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Whitefish Market Analysis 2025: United Kingdom

Market Analysis: UK whitefish

WHITEFISH HAS BEEN CRUCIAL to the growth of the MSC programme since its inception more than 25 years ago. In the 2024/25 financial year, UK consumers purchased over 90,000 metric tonnes of MSC labelled whitefish, accounting for approximately 55% of total MSC labelled sales. Throughout the past decade, cod, haddock, and walleye pollock have consistently been the top three highest selling species with the blue MSC ecolabel in the UK. During the pandemic in 2020/21, MSC sales of these species (and whitefish generally) increased sharply as consumers opted for more frozen products, but volumes have since returned to pre-Covid levels.

The UK's retail sector has held firm in its commitment to offering certified sustainable whitefish for many years now, with nine of the ten leading UK supermarkets offering MSC certified own-brand whitefish products. Household brands have also been crucial in promoting MSC certified whitefish in the UK, with Birds Eye selling large amounts of MSC-labelled frozen whitefish products in formats such as their famous fish fingers. The majority (55% by volume) of MSC labelled whitefish sold in the UK is frozen, in both plain formats such as fillets and prepared formats such as fishcakes. MSC labelled whitefish is also available in UK foodservice outlets, such as in the McDonald's Filet-o-Fish and in numerous fish and chip shops. Many of the MSC certified fisheries supplying the UK market have been longstanding sustainability champions – New Zealand hoki was the world's first whitefish fishery to achieve MSC certification in 2001, whilst Alaska pollock, the world's largest whitefish fishery, became certified in 2005. These two certifications opened up opportunities in the UK for

businesses to start selling whitefish with the blue MSC ecolabel. Since then, many other fisheries all over the world have followed suit to meet demand for certified sustainable whitefish.

While certified cod, haddock, and walleye pollock remain particularly important to the UK market, alternative whitefish species, such as hoki and hake, have become available as MSC certified options. The number of MSC labelled hake products sold in the UK grew from 7 to 27 between 2015 and 2025. This includes Cape hake from South Africa and Namibia, European hake from across the UK and Europe, and North Pacific hake from the US and Canada. Retailers have been crucial in increasing the availability of MSC labelled hake, with Waitrose leading the way by offering seven own-brand MSC labelled hake products across the past year. Brands have also been important in promoting locally-sourced MSC certified hake, with Hook, Line & Sinker selling chilled hake from the Cornish hake gill net fishery.

Going forward, whitefish will continue to be an essential component of certified sustainable fish offerings across the UK. With economic conditions remaining challenging, the often affordable cost of MSC certified whitefish, particularly in a frozen format, and the breadth of options, in terms of species and sources, provides an invaluable demonstration that sustainability does not have to cost the earth or the ocean. The network of retailers, brands, suppliers, and fisheries that have enabled so much MSC certified whitefish to reach consumers are therefore essential to driving the MSC's broader theory of change, in the UK and globally. ●



Market Data: UK whitefish

Championing Sustainable Whitefish: Birds Eye

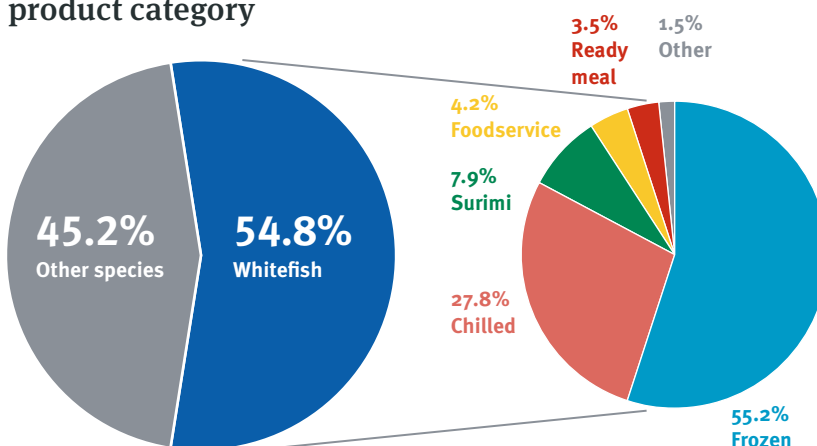


Birds Eye have consistently sold more MSC-labelled whitefish than any other brand or retailer own-brand in the UK. They achieved 100% MSC or ASC certification across their full UK product range, reflecting their drive to lead for the highest standards of responsibly sourced fish and seafood. In 2023/2024, Birds Eye introduced a range of fish finger products using silver smelt, demonstrating continued innovation within their certified sustainable offering.

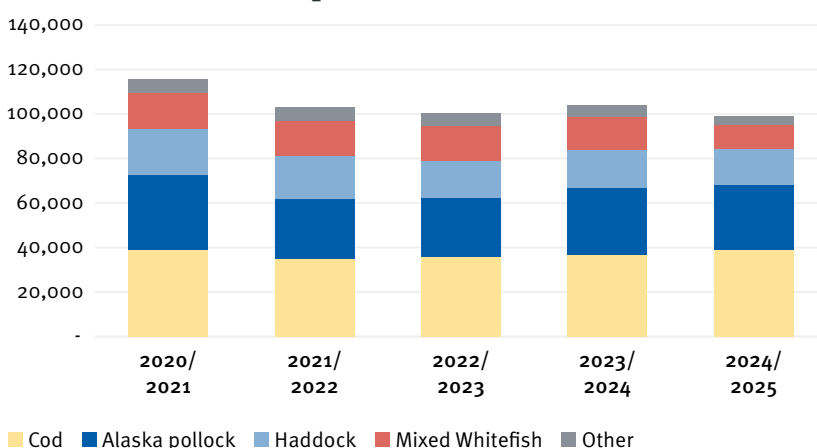
“At Birds Eye, we’re proud that 100% of our wild-caught fish is MSC certified, with our UK range currently including cod, haddock, pollock and silver smelt. We’re passionate about championing fish as a healthy, sustainable choice - making it easy and delicious for millions of families across the UK to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

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

Volume of MSC labelled whitefish sold in the UK by product category



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



78%

of global whitefish catch is MSC certified

6 million+

metric tonnes of certified whitefish is in the MSC program



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Find out more: <https://www.msc.org/species/whitefish-yearbook>

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All data in this report is correct as of 30 June 2025 unless otherwise stated. Forecast data included in 2024/2025.
Registered Charity number: 1066806. Registered Company number: 3322023.
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