



MSC UK and Ireland Market Report 2021

2nd edition

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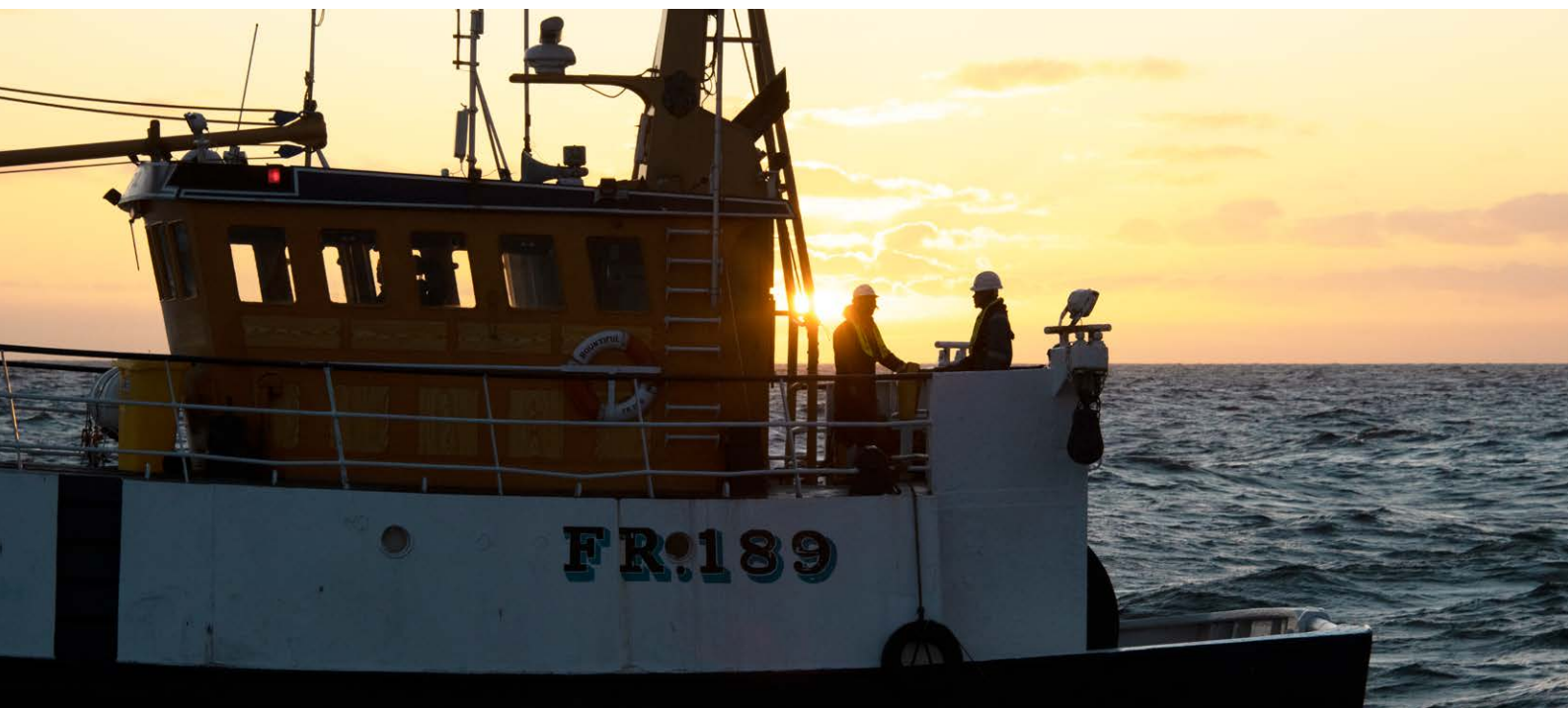
Executive Summary

This second edition of the MSC UK and Ireland Market Report showcases the continued leadership of these markets in sourcing and selling sustainable seafood. The report highlights where there has been growth in certified product sales and availability, and profiles new and emerging sectors in the sustainable seafood space. Data analysed and presented in this report is provided to the MSC by businesses using the ecolabel on products and menus.

Key findings:

- Shoppers in the UK and Ireland spent £1.26 billion on certified sustainable MSC fish and seafood in 2021
- The impact of the Covid-19 pandemic varied considerably by sector and product format. The volume of MSC labelled frozen product sales grew by 24% over the past year, while sales of chilled, food-to-go, fish counter and foodservice products all decreased
- While the number of labelled products sold in the UK and Ireland decreased from 1642 in 2019/20 to 1560 last year, driven largely by the suspension of all North East Atlantic mackerel fisheries, the variety of sustainably sourced species available to consumers increased - up to 45 compared to 33 six years ago
- Labelling of MSC certified fish and seafood in pet food has grown by 53% in the UK and Ireland during the last five years, while consumer spend on certified fish oil and supplements surpassed £7 million for the first time
- In 2020/21, Irish consumers spent an estimated €58 million on MSC labelled products. The number of certified species sold increased from 14 in 2016/17 to 24 last year, while the number of products sold with the blue MSC ecolabel jumped more than 400% in the same period
- Growth in the global supply of MSC certified tuna offers UK brands and retailers the perfect opportunity to meet the expectations of their customers. With MSC certified tuna sold in the UK at 7.5% of the total volume consumed annually, offering more sustainably sourced tuna products will help businesses match the availability of certified sustainable wild options seen across the other big five seafood species

Despite the unprecedented challenges of the past two years, the UK and Irish markets remain deeply committed to the MSC programme. This report is designed to profile the impact of these commitments made across the supply chain and highlight notable achievements across the year. It is also designed to emphasize opportunities for future labelling options in response to growing consumer demand for sustainably sourced fish and seafood, which is highlighted in our first ever **MSC UK Tuna Shopper Report**.



Introduction

The past year has been one like no other. The seafood sector has been faced with the ongoing Covid-19 pandemic and the UK's formal exit from the European Union (hereafter referred to as Brexit), alongside the subsequent market and logistical challenges that have emerged. There has also been ever-increased scrutiny and interest from the media and consumers in the fishing and seafood sector. In spite of all this, the industry, both on land and at sea, has continued to demonstrate great resilience.

Businesses across the supply chain have remained firmly committed to championing sustainability as seafood consumers become more conscious of the threats facing our oceans. This has had positive implications for the UK MSC programme at large, and our engagement with consumers directly. Research conducted by YouGov following MSC UK's recent Sustainable Seafood Week in September 2021 indicated increasing awareness of the blue MSC ecolabel, and well over half of UK seafood consumers surveyed would be likely to participate in future Sustainable Seafood Weeks.

In this report, we will highlight the many MSC certified businesses that continue to expand their selection of certified sustainable products to meet the needs of their customers and outline how the difficulties of the past year have had an impact across the seafood business spectrum. We will offer a deeper dive into some specific sectors that are either growing or have opportunities to grow. We will also identify those that are declining.

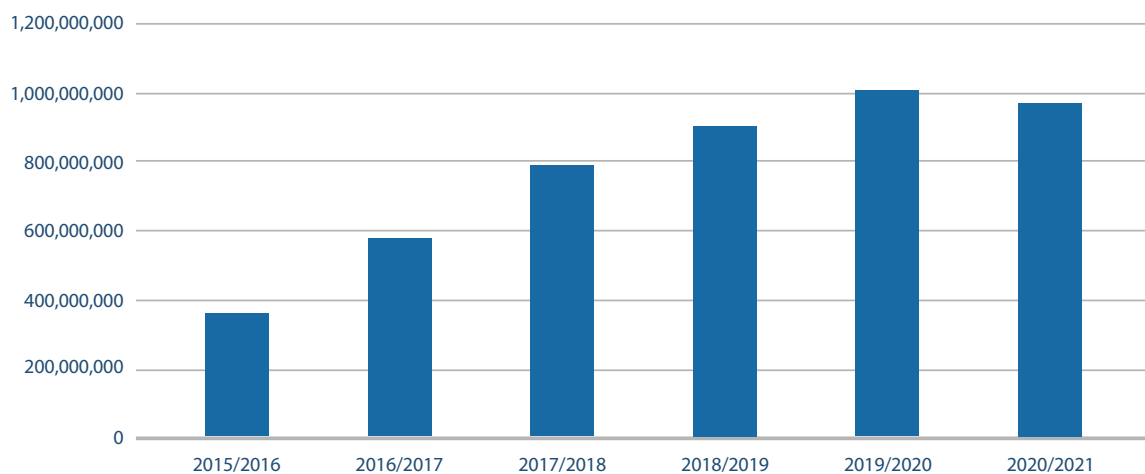
We hope that you enjoy this second edition. If you have any questions or queries for your key contact at MSC, or if you would like to make a general enquiry, you can find our contact details listed at the end of the report.



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

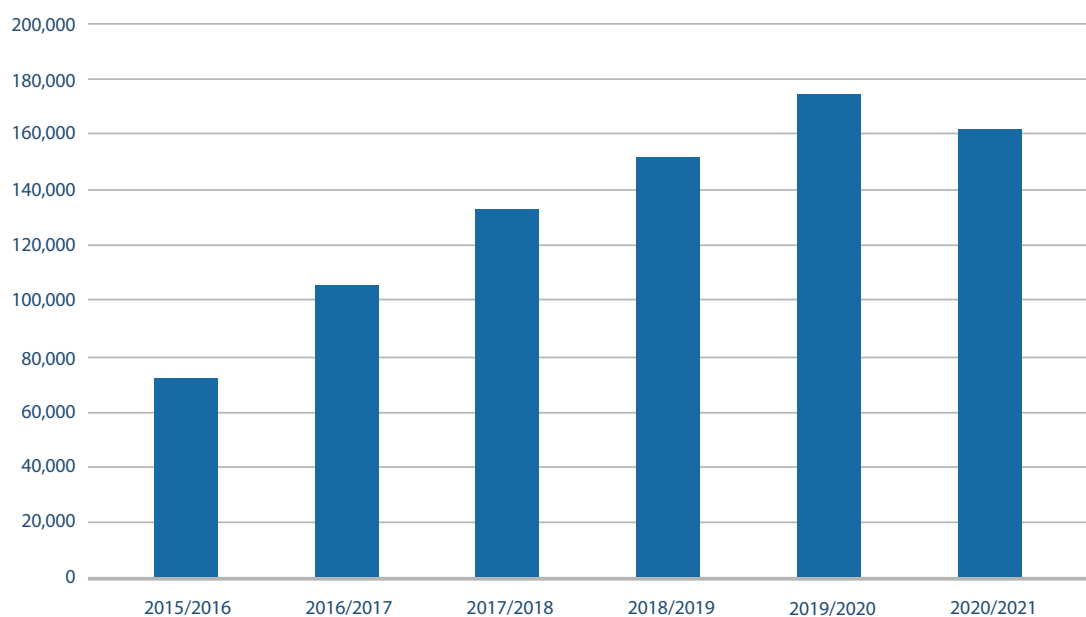
Market Overview

Consumption of MSC certified fish and seafood remains a priority for UK and Irish shoppers, with an ever-expanding array of products and species on offer across many different sectors. The strength of the UK and Irish markets has been evident, with consumer spend on MSC certified seafood products reaching £1.3 billion in 2020, a 16% increase on the previous year. In 2021, despite the ongoing challenges of the pandemic and continued suspension of the North East Atlantic mackerel fisheries (which accounted for 9% of all MSC labelled product sales (£) in 2019/20), sales of MSC certified seafood decreased by just 3.4%. Stockpiling at the outset of the pandemic and the prolonged closure of the foodservice sector meant retail seafood sales performed exceptionally well in 2020/21. In March 2021, the volume of seafood sold in retail remained 13.5% higher than what it had been prior to the pandemic.¹ The increase in sales, particularly of frozen and ambient products (which accounted for roughly 54% of the volume and value of all certified seafood sales in the UK), helped to offset the loss of MSC labelled products in other categories. With £1.26 billion spent by shoppers in the UK and Ireland last year, it is clear that strong support remains for sustainably sourced fish and seafood in both markets.



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

The dip in sales (£) of MSC certified fish and seafood in 2021 was mirrored in the volume (tonnes) of labelled product and menu items in the market. Just over 161,000 tonnes of sustainable, wild-caught fish and seafood was sold in the UK and Ireland – 13,623 tonnes lower than the previous year (see Graph 2).



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

¹Seafood in Retail during Covid-19, July 1, 2021.

*Data collected on the cost-value of consumer-facing MSC registered products is provided by businesses using the MSC ecolabel. A 30% mark-up is applied to these cost-value figures to estimate consumer spend

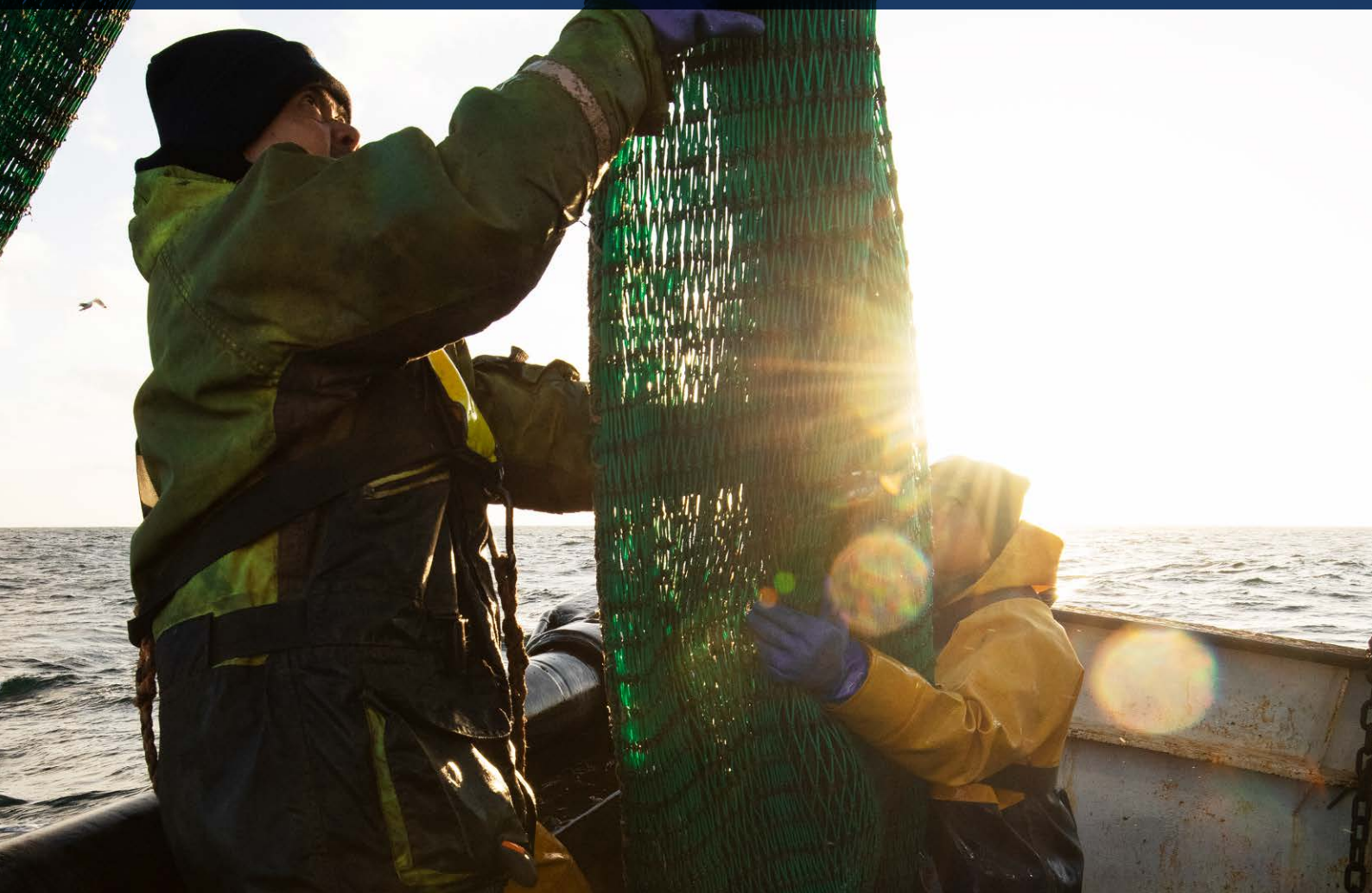
The apparent drops in both sales (£) and volume (tonnes) shown in Graphs 1 and 2 were driven by a reduction in the number of MSC labelled products, mainly mackerel, on offer in the UK and Ireland. In 2019/20, shoppers could choose from 1,642 certified sustainable options. Last year, there were 1,560 available to UK and Irish shoppers. Loss of the MSC ecolabel on North East Atlantic mackerel products meant a significant 85 fewer Stock Keeping Units (SKUs) bearing the blue ecolabel were available in 2020/21, compared to the previous year.

The suspension of all mackerel fisheries, Brexit and the Covid-19 pandemic also impacted the middle of the supply chain. The number of businesses holding MSC Chain of Custody certification in the UK and Ireland dropped from 302 in April 2020 to 285 in September 2021. In some cases, this was the result of businesses going into administration or business consolidation, while in other cases, businesses previously certified solely to trade MSC mackerel have decided they no longer need Chain of Custody as a result of the fishery suspensions.

There have, however, been a number of positive developments with regards to new Chain of Custody holders. Several brown shrimp suppliers from The Wash (the UK's most recently MSC certified fishery) gained Chain of Custody certification this year, enabling it to continue to be traded as an MSC product. The Irish market's support for the MSC programme has also continued to grow, with an increasing number of Chain of Custody certified businesses (see page 16).

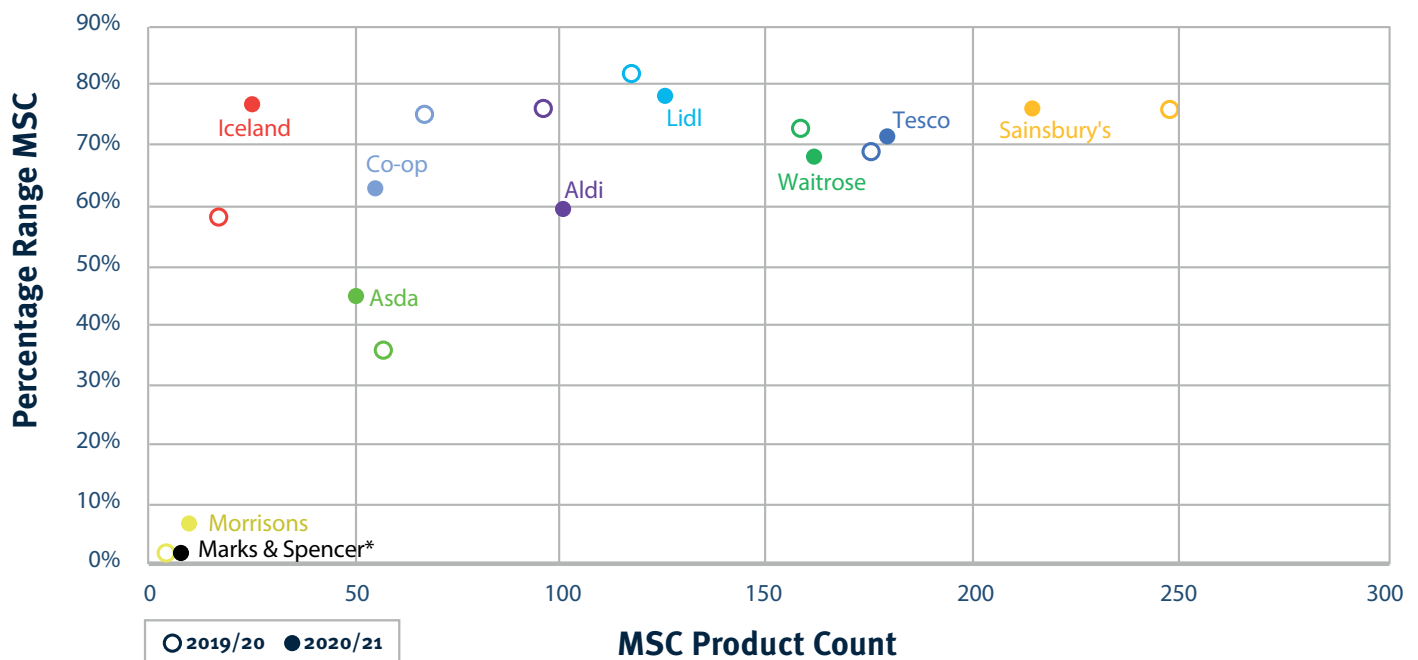
Brexit and Covid-19 have also had varying impacts on MSC certified fisheries in the UK and Ireland. The Poole Harbour clam and cockle fishery, which traditionally supplied the foodservice industry and exported the majority of what it landed, was given a lifeline when Waitrose introduced both species onto their fish counters in the middle of the pandemic. Other MSC certified shellfish fisheries in the UK found access to their markets in Europe restricted following Brexit. Following ten years of certification, the North Menai Strait mussel fishery withdrew from the MSC programme in November 2021, after a year of struggling to export its products to Europe.

Despite these challenges, retailers, brands and foodservice businesses have continued to demonstrate strong support for MSC certified fisheries, both in the UK and Ireland and abroad. Over the past six years, the number of certified species on sale in the UK and Ireland increased from 33 to 45, with five species introduced for the first time this year – Manila clam, longfin squid, northern shortfin squid, gloomy octopus, and lemon sole. This progress is a great testament to businesses across the UK and Ireland recognising, rewarding and investing in sustainable fishing practices.



UK Supermarket

In 2020/21, retail sales and the availability of MSC labelled own-brand products were profoundly impacted by the Covid-19 pandemic and the suspension of MSC certificates for all North East Atlantic mackerel fisheries in March 2019. The number of MSC labelled own-brand products on sale at the ten leading retailers (see Graph 3) dropped from 962 in 2019/20 to 925 in 2020/21. Despite this, the volume of labelled product sold increased by 1.4% over the same period, as lockdowns restricted access to foodservice and consumers stocked up on groceries. With many restaurants closed for significant periods over the last financial year, nearly 113,000 tonnes of own-brand labelled product sold across the UK's ten leading retailers accounted for 70% of certified wild seafood sales across all sectors, compared to 63% of the total market in the previous year. The remainder was largely made up of sales of other branded products on sale in retail, with foodservice accounting for 1.4% of MSC labelled fish and seafood sales, by volume, last year.



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

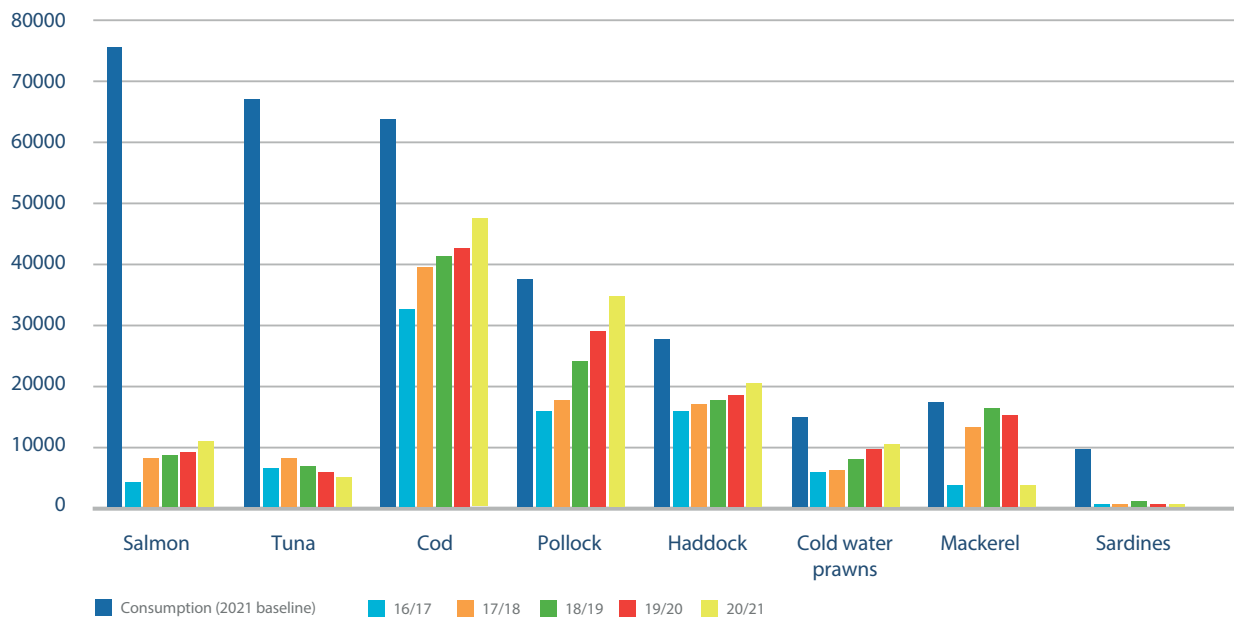
Graph 3. UK MSC Retail Landscape

Despite several retailers having partially or fully exhausted their stock of labelled mackerel products before 2020/21, Waitrose, Lidl, Aldi, Iceland, Morrisons and Tesco all increased their MSC product offering last year. Sainsbury's continued to offer the most MSC labelled products, in spite of the permanent closure of its fish counters. Tesco, winner of MSC UK Supermarket of the Year 2021, sold the largest volume (tonnes) of labelled product.

For the second year in a row, Iceland made the biggest improvement to the percentage of its wild seafood range bearing the blue MSC ecolabel. An 18-point increase brought the company on par with Sainsbury's, which also had 76% of its wild range of products MSC labelled. Both Co-op and Waitrose remained above 60%, with 63% and 68% of their range certified respectively. Lidl, winner of MSC UK Mid-size Store Retailer of the Year 2021, once again had the highest percentage of its wild seafood range MSC certified, at 79%.

Label Coverage by Species²

The presence of the blue MSC ecolabel on products available in UK retail varies depending on the species and format. Sales of certified white fish products remain high, with strong growth for cod, pollock and haddock. Using Seafish data³ on seafood sales in retail (2021) as a baseline and comparing it to MSC volumes sold, an estimated 92.8% of pollock sold in UK supermarkets carries the blue MSC ecolabel (see Graph 4). Labelled cold water prawn sales have also continued to rise with the species available in both chilled and frozen formats, and in popular food-to-go or ready meals like prawn toast, prawn sandwiches and prawn cocktail.



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

Although the majority of salmon sold in retail comes from farmed sources and is thus not eligible to carry the blue ecolabel, the volume of wild certified salmon sold increased by nearly 18% over the previous year in 2020/21, with all ten major UK retailers offering at least one sustainably sourced product. Certified tuna sales, on the other hand, continued to decline further in the UK market, despite expanding availability from a growing number of certified fisheries and significant increases in labelled product on offer elsewhere in Europe and North America (see the **MSC UK Tuna Shopper Report**). The full impact of the suspension of all certified mackerel fisheries in March 2019 can clearly be seen in Graph 4. With most retailers and brands having now exhausted their certified supply, the volume of labelled mackerel sold in 2020/21 was about one fifth of that in 2019/20.

Species in Focus: Haddock



The volume of MSC labelled haddock sold in UK retail has nearly doubled since 2015/16. A 10.5% increase in volume sold over the last year took the species past the 20,000 tonne mark (see Graph 4) for the first time. Globally, there are 20 haddock fisheries, including two covered by Scottish Fisheries Sustainable Accreditation Group (SFSAG) certificates, that have met the MSC Standard. Combined, these represent 91.56% of the global haddock catch being MSC certified.⁴ The UK has, and continues to be, an important and supportive market for these fisheries, accounting for nearly 77% of all MSC labelled haddock product sales (by volume) globally.

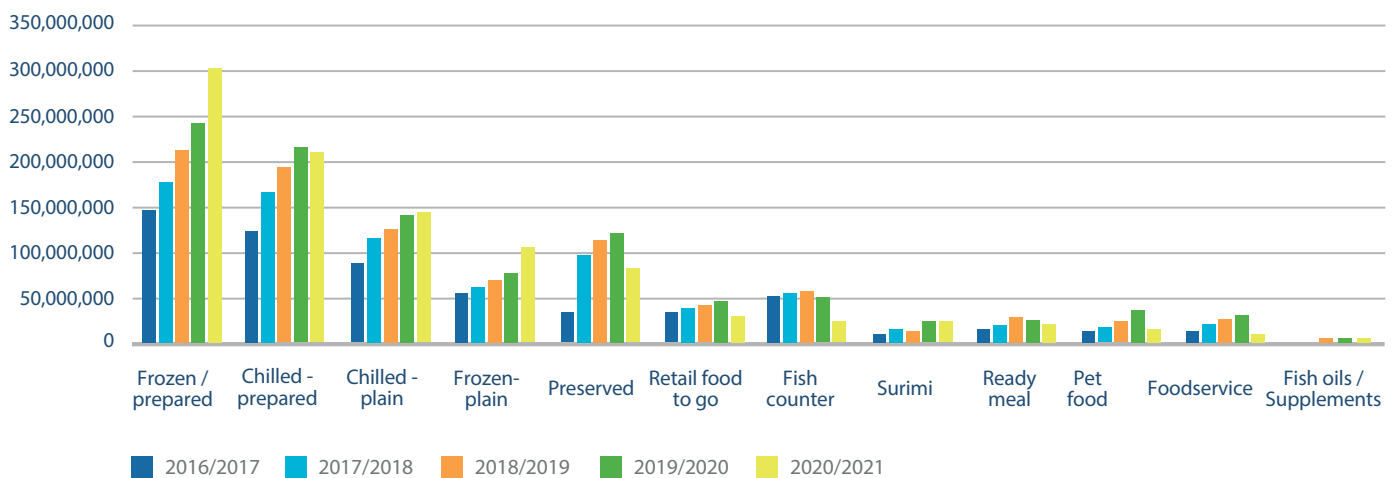
²Seafood consumption in retail data was provided by non-departmental public body Seafish specifically for the UK market. Label coverage by species analysis was therefore estimated specifically for the UK market, Ireland was not included in this case.

³Market Insight Factsheet: Seafood in multiple retail (2021 update). [Seafood in multiple retail \(2021 update\)](#) — Seafish

⁴Based on UN FAO data (2019)

Label Coverage by Product Category

The Covid-19 pandemic had a definitive impact on consumer purchasing behaviour. While some sectors and product categories had tremendous spikes in sales, others had a far more challenging period. After years of consistent growth, sales of MSC labelled chilled products experienced a slight decline compared to 2019/20, as shoppers opted for ambient and frozen options while weathering various national lockdowns. With many businesses and offices closed for much of the year, sales of labelled food-to-go options like sandwiches and salads dropped by 39% (see Graph 5). Sales of MSC labelled fish and seafood at restaurants and on fish counters were also hit hard by the pandemic. Several retailers temporarily or permanently closed their fish counters, while contract caterers, restaurants and even some take-aways were forced to shut their doors for certain periods in response to government restrictions.



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

Fish Counters

While the last year has created new opportunities for fish counters, challenges remain. The Covid-19 pandemic continues to affect fish counter operations across the UK and Ireland and will undoubtedly have a lasting impact well into the future. Changing customer habits and the ongoing pandemic resulted in the temporary closure of Tesco fish counters in 2020, most of which have now reopened, and the permanent closure of all Sainsbury's fish counters. New product innovation, shifts in demand and consumer preferences, and other impacts of the pandemic, can clearly be seen in the dip in sales of MSC products on fish counters (see Graph 5).

Despite questions around their future, and the ability to evolve and innovate in the face of new ways of shopping, fish counters have and will remain an important part of the UK shopper experience. Across all retailers with fish counters open during the 2020/21 financial year, UK consumers were given the choice of 26 different species, including several newly certified sustainable options. Waitrose introduced lemon sole and saithe for the first time, Selfridges added Atlantic scallops and Tesco became the first UK retailer to offer MSC certified yellowfin tuna on its fish counters. The UK shopper, where possible, is still keen to utilise the fish counter experience and try new species.

Product in Focus: Waitrose Lemon Sole + Saithe

Waitrose, four time winner of the **MSC UK Fish Counter of the Year** continues to develop its sustainable fish offer for customers. Fifteen different species were available on the counters according to the 2021 MSC UK Award judging process. After becoming the first major UK supermarket to sell MSC certified British clams and cockles from Poole harbour last year, Waitrose also introduced MSC labelled lemon sole from Iceland and Scottish saithe, both UK firsts for fish counters.

Product in Focus: Tesco Yellowfin Tuna

Tesco became the first retailer in the UK to offer MSC certified yellowfin on a fish counter, following the big announcement earlier in the year that the business would aim to achieve 100% MSC ecolabel coverage across its tuna range by 2025. Growing awareness of the pressure overfishing puts on tuna populations and ocean life in general has meant consumers increasingly want to be able to buy and eat their tuna with a clear conscience, with Tesco offering counter customers just that.

Chilled & Frozen

Sales in frozen fish and seafood show that it was one of the fastest growing categories in retail during Covid-19, with signs that the trend toward frozen products will continue to grow beyond the pandemic. MSC labelled frozen fish and seafood sales saw the strongest growth across all product categories, with a 24% increase by volume (tonnes) in comparison to the previous year, and sales nearly double what they were in 2016/17. Birds Eye continued to demonstrate its strong standing in the category, selling more MSC labelled frozen fish and seafood than any other brand and winning **MSC UK Frozen Brand of the Year** for the 8th year in a row.

Despite steady growth of MSC chilled fish and seafood over the past few years, as shown in Graph 5, consumer reliance on frozen food and other categories, including canned, was observed during the pandemic. This can mainly be attributed to availability concerns and the stockpiling that took place. A slight decrease of 2% in sales of MSC labelled chilled products was recorded in 2020/21.

In 2020/21, chilled and frozen accounted for 76% of the total volume of MSC certified product sales in the UK and Ireland. The total number of different species sold across chilled and frozen categories was 34, up 3 from the previous year, with squid, yellowfin and albacore tuna appearing as brand new additions to retail fridges and freezers this year. Cod, pollock and haddock remain the most widely labelled MSC species available to UK consumers.

Product in Focus: Waitrose No. 1 Yellowfin Tuna

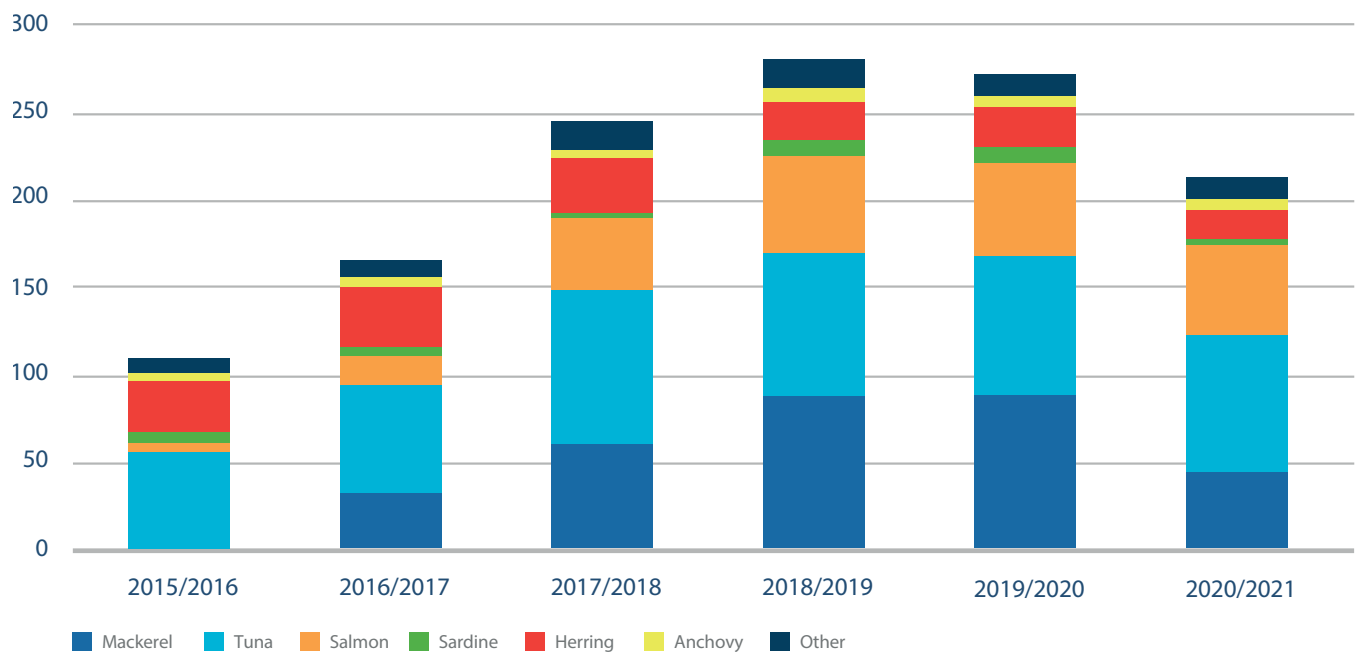
Despite another very challenging year, Waitrose demonstrated continued commitment to sourcing sustainable seafood, claiming a UK category first with their MSC-certified chilled, pre-pack yellowfin tuna products, launched in March 2021. Sourced from a South Korean fishery in the Pacific Ocean, Waitrose has spent more than a decade supporting the supply chain for these products, following engagement with its supplier New England Seafood International, governments and NGOs. Waitrose was recognised for these efforts later in the year, winning MSC UK's first ever **Product of the Year** award in 2021.

Product in Focus: Tesco Frozen Squid Rings

In another supermarket first, Tesco introduced MSC labelled frozen squid rings, currently the only product of its kind in the UK, demonstrating great support for the fishery on the East Coast of the United States. The fishery, which is made up of two MSC certificates – U.S. Northeastern Coast Longfin Inshore Squid and Northern Shortfin Squid Bottom Trawl, and U.S. Northeast Squid Bottom Trawl – catches longfin squid (*Doryteuthis (Amerigo) pealeii*), also known as loligo, and Northern shortfin squid (*Illex illecebrosus*), and is currently the only certified source of squid anywhere in the world.

Preserved and Canned

Sales of MSC labelled preserved/canned products in the UK and Ireland declined by 32% between 2019/20 and 2020/21 following the suspension of all MSC North East Atlantic mackerel fishery certificates in March 2019 and further reduction in the number of certified tuna products on offer. Despite this decline, consumers still had the opportunity to choose from 18 different MSC species in ambient formats.



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

Canned salmon continues to have widespread MSC label coverage, with Tesco, Lidl, Co-op, Sainsbury's, Aldi, Waitrose, Princes and John West all offering an MSC certified product range. Waitrose remains the only major British supermarket to sell 100% of its own-brand tuna cans with the MSC ecolabel, despite continued increases in the volume of certified raw material and strong uptake in the United States and several European markets in the last year (see the **MSC UK Tuna Shopper Report**).

The Pilchard Works is the only canned brand in the UK to offer MSC labelled European pilchard from the Cornish sardine fishery, which remains the only certified source of the species globally. The fishery has received strong support from European markets, with labelled canned Cornish sardines sold in 11 countries on the continent (Austria, Belgium, Czech Republic, Denmark, France, Germany, Netherlands, Portugal, Spain, Sweden and Switzerland in 2020/21) in retailers including Aldi Nord, Coop Switzerland, E.Leclerc, Jumbo, Lidl, Migros, and Rewe.

Several other species are also available in a preserved product format. The Ocean Crown brand offers MSC labelled jarred cockles and mussels, while the King Oscar brand introduced three certified sustainable European sprat products into the UK for the first time last year.

Species in Focus: Anchovy

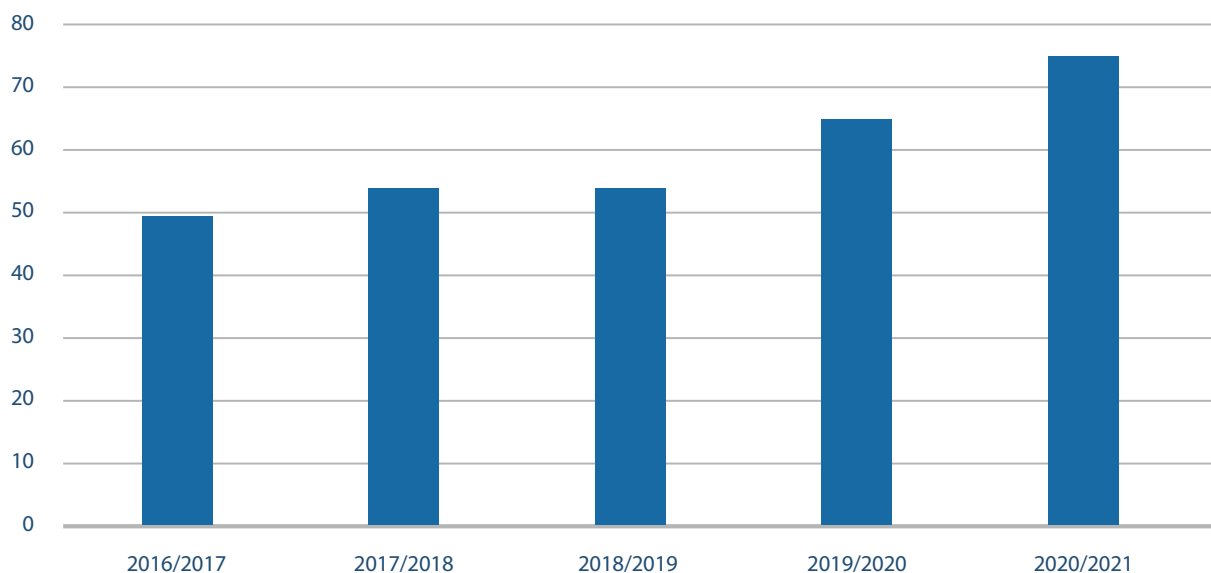


Anchovy sales in UK retail experienced a remarkable 54.8% increase in volume between June 2020 and June 2021, according to data from Seafish⁵. Tesco joined Lidl, Sainsbury's, and Waitrose in offering their customers sustainably sourced anchovies when they introduced two new products – one tinned and one in jar – from the MSC certified Cantabrian fishery last year.

⁵Market Insight Factsheet: Seafood in multiple retail (2021 update). [Seafood in multiple retail \(2021 update\)](#) – Seafish

Pet Food

As animal lovers are increasingly choosing seafood options that are good for their pets and the ocean too, the availability of pet food products containing MSC certified seafood has increased. A temporary change in packaging for Sheba and Whiskas brand pet food contributed to a dip in the volume of MSC labelled pet food in general in 2020/21 (see Graph 5). However, the brands are continuing their commitment to sustainable sourcing, and with the label on pack once more, pet food volumes should grow over the coming year. Despite that drop in volume, the number of pet food products containing MSC certified sustainable seafood has grown by 53% in the UK and Ireland during the last five years, with the number of labelled products increasing from 49 to 75 products (see Graph 7). In 2020/21, 18 different brands sold MSC labelled pet food products in the UK and Ireland, containing 10 different species including tuna, salmon, saithe, cold water prawn, golden redfish, sardines, cod, haddock, herring and shrimp. This trend can be seen globally as well, with the number of pet food products containing MSC fish and seafood growing by more than 120% during the last five years and consumers buying 200 million tins of MSC-certified pet food in the last year alone.



Graph 7. MSC Labelled Pet Food Products (SKU) sold in the UK and Ireland

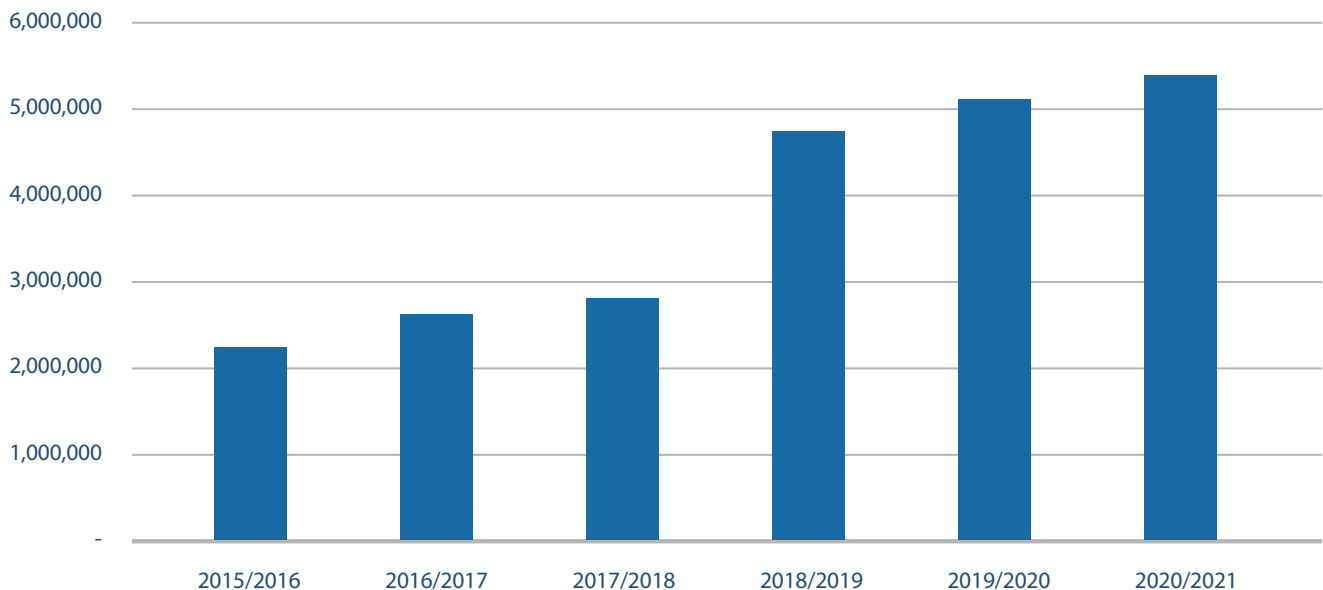
While salmon, tuna, and cod remain popular choices for brands like Lidl, Co-op, Webbox, Sheba, and Whiskas, newly launched pet food ranges include an MSC cold water prawn pet food product by McAdams, Cornish sardines by Aldi, and a golden redfish product by Woofs.

Partner in Focus: Woofs

Woofs, a producer of fish-based treats for dogs, was awarded the inaugural **MSC UK Pet Food Brand of the Year** award at the 2021 MSC UK awards, one of four new categories introduced last year. Using the blue MSC ecolabel on Woofs products not only helps its customers identify sustainable fish and seafood, but also recognises and rewards efforts made by fisheries to ensure our oceans remain healthy. Innovative products including cod cubes, cod crunchers and redfish cookies are all on offer for hungry pooches looking for a nutritious, sustainably sourced treat.

Supplements

Over the past five years, MSC labelled supplement product sales in the UK and Ireland have more than doubled. Last year, with 55 different products on sale, consumer spend in the sector surpassed £7 million for the first time (Graph 8). This growth was driven by nine brands, including longstanding supporters like Wiley's Finest, Healthspan and Naturalife, as well as new entrants to the UK market, like Dr. Mercola, Tesco and Amazon, which all offer MSC certified fish oil products.



Graph 8. MSC Labelled Supplements: Product Cost-Value (£) in the UK/Irish Market⁶

While Atlantic and Pacific cod, pollock and Antarctic krill are the primary sources for most MSC labelled supplements in the UK and Ireland, the range of species used is expanding. American brand Dr. Mercola introduced a herring caviar oil product last year, the first of its kind in the UK. MSC labelled marine collagen also became available to UK consumers for the first time in 2021, with both Dr. Mercola and Norwegian brand Seagarden introducing products into the market.

Partner in Focus: Morrisons

Following in Tesco's footsteps, Morrisons became the second UK retailer to introduce the blue MSC ecolabel on all of its own-brand fish oil products in 2021. The four new products represent a significant addition to Morrisons' MSC offering and demonstrate the retailer's leadership in sustainable supplement sourcing.



⁶Data is collected on the cost-value of consumer-facing MSC and total spend by consumers is calculated by applying a 30% mark-up to that cost-value.

Focus on Online

Online sales of seafood skyrocketed during the Covid-19 pandemic. Research presented by Kantar at the Norwegian Seafood Council's UK Summit in March 2021 shows that 13.1% of seafood sales were made online since the UK went into its first lockdown in March 2020.⁷ In a clear indication of changing consumer purchasing behaviour, Kantar also reported that e-commerce accounted for 60.5% of all growth in seafood sales during lockdown.

Online Share of Total Grocery



See Source in Footnote 7 below

The increased use of online platforms for grocery shopping during lockdowns provided retailers with new channels for communicating their approach to sustainable seafood sourcing and educating their customers about the MSC. During MSC UK's inaugural Sustainable Seafood Week in September 2020, Sainsbury's launched the country's first online 'Sustainable Seafood Shelf,' allowing their customers to locate seafood products bearing an MSC ecolabel. The platform was recognised for its innovation, winning the **Marketing Champion of the Year award** at the 2021 MSC UK Awards. Waitrose followed soon after with their own online MSC shelf covering all chilled seafood products.

In addition to growth in online sales of seafood from traditional retailers like Waitrose, Tesco, Sainsbury's, Morrisons, Asda and Iceland, the presence of MSC labelled products has also increased at Ocado and Amazon. Between its online platform and brick-and-mortar stores in the UK, Amazon now offers MSC labelled own-brand cod, haddock, mussel, cold water prawn, and tuna products, as well as certified supplements and pet food. Certified cod, haddock and Atlantic scallops have all been sold under Ocado's own brand for several years, while cold water prawns were introduced for the first time in 2020/21. The purely online retailer is also an important marketplace for a number of brands offering MSC labelled products that cannot be found in traditional UK retailers, such as The Nice Fisherman canned tuna range and Beco brand pet food.

Recipe boxes have also enjoyed a boom in popularity because of the Covid-19 pandemic. In May 2020, the Financial Times reported that Mindful Chef had seen a 452% rise in new customers since the outbreak of the pandemic.⁸ Gousto, which has offered MSC labelled cod and haddock in its boxes since 2017, also saw tremendous growth during the pandemic, with sales more than doubling.⁹ National lockdowns sparked increased interest in other home delivery services as well. For the fish and seafood industry, this afforded shoppers the opportunity to engage with and support local fishing communities through direct purchasing and delivery schemes.

Partner in Focus: Mindful Chef

The concept for Mindful Chef was conceived on a fishing boat in 2015. Six years later, Mindful Chef became the second recipe box business in the UK, after Gousto, to introduce MSC certified fish options to their customers. Working closely with their supplier, all cod, haddock, hake and coley in Mindful Chef boxes now come bearing a blue MSC ecolabel. This new certified product range was featured prominently on the brands social media as part of MSC's Sustainable Seafood Week.

⁷James McKenna, Kantar. Cited in [World Fishing & Aquaculture](#), March 2021, Vol 70, Issue 2.

⁸Alice Hancock and Camilla Hodgson, Financial Times. [Recipe box sales surge under lockdown](#).

⁹Sarah Butler, The Guardian. [Gousto to take on 1,000 staff as sales more than double in Covid crisis](#).

Focus on Tradition

Pilchards

A decline in the consumption of pilchards in the second half of the last century meant uncertainty for this historic fish. Thankfully, pilchard fishing came back to life in the Southwest of England after they became formally known as Cornish Sardines in the 2000s. Contrary to popular belief, sardines and pilchards are the same species, *Sardinia pilchardus*.

Since the fishery's certification in 2010, MSC Cornish sardines can be found across many product categories, with chilled sales accounting for 48% of the total market in the UK and Ireland in 2020/21, followed by fish counter sales, representing 34%.

Labelling of canned Cornish sardines lags behind other European markets, however (see section on Preserved and Canned). The artisanal brand The Pilchard Works remains the only company to offer MSC labelled canned sardine products from the Cornish sardine fishery, despite strong labelling of Cornish sardines by retailers in mainland Europe. New demand from Europe for this Cornish fishery has been fuelled by the suspension and loss of MSC certification for fisheries in other parts of Europe, demonstrating buying shifts in accordance with availability of sustainable sources.

Kippers

The exact origin of kippers is unknown, although fish have been smoked for centuries. After experiencing a decline in demand from a younger generation of seafood buyers, despite being a traditional British breakfast food, kippers are enjoying a revival, with a new wave of fish lovers enjoying the health benefits and affordable price of MSC certified smoked herring.¹⁰

UK retailers Aldi, Lidl, Tesco, Asda, Co-op, Sainsbury's and Waitrose all offer MSC labelled kippers. The volume of MSC labelled herring sales last year increased by 7% over the previous year to 2,400 tonnes and consumer spend on the species hit a record £12.95m in 2020/21, a nearly 70% increase since 2015/16.

While kippers have been an MSC labelled product in many retailers for several years now, Sainsbury's Taste the Difference Smoked Kippers 280g has been on sale since 2009, the longest standing labelled kipper product in the UK and Ireland. At Waitrose, kippers have also been available on the fish counter since 2017, cured in smoke houses that are over 130 years old in the small fishing village of Craster. The retailer was awarded **MSC UK Fish Counter of the Year** for the fourth time running in 2021 for their ongoing commitment to increasing the variety of species available to Waitrose shoppers.

Potted Shrimp

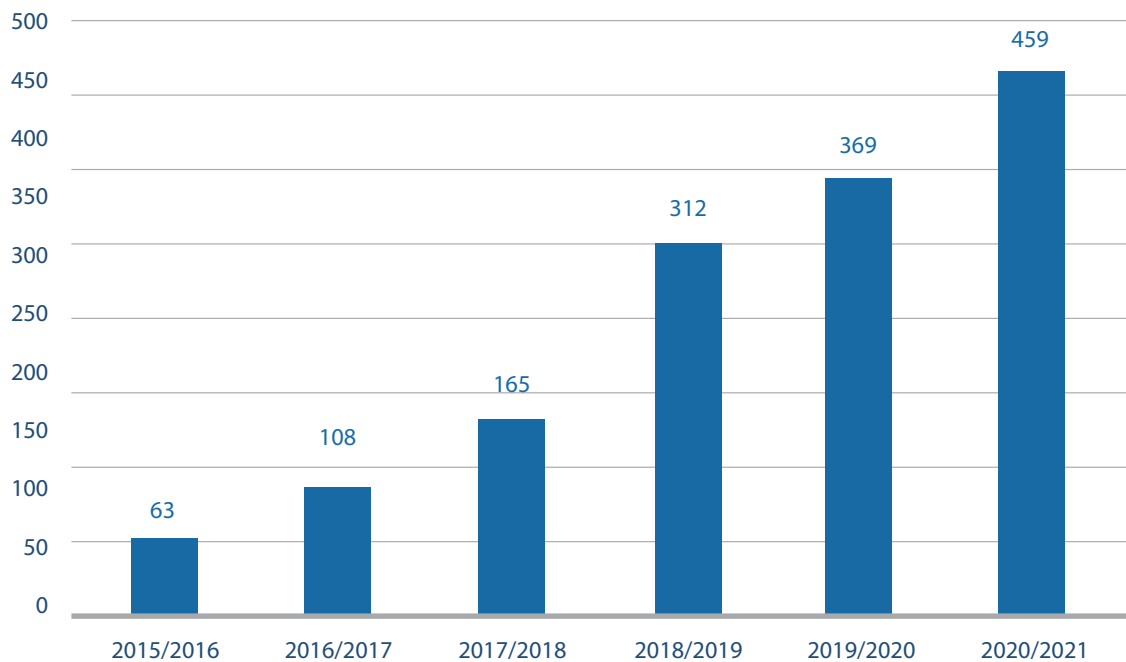
Hand-peeled and delicious spread on hot toast, shoppers in the UK can now get their hands on the world's first ever MSC labelled potted shrimp product. Available at Sainsbury's since September 2021 under 'The Good Tide' brand from Seafood and Eat It, this new product marks continued interest in ensuring our traditional favourite seafood dishes are sustainably caught. Potted shrimp, which is a traditional British dish made with brown shrimp flavoured with spices like nutmeg and cayenne, originated in Lancashire and is said to be one of James Bond's favourite delicacies.



¹⁰Rebecca Smithers, The Guardian. [Kippers, the breakfast dish that fell out of favour, are back on British menus.](#)

Focus on Ireland

The Republic of Ireland has seen a sustainable seafood boom, with consumer spend increasing seven-fold in five years. In 2020/21, Irish consumers spent an estimated €58 million on MSC labelled products.¹¹ The number of certified species sold increased from 14 in 2016/17 to 24 in the last year, while the number of products sold with the MSC blue ecolabel jumped more than 400% in the same period (see Graph 9).



Graph 9. MSC Labeled Products Sold in Ireland (SKUs)

The growth of certified sustainable seafood products available to Irish consumers has been made possible by increasing support for the MSC programme from the Irish supply chain. Between January 2015 and June 2021, the number of businesses eligible to sell certified seafood as a result of being certified to MSC's Chain of Custody Standard has increased from 11 to 31.

There has also been strong support for the MSC programme from the retail sector in Ireland, with Lidl, Tesco, Aldi and Iceland, as well as brands like Bird's Eye and Keohane's, all offering a range of MSC labelled products. Centra and SuperValu both introduced new MSC labelled products this year. As well as fresh fish, canned and frozen seafood, the MSC blue ecolabel can be found in other product categories like health supplements from Naturalife under its Cleanmarine brand and on FishDish pet food.

Irish diners can also find the blue MSC ecolabel on the menu at McDonalds and IKEA, and for fish and chip lovers, the Dublin-based chain Beshoff Bros sells certified cod and haddock.

¹¹Data 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 sizes of the Ireland the UK.



IRISH CONSUMER INSIGHTS¹²

40%

of all consumers
are aware of
the MSC ecolabel



1/3rd

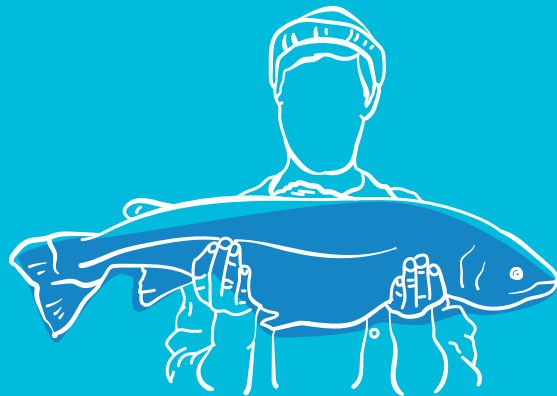
of seafood consumers say
they always or often choose
eco-labelled products when
they purchase or eat
fish/seafood

83%

agree that we need to protect
fish so that future generations
can enjoy seafood

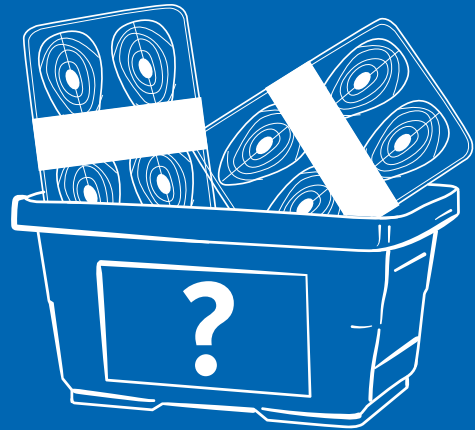
Three quarters

believe that, in order to save the oceans, we have to consume fish
and seafood only from sustainable sources



86%

say they want better information so they can be confident they are not buying unsustainable fish or seafood products



72%

agree supermarkets should take all unsustainable fish and seafood products off their shelves

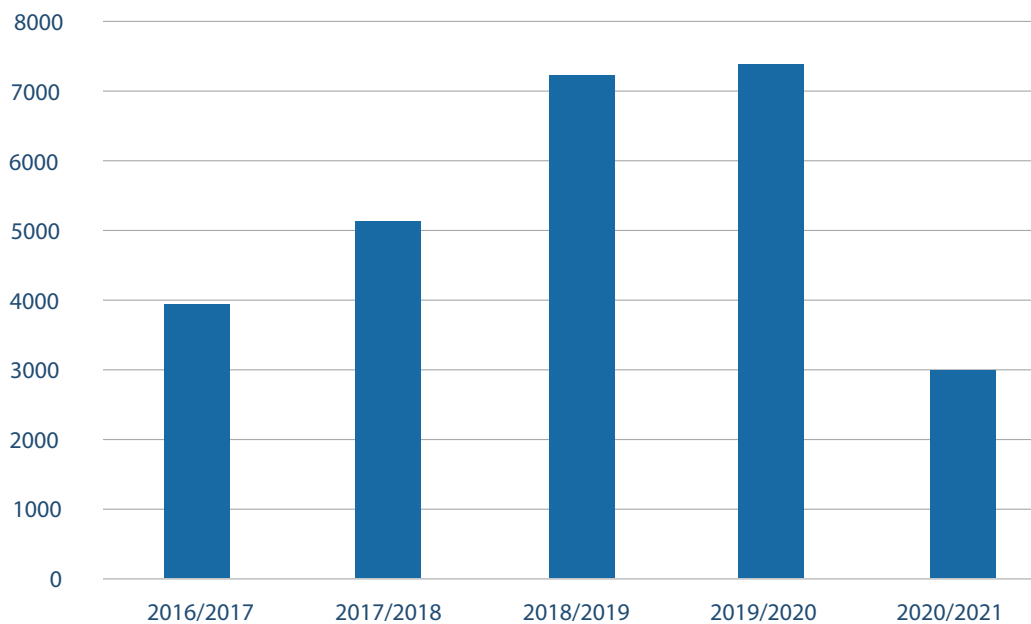
74%

agree restaurants should ban all unsustainable fish and seafood from their menus



Foodservice

The Covid-19 pandemic has had a considerable impact on the restaurant industry. Irrespective of the ongoing challenges faced, quick reactions and the ability to adapt makes it clear that these new approaches will last well into the future. The impact of the pandemic on sales of MSC fish in foodservice is shown in Graph 10. As MSC certified foodservice businesses continued to grapple with lockdowns and consumer hesitancy to dine out, MSC volumes fell sharply in 2021.



Graph 10. Volume (tonnes) of MSC Labelled Fish and Seafood sold in Foodservice in UK and Ireland

There were, unfortunately, casualties on the high street over the course of the pandemic, as businesses faced the most challenging time in the history of the industry. Some restaurant chains in the UK were struggling prior to the pandemic, but their revenues collapsed when the UK swayed between lockdowns over the past year. Café Rouge, part of Casual Dining Group (CDG), formerly one of the UK's leading restaurant groups, went into administration in 2020. Having previously used the ecolabel on the menu, the impact of the pandemic was apparent and they now operate only a small number of their original sites. MSC certified Mexican restaurant group Wahaca was another business that closed several of its locations during the pandemic. Despite this, the restaurant chain continues to champion sustainable seafood and has embarked on new ventures, including a collaboration with Mindful Chef, which saw the recipe box offer tacos to its customers for the first time in November 2021.

Conversely, independent restaurant Lussmanns proved to be resilient as the business quickly pivoted and began running a ready-to-cook meal delivery service from its St Albans location. In the quick service restaurant sector, sales of the popular Filet-O-Fish and Happy Meal Fish Fingers continued as McDonalds remained open throughout the pandemic and kept these fan favourites on their menu. JD Wetherspoons gradually opened many of its sites once restrictions lifted, with the pub group operating a slightly reduced menu, which of course included MSC certified fish and chips.

As the awareness of the MSC label continues to grow in the UK and Irish foodservice sector, more businesses are implementing MSC Chain of Custody certification to use the blue tick on their menus. Using the blue MSC ecolabel next to fish and seafood dishes allows these committed businesses to confidently and credibly inform their customers that they are making the right sustainable choice when dining out.

Fish and Chips

Beef dripping or vegetable oil, mushy peas or curry sauce, cod or haddock; these are very important choices for hungry fish and chip lovers when purchasing this symbolic British meal. However, with more than 167 million servings of fish enjoyed from chippies every year across the UK, there is a significant impact down through the supply chain and onto fish stocks.

With growing awareness around the need to protect fish and chips for future generations, consumers are becoming increasingly concerned about the impact they have when choosing their Friday night favourite. A recent study by the Norwegian Seafood Council¹³ confirmed the clear surge in consumer awareness and activism around the need to protect our oceans and consume seafood sustainably. In the study, nearly 89% of respondents agreed that sustainable fish is important to them, but only 24% said they knew what to look for when it comes to sustainable fish in a fish and chip shop. These sentiments align closely with a 2018 study conducted by Globescan on behalf of the MSC, which found that chippy diners choose sustainability over price when dining out¹⁴.

As consumers demand greater transparency, fish and chip shops can, through a trusted, independent and credible ecolabel, demonstrate that the fish they source and sell has come from a well-managed and sustainable fishery. Because of course, without fish, there is no fish and chips. By using the blue MSC ecolabel on menus, both businesses and chippy diners have an easy choice to make and can also play a part in protecting the future of our oceans and fish stocks while enjoying fish and chips, not avoiding it.

Partner in Focus: Anstruther Fish Bar

At Scotland's Anstruther Fish Bar and Restaurant, winner of the 2021 **MSC UK Foodservice Champion of the Year**, sustainability is in their DNA. The fish bar opened in 2003 and was the world's first MSC certified fish and chip shop, earning Chain of Custody certification in 2009. The business celebrated 12 years of serving delicious certified sustainable seafood after being re-certified to the MSC Chain of Custody Standard independently in March 2021, making Anstruther Fish Bar the longest standing MSC certified shop in the UK. Owners Alison and Robert have been true sustainability trailblazers in the foodservice industry in the UK, and have worked hard to maintain and improve upon their long-established reputation, becoming well recognised ambassadors for the fish and chips industry. Their ongoing commitment reinforces the importance of sustainable sourcing and protecting fish for future generations, giving consumers a chance to reward sustainable fishing practices by choosing fish and chips with the blue MSC ecolabel.



¹³Survey carried out by One Poll, 2000 UK consumers, July 2021

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

Looking Forward: 2022 outlook

As fisheries and supply chains continue to face the ongoing Covid-19 pandemic, it is becoming clear that some of the impacts felt across the UK and Ireland will have a lasting effect on consumer behaviour. We have seen businesses and consumers interact with each other and with their local fishing communities in new and different ways. Fish-to-home delivery created shorter supply chains and gave consumers closer connectivity and exposure to fisheries and species they may have not been familiar with before.

There have also been incredibly inspiring stories of resilience as the seafood sector was forced to adapt to a new and unforeseen reality. Despite the challenges of the past two years, it has been incredibly encouraging to see continued growth and support of the MSC programme in the UK and Ireland.

COP26 was a crucial moment for the UK and the world at large, putting climate and environmental issues at the centre of mainstream media. Growing public concern for our oceans and awareness of sustainability is driving a new wave of consumer activism.

There are lessons to learn from the experiences of the past two years that can be applied to other global issues. The power of collaboration in tackling a global pandemic has become clear. This approach is essential if we are to deliver best practice international fisheries management.

The market also has an important role to play in ensuring certified fisheries are being recognised and rewarded for operating sustainably. As more fisheries become certified, there will be further opportunities to add the blue MSC ecolabel to packaging in the UK. This is particularly true for species like tuna and sardines.

It is also clear that consumers want to understand how to make choices that are good for our planet and that they have an appetite for learning more about where and how fish and seafood is caught. The seafood industry has a real opportunity to work collectively to answer those questions and educate the public.

As we face growing environmental pressure brought about by climate change, warming oceans, and continued overfishing, all whilst trying to feed a population projected to grow to nearly 10 billion by 2050, the seafood industry will need to apply all of these new approaches, innovations and lessons learnt throughout these past 18 months in order to remain resilient and thrive.

Expectations are high, but 2022 holds a lot of opportunity for the MSC and our partners.



Share with friends and colleagues

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All data in this report is correct as of 1 December 2021, unless otherwise stated.
The reporting year is 1 April 2020 to 31 March 2021.

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