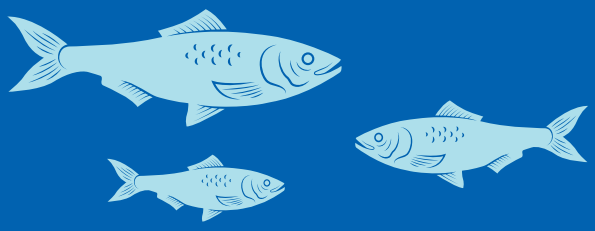
MSC UK & IRELAND MARKET REPORT 2025: AT A GLANCE

£1.7bn
spent on MSC labelled products - an all-time record



Nearly
2/3rds
of all wild-caught fish/seafood sold in UK retail carried the blue MSC ecolabel

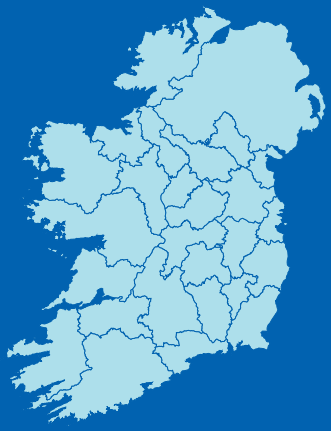
49 MSC certified species sold



Shoppers bought
£339m
of MSC labelled preserved products



+64%



>300
MSC labelled products sold in Ireland



£12.8m
spent on MSC labelled supplements

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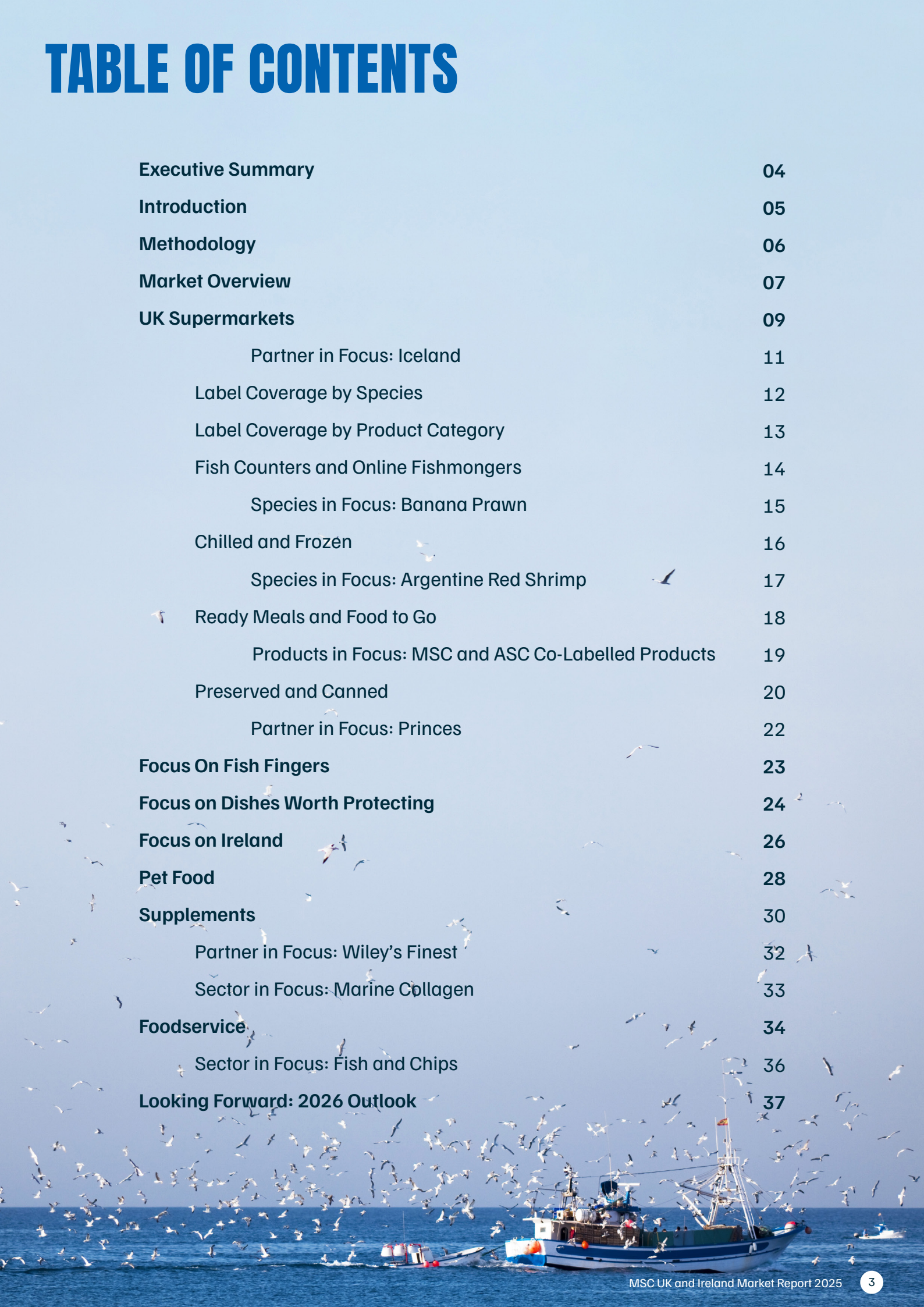
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EXECUTIVE SUMMARY

This sixth edition of the MSC UK and Ireland Market Report shows the exceptional progress that businesses in both the UK and Irish markets have made in increasing the amount of certified sustainable seafood products on sale. It profiles trends in MSC labelled product sales, species newly available with a blue MSC ecolabel, and 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 **an estimated £1.7bn on 189,900 tonnes of products and menu items carrying the blue MSC ecolabel**, a 14% increase in volume and value compared to 2023/24
- Within UK retail, MSC labelled products accounted for an estimated **65% of the value and 63% of the volume** of all wild caught fish and seafood, up from 59% and 58% two years prior
- **49 MSC certified species** were sold in 2024/25, with banana prawns, Argentine red shrimp and Chilean jack mackerel all appearing on shelves with a blue MSC ecolabel for the first time
- The number of MSC labelled products sold under a supermarket's own brand increased **from 883 in 2023/24 to 948 products in 2024/25**
- Preserved products accounted for **two-thirds of the growth in consumer spending** on MSC products in the UK market in 2024/25, with UK shoppers spending **£339m on preserved MSC products** over that period, a 64% rise on the year prior
- Volumes of **MSC labelled canned and jarred tuna have grown more than fifteen-fold**, from 2,461 tonnes in 2020/21 to 37,027 tonnes in 2024/25
- Irish shoppers could choose from just **over 300 different MSC labelled products** last year, with Aldi leading the market, selling 72 labelled products under their own brand
- Consumer **spend on MSC certified pet food has increased** steadily over the last five years, rising from approximately £18.3 million in 2020/21 to nearly £30 million in 2024/25
- Shoppers in the UK and Ireland spent a combined **£12.8m on MSC labelled supplements** in 2024/25, double what was spent the year before

The UK and Irish markets have remained firmly committed to supporting fisheries that are engaged with MSC's programme. This is evident in the growing number of products and species available with the blue MSC ecolabel profiled in this 2025 edition of our Market Report. The report also highlights further MSC labelling opportunities and or those that are being developed to meet growing consumer demand for sustainably sourced fish and seafood.

INTRODUCTION

Over the past year, the seafood industry in the UK and Ireland has continued to make remarkable progress in providing shoppers and diners with more certified sustainable choices, covering a variety of species and product formats. Several brands and retailers set ambitious targets to expand their range of MSC certified fish and seafood products by the end of 2025. This was particularly true for tuna, where progress in delivering on these targets led to unprecedented growth in the availability of MSC labelled products. Another historic milestone was reached in 2025 when Iceland became the first frozen food retailer globally to source 100% of its own brand wild fish and seafood from MSC certified fisheries. Due to these commitments, shoppers in the UK and Ireland purchased a record amount of MSC labelled fish and seafood last year, with supermarkets and brands in both markets continuing to demonstrate their global leadership in offering sustainable seafood to their customers.

This leadership was also evident in major decisions a number of brands and retailers in the UK and Ireland made over the past year to recognise and reward fisheries that have committed to certification. Less than six months after the fishery gained MSC certification, Iceland became the first retailer in the world to launch an MSC labelled Argentine red shrimp product under its own brand. Due to years of overexploitation and political deadlock over management of the vital stock, Princes also notably announced that it would stop selling Northeast Atlantic mackerel under its own brand and replace it with MSC certified Chilean jack mackerel.

Businesses across the UK supply chain are also using their market position to support fisheries on their journey to certification. In May 2025, a move led by the catching sector with support from processors, retailers and scientists, saw the UK Nephrops fisheries in the North Sea, Irish Sea, and the west of Scotland become the first of the Project UK Fishery Improvement Projects (FIPs) to enter the MSC Improvement Program, which provides fisheries with a framework to make progress towards certification. The supply chain, retailers and fishing industry also collaborated to launch a new initiative, the South West Seafood Sustainability Hub, aimed at moving key regional fisheries in the South West of the UK toward long-term sustainability and securing MSC certification. Thanks to these initiatives, consumers may be able to see more locally-caught certified sustainable fish and seafood on UK shelves in the coming years.

Support for these projects and major developments in sourcing created new opportunities for businesses in the UK and Ireland to communicate more about their commitment to sustainable seafood to their customers. This was also true of MSC's sixth annual Sustainable Seafood September campaign, launched with a new 'Buy Blue, Protect Dinner' concept and receiving the most significant level of partner involvement to date, including endorsement from celebrity chef Jamie Oliver. Retailers, brands and restaurants used the opportunity to promote their certified products and menu items, while fisheries were profiled to showcase their efforts in operating sustainably. The MSC UK and Ireland Market Report aims to show the various ways in which the region's sustainable seafood movement continues to be world leading, and also highlights the ongoing challenges and opportunities for further progress to be made.

We hope that you enjoy this sixth 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.



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 blue MSC ecolabel on products and menus. The reporting period is aligned with the most recent financial year: April 1, 2024 – March 31, 2025.
- 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 these regions unless otherwise stated.

UK Retail Seafood Sales Data

- Seafood sales data for the UK retail sector presented in this report has been sourced from various reports published by Seafish. The underlying data in those reports is provided by Nielsen.

2025 Sustainable Seafood September Consumer Survey

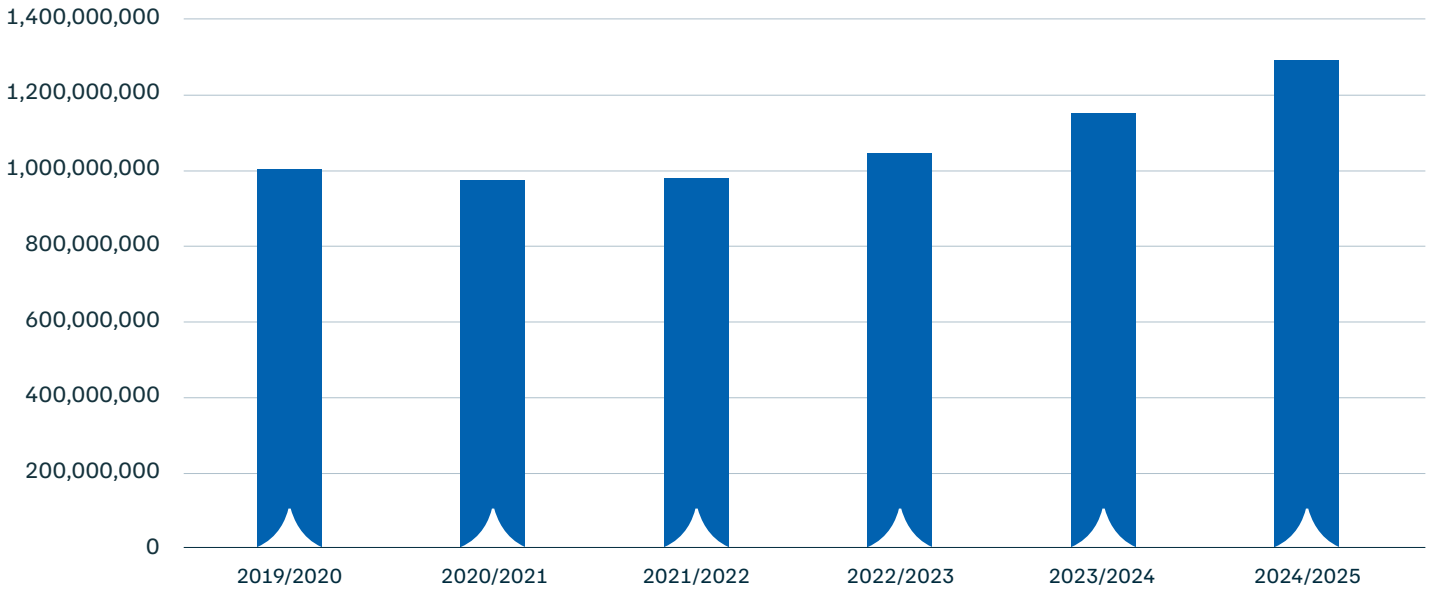
- A consumer research survey of 2,000 UK adults was conducted in July 2025 by Perspectus Global on behalf of MSC.



MARKET OVERVIEW

Brands, supermarkets, and foodservice businesses in the UK and Ireland have played a leading role internationally in adopting the MSC programme, and championing certified sustainable seafood. In 2003, Sainsbury's became the first retailer to make a commitment towards selling 100% sustainably sourced fish and seafood. Since then, others have followed Sainsbury's lead, setting ambitious, time-bound targets for expanding their range of products from MSC certified fisheries. Several years ago, Princes and Tesco announced that they would be introducing the blue MSC ecolabel across their tuna range by the end of 2025. With both making great progress towards those targets over the past year, there is now more certified sustainable seafood available to shoppers in the UK and Ireland than ever before.

With increased availability, for the third year in a row, spending on MSC certified fish and seafood in the UK and Ireland hit a new record high in 2024/25. Consumers spent an estimated £1.7bn on products and menu items carrying the blue MSC ecolabel, a 14% increase on the previous year.



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

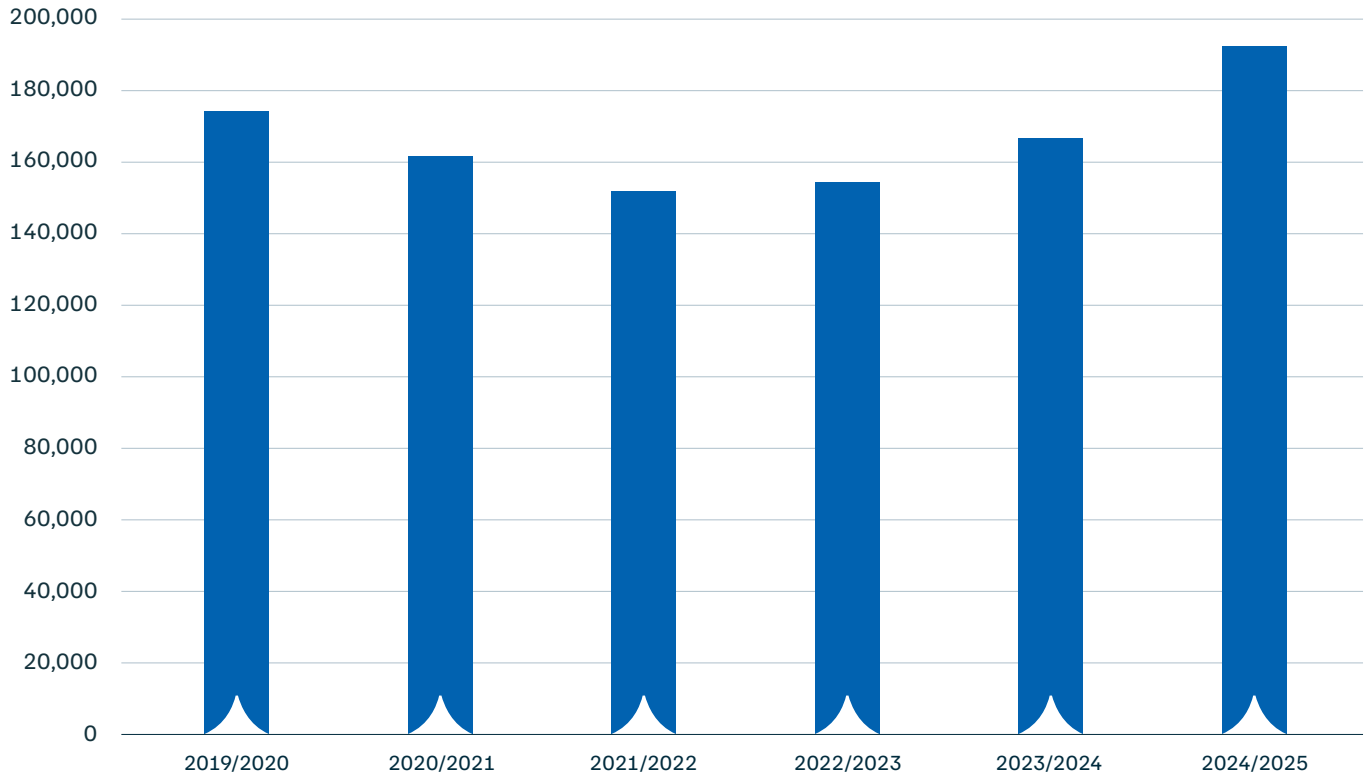
The growth in sales of MSC labelled products was also reflected in total seafood sales across UK retail which grew over the past year, albeit not to the same extent. Between June 2024 and June 2025, shoppers in the UK spent £4.744bn on 410,225 tonnes of fish and seafood, a 3.5% increase in value and 0.9% increase in volume over the previous year.[2] MSC labelled products accounted for an estimated 65% of the value and 63% of the volume of all wild caught fish and seafood sold, up from 59% and 58% two years prior.[3]

[1]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.

[2]Data taken from Total Seafood in Multiple Retail (2025 Update). Sales data cited in the report runs from June 21, 2024 to June 21, 2025 and includes both farmed and wild-caught fish and seafood.

[3]Calculated using Seafish, Farmed Seafood in Multiple Retail (2025 Update).





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

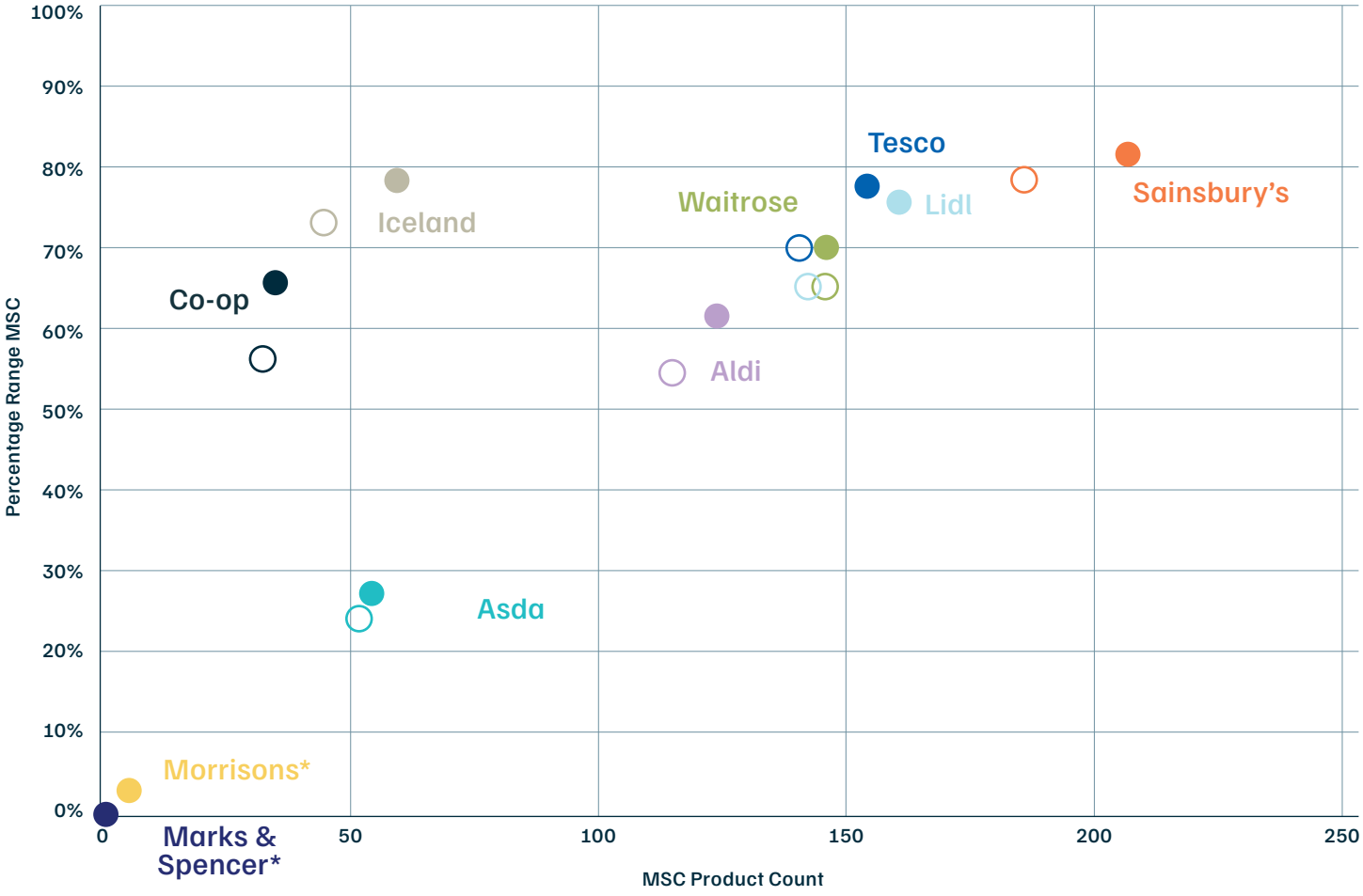
Alongside the growth in consumer spend, shoppers and diners across the UK and Ireland purchased 189,900 tonnes of MSC labelled fish and seafood last year, a 14% increase from 2023/24. This was the first time that figure surpassed the pre-pandemic high of 175,309 tonnes recorded in 2019/20. For a third year in a row, the primary driver behind this growth was increased availability of MSC certified skipjack tuna which grew by 101% between 2023/24 and 2024/25. With retailers and brands making progress towards their targets for establishing their MSC certified ranges by the end of 2025, sales of labelled products are currently on track to surpass 220,000 tonnes in 2025/26. Hitting these major milestones has been possible thanks to brands and retailers working closely with their suppliers over many years to support fisheries on their journey to MSC certification.

Retailers, brands, and some restaurants in the UK and Ireland also continue to recognise and reward fisheries that have committed to certification by introducing new MSC certified species into the market or expanding their range of labelled products. In 2024/25, 49 unique MSC certified species were sold, and over the past year, banana prawns, Argentine red shrimp and Chilean jack mackerel were sold with a blue MSC ecolabel for the first time (see sections on *Fish Counters and Online Fishmongers, Chilled and Frozen,* and *Preserved and Canned*). The types of MSC certified products available to UK and Irish consumers is also evolving, with more supplement brands launching labelled marine collagen products (see section on *Supplements*) and further growth in the variety of ready meals and food to go options on offer.

It is impressive to see so many businesses hitting the ambitious targets they have set for sourcing sustainable seafood. The commitments they have made, and the years of work they have put into reaching their aims, are the driving force behind the MSC programme. They are what enables the programme to be an extremely effective tool for transforming the seafood industry and fishing practices, and will help us to meet our goal for engaging over a third of the global marine catch by 2030.

UK SUPERMARKETS

The UK retail sector continued to increase the certified sustainable seafood options available to shoppers around the country, with the number of MSC labelled products sold under a supermarkets own brand increasing from 883 in 2023/24 to 948 last year. With more labelled products on shelves, nine of the 10 leading UK supermarkets sold 137,031 tonnes in 2024/25, a 13% increase on the previous year and another all-time high. In terms of sales value, this equated to £1.27 billion in consumer spend on MSC labelled fish and seafood under retailer own brand products, a 12% increase from 2023/24.



* Morrisons and Marks & Spencer saw no change compared to 2023/24

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

Last year, eight of the 10 leading UK supermarkets increased the percentage of their total wild seafood range that was sold as MSC certified (see Graph 3). For five of the 10, the blue MSC ecolabel was used on more than 70% of their own wild seafood range. For the second year in a row, Sainsbury's had the largest range of MSC labelled products with 208 (21 more than the previous year), and had the highest percentage of its wild seafood range bearing an MSC ecolabel at 81%.

TESCO

won the MSC UK Supermarket of the Year 2025 - Gold Award

MSC UK SUPERMARKET OF THE YEAR 2025 Gold

Sainsbury's

labelled **208** MSC labelled products last year, the most of any UK retailer

Waitrose

sold **28** different MSC certified species last year, the most of any UK supermarket

ALDI

Aldi sold the greatest volume of MSC labelled products of all UK retailers

Tesco, winner of **MSC UK Supermarket of the Year 2025 - Gold Award** at the 12th annual MSC and ASC UK Awards, made notable improvements in several areas over the past year, increasing the volume of own brand MSC labelled products sold by over 40% and improving their MSC certified wild seafood range from 70% to 77% of all products. This growth was achieved, in large part, by the introduction of the MSC ecolabel onto more tuna products, as Tesco continued towards its 100% MSC certified tuna commitment. Lidl, winner of **MSC UK Supermarket of the Year 2025 - Silver Award**, offered the second most MSC labelled products with 157, and remains the only UK supermarket to use the ecolabel across its entire wild seafood pet food range.

Waitrose and Aldi both increased MSC label coverage across their wild seafood range by 6 percentage points to 71% and 61% respectively, while Co-op's range grew to 65%. Iceland's MSC certified product range expanded from 46 to 57 and the retailer finished the year with the second highest certified wild seafood range at 79%, helping them to secure the **MSC UK Supermarket of the Year 2025 - Bronze Award**. In September 2025, Iceland announced it was making further progress, with 100% of its own label wild fish and seafood being sourced from MSC certified fisheries (see *Partner in Focus: Iceland*). Asda also continued to grow their MSC labelled product offering under their own range, introducing new certified canned anchovy and salmon products which helped take their total from 51 to 53, whilst Morrisons' MSC certified product count remained at six. Marks and Spencer remains the only one of the top 10 major UK retailers not to offer any MSC labelled products to their customers.



Partner in Focus: Iceland

Iceland

100% MSC

In September 2025, Iceland became the first frozen food retailer globally to ensure that 100% of its own label wild fish and seafood was sourced from MSC certified fisheries, setting a new standard for sustainability in global grocery retail. The announcement follows years of progress made by the supermarket, which expanded its MSC certified product range from 17 five years ago to 57 last year. To meet this historic milestone, Iceland worked with its supplier, Northcoast Seafoods, to become the first UK retailer to introduce the MSC ecolabel onto two Argentine red shrimp products after the fishery became certified earlier in the year (see *Species in Focus: Argentine Red Shrimp*).

> *"This is a big moment for us. Our oceans are in crisis, and we all have a responsibility to do something about it. Sourcing 100% of our wild fish and seafood across all our own label seafood products shows what's possible when you set your sights high and stick to your principles. Our customers can now be confident that every own label product bearing the blue MSC ecolabel is sustainably sourced to the recognised independent standard. That's good for the planet, good for future generations, and it sets a global benchmark for what responsible retail should look like."*
>
> *Richard Walker, Executive Chairman at Iceland Foods*

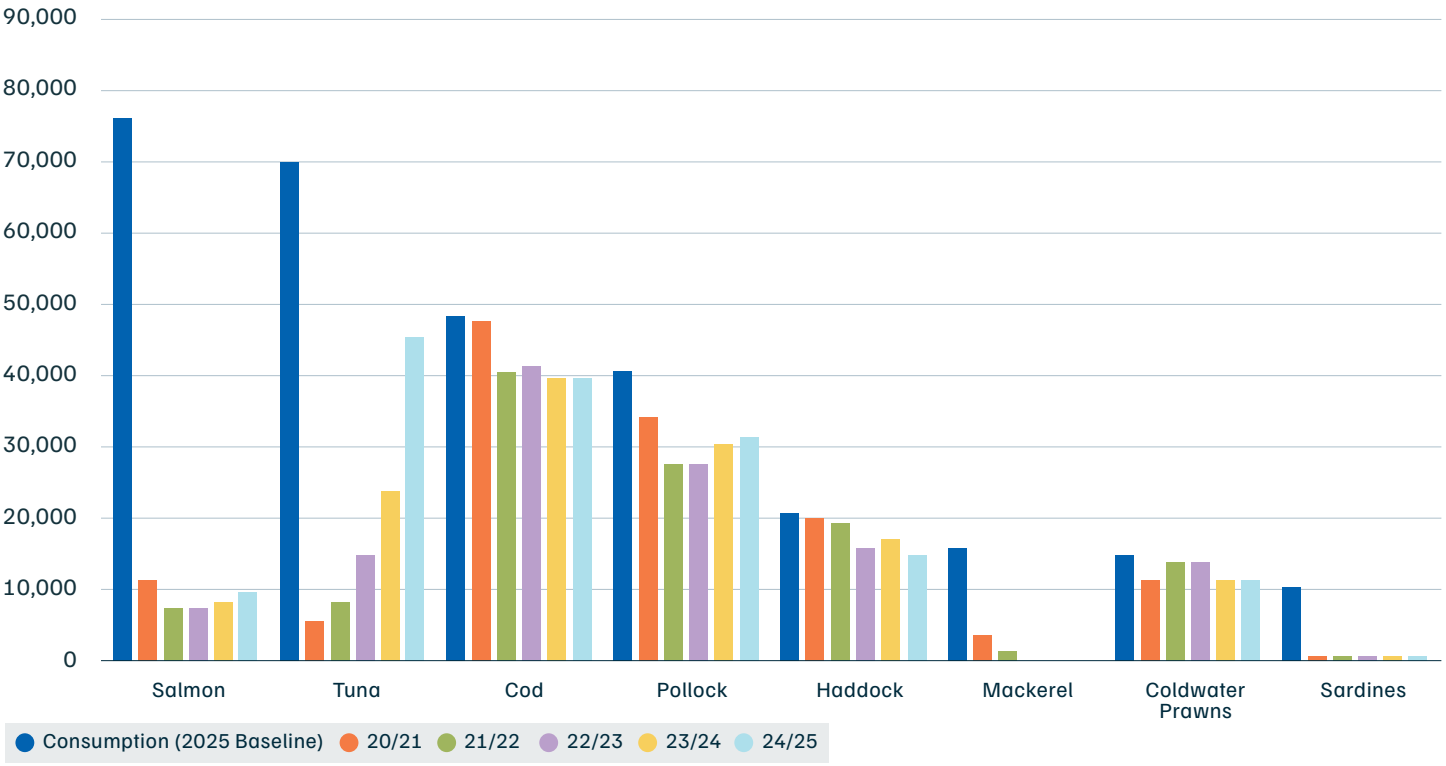


Label Coverage by Species

There is now widespread availability of MSC certified products across the most commonly purchased wild-caught fish in UK supermarkets – tuna, cod, pollock, and haddock. In 2024/25, these four types of fish accounted for 72% of all products carrying the blue MSC ecolabel compared to 57% in 2019/20.

This is, in large part, thanks to substantial growth in the number of certified tuna products on offer over the past year. Comparing volumes of MSC certified products sold to total UK retail seafood sales (in metric tonnes) provided by Seafish, 65% (just over 45,000 tonnes) of all tuna sold last year carried an MSC ecolabel, compared to just 38% the year before (see Graph 4).[4] Nine retailers - Aldi, Sainsbury's, Tesco, Lidl, Waitrose, Co-op, Iceland, Amazon, and Whole Foods - sold MSC certified tuna under their own brand during the last financial year, while Asda has since also introduced a set of canned tuna products carrying the blue ecolabel. For the first time, consumers bought more MSC labelled tuna (by volume) than cod, making it the most widely consumed certified wild-caught fish. With major brands like Princes and John West introducing the MSC ecolabel onto more of their tuna ranges, label coverage will certainly increase further in the year ahead.

Amongst the main whitefish species, ecolabel coverage remained high; 83% of cod, 72% of haddock, and 77% of pollock products sold in supermarkets last year carried a blue MSC ecolabel (see Graph 4). Despite still having the highest label coverage, the volume (tonnes) of MSC certified cod sold dropped a further 3% compared to the previous year, while pollock volumes rose by 2%, as price and affordability continued to influence sourcing decisions and consumer purchasing behaviour.



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

MSC label coverage of coldwater prawn products continued to remain at similar levels to whitefish, with 78% of all products sold in supermarkets carrying a blue MSC ecolabel. MSC certified Pacific salmon is also widely available across multiple product formats, although most salmon sold in UK retail is farmed, and thus ineligible to carry the MSC ecolabel. In 2024/25, 19 different brands sold 9,624 tonnes of MSC certified salmon, 12% more than in 2023/24. This included canned pink and red salmon products sold under

[4]Data taken from Total Seafood in Multiple Retail (2025 Update) — Seafish.

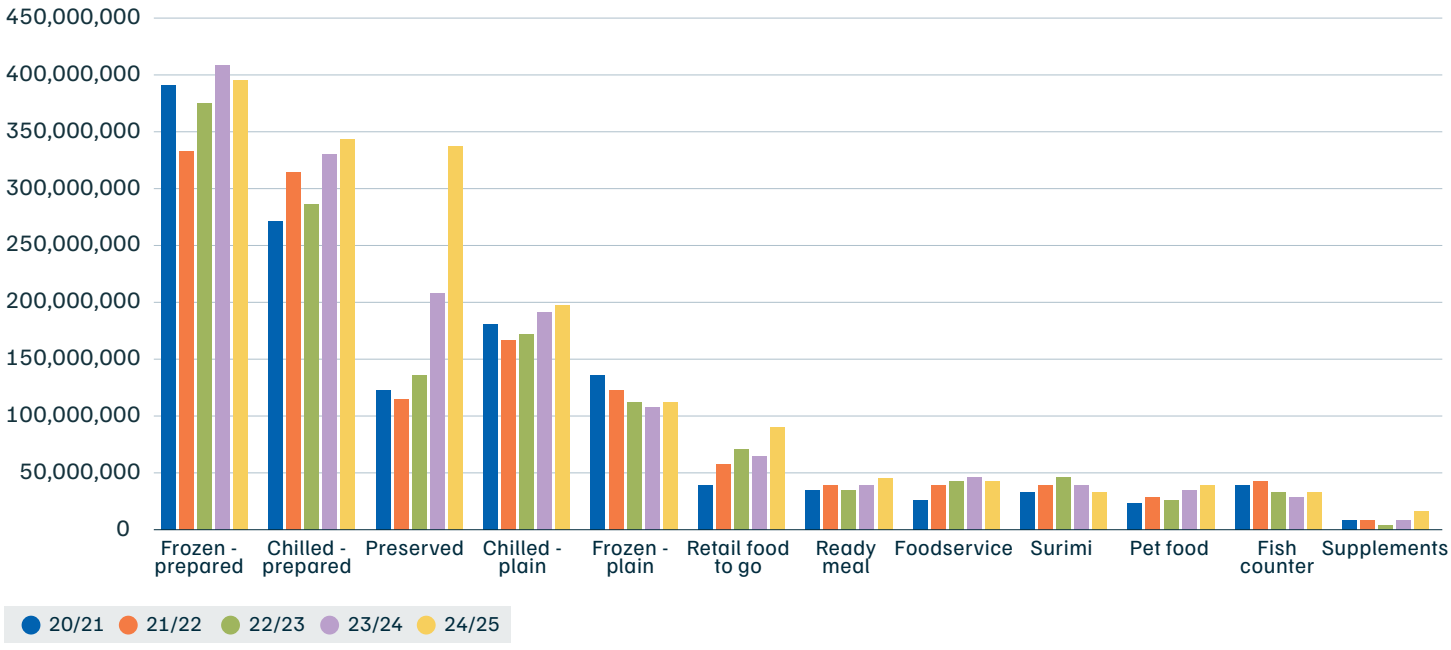
Amazon's own brand for the first time. Just over 1,270 tonnes of MSC labelled herring was also sold last year, a 17% increase compared to 2023/24. The species also continues to be available with an MSC ecolabel in multiple formats. Asda, Sainsbury's, Tesco, Princes, and John West all offered either canned or chilled kipper products that carried the blue fish tick last year, while the Onuga and Arënkha brands introduced new faux caviar products made from natural smoked herring.

MSC label coverage of other staples in the food cupboard, like mackerel and sardine, remain more limited. This is beginning to change, however. With no MSC certified source of Atlantic mackerel (*Scomber scombrus*) and continued political impasse over quota sharing, Princes made the decision to switch to MSC certified Chilean jack mackerel (*Trachurus murphyi*) in October 2025 (see *Partner in Focus: Princes*). Certification of Iberian sardines in July 2025 has also created significant new labelling opportunities for canned products in the UK supermarket aisle.

Among shellfish, availability of MSC certified options has varied considerably by species. Sales of MSC labelled mussels remained consistent at just over 3,500 tonnes, which represented 80% of all mussels in UK supermarkets.[5] Sales of certified scallop, made up primarily of Patagonian scallops (*Zygochlamis patagonica*), grew by 38% last year, and accounted for 78% of all scallop products purchased last year. This growth was driven by several new product launches, including a Canadian scallop product sold under Iceland's brand, the retailer's first MSC labelled scallop product. By contrast, for the first time in many years there were no MSC labelled crab products available anywhere in the market, highlighting a gap for many UK retailers and brands looking to continue expanding their MSC certified ranges.

Label Coverage by Product Category

A challenging economic climate has shaped the shopping habits of UK consumers for several years now, and spending on MSC products in 2024/25 followed that trend. Simpler preparation and long shelf life were two features increasingly prioritised by shoppers. The preserved category alone accounted for two-thirds of the growth in consumer spending on MSC products in the UK market in 2024/25, with UK shoppers spending £339m on preserved MSC products over that period, a 64% rise on the year prior. Preserved, frozen-prepared, and chilled-prepared products are now comfortably the three leading categories in terms of MSC consumer spending, demonstrating the appeal of convenient and affordable products amidst cost-of-living pressures.



Graph 5. UK Market Labelled Product Sales (£) by Category

[5]Note: some mussels sold in UK retail are farmed, and therefore would not be eligible to carry a blue MSC ecolabel. 80% of all mussels (farmed and wild) sold in UK retail carried a blue MSC ecolabel last year.

Beyond evolving consumer preferences, these trends are also a result of growing MSC labelled offerings within this space. The UK retail sector has shown strong commitment to expanding the availability of MSC certified tuna, and this is driving growth across multiple categories. Canned tuna has grown particularly rapidly, with 175 different preserved tuna products available bearing the blue MSC ecolabel in the UK in 2024/25, compared to 98 the prior year. The growth in MSC labelled retail food to go sales, which rose by 44%, was similarly driven almost exclusively by skipjack tuna products, such as tuna sandwiches, pastas, and salads.

Frozen-prepared and chilled-prepared products remained the highest selling categories for MSC labelled products in UK retail, despite the growth in preserved sales, with the former declining modestly by 1% whilst the latter grew by 5%. Consumer spending on chilled-plain MSC labelled products grew for the fourth year in a row, whilst frozen-plain sales rose by 6% after four years of decline. Sales of MSC labelled supplements in the UK grew rapidly (see *Supplements* section), as did ready meals, the latter in line with the broader trend towards convenience in shopping habits. Spending on MSC labelled products in foodservice and surimi categories declined, whilst pet food and fish counter spending both rose by 3%.

Fish Counters and Online Fishmongers

In the 2024/25 financial year, the UK fish counter landscape continued to evolve, shaped by the ongoing reduction in traditional supermarket counters in-store, alongside growing innovation in how consumers access seafood online. Waitrose and Whole Foods remain the only major retailers offering MSC labelled fish and seafood on their in-store fish counters, a position that has become increasingly distinctive as the number of counters in the market declines.

In 2024/25, Whole Foods expanded its MSC certified fish counter offering, selling banana prawns, yellowfin tuna and rock lobster with a label for the first time. Across Waitrose and Whole Foods, 23 distinct MSC labelled species were offered through fish counters, highlighting the continued breadth and diversity of MSC certified seafood available via this format and demonstrating that variety remains a defining selling point of certified counters. Waitrose continues to play a leading role in showcasing British fisheries at its counters, with MSC labelled species including Cornish sardines and Poole Harbour clams and cockles, reinforcing the importance of provenance and local sourcing within the fish counter offer.

Despite the widespread closure of traditional fish counters in supermarkets, retailers are exploring alternative models to deliver engaging seafood experiences to their customers. Sound Seafood partnered with Sainsbury's, supplying primarily British, wild-caught fish and bringing an expanded range of seafood species often found in restaurants directly to customers' doors via Sainsbury's online platform. The Sound Seafood range includes MSC certified black cod (sablefish), sockeye salmon, whole Cornish sardines, Cornish sardine fillets and banana prawns, extending access to certified species beyond the physical fish counter.

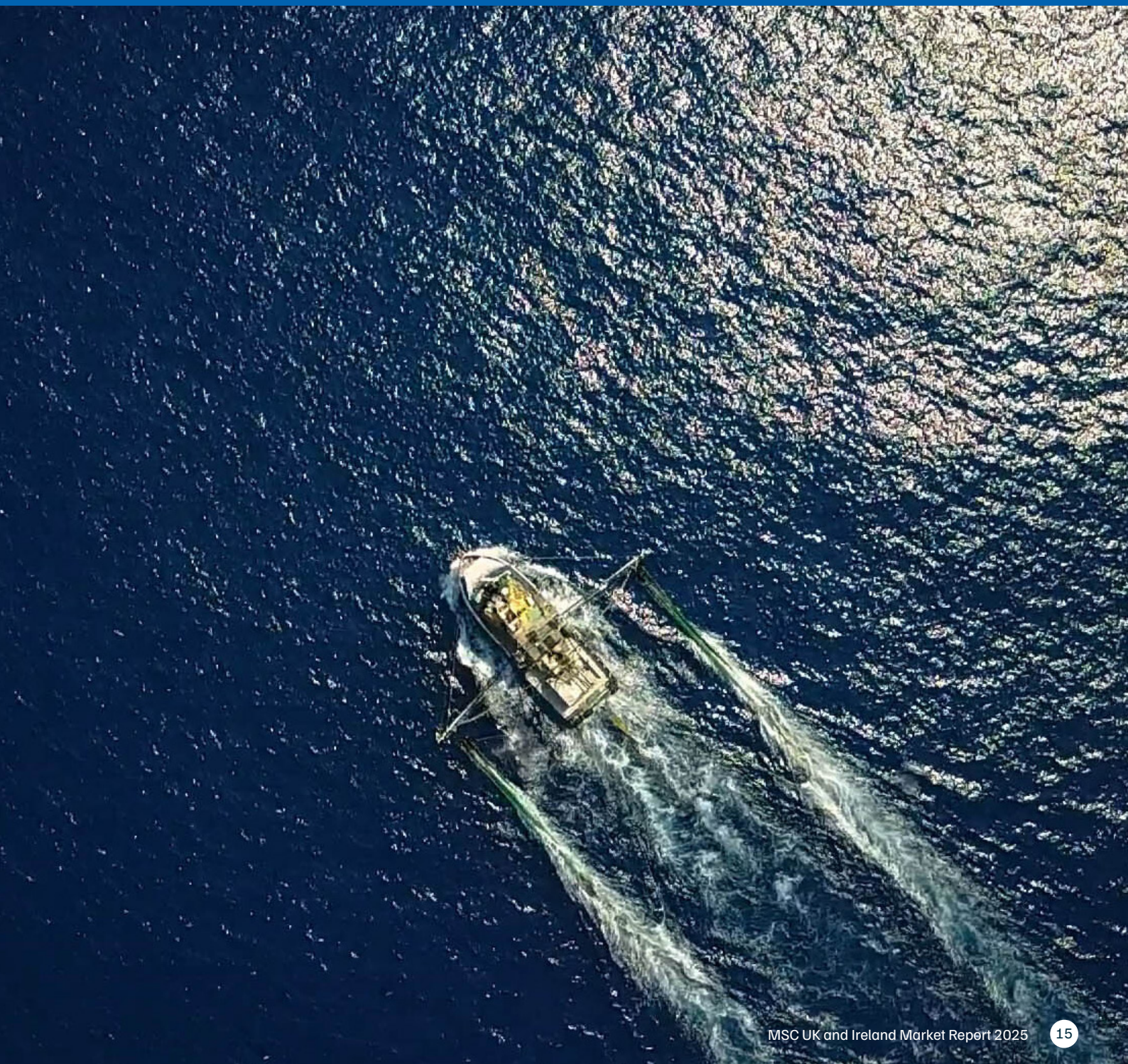
Rockfish Seafood at Home also continues to develop its direct-to-consumer offer, including MSC certified banana prawns, alongside certified Cornish sardines, haddock, and cod. This further reflects the shift towards online and hybrid seafood retail models showing that these routes to market complement traditional counters.

Despite changes in how seafood is sold, fish counters continue to serve an important segment of shoppers seeking expert guidance, provenance and access to a diverse range of fresh, sustainably sourced, and often local fish and seafood. In this context, Waitrose and Whole Foods continue to offer a unique shopping experience for fish and seafood lovers.

Species in Focus: Banana Prawn

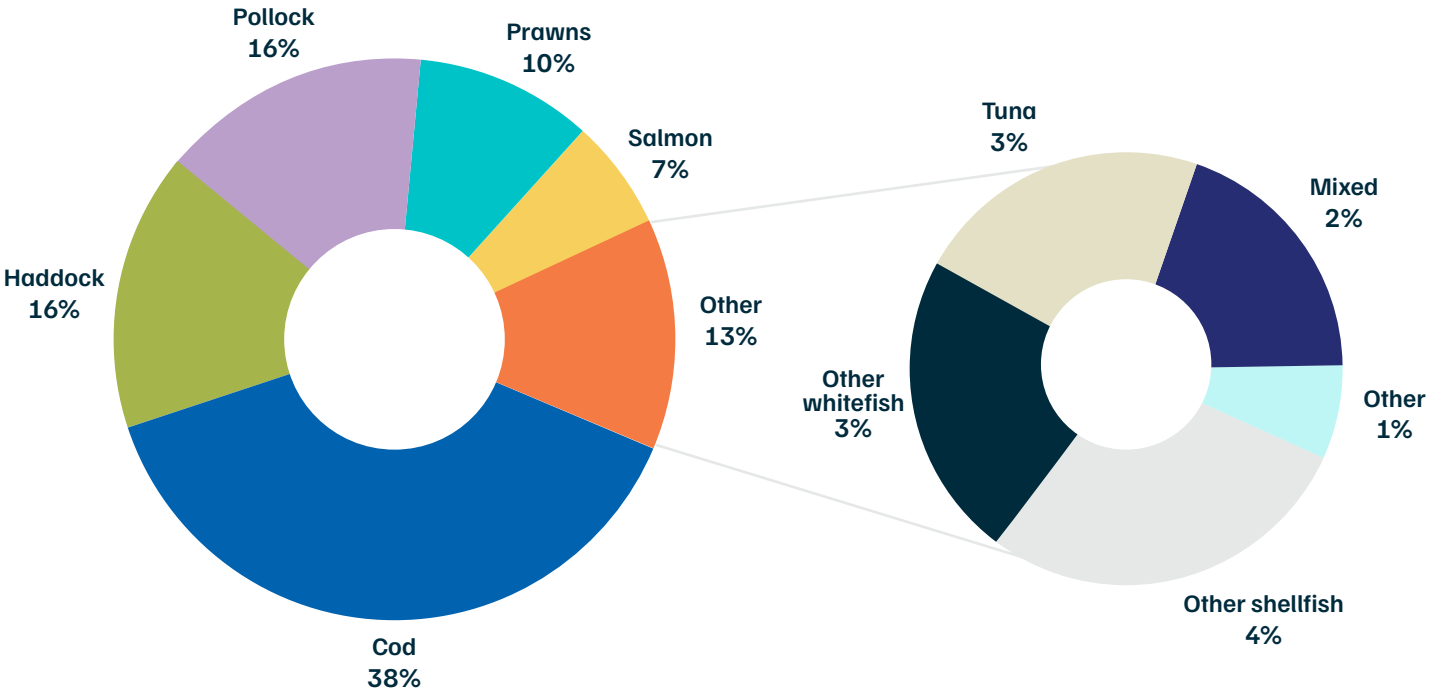
Banana prawn (*Penaeus merguiensis*) is Australia's largest prawn species and an important tropical warm-water prawn. The MSC certified Australia Northern prawn fishery operates across tropical waters off Australia's northern coast and includes more than 50 vessels targeting several prawn species. White banana prawns are typically caught in short trawl tows, helping support efficient fishing practices, and all nets in the fishery are fitted with devices to exclude turtles and reduce bycatch.

In 2024/25, banana prawns were sold in the UK with the blue MSC ecolabel for the first time, marking a key milestone for the species in the market. Products are now available via Rockfish's online seafood market, as well as through the Whole Foods fish counter and Sound Seafood online fishmonger on Sainsbury's website. The introduction of MSC certified banana prawns highlights the role that lesser-known species can play in supporting diversification, premium positioning, and credible sustainability messaging within the seafood category.



Chilled and Frozen

Chilled and frozen remain the leading formats for MSC labelled sales in the UK, with 63% of all consumer spend occurring in these combined categories in 2024/25. While this is down from 71% in the preceding year, this is due to rapid growth in preserved products rather than any decline. UK consumers spent £1.09bn on 111,243 tonnes of MSC certified chilled and frozen seafood, a modest rise of 3% and 1% in spending and tonnage respectively compared to the year before. This is a new record for consumer spending across the chilled and frozen categories, although volumes remain lower than the pandemic high of over 121,000 tonnes in 2020/21.



Graph 6. Percentage of Consumer Spend on MSC Labelled Chilled and Frozen Products in the UK by Species

Chilled and frozen MSC labelled products in the UK continue to be dominated by whitefish, with cod, haddock, and pollock accounting for 70% of all sales across these categories. However, there remains a diverse range of species on offer, with 35 different species sold bearing the blue MSC ecolabel in chilled and frozen formats. Three species – Lyrate hard clam, longfin squid, and Yesso scallop – became available to shoppers with a label once again, having not been sold as MSC certified in 2023/24.

Furthermore, most of the growth in this area in 2024/25 has come from outside the whitefish species group. Consumer spending on chilled MSC certified tuna has more than doubled since the preceding financial year, with this growth derived from a combination of chilled yellowfin tuna steaks and prepared skipjack tuna products, such as salads, sandwiches, and pastas. In the frozen-plain category, two-thirds of the growth in spending on MSC labelled products can be attributed to prawns, which are sold whole across multiple retailers with the blue MSC ecolabel. Similarly, while consumer spend on MSC certified frozen-prepared seafood declined overall, some less ubiquitous species saw higher sales in this format. UK shoppers spent £7.46m on MSC frozen-prepared pink salmon products, for example, whilst sales of MSC certified American lobster in this format rose by 55% with Aldi, Iceland, and Morrisons all launching new products in 2024/25.

Species in Focus: Argentine Red Shrimp

In March 2025, an Argentinian coastal trawling fishery targeting Argentine red shrimp (*Pleoticus muelleri*) achieved MSC certification, following a decade of dedicated improvements to reach global best practice for sustainability.

Less than six months after the fishery became certified, Iceland became the first retailer in the world to launch an MSC labelled Argentine red shrimp product (*Iceland Easy Peel Wild Red Shrimp 200g*) under its own brand. A second product, *Iceland Sugo ai gamberi wild red shrimp in a tomato & chilli sauce 300g*, followed shortly after. These products are a unique offering in global retail, and validate the time and resources invested in meeting the MSC Standard by the fishery.



Ready Meals and Food to Go

Although the majority of fish and seafood is sold chilled, frozen or canned, ready meals and food to go are both important and growing categories for UK retail and their fish and seafood offering. MSC labelled food to go consists primarily of sandwiches, pastas, and salads, that would usually be included in retailer meal deals. For many years, these products primarily featured Northern prawn (*Pandalus borealis*), but in 2024/25 the availability of MSC labelled skipjack tuna in retail food to go ranges increased significantly. Last year, there were nine brands selling MSC labelled tuna food to go products in the UK, seven of which were sold under a retailer's own brand: Aldi, Amazon, Co-op, Iceland, Sainsbury's, Tesco, and Waitrose. Additionally, MSC certified tuna sushi was available in Waitrose under the Taiko brand, while tuna sandwiches bearing the blue label were also sold by the hospitality provider BaxterStorey under their Society brand. This translates to 31 different tuna food to go products available to UK shoppers with an MSC ecolabel, and more than 30 million product units of this type sold last year.

Ready meals, by contrast, remain a more whitefish-dominated category, with meals such as fish and chips or cod in Mornay sauce sold frequently with a blue MSC ecolabel, along with fish pies that usually contain whitefish along with other species such as salmon or prawns (see *Focus on Dishes Worth Protecting*). However, MSC labelled skipjack products are also still available in this format, often as pre-made tuna pasta bakes, in line with the broader market trend of rising availability of MSC certified tuna. Ready meals offer a convenient choice for consumers, and the presence of the MSC ecolabel in these categories demonstrates that sustainability remains relevant to UK shoppers across all food formats.



Products in Focus: MSC and ASC Co-Labelled Products

The 2024/25 financial year saw a notable increase in the number of products that are co-labelled – bearing both the MSC and Aquaculture Stewardship Council (ASC) labels – on sale in the UK market. These products contain both wild-caught seafood originating from MSC certified sustainable fisheries, and responsibly farmed seafood originating from ASC certified farms. Because both organisations use a shared Chain of Custody Standard for traceability assurance, co-labelling offers a practical and efficient way to highlight products that combine sustainably caught seafood with responsibly farmed options.

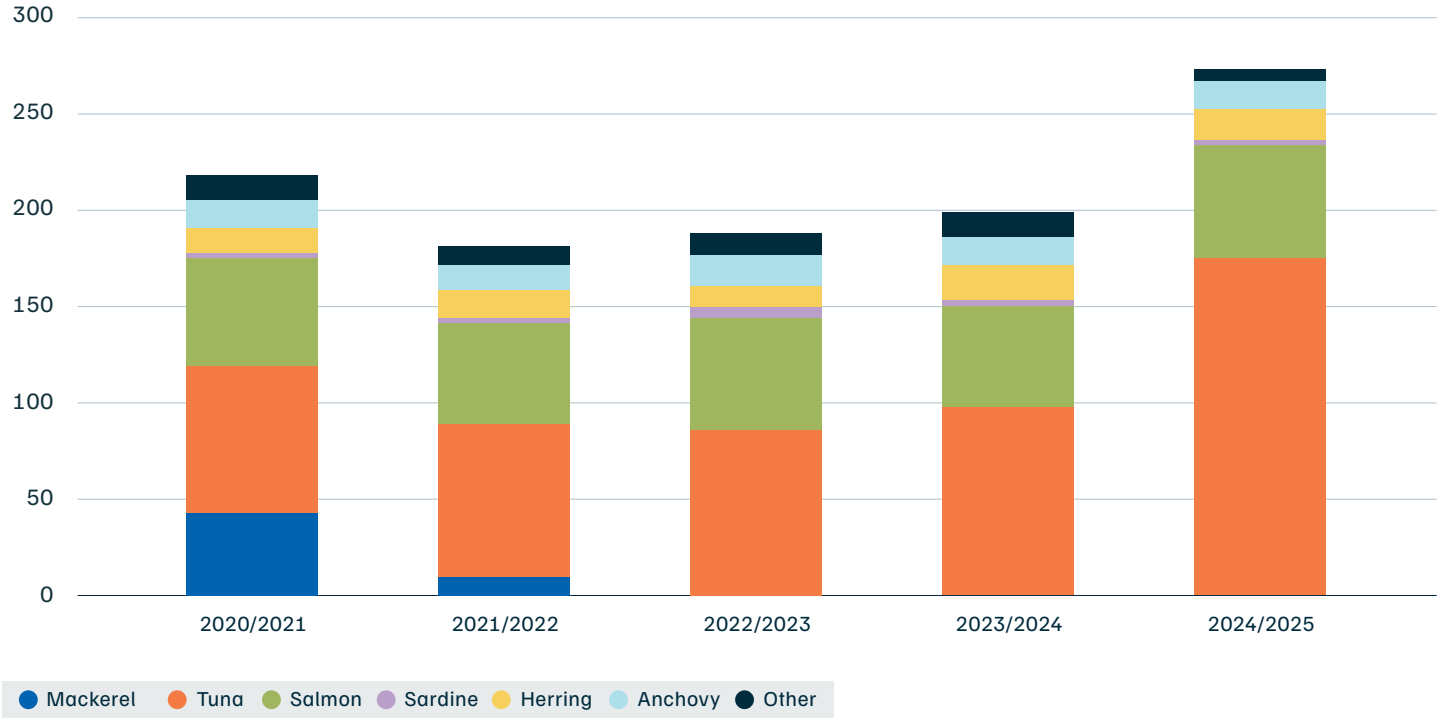
Many of the co-labelled products launched in 2024/25 were ready meals, with Iceland and Sainsbury's leading the way amongst the retail sector. Co-labelled ready meals sold by Sainsbury's included a *Smoky Seafood, Tomato & Chorizo Bake* product containing ASC certified king prawns and MSC certified Atlantic cod and Patagonian scallops, while Iceland launched three Italian-themed frozen ready meals, including a *Sugo Alle Vongole* product containing MSC certified Alaskan pollock and cockles, along with ASC certified clams. Iceland revealed that these three products enjoyed a 15% lift in sales upon being re-launched with both labels, compared to when they were on sale without either.[6]

[6] Iceland relaunches seafood ready meals displaying both MSC and ASC ecolabels - Iceland – Doing it Right Iceland Retail.



Preserved and Canned

The availability of MSC labelled preserved fish and seafood products in the UK has continued to grow, with 2024/25 recording the highest number of products on offer since 2018/19 when a wide variety of MSC labelled Northeast Atlantic mackerel was still available. Total MSC certified ambient listings increased from 198 products in 2023/24 to 272 in 2024/25, a 37% year-on-year increase. This marks the largest single year rise over the past four years (see Graph 7) and corresponds with a total volume increase from 12,059 tonnes in 2020/21 to 42,411 tonnes in 2024/25.



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

Growth over the past year was driven overwhelmingly by MSC labelled tuna products, which dominate the preserved category. Volumes of MSC labelled canned and jarred tuna have grown more than fifteen-fold, from 2,461 tonnes in 2020/21 to 37,027 tonnes in 2024/25. Consumer spend has grown even more rapidly, from £24.3 million to £269.1 million. The increase in both volume and consumer spend is supported by a growing range of tuna products on offer, with the number of MSC labelled tuna products offered by brands and retailers jumping from 76 in 2020/21 to 175 in 2024/25 to meet consumer demand for certified sustainable options.

Sardines are also gaining renewed attention in the UK market thanks to new certified sustainable sourcing opportunities. Following the MSC certification of the Iberian sardine fishery, the category is set for growth, with more sustainable options entering the market. Waitrose is launching seven new MSC labelled products in January 2026 across its Essentials and No. 1 ranges, featuring a mix of Iberian and Cornish sardines. These new products will add to the range of certified sustainable canned sardine options which included the introduction a can of *Sound Seafood Cornish Sardines Fillets in Olive Oil 100g*, supplied by Interfish, and a can of Minerva brand sardines, both new to the market in 2025. Until recently, MSC certified canned sardines have largely only been available from Tesco and under The Pilchard Works brand, both sourced from Cornwall. The certification of Iberian sardines means it joins the Cornish sardine fishery in being able to supply product that carries an MSC ecolabel, providing additional volume and choice for retailers and consumers alike.

Other small pelagic species, such as herring and anchovies, remain important components of many retailers' and brands' canned seafood ranges. Anchovies in tins or cans are currently available with an MSC ecolabel at Tesco, Waitrose, Asda, and Sainsbury's, as part of their permanent own brand range, while Italian brand Delicius introduced several new certified anchovies, including a Cantabrian anchovy fillets product that was in the running for MSC UK Product of the Year 2025 at the MSC UK Awards. These products highlight the good availability of MSC certified anchovies in the market, but there is still room for other brands and retailers to introduce the MSC ecolabel onto their own anchovy product ranges where the label is currently absent.

Herring is another staple of the canned fish aisle. Lidl remains the only retailer to offer MSC labelled herring in a tin under its own brand, with six different product varieties, while MSC certified kippers have been a part of the Princes and John West ranges for many years. Volumes of MSC labelled herring increased significantly year on year, rising from 543 tonnes in 2022/23 to 873 tonnes in 2024/25, an increase of approximately 61%, signalling growing demand for sustainably sourced herring. MSC labelled canned salmon has been widely available for many years and remains a high-volume category, second after tuna, with sales reaching just over 4,000 tonnes last year.

Conversely, MSC labelled mackerel is no longer an option for the third consecutive year because of the loss of certification of all Northeast Atlantic mackerel fisheries. The impact of this on supermarket shelves was apparent, with the number of MSC labelled products dropping from 43 in 2020/21 to nothing from 2022/23 onwards. With no certified Northeast Atlantic mackerel available and a lack of effective quota-agreements by governments, the UK market has yet to fill this gap at scale, although recent moves toward MSC certified jack mackerel suggest an emerging route forward for those looking to offer sustainable alternatives (see *Partner in Focus: Princes*).

Overall, 2024/25 marked a turning point for the UK ambient seafood category, with strong upward momentum fuelled primarily by tuna and emerging shifts in alternative small pelagic sourcing. This indicates the category becoming broader and more resilient as brands and retailers respond to sustainability challenges, particularly those affecting the Northeast Atlantic mackerel fishery.



Partner in Focus: Princes

Princes continues to be a major supplier of MSC certified canned fish in the UK and was recognised for its leadership this year, winning **MSC UK Seafood Brand of the Year** for the second year running. Central to this success is the company's commitment to introduce the blue MSC ecolabel onto 100% of its canned tuna range. Steady progress towards this goal has significantly expanded the availability of certified tuna on shelf, helping to shape the strong upward trend in sustainable tuna across the market and cementing Princes' role in growing the certified product offering across the ambient category.

Princes has also taken a decisive and industry-leading step in response to the long running challenges surrounding Northeast Atlantic mackerel. With the fishery still uncertified due to overfishing and stalled quota agreements, Princes became the first UK brand to halt sourcing from the region for its own brand products and transition to MSC certified Chilean jack mackerel (*Trachurus murphyi*) in October 2025. This move reintroduces a certified mackerel option to UK shelves and has set a significant precedent for the category.



FOCUS ON FISH FINGERS

In 2025, one of the nation's favourite foods, the fish finger, celebrated its 70th birthday. First introduced in the UK in 1955 by Birds Eye, the fish finger has since become a cultural icon with 1.5 million of them eaten every day, equivalent to 18 every second.[7] MSC's own history has a connection to the fish finger and its pioneer, Birds Eye. Following the collapse of the Grand Banks cod fishery in Canada in 1992, Unilever (then owner of Birds Eye) partnered with the World Wildlife Fund (WWF) to develop a solution to tackle the issue of overfishing. That solution was the Marine Stewardship Council (MSC), which was created to use a certification programme and blue ecolabel to recognise and reward sustainable fishing practices.

Thanks to the early adoption of the MSC programme by several major whitefish fisheries around the world, shoppers in the UK and Ireland have been able to purchase a range of fish finger products with the blue ecolabel for many years. Last year, 17 brands sold 88 different MSC certified fish finger products across the UK and Ireland. In the UK, of the £209 million shoppers spent on fish fingers, 88% went to products carrying an MSC ecolabel.[8] Birds Eye continues to offer the greatest selection of certified fish fingers, with 32 different MSC labelled products sold under its brand across the UK and Ireland last year. The business continues to innovate; in 2023, Birds Eye introduced a set of MSC labelled fish finger products made with silver smelt, the first time the species was sold with an ecolabel in the UK.



> *"At Birds Eye, we're proud that 100% of our wild-caught fish is MSC certified, with our UK range currently including cod, haddock, pollock and silver smelt. We're passionate about championing fish as a healthy, sustainable choice - making it easy and delicious for millions of families across the UK to enjoy the goodness of fish, while safeguarding our oceans for the future."*

Anna Owen - Cluster Head of Sustainability, Birds Eye UK & Ireland

In the past year, other brands have also introduced products with an MSC ecolabel for the first time. Amazon launched a Chunky Cod Fish Finger while fast food chain, Leon, expanded its pre-pack grocery range to include an Alaskan pollock fish finger product. Outside the supermarket, fish finger lovers in the UK and Ireland have also been able to find a sustainably sourced option as part of the McDonald's Happy Meal offering since 2012. With an increasing number of brands using the blue MSC ecolabel on their products, 70 years after they were first introduced, fish fingers are not only a staple in many households, they are also one of the most widely available certified options across the fish category.

[7]The Telegraph. Are fish fingers actually healthy?

[8]Determined using MSC data and total consumer spend referenced in Seafish Total Seafood in Multiple Retail 2025.

FOCUS ON DISHES WORTH PROTECTING

MSC ran a major consumer marketing campaign in September 2025 for the sixth consecutive year. And for the third year in a row, sustainable seafood was celebrated over the entire month. For the 2025 Sustainable Seafood September campaign, MSC launched a new 'Buy Blue, Protect Dinner' concept to help engage younger consumers (Gen Z and Millennials) with the sustainable seafood movement. A national survey organised for the campaign on the types of seafood people like to eat found that, while younger generations are becoming increasingly adventurous when it comes to fish and seafood, some of the nation's traditional family favourites remain the UK's most popular seafood dishes. Based on these consumer insights, three 'hero dishes' – fish and chips, fish pie, and seafood pasta – starred in the campaign as dishes worth protecting for future generations and dinners to come. Thanks to the work of restaurants, brands, and retailers across the UK and Ireland, certified sustainable versions of these dishes are also easy to find, whether dining out or being made at home.

According to the survey, unsurprisingly, nearly two-thirds (63 percent) of Brits of all ages voted fish and chips as their favourite seafood dish.[9] Thanks to a committed group of fish and chip shop owners and foodservice businesses like Whitbread, fish and chip lovers can find the blue MSC ecolabel on menus across the country (see section on *Foodservice*). For shoppers looking to replicate the fish and chip shop experience at home, Asda, Birds Eye, Harry Ramsden, Sainsbury's and Tesco all offered an MSC labelled version of the classic ready meal under their own brand last year.



Fish pie is another national favourite which featured in MSC's Buy Blue, Protect Dinner campaign. The dish is a staple in many supermarket ready meal aisles, with 26 different MSC certified products available in eight different supermarkets last year. This included a fish pie for kids launched under Iceland's Little Explorers range, developed in partnership with parenting site Mumsnet. Thanks to the versality of the dish, there are

[9]Consumer research results were part of a poll conducted by Perspectus Global on behalf of MSC in July 2025.

now many different versions using a wide range of species that can be adapted to fit different price points and palates.

The final hero dishes of the Buy Blue, Protect Dinner campaign celebrated seafood pasta in all its diversity and versatility, favoured for its ability to suit every occasion, budget and cooking ability. With MSC certified tuna, sardines, anchovies, scallops and shrimp increasingly available in supermarkets – and certified sustainable fresh clams and mussels also available at fish counters – it is easier than ever for even the more elaborate seafood pasta dishes to be made using MSC certified seafood. Supermarkets are capitalising on consumer preference for convenient, environmentally friendly dinner options like seafood pastas. In 2022, Sainsbury's added a *Prawn, Chilli & Garlic Ravioli* to its ready meal range, the first MSC labelled prepared ravioli product in the UK market (see MSC UK and Ireland Market Report 2023). In recent years, Aldi has also offered a heart-shaped fresh pasta product filled with MSC certified lobster as part of its more premium Gastro range, on offer around Valentine's Day.

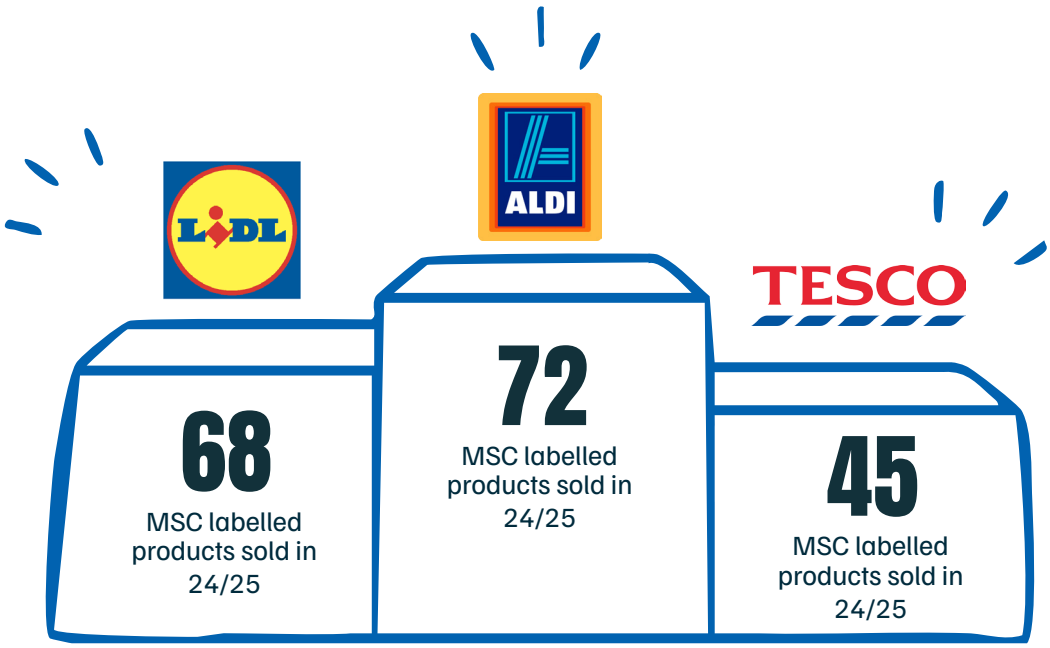
The growing availability of MSC certified tuna has also created new opportunities for supermarkets to expand their ready meal ranges; Aldi, Co-op, Iceland, Sainsbury's, Tesco and Waitrose all introducing new MSC labelled tuna pasta bakes since April 2024. Whether it is a shellfish showstopper or midweek meal, seafood pasta, in all its forms, remains a firm favourite. With an ever-growing variety of MSC certified options available, shoppers and diners around the UK and Ireland can enjoy seafood pasta knowing that the choices they have made will ensure it stays on the menu for many years come.

2025's 'Buy Blue, Protect Dinner' campaign demonstrated how bringing some of the nation's best loved fish and seafood dishes to life, and championing sustainable seafood, can captivate the public interest and encourage everyone to take action to protect our favourite dishes and the important fisheries that they rely on.



FOCUS ON IRELAND

The Irish retail sector continues to provide consumers with a broad selection of certified sustainable seafood, offering more than 300 MSC-labelled products last year. Aldi led the market, selling 72 MSC labelled products under their own brand. The supermarket was also recognised for this by winning the inaugural **MSC Irish Supermarket of the Year 2025** award. Aldi was followed closely by Lidl, which sold 68 MSC labelled products, while Tesco shoppers could find the blue label on 45 of their own brand fish and seafood products. All three supermarkets have made great progress over the past two years in expanding their MSC certified ranges, particularly on tuna products. Tesco has now introduced the blue MSC ecolabel onto its entire own brand tuna range across all formats in Ireland as part of the retailer's broader commitment to do so in the UK and Ireland by the end of 2025.



In the canned aisle, John West also introduced a range of new MSC labelled tuna products alongside the MSC certified salmon, herring and anchovy products it already sells under its brand in Ireland. This included two jarred yellowfin tuna products, the only such products carrying the blue MSC ecolabel available in either the UK or Ireland. With Rio Mare and the newly introduced Minerva brand also both offering several certified products, tinned fish lovers across Ireland can now enjoy more sustainably sourced options than ever before.

Birds Eye continues to be the market leader in Ireland in championing sustainability in the frozen aisle with its extensive MSC labelled products, while several MSC certified cod and haddock products were available under the Harry Ramsden brand. SuperValu also sold two certified frozen products – cod fillets and breaded fish fingers - under its own brand, while Centra and Dunnes were the only retailers not to offer any MSC labelled own brand products.

For environmentally conscious Irish shoppers, MSC's blue ecolabel can also be found on krill oil supplements under the Cleanmarine brand, and on pet food products sold under the Mars-owned Sheba brand, and Lidl's Coshida range. For home chefs, getting certified fish delivered to the door became easier with HelloFresh introducing MSC labelled hake into its recipe boxes this year. Outside the supermarket and home kitchen, Irish diners can also find the blue MSC ecolabel on menus at McDonalds and IKEA.

Despite the growing availability of MSC certified products in Ireland, many Irish brands and retailers continue to source a range of locally caught fish and seafood which is not yet certified. A number of these commonly

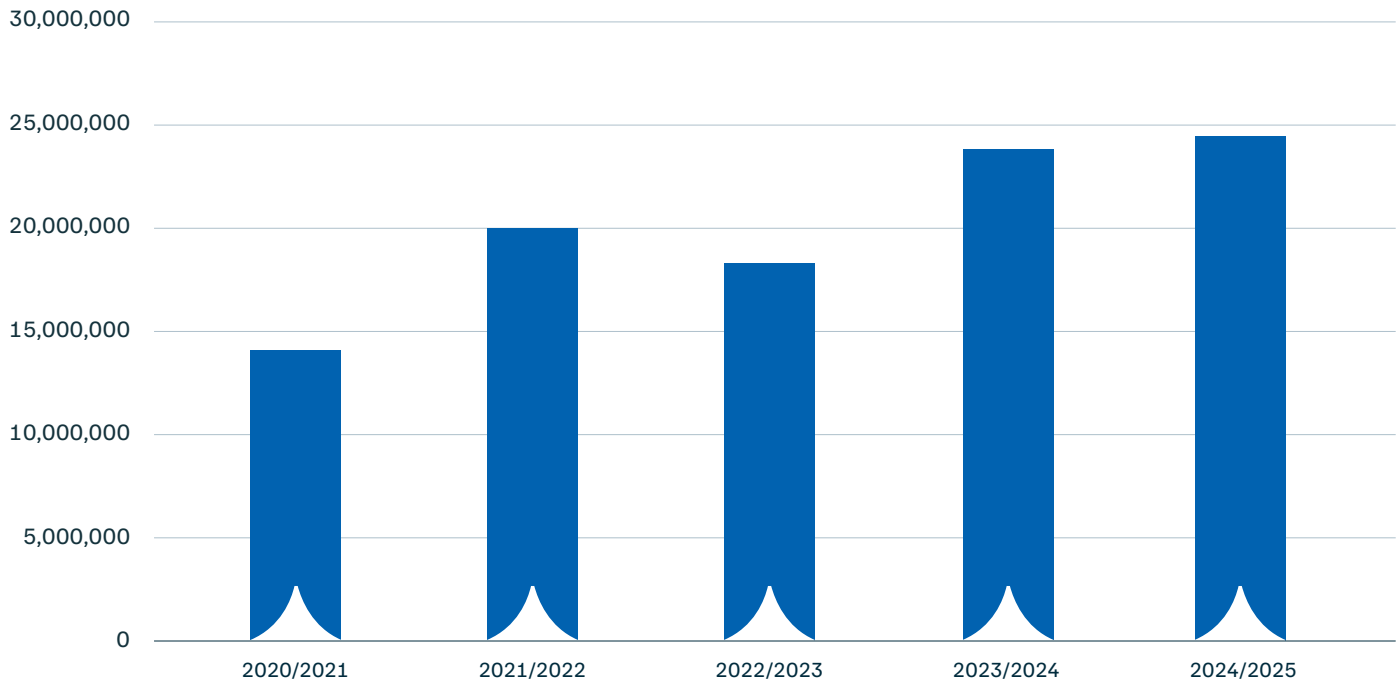
sold local species come from fisheries which are engaged in Fishery Improvement Projects (FIPs), meaning they are working to improve their sustainability to a place where they could achieve MSC certification. With only 8% of Ireland's national landings currently coming from mussel fisheries that have met the MSC Standard (see MSC UK and Ireland State of the Water Report 2023), these FIPs offer a real opportunity to see this percentage increase in the coming years should they reach a point where they could become certified. For retailers, brands and restaurants sourcing from these fisheries, this represents a potential opportunity to expand the range of locally caught MSC certified fish and seafood available in stores and on menus. The Irish market has an important role to play in supporting these fisheries on their journey to sustainability, and recognising their efforts, should they pursue certification.



PET FOOD

Sustainability is an increasingly important consideration for pet owners, with expectations around responsible sourcing extending into the ingredients used in pet food products. As the category continues to evolve towards more premium positioning, sustainably sourced fish ingredients are playing an increasingly important role in building trust amongst consumers and supporting credible environmental claims made by brands.

This shift is reflected in strong growth in the value of certified sales in the sector. Consumer spend on MSC labelled pet food has increased steadily over the past five financial years, rising from approximately £18.3 million in 2020/21 to nearly £30 million in 2024/25. While spending dipped slightly in 2022/23, this recovered quickly, with growth accelerating through 2023/24 and continuing into 2024/25, highlighting sustained consumer appetite for certified pet food products.



Graph 8. MSC Labelled Pet Food Sales (£) in the UK and Ireland

While volumes of MSC certified pet food in the UK and Ireland have stabilised in recent years, there remains significant room for growth and further labelling across brand and retail product ranges. Volumes have remained steady at around 7,000-7,500 tonnes over the past two financial years. With relatively limited retailer use of the label in the category overall, and a small number of brands currently driving the majority of sales, there is clear potential to expand the use of certified ingredients and provide shoppers with more sustainable pet food options.

Despite this recent stabilisation, the UK and Ireland remains the third largest market globally for MSC certified pet food, behind the DACH (Germany, Austria, and Switzerland) and Benelux (Belgium, Luxembourg, and Netherlands) regions. While this reflects the region's leadership on a global level, it also highlights that there are opportunities to grow the presence of the MSC ecolabel in the sector further through increased retailer engagement, brand investment, and commitment to selling certified products.

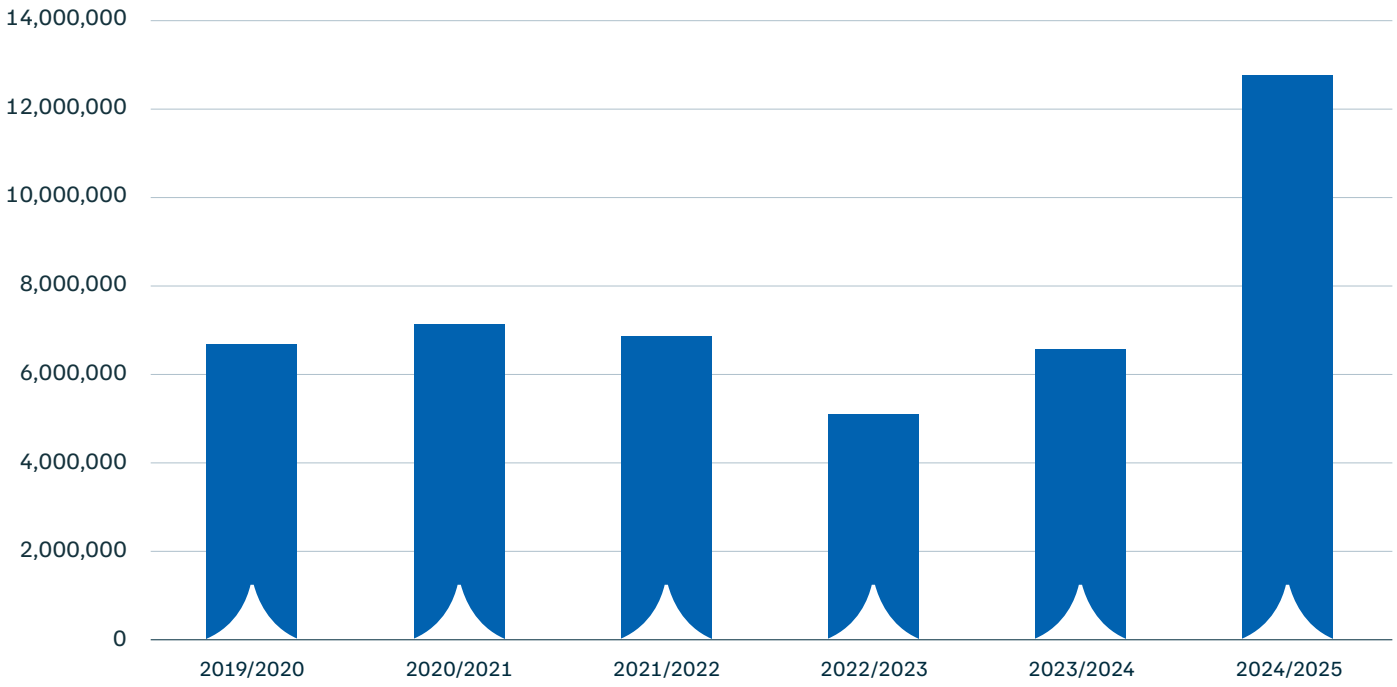
Product innovation continues to play a key role in the category. A notable development was the launch of *Canagan Petite MSC Cod with MSC Herring Paté 100g* in 2024/25, the first MSC labelled pet food product in the UK to feature herring. This product launch marked an important step in broadening the range of certified species used in pet food.

At a retailer level, Lidl remains the only UK retailer currently using the blue MSC ecolabel across its entire wild seafood pet food range. From a brand perspective, longstanding supporter of the MSC programme, Mars, continues to sell the highest volume of MSC labelled pet food in the UK, demonstrating the critical role of established players in driving change at scale and promoting the use of certified seafood ingredients in pet food products.



SUPPLEMENTS

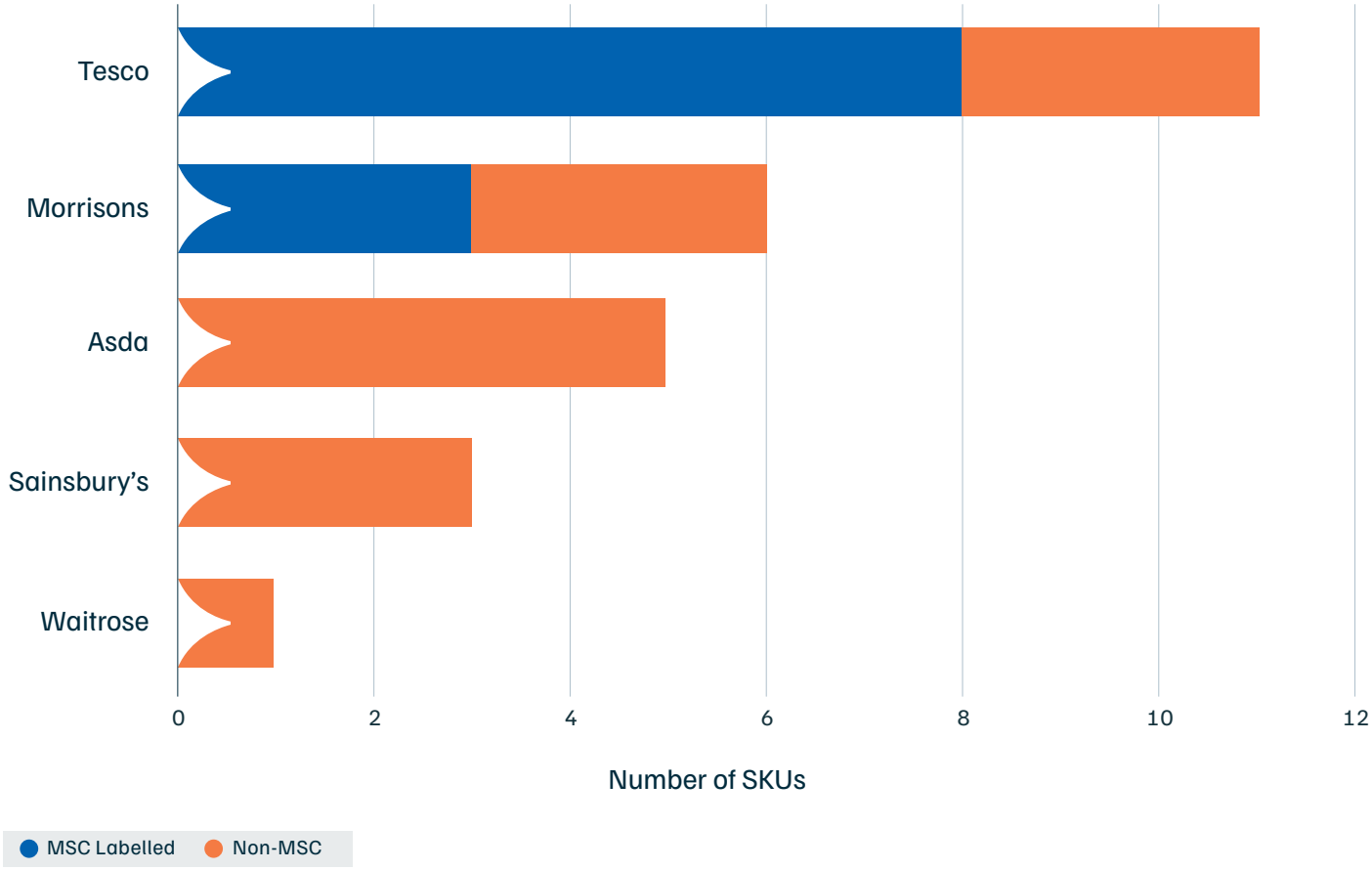
The UK and Ireland has seen promising growth in MSC labelled supplements in recent years, hitting a new record for this sector in 2024/25. Consumers spent a combined £12.8m on MSC labelled supplements, a 99% rise on the preceding year. Together, the UK and Ireland are now nearly on a par with China in terms of consumer spend, but remains behind the US and Canada, which lead globally in sales of MSC certified supplements.



Graph 9. Consumer Spend (£) on MSC Labelled Supplements in the UK and Ireland

Currently, only two major retailers — Tesco and Morrisons — sell MSC labelled own brand supplements, primarily cod liver oil and other omega-3 fish oil products. Both retailers, along with several others, also offer marine-based supplements using similar ingredients that do not carry the blue MSC ecolabel. For businesses seeking to expand their certified product ranges, there is a clear opportunity within the supplements category to increase certified sustainable product availability, as raw materials for several key species are often available from sustainable sources.





Graph 10. Own Brand Marine Supplements Products Sold in UK Retail[10]

Outside of retail, longstanding sustainability champions Wiley's Finest (see *Partner in Focus: Wiley's Finest*) and Green Pasture continued to sell MSC labelled fish oils, as did the more recently certified brand, Wild Nutrition. Meanwhile, Healthspan and Naturalife both sold MSC labelled krill oil for the 14th year running, the latter under the brand name Cleanmarine. Collagen has been growing in popularity for several years now within the wider supplements sector, and in 2024/25 there were four marine collagen brands selling MSC labelled products in the UK and Ireland.

Amidst this growth in sales of MSC labelled supplements, many small pelagic fisheries that supply this market globally remain threatened by intertwined climate and management challenges. The rise in MSC labelled sales of supplements, both in the UK and Ireland and globally, demonstrates clearly that consumers are looking for certified sustainable products, even amidst economic difficulties. In this context, it is vital that this sector is safeguarded for the future through sustainable fisheries management practices.

[10]Analysis of own brand marine supplements products was conducted using retailer websites in November 2025. Note: this analysis was limited to major UK supermarkets with online grocery platforms and does not cover all UK retailers.



Partner in Focus: Wiley's Finest

Wiley's Finest is a fish oils brand under the Wiley Companies umbrella. All Wiley's Finest fish oils are derived from Alaska pollock, giving Wiley's Finest a fully MSC certified range of fish oils. The Alaska pollock fishery is the largest MSC certified fishery in the world by catch volume, and was first certified in 2005. It is currently certified without any conditions.

Wiley's Finest first sold MSC labelled fish oils in the UK and Ireland in 2014/15, meaning that they have recently hit a major milestone of a decade of selling certified sustainable omega-3 oils in this market. With product formats ranging from liquids to soft gels, as well as gummies for both children and adults, Wiley's continue to lead the way in the field of certified sustainable marine supplements.

> *"MSC accreditation is far more than a label – it's a promise to our customers that our fish oils are sourced from traceable, responsibly caught fish. We're proud that Wiley's Finest is the longest standing supplement company to be certified by MSC; it's the highest global standard in sustainable fishing."*
>
> *Paul Farquhar - Managing Director, Wiley's Finest UK*



Sector in Focus: Marine Collagen

Marine collagen continues to be a rapidly growing subsector within the supplements market. According to customer research conducted by Boots, searches on their website for marine collagen have risen by 227% year-on-year, and collagen is now the most popular product type within the realm of skincare.[11]

The manufacturing of marine collagen makes use of whitefish by-products, such as the skin, bones, scales, and connective tissue, that may otherwise have gone to waste, in line with the principles of a circular economy. Last year, four brands sold MSC certified marine collagen in the UK and Ireland market, profiled individually below.

Ancient + Brave

Headquartered in Lewes, East Sussex, Ancient + Brave offer a range of health products, including their MSC certified Wild Collagen. Consumers can use a refillable jar or pouch after first purchase, in line with the broader waste reduction objectives within the marine collagen market.

Bare Biology

Brighton-based supplements business Bare Biology began using the blue MSC ecolabel on their marine collagen products in 2024. Bare Biology's marine collagen is manufactured using the skins of cod from MSC certified fisheries.

Planet Paleo

Planet Paleo were the first marine collagen brand in the UK to use the blue MSC ecolabel on their products. Based in Brighton, they were awarded MSC UK Newcomer of the Year in 2023 for breaking new ground in UK supplements by launching their MSC certified range.

Zinzino

In 2024, Swedish nutraceuticals business Zinzino applied the blue MSC ecolabel to their Collagen Boozt product, containing MSC certified marine collagen. Based in Gothenburg, Zinzino's products are sold online into multiple markets, including the United Kingdom.

[11] Boots reveals the top beauty and wellness trends and best-selling products of 2025. The Boots Company – December 5, 2025.

FOODSERVICE

The foodservice sector represents a significant growth opportunity for use of the blue MSC ecolabel on menus. Although adoption of the label has grown steadily over time, proving that certification can be integrated into procurement and menu planning, its uptake remains inconsistent. This highlights both the untapped potential within foodservice and the role that brands and restaurant groups can play in accelerating change in our oceans.

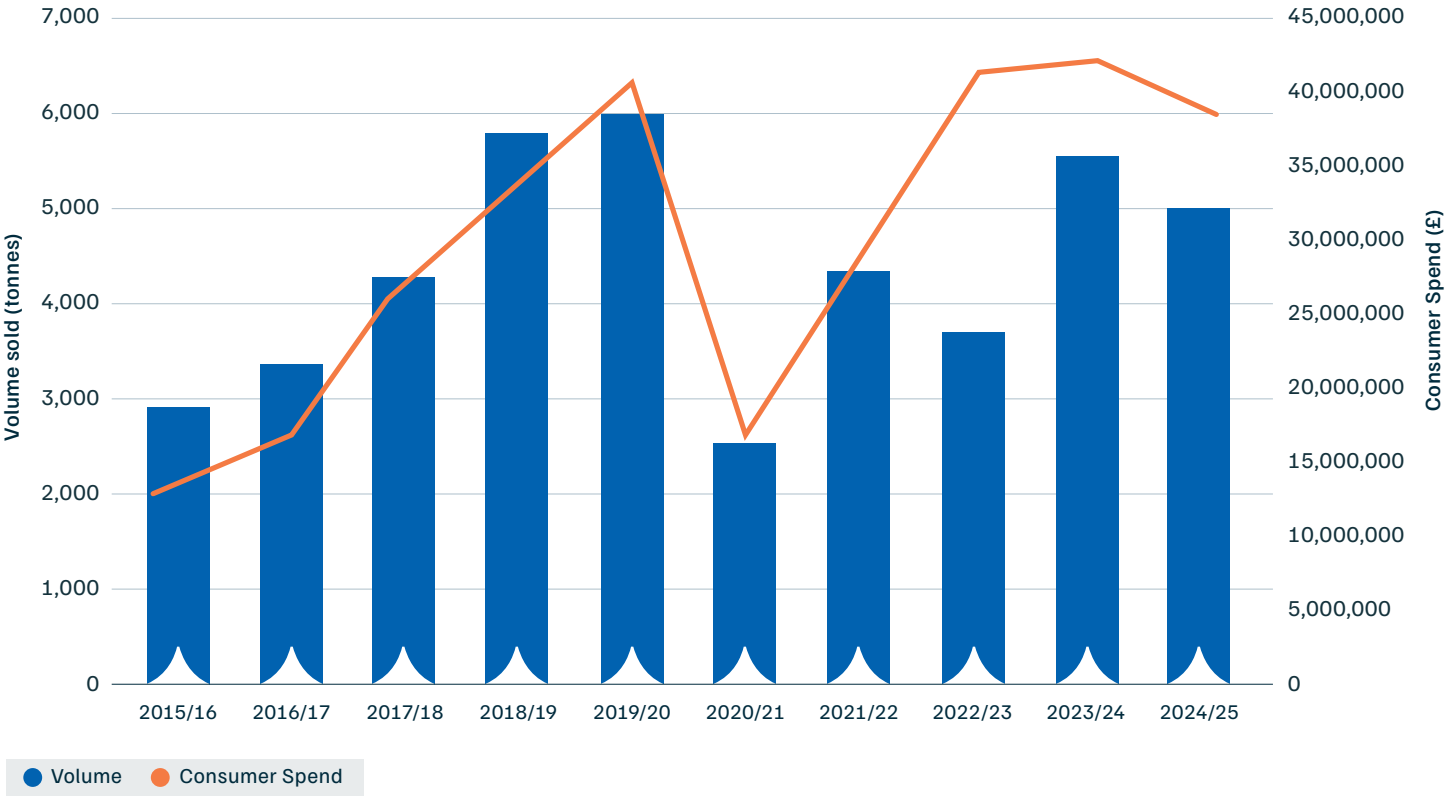
From a consumer perspective, the blue MSC ecolabel offers clear advantages in a foodservice environment, where information about sourcing is often limited and trust cues are critical. The label provides a simple, recognisable and independently verified indication that the seafood has been sourced from a well-managed, sustainable fishery, helping consumers make confident choices when dining out.

Several well-known foodservice brands continue to play an important leadership role in offering certified sustainable seafood to their consumers. Costa Coffee, the UK's largest coffeehouse group, introduced an MSC labelled tuna melt in August 2024, becoming the first high-street coffee chain to apply the blue MSC ecolabel to a tuna product. The brand has clearly demonstrated how sustainability can be integrated into everyday, mainstream menu items.

McDonald's remains one of the most significant users of MSC certified seafood at scale. Its Filet-o-Fish® and Fish Fingers in children's Happy Meals use Alaska pollock sourced exclusively from certified sustainable fisheries. As long-standing menu items, McDonald's is helping MSC labelled seafood to reach millions of consumers annually, building brand value and helping to raise the profile of certified sustainable seafood across the UK and Ireland. In July 2025, McDonald's expanded its menu offering with the launch of an MSC labelled Double Filet-o-Fish®.

Other foodservice businesses, including IKEA, Whitbread, Lussmanns, Rockfish, as well as a group of independent fish and chip shops (see *Sector in Focus – Fish and Chips*) also continue to use the blue MSC ecolabel to communicate about their commitment to sustainable sourcing. They remain leaders across the industry, offering an important example of the role foodservice can play in supporting the sustainable seafood movement.

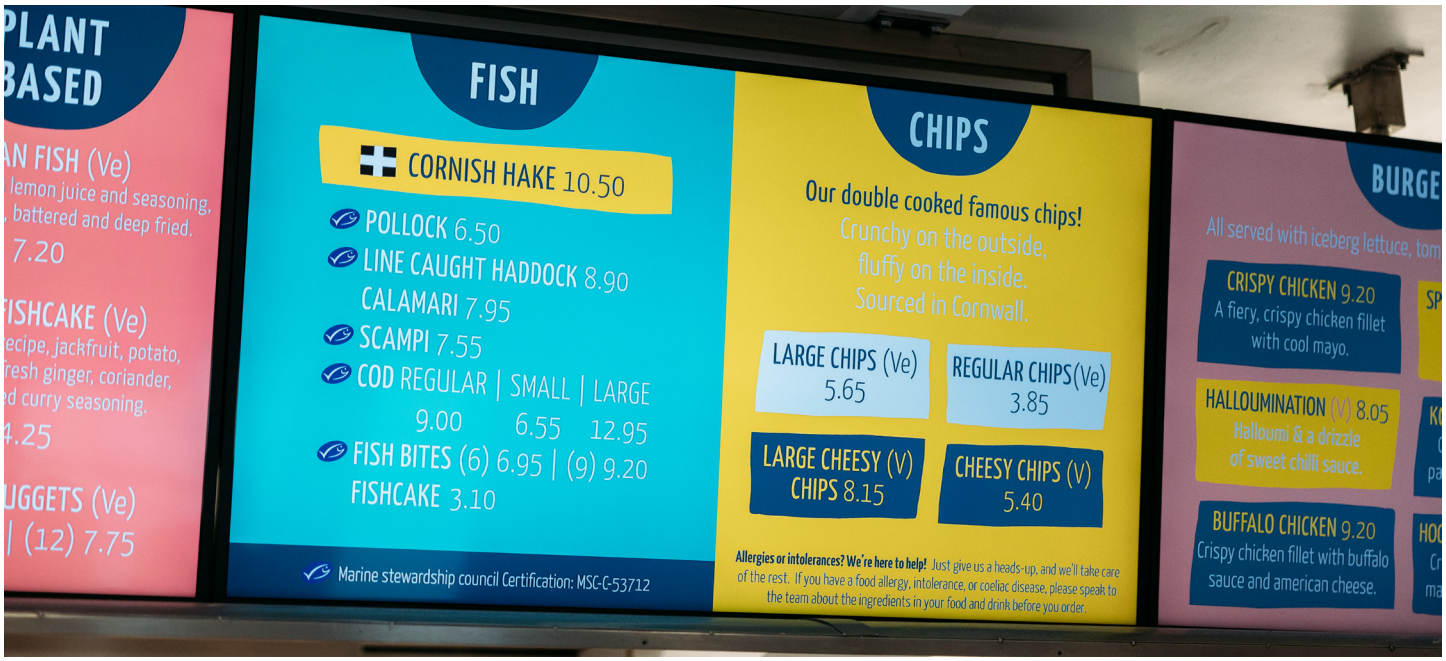




Graph 11. Volume and Value of MSC Labelled Product Sold in UK & Ireland Foodservice

The steady, yet uneven growth in sales of MSC certified fish and seafood in the foodservice industry can be seen in Graph 11. After a significant drop in both volume and consumer spend in 2020/21 as a result of the Covid-19 pandemic, the seafood category has recovered, with consumer spend peaking in 2023/24 and remaining well above pre-pandemic levels in 2024/25.

Despite some progress, there remains a notable gap in parts of the out of home market. Many quick service restaurants (QSR) and pub chains continue to sell seafood without using the blue MSC ecolabel, limiting transparency for their customers, missing an opportunity to build trust and falling short in supporting fisheries that committed to independent verification of the sustainability of their activity. As leading brands have demonstrated, the MSC ecolabel provides a clear, credible way to communicate sustainable sourcing and meet the expectations of diners around the country.



Sector in Focus: Fish and Chips

Ahead of the 2025 Sustainable Seafood September campaign, MSC commissioned research into the British public's favourite seafood dishes. The results were resounding – 63% of respondents said that fish and chips was their go-to seafood dish, with the next most voted for option (fish cakes) coming a distant second with 37% (see *Focus on Dishes Worth Protecting*). Although fish and chips remains Britain's favourite fish dish, the sector has struggled in the recent economic climate, with rising costs and changing consumer behaviour.

In August 2025, the National Federation of Fish Friers (NFFF) launched an MSC Group Certificate to offer fish and chip shops a logistically manageable and cost-effective route towards MSC certification. This achievement will help to embed sustainability into the fish and chip sector, reassure customers of the sustainability of fish and chips and safeguard Britain's favourite seafood dish against the challenges of overfishing.

In celebration of some of the sustainability champions within the fish and chip sector, three Awards were given to fish and chip shops at the 2025 MSC and ASC Awards ceremony in Edinburgh. York-based chippy The Scrap Box was awarded **MSC Newcomer of the Year**, whilst Belfast-based Fish City collected two awards, **MSC UK Marketing Champion of the Year** and **MSC UK Foodservice Champion of the Year.** These achievements demonstrate that, even amidst economic difficulties, many within the fish and chip sector remain firmly committed to sustainable seafood.

> ***Fish and chips is iconic. It's the best comfort food there is. We got MSC certification in 2017 because it's the right thing to do, it's what people want and we need to look after fish for the future. I'd love every fish and chip shop in the country to be certified.***
>
> *David Miller – Owner, Miller's Fish and Chips, Haxby.*

[12] Fish and chips are still Britain's number one fish dish – despite Gen Z and Millennial's love for sushi and fish tacos | Marine Stewardship Council MSC, September 10, 2025.



LOOKING FORWARD: 2026 OUTLOOK

The remarkable progress made in the past year looks set to continue in the year ahead, with several brands and retailers in the UK and Ireland already announcing their intentions to expand their MSC certified product ranges. Much of the past year's growth and the future growth in MSC labelled product sales can be attributed to greater availability of certified tuna. This progress, as well as the drivers behind it, will be featured in the third edition of the MSC UK Tuna Shopper Report set to be released in 2026. The certification of the Iberian sardine fishery has also created new opportunities for brands and retailers to expand their MSC certified canned fish ranges. With some already committing to this, MSC label coverage in the canned aisle is set to increase in 2026. Thanks to this growing availability of certified tuna and small pelagic species, forecasts by the MSC based on current sales figures for this financial year (2025/26) suggest that consumers could spend over £1.9 billion on 220,000 tonnes of certified product in 2026, a 12% increase in value and 16% increase in volume compared to the past year.

Despite this, there will be some challenging sourcing decisions that will need to be taken in 2026 for businesses across seafood supply chains in the UK and Ireland. Many major retailers, brands and suppliers in the UK have advocated for long-term, science-based management of Northeast Atlantic pelagic fisheries for many years via the North Atlantic Pelagic Advocacy Group (NAPA). With the mackerel and Atlanto-Scandian herring fisheries' FIPs set to end in April 2026 and a continued lack of political agreement on setting quotas in line with scientific advice, these businesses will be determining if continuing to source from these fisheries fits within their responsible sourcing policies. Significant reductions in quotas for some key whitefish fisheries that supply the UK and Irish markets will also mean that availability of some popular MSC certified species, like Atlantic cod, could be more limited. This could pose a challenge for businesses that have longstanding commitments to selling MSC labelled fish, but could also present an opportunity to explore other certified sustainable alternatives.

In the UK, there is also a clear desire to see more fisheries become MSC certified, which would allow retailers, brands and restaurants to sell a greater variety of locally-sourced, sustainably caught fish and seafood. The establishment of the South West Seafood Sustainability Hub and the entrance of the *Nephrops* fishery into the MSC Improvement Program provide a foundation and path forward to enable that to happen. Continued support of these important initiatives from the market will be key to ensuring they are successful in meeting that objective.

Helping more fisheries in the UK to become MSC certified and increasing the availability of sustainably sourced fish and seafood also aligns well with the government's new food strategy, launched in July 2025 with the aim of encouraging healthier diets, tackling food insecurity, and addressing the challenges of climate change and biodiversity loss. Ensuring fisheries are well-managed and operating sustainably is fundamental to building resilient supply chains, supporting food security and protecting our national resources. Seafood also has a key role to play in developing healthier diets, yet only one in five of the UK population are eating the two portions of fish a week recommended by the National Health Service (NHS).[13] Promoting the consumption of certified sustainable seafood in line with government recommendations was a central theme in MSC's Super Seafood: Sustaining People and Planet report published in November 2024. This will continue to be a feature within our communication in the year ahead and we look forward to working with all our partners to support the government in meeting the objectives of its new food strategy.

[13] Fish and shellfish - NHS



Outside the UK, the political and regulatory landscape is also continuing to evolve. The MSC is well positioned to support businesses engaged in the programme to navigate a number of these changes. This is particularly true of the new environmental legislation on green claims in the European Union which is designed to stop greenwashing and empower consumers to make more informed choices. The MSC engaged with the European Commission, ISEAL, and legal experts to confirm compliance of our ecolabel and claims with the directive, and ensure businesses using the programme are able to make credible claims supported by third-party verification. With similar types of legislation being implemented in other parts of the world, independent certification programmes have an increasingly important role to play in supporting all members of the seafood supply chains to demonstrate their commitment to operating sustainably.

Looking towards the year ahead, despite some significant challenges on the horizon, there are clear signs that once again exceptional progress will be made, with a growing group businesses and organisations working together to drive the sustainable seafood movement forward. 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 2026.





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All data in this report is correct as of 1 December 2025, unless otherwise stated. The reporting year is 1 April 2024 to 31 March 2025.

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