



# MSC UK and Ireland Market Report 2022

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# Executive Summary

This third edition of the MSC UK and Ireland Market Report showcases the continued progress of these markets in sourcing and selling sustainable seafood. It highlights the findings of the MSC's latest UK consumer research, examines recent trends in certified product sales and availability, and profiles new and emerging sectors and species 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 MSC certified fish and seafood in 2022. While this figure remained consistent between 2021 and 2022, the volume (just over 152,000 metric tonnes) of MSC labelled product sold decreased by 6%. Despite this dip, MSC labelled products still accounted for an estimated 54% of the value and 51% of the volume of all wild caught fish and seafood sold in UK retail
- Trends in the sale of MSC labelled fish and seafood varied by sector and product format. Sales of certified fish and seafood in foodservice and food to go increased by 79% and 53% respectively in the last year, while sales of MSC labelled frozen products declined by 14%, as sector trends showed signs of returning to pre Covid-19 trading patterns
- 8,550 tonnes of MSC labelled **tuna** was sold in the UK last year, the highest volume ever for the market. Despite this, that figure still only accounted for 12% of all UK retail tuna sales. With new commitments to sustainable sourcing, this figure will likely grow further in the coming years
- The **variety** of sustainably sourced species available to UK and Irish consumers continues to grow, with 49 different species sold compared to 45 last year, and 26 ten years ago
- Last year, MSC labelled **pet food** sales increased by 51% from the previous year. There is further opportunity for growth in this sector, with only 4 out of 9 UK retailers selling certified pet food under their own brand despite the raw material available
- Shoppers in the UK and Ireland spent just over £6.8 million on over 50 different MSC labelled **supplement** products last year, with the range growing to include those sourced from new species (such as herring) and in different formats

In general the UK and Irish markets remain deeply committed to the MSC programme and to supporting certified sustainable fisheries, despite the challenges of the past three years and current geopolitical and economic climate. This 2022 edition of our Market Report is designed to profile the impact of these commitments made across the supply chain and highlight notable achievements throughout the year. It is also designed to emphasize options for future labelling opportunities and thus encourage increased consumption of a wider variety of sustainably sourced fish and seafood.



# Introduction

This year, the world emerged from the Covid-19 pandemic into the reality of a new normal. The lasting impacts of the pandemic were evident in changes to the way we live, eat, work, and shop. The fishing and seafood sector demonstrated tremendous resilience in adapting to our new reality, and it was encouraging to see continued growth and support of the MSC programme in the UK and Ireland. Yet, further challenges emerged in 2022 with the ongoing Russian invasion of Ukraine and the current cost of living crisis.

Despite this environment of uncertainty, businesses across the supply chain have remained firmly committed to championing sustainability, as seafood consumers are increasingly worried about the state of the world's oceans. Research conducted by Globescan on behalf of the MSC found that, despite their concerns, consumers in the UK are feeling more empowered to effect change, with 70 percent agreeing that the seafood choices they make can help make a difference to the health of our oceans<sup>1</sup>.

The blue MSC ecolabel continues to be the leading tool to help consumers find certified sustainable wild fish and seafood quickly and easily. In this report, we will examine how consumer attitudes have evolved and how MSC certified businesses have continued to meet the needs of their customers by expanding their range of certified sustainable products. We will analyse the impact of the pandemic across the seafood business spectrum, and highlight specific sectors, product formats, and species that are either growing or have opportunities to grow. We will also identify those that are declining.

With MSC's goal of having one third of global marine catch engaged in the programme by 2030, we are at a critical stage of further engaging fisheries into our programme, and it is the market that ultimately drives this demand forward. Our market-based and supply chain partners therefore have a critical role to play in achieving this goal, and ultimately improving the sustainability of more fisheries worldwide.

We hope that you enjoy this third 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.

<sup>1</sup>The survey was conducted by research agency Globescan, using reliable national consumer research panels to recruit respondents. Fieldwork was undertaken between the end of January and mid-March 2022. Total sample size was 1,260 and are representative of all GB adults (aged 18+).



**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.

# UK CONSUMER INSIGHTS 2022

The findings of the bi-annual independent consumer research survey conducted by Globescan for the Marine Stewardship Council (MSC) show that while ocean anxiety is high, British seafood consumers are feeling more empowered and increasingly believe the choices they make can have a positive impact on the health of our oceans.

## ATTITUDES TO OCEAN SUSTAINABILITY

**9 in 10**

consumers agree that they are worried about the state of the world's oceans and two-thirds say they are more worried today than they were two years ago



### OVERFISHING

is the 2nd most concerning ocean issue for seafood consumers, behind pollution of the ocean

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



Consumers feel increasingly more empowered to effect change, with now saying that the fish/seafood choices they make can help make a difference to the health of our oceans (UP FROM 61% IN 2020)

**70%**

## CONSUMER ACTION AND DIET



UK consumers are mainly changing their diets to be healthier and to eat better quality food, although **50 PERCENT** of those who have changed their diet have done so because of an environmental reason

**2 IN 5** UK seafood consumers are willing to buy more sustainable seafood, with 1 in 5 saying they have already made this change in the last year



# MOTIVATORS OF PURCHASE AND ECOLABELS

There has been an increase in positive perceptions of ecolabels amongst seafood consumers since 2020. Those that were surveyed agreed that:

By buying ecolabelled fish and seafood I am helping ensure there will be plenty more fish left in the sea for future generations



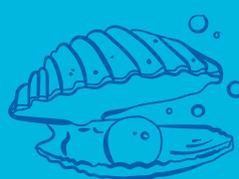
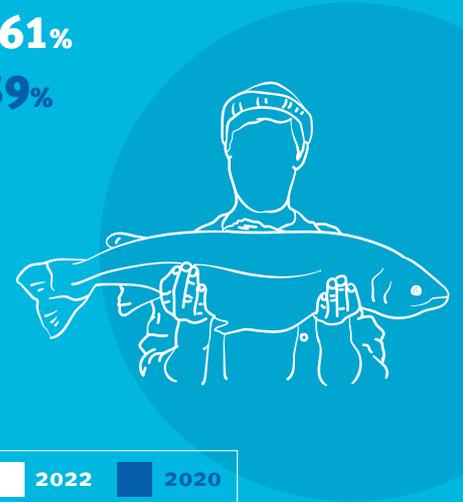
Ecolabelled fish and seafood is better for our health



Buying products with ecolabels excites me



I notice ecolabelled products when I'm shopping



**41%** OF SEAFOOD CONSUMERS buy eco-labelled fish/seafood as often as they can or occasionally, up from 35% in 2020

**77%** OF SEAFOOD CONSUMERS think supermarket/brand claims about sustainability and the environment need to be clearly labelled by an independent organisation, up from 70% in 2020

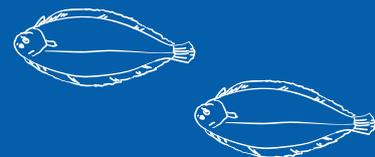


## MSC AWARENESS, TRUST & UNDERSTANDING

### MSC AWARENESS (all consumers)

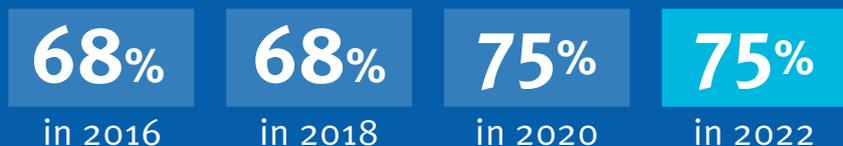


Yes, seen occasionally (light blue) Yes, seen often (dark blue)



Trust in MSC remains high amongst MSC-aware seafood consumers at 75%

### TRUST IN MSC (MSC aware consumers)



**33%**

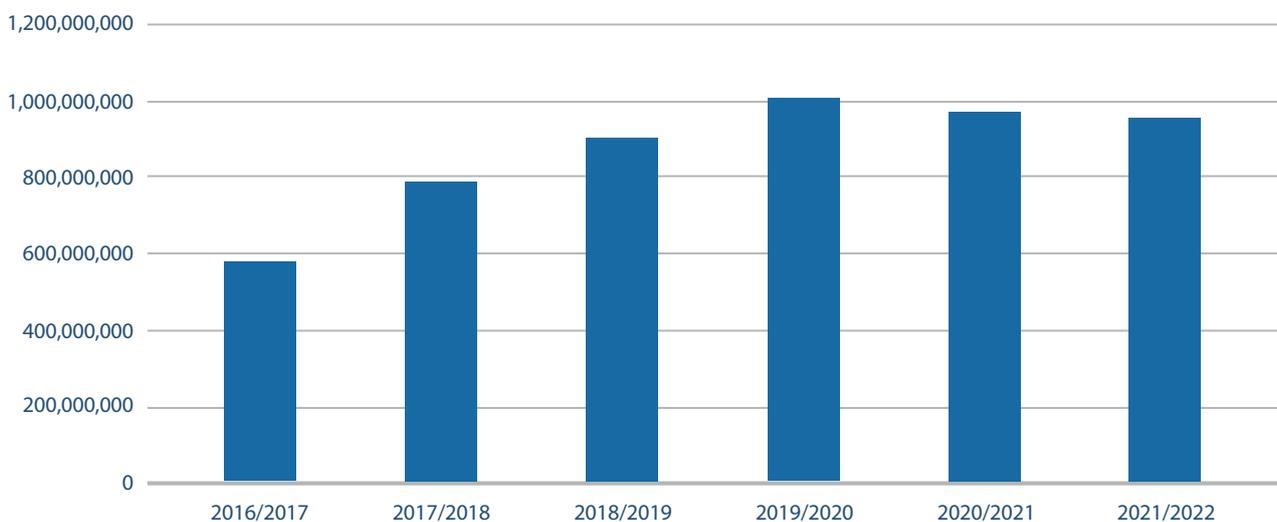


of consumers have at least some understanding of the MSC label, spontaneously associating it with either ocean sustainability or certification (up 4 percentage points from 2020)

The 2022 Globescan online consumer survey was conducted between January and February in 23 countries worldwide. In the UK, 1,260 consumers were surveyed, of which, 1,000 identified themselves as seafood consumers.

# Market Overview

Shoppers in the UK and Ireland are increasingly concerned about the future of our oceans and are looking for ways to effect change with their forks and their wallets (see UK Consumer Insights 2022 on pages 5 and 6, and [MSC UK and Ireland Market Report 2021](#)). Consumption of MSC certified fish and seafood in both countries remains high, with sustainably sourced options available on a wide variety of products and species across many different formats and sectors. Consumers spent an estimated £1.26 billion on MSC labelled products in the UK and Ireland last year, equal to the total from the previous year (see Graph 1). This figure is impressive when considering that the 10 percent boost in seafood sales seen across UK retail during the Covid-19 pandemic had largely dissipated in 2022<sup>2</sup>. Total seafood sales in UK retail dropped closer to pre-pandemic levels, with £4.08 billion in value and 407,352 tonnes in volume sold between June 2021 and June 2022<sup>3</sup>. Of that, MSC labelled products accounted for an estimated 54% of the value and 51% of the volume of all wild caught fish and seafood sold in UK retail<sup>4</sup>.



Graph 1. MSC Product Cost-Value (£) in the UK/Irish Market<sup>5</sup>

Although sales (£) of MSC certified fish and seafood did not change between 2021 and 2022, this was not the case in terms of the volume (tonnes) of labelled product and menu items sold in the market. Just over 152,000 tonnes of sustainable, wild-caught fish and seafood was sold in the UK and Ireland last year – 9,240 tonnes lower than the previous year (see Graph 2). This suggests that as retail seafood sales dropped closer to pre-pandemic levels, shoppers shifted from purchasing a lot of higher-volume, lower-cost MSC labelled products to those that were lower-volume but higher-cost. This is reflected in the trends presented in the section on Label Coverage by Product Category (see page 12).

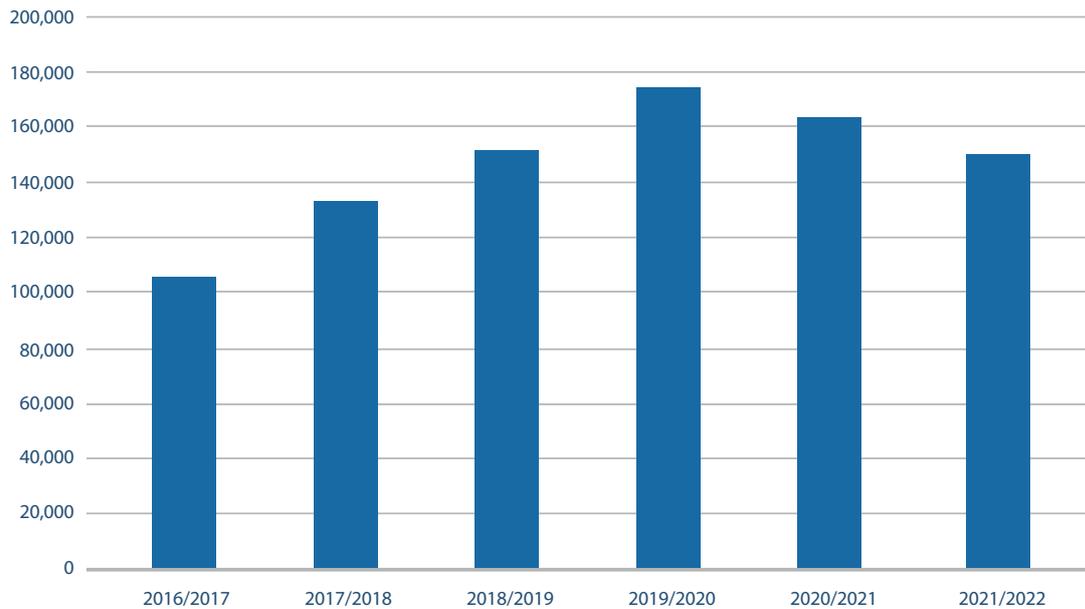
The continued drop in volume (tonnes) of MSC labelled products shown in Graph 2 also reflects the importance of mackerel to the UK market. In 2019/20, nearly 15,000 tonnes of MSC labelled mackerel was sold in the UK and Ireland. By 2021/22, this figure had dropped to just over 700 tonnes as retailers exhausted the remains of their stock of mackerel caught before the fisheries were suspended in March 2019.

<sup>2</sup>Data taken from Seafood Consumption (2022 Update). [Seafood Consumption \(2022 Update\) - Seafish](#)

<sup>3</sup>Data taken from Market Insight Factsheet: Seafood in multiple retail (2022 Update). [Seafood in multiple retail \(2022 Update\) - Seafish](#)

<sup>4</sup>Farmed species account for an estimated 45% of the value and 30% of the volume of the total UK retail seafood category (all species, products and formats) according to Farmed Seafood in Multiple Retail (2022 Update). [Farmed Seafood in Multiple Retail \(2022 Update\) - Seafish](#)

<sup>5</sup>Data collected on the cost-value of consumer-facing MSC registered products demonstrates strong growth over the past five years in the UK/Irish market (see Graph 1). A 30% mark-up is applied to these cost-value figures to estimate consumer spend.



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

The suspension of mackerel, Brexit, and Covid-19 have had a tremendous effect on MSC certified fisheries and businesses in the UK and Ireland. The resiliency shown across the industry is once again being tested by the wider impact of the Russian invasion of Ukraine and the ongoing cost of living crisis. Despite these challenges, it is encouraging to see continued demand for credible third-party verification to support sustainability commitments by businesses in the UK and Ireland.

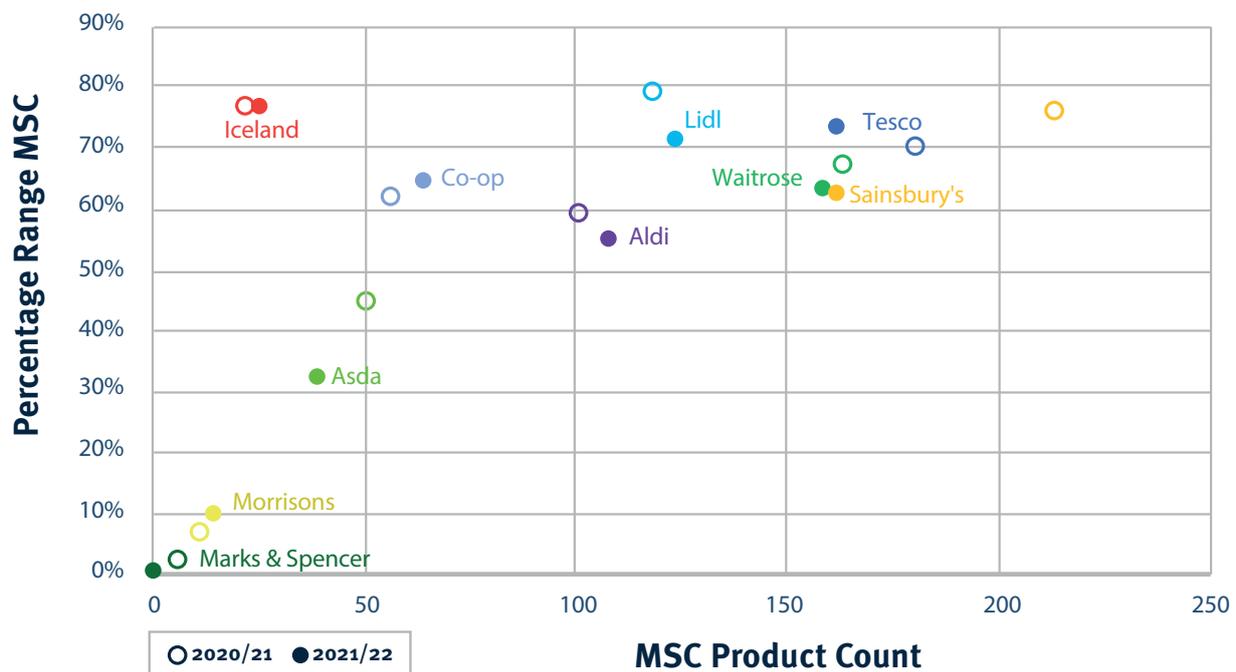
One way in which brands and retailers have demonstrated this commitment over the past year is through increased support for MSC certified fisheries in the UK and Ireland. In two UK supermarket firsts, Waitrose introduced MSC Shetland scallops on their fish counters (see page 13), while Tesco launched a tinned Cornish sardine product under its own brand that was canned in the UK's only fish cannery, in Scotland (see page 18). Aldi also included MSC labelled Cornish sardines as part of a special-buy British fish range in the first quarter of 2021/22, and a new partnership between Ocado and Ocean Fish saw value-added MSC certified Cornish hake and sardine products listed with the online retailer, under the 'Hook, Line and Sinker' brand for the first time (see page 18).

The range of MSC certified species available to shoppers in the UK and Ireland has also continued to grow, with 49 options available last year (see Growing Diversity of Seafood). As the number of fisheries certified to the MSC Standard continues to increase, there are further opportunities for introducing new, sustainably sourced fish and seafood species to the market. This is particularly true for tuna, which already has some MSC label coverage in the market but could grow considerably thanks to a number of large volume fisheries getting certified in the last year (see Focus on Tuna). Future opportunities and potential also exists for locally landed species, like crab, lobster, lemon sole, monkfish, scallops and nephrops (scampi), which are in Fishery Improvement Projects (FIPs) as part of [Project UK](#). With support from across the supply chain, this project is helping fisheries make meaningful improvements in their sustainability, and work towards a position where entering an MSC assessment could be viable. As these fisheries move nearer to this point, there could be further expansion of retailer ranges of locally-caught, certified sustainable species in the UK and Irish market.



# UK Supermarkets

The UK retail sector continues to be a global leader in sourcing certified sustainable seafood. In 2021/22, nine of the ten leading UK supermarkets sold 106,670 tonnes of MSC labelled own-brand products. Although a slight decrease compared to the 113,000 tonnes sold by those retailers in 2020/21, that follows the general decline in UK retail seafood sales as restaurants and businesses re-opened following the pandemic. Despite this dip, own-brand labelled MSC product sold across the nine UK retailers still accounted for 71% of certified wild seafood sales in all sectors, compared to 70% of the total market in the previous year and 63% two years prior. While the remainder was largely made up of sales of other branded products on sale in retail, foodservice accounted for 2.6% of MSC labelled fish and seafood sales, by volume, last year (up from 1.4% of the total of the previous year, which was at the height of the Covid-19 pandemic<sup>6</sup>).



Graph 3. UK MSC Retail Landscape

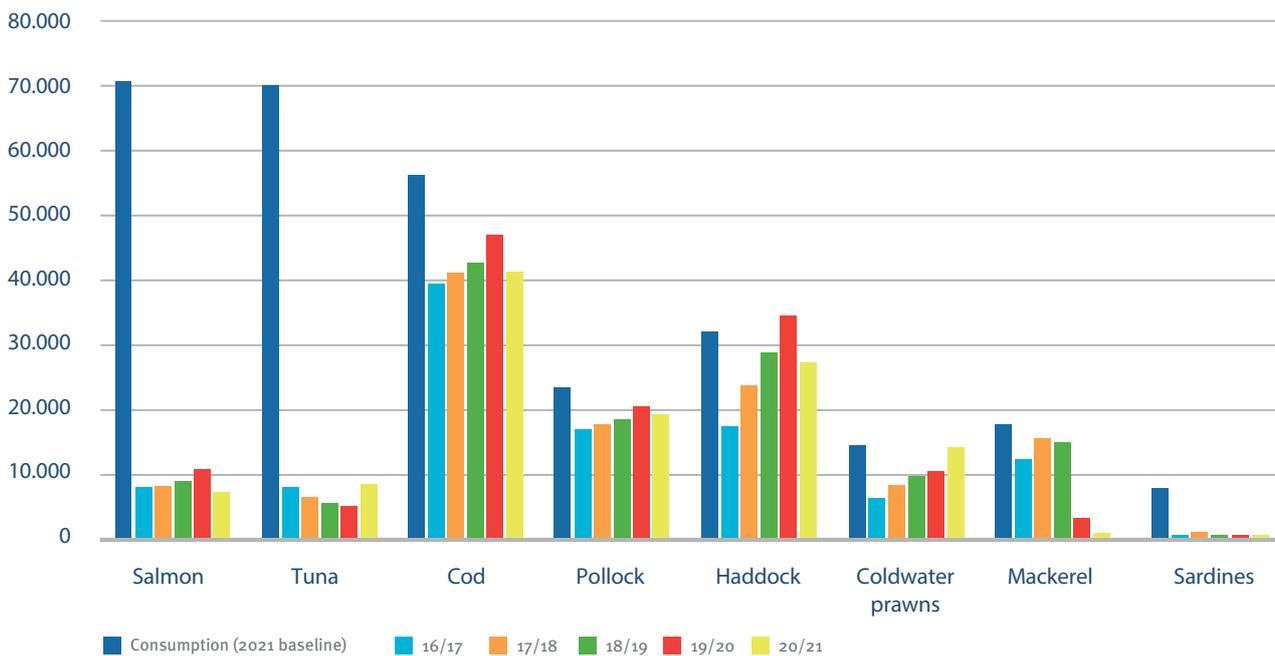
MSC label coverage on own-brand retail products remained strong across nine of the UK's ten leading supermarkets (see Graph 3), with seven using the blue ecolabel on more than 50% of their wild seafood range. Iceland had the highest percentage of its range certified, with 76%, followed closely by Tesco at 73% and Lidl at 72%. Co-op and Morrisons were the only two retailers to increase the percentage of their wild seafood range bearing the blue MSC ecolabel last year, with two and four percentage point increases respectively.

Tesco, winner of **MSC UK Supermarket of the Year 2022**, joined Sainsbury's in offering the greatest number of MSC labelled products, with 161 on offer last year at both supermarkets. Waitrose was close behind with 158 products on offer, while Lidl, winner of **MSC UK Mid-size Store Retailer of the Year 2022**, increased their range from 125 labelled products in 2021 to 128 last year. Aldi, which offered 105 MSC labelled products last year, sold the largest volume (tonnes) of certified sustainable seafood amongst all UK retailers.

<sup>6</sup>Data taken from Market Insight Factsheet: Seafood in multiple retail (2022 Update). [Seafood in multiple retail \(2022 Update\) - Seafish](#)

## Label Coverage by Species<sup>7</sup>

The availability of MSC labelled products in UK retail varies considerably depending on the species and format. Despite a dip in sales between 2020/21 and 2021/22, white fish continues to have the highest label coverage across all formats. Using Seafish data<sup>8</sup> on seafood sales in UK retail (2021) as the baseline, and comparing it to MSC volumes sold, an estimated 74% of cod, 83% of haddock and 86% of pollock sold in UK supermarkets carried a blue MSC ecolabel last year (see Graph 4). MSC label coverage is also strong with some flatfish species. 82% of plaice products sold in UK retail carried an MSC ecolabel last year, and the volume of labelled product has more than doubled since 2017/18. Coldwater prawns have also seen consistent growth in MSC labelled product sales recently and can be found across many different formats and variations (see Species in Focus: Coldwater Prawn).



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

Although there is a wide range of MSC labelled salmon products available across many different product formats, the total number of labelled products of the various species (sockeye (red), pink, chum, and coho) available to shoppers dropped 19 over the last year, from 132 in 2020/21 to 113. This corresponded to a 33% drop in volume (see Graph 4), which was likely driven, in part, by retailers responding to consumers returning to pre-pandemic purchasing behaviour. Sales of canned and frozen seafood products, which received a boost during the pandemic, started to decline while chilled product sales started to increase again. For salmon, this meant a shift from categories where MSC label coverage was strong to one which is dominated by farmed product, and thus ineligible to carry the blue MSC ecolabel.

While sales of salmon dropped last year, a record amount of certified tuna was sold in UK retail. Although MSC label coverage of tuna still remains limited (see Graph 4), the 70% increase in volume of sustainably sourced tuna sold ends several years of declining sales and is a positive sign of support for the growing number of tuna fisheries certified to the MSC Standard (see Focus on Tuna). Finally, the full impact of the suspension of all certified mackerel fisheries in March 2019 is evident in Graph 4, with retailers working through the remainder of their certified supply. Just over 700 tonnes of labelled product of the species was sold in 2021/22.

<sup>7</sup>Seafood consumption in retail data was provided by non-departmental public body Seafish specifically for the UK market. Label coverage by species analysis was therefore estimated specifically for the UK market, Ireland was not included in this case.

<sup>8</sup>Data taken from Market Insight Factsheet: Seafood in multiple retail (2022 update). [Seafood in multiple retail \(2022 update\) - Seafish](#)



## Species in Focus: Coldwater Prawn

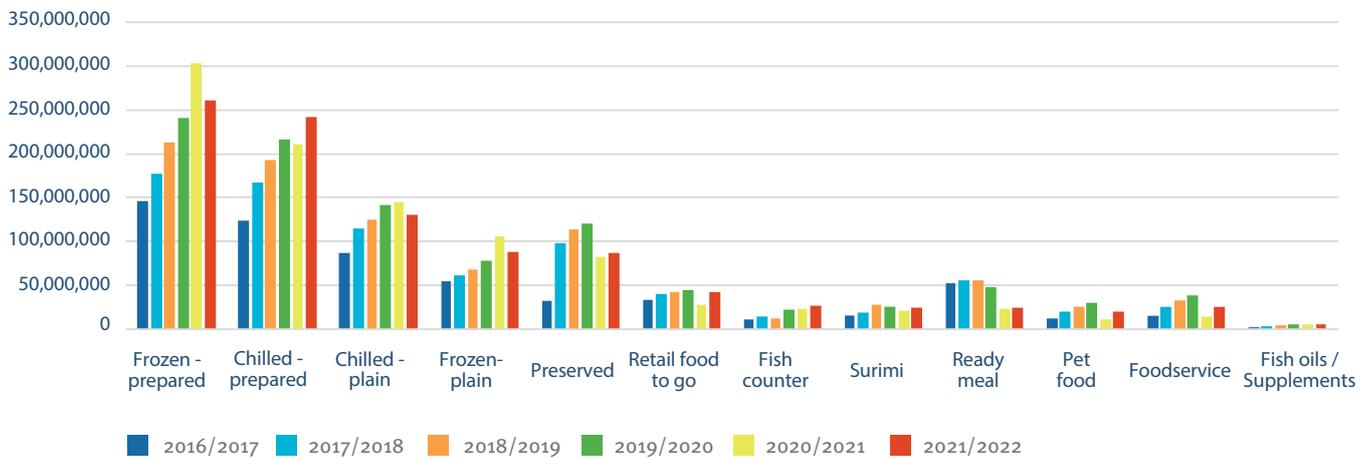
Prawns remain a popular choice amongst consumers in the UK. Coldwater prawns were the fifth most widely sold species, by volume, with a blue MSC ecolabel in the UK in 2021/22. Since 2017/18, sales of certified coldwater prawn products have doubled, increasing from 6,444 tonnes to 12,879 tonnes in the last financial year. Globally there are eleven Northern Prawn (*Pandalus borealis*) fisheries that have met the MSC Standard, representing an estimated 90% of the global catch of coldwater prawn according to FAO data (taken from the FAO Global Capture Production database).

The UK is a crucial market for these fisheries. Tesco introduced two new products last year, a 16 Piece Chinese Style Selection and Tesco 4 Prawn Toasts 128g, and Aldi launched a Specially Selected Crispy Prawn Cali Rolls 234g. When comparing certified product sales to baseline data provided by Seafish, it is estimated that just over 90% of coldwater prawn products in UK retail were sold with a blue MSC ecolabel (see Graph 4).



## Label Coverage by Product Category

In 2021/22, an analysis of MSC labelled product sales by product category showed the profound impact of the Covid-19 pandemic on various sectors of the seafood industry. As the UK and Ireland returned to a new normal after the pandemic, sales of MSC labelled fish and seafood in foodservice increased by a staggering 79% (see Graph 5), the most significant of any product category and a clear indication that consumers had started dining out again. Workers also resumed purchasing the ever-popular meal deal as offices reopened, which resulted in the sales of labelled food to go options increasing by 53%. MSC labelled pet food sales were just behind that, with a 41% increase on the previous year. During the pandemic, as consumers made fewer visits to the shops and stocked up on long shelf-life items, frozen labelled products received a boost in sales. Yet the data suggests that pre-pandemic shopping habits may have returned, with sales of MSC labelled frozen products declining by 14% in the past year, and are now closer to pre-pandemic levels, although growing. MSC certified fish oil and chilled-plain product sales also declined slightly, although chilled-prepared product sales increased by nearly 15%.



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



## Fish Counters

It was another challenging year for fish counters, with the lingering pressures of Covid-19, Brexit, and cost volatility. However, consumers still clearly enjoy shopping at fish counters, and the human interaction, which creates opportunity to educate on cooking techniques and advise on the sustainable offerings available for retailers like Tesco and Waitrose.

Sales of certified fish and seafood on UK fish counters remained relatively stable over the past two years, with a slight 3% increase between 2020/21 and 2021/22. It is unlikely though that sales of MSC labelled fish and seafood on counters will return to pre-pandemic levels (2020/21), with the permanent closure of all Sainsbury's fish counters and the reduction of fish counters seen at Tesco sites. However, fish counters continue to provide opportunities to introduce new species and varieties of products to shoppers in the UK.

Across all retailers who had fish counters open during the 2021/22 financial year, UK consumers were given the choice of 28 different species, some for the first time. Whole Foods Market UK introduced MSC certified Red King crab to their counters, a UK first across all categories. Waitrose fish counter, which has the widest variety of certified sustainable options amongst all retailers, demonstrated strong support of a local fishery last year, by introducing MSC Shetland scallops, another UK first.

### Product in Focus: Waitrose No. 1 King Scallops



Waitrose, winner of **MSC UK Fish Counter of the Year** for a fifth year in a row in 2022, have continued to innovate and offer new sustainable options on their fresh fish counter for their customers. After introducing lemon sole and saithe last year, Waitrose introduced King scallops (also known as Great Atlantic scallops), from Shetland, for the very first time this year, in a tremendous example of retailer support for a local small-scale fishery.

### Product in Focus: Whole Foods Market King Crab



Whole Foods Market UK became the first retailer in the UK to offer their customers MSC certified King crab on their fish counter. The red king crab (*Paralithodes camtschaticus*), also known as the Kamchatka crab or Alaskan king crab, is native to the Okhotsk and Japan Seas, the Bering Sea and the northern Pacific Ocean. Whole Foods Market customers now have the chance to try King crab meat which is known to be characteristically sweet.



## Chilled and Frozen

Chilled and frozen product sales accounted for just over 70% of all MSC labelled fish and seafood sold across the UK and Ireland last year. Although the volumes sold across the two categories dropped by 4% and 17% respectively, this was largely due to 2020/21 being an extraordinary year, with consumers dependent on retail as lockdown restrictions shut down large parts of the foodservice industry. By 2021/22, the boost in sales of MSC labelled products, particularly in the frozen format, had dissipated and volumes returned closer to 2019/20 levels.

In 2021/22 there were 450 different MSC labelled frozen products available to shoppers across the UK and Ireland. Although cod, pollock and haddock made up nearly 73% of the volume of all labelled products sold, 19 MSC certified species could be found in a frozen format last year. Strong label coverage on frozen white fish has been driven by Birds Eye, who have continued to demonstrate their strong commitment to sustainable sourcing, selling more MSC labelled frozen fish and seafood than any other brand and winning MSC UK Frozen Brand of the Year for the 9th year in a row.

In Ireland, there were also new developments in the frozen category in 2021/22. Centra introduced a certified cod fish finger to their range, the first product to be sold with an MSC label under the retailer's own brand across any category. Fellow Musgrave group retailer Supervalu also introduced its first MSC labelled frozen products, Breaded Cod Fish Cakes and Battered Cod Fillets. With these new products, the retailers have now joined Lidl, Aldi and Tesco in offering certified sustainable options under their own brand to shoppers in Ireland.

Chilled products accounted for 28% of all MSC labelled fish and seafood sold last year. Although there were 29 different certified species sold across the format, cod, haddock and coldwater prawn, made up 71% of all sales by volume. New certified species continue to be introduced, however, with both Tesco and the Fish Said Fred brand introducing chilled pre-pack MSC lemon sole for the first time in the UK in 2022. Tesco continued to expand the variety of sustainable fish options available to its customers later in the year when it launched a chilled MSC certified black cod product.



## Partner in Focus: Fish Said Fred

In 2020, New England Seafood International (NESI) launched a new brand, Fish Said Fred, 'with the purpose of being the accessible face of fresh fish, giving consumers confidence to buy and inspiration to cook'. The range, which is now 100% ASC and MSC certified, includes farmed sea bass and sea bream and wild-caught cod, haddock and Alaska pollock and is available at Tesco, Waitrose, Sainsbury's, and Ocado. In 2022, Mindful Chef also introduced Fish Said Fred's MSC hake and lemon sole in its recipe boxes alongside MSC cod and sockeye salmon under NESI's LEAP brand.



### Product in Focus: Tesco Finest Black Cod



In September 2022, Tesco launched a chilled pre-pack MSC certified black cod (or sablefish) product. While the lesser-known species has been available with an MSC label on the Whole Foods fish counters since 2019, Tesco's introduction of black cod to their Finest range means a new certified sustainable species is now available to shoppers across the UK. There are currently two sablefish fisheries certified to the MSC Standard off the US West Coast, operating in the waters between Alaska and California.

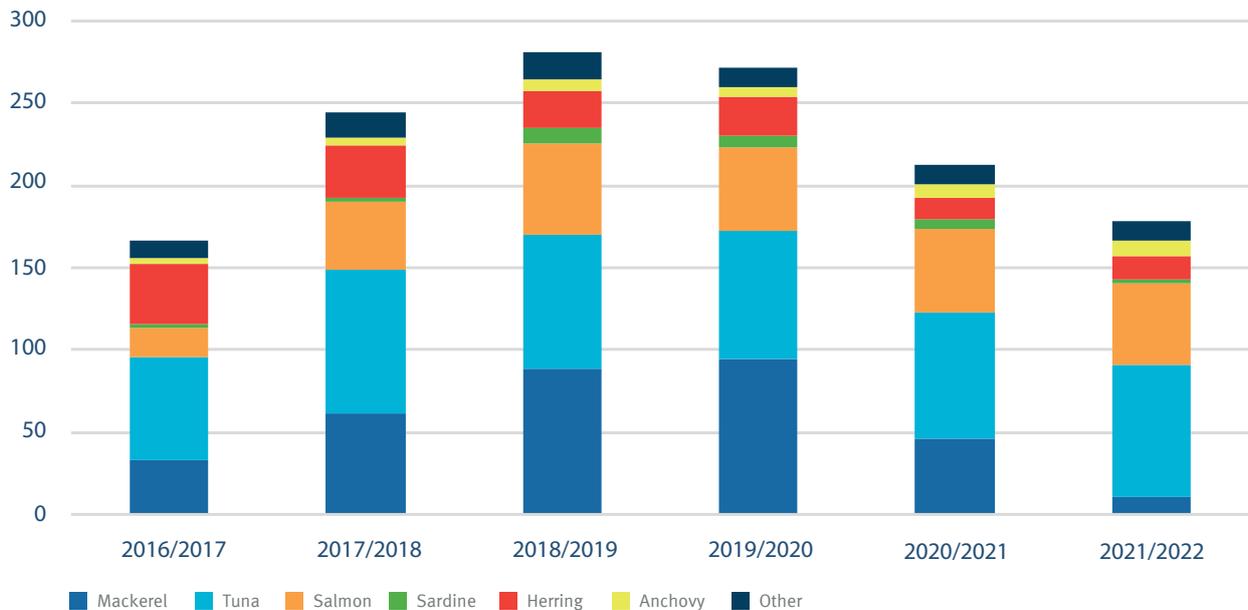
### Product in Focus: Iceland Frozen Cornish Sardines



Iceland, winner of MSC UK Newcomer of the Year 2020, became the first retailer to launch frozen MSC Cornish sardines under their own brand, showing great support for a local, small-scale fishery. The sardines were the second new species to be introduced at the supermarket, with MSC labelled whitebait introduced earlier in the year.

## Preserved and Canned

In 2021/22, shoppers in the UK and Ireland bought just 11,300 tonnes of MSC labelled products in a tin or a jar. Although that was a 7% increase on the previous year, the number of certified sustainable ambient products available decreased from 212 in 2020/21, to 178 last year. This was largely due to a further decrease in the number of MSC labelled mackerel products on offer as retailers continued to work through their supply of raw material caught before the suspension of all MSC North East Atlantic mackerel fishery certificates in March 2019. Despite this, there were still 16 different MSC species available to consumers last year in a preserved or canned format.



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

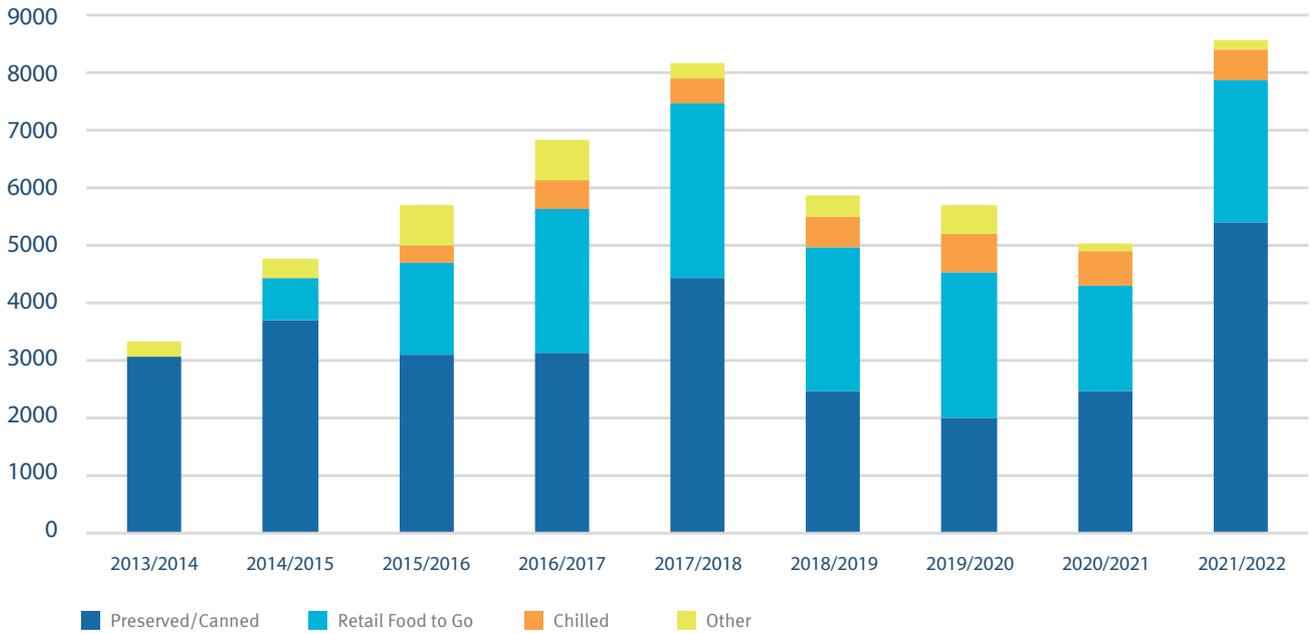
MSC labelled canned salmon continues to be widely available to shoppers in the UK and Ireland. Tesco, Lidl, Co-op, Sainsbury's, Aldi, Waitrose, Princes and John West all offer a certified product range. The Nice Fisherman brand, available on Ocado, also introduced an MSC red and pink salmon product to compliment their 100% MSC labelled tuna range. Together, these brands and retailers have maintained a strong range of certified sustainable canned salmon products, with sales remaining steadily anywhere between 4,000 and 4,450 tonnes a year during each of the last five years, showing great support for the longstanding wild salmon fisheries in the programme.

Waitrose is still the only major British supermarket to sell 100% of its own-brand tuna cans with the MSC ecolabel, although Tesco have made progress in reaching their goal of labelling 100% of their own range tuna by 2025 after launching three new MSC certified canned products last year (see Focus on Tuna). Amazon, which expanded its physical footprint in the UK last year to 19 Fresh stores (as of August 2022), also introduced five MSC labelled tuna multi-packs, available both in-store and online.

Tesco, Sainsbury's, Waitrose and Lidl all offered MSC labelled anchovies under their own brand, while jarred cockles and mussels continued to remain available from the Ocean Crown brand. Lidl were the only UK supermarket to sell certified herring under their own brand last year, with 8 different products to choose from, while John West and Princes have had MSC labelled kippers as part of their range for many years. Canned Cornish sardines have also been available to Waitrose and Amazon shoppers for several years under The Pilchard Works range, but in a major boost to the fishery, Tesco launched the first canned product sourced from Cornwall and sold under a retailer's own brand with a blue MSC ecolabel in August 2022 (see Focus on Sardines).

# Focus on Tuna

Tuna was the second most popular seafood species purchased by shoppers in UK supermarkets last year. However, of the nearly 70,000 tonnes sold<sup>9</sup>, only 12% (8,550 tonnes) was sold with a blue MSC ecolabel at UK supermarkets (see Graphs 4 and 7), demonstrating a lack of availability of certified products for consumers wanting to prioritise sustainability with their tuna purchases.



Graph 7. MSC Labeled Tuna Sold in the UK/Ireland by Volume (Tonnes) and Format<sup>10</sup>



<sup>9</sup>Data taken from Market Insight Factsheet: Seafood in multiple retail (2022 update). [Seafood in multiple retail \(2022 update\) - Seafish](#)

<sup>10</sup>Preserved/Canned includes all ambient products. Retail Food to Go includes sandwiches, salads, pastas, and sushi. Chilled includes pre-pack, fish counter, and ready meals. Other includes pet food, foodservice and frozen products.

Although more certified sustainable tuna was sold in the UK and Ireland in 2021/22 than ever before, it still only accounted for 6% of the 136,000 tonnes of MSC labelled tuna sold globally last year (see [MSC Sustainable Tuna Handbook 2022 Update](#) for further insights). The majority of labelled tuna products continue to be sold across the DACH (Germany, Austria, Switzerland) and Benelux (Belgium, Luxembourg and the Netherlands) regions, as well as the Southern European markets of Spain, France, Italy, and Portugal, where brands and retailers have made significant new progress in delivering on their sustainability commitments.

This has been made possible due to the growing availability of tuna from MSC certified fisheries. Between September 2021 and September 2022, the volume of MSC certified tuna catch increased 24% from 1,982,000 tonnes to 2,460,000 tonnes. Close to half (47%) of the world's commercial tuna catch is now MSC certified with another 11% in assessment. With this growing availability of sustainably caught raw material, there are more opportunities for UK retailers and brands, who once led the world in selling MSC labelled tuna, to match the customer offer of their counterparts in Europe.

There has been progress in the last year with Tesco introducing three new MSC canned tuna products sourced from Papua New Guinea. One of these, the Stockwell & Co Tuna Chunks in Brine, is the supermarket's most affordable single can of tuna, demonstrating that sustainable sourcing of the species can still be done while remaining competitive on price. The growing number of MSC certified tuna fisheries has also paved the way for new commitments. In August 2022, Princes joined Tesco in committing to label 100% of its own brand tuna by 2025. Through these commitments, environmentally conscious consumers across the UK and Ireland should start to have greater choice when purchasing their canned tuna in the year ahead.



## Partner in Focus: Princes

In August 2022, international food and drink group, Princes, announced a commitment to source and sell 100% of its UK Princes branded tuna from MSC certified sustainable fisheries by the end of 2025. Their roadmap to delivering on this commitment includes three key milestones, which will see Princes increase its MSC labelled tuna range to 25% by the end of 2023, 50% in 2024 and 100% by the end of 2025. Achieving the 100% milestone would represent 75 million cans (11,000 tonnes) of MSC-certified tuna on the market each year. This will be an important step in the company's journey toward helping families to eat well while providing them with sustainably sourced options that will protect our oceans for future generations.



# Focus on Sardines

The Cornish sardine fishery was first certified in 2010, and since March 2019 has been the only source of MSC European pilchard (*Sardina pilchardus*) in the world. The small-scale fishery consists of 15 vessels under 15 meters in length – usually manned by a skipper and two crew – catching sardines with ring nets. Fishing traditional grounds within six nautical miles of shore, the fishery landed just over 8,800 tonnes in 2021 into ports from Newlyn to Plymouth. In 2007, under the European Union’s protected names scheme, the name ‘Cornish sardine’ was granted the Product of Geographical Indication (PGI) status, meaning that sardines can only carry that name if the fish are caught within six miles of the Cornish coast, and then landed and processed within the county of Cornwall or the port of Plymouth. In a major milestone for the fishery, it was successfully re-certified against the MSC Standard for a second time in August 2022.

MSC certification has been particularly important for gaining and maintaining retail support in the UK and overseas markets for Cornish sardines, as detailed in a [2020 study](#) commissioned by the MSC and produced by New Economics Foundation (NEF) Consulting. In 2021/22, MSC labelled Cornish sardines were sold in 12 countries, including the Netherlands, Belgium, France, Austria, Germany, Switzerland, the UK, Ireland, Finland, Sweden, the United States, and, for the first time, Australia. Shoppers across these countries spent just under £5 million on 49 different MSC labelled products sourced from the fishery, a substantial increase from two years earlier when consumers spent less than half that and only 25 labelled products were on the market.

This growth has been driven by an increasing number of retailers and brands choosing to source from the Cornish fishery because of its sustainability credentials. This has been particularly true in the UK over the past year. MSC labelled Cornish sardines have been available on the fish counters at Tesco and Waitrose and in The Pilchards Works tinned range for several years. However, in the first quarter of 2021/22 Aldi introduced MSC labelled Cornish sardines as part of a special-buy British fish range while Iceland became the first UK retailer to offer whole frozen MSC Cornish sardines under its own brand later in the year (see page 14). In other moves to increase the availability of domestically sourced, sustainable seafood, the Hook, Line and Sinker brand introduced a chilled value-added MSC Cornish sardine product on Ocado and Tesco became the first UK retailer to sell MSC labelled tinned Cornish sardines under its own brand.

## Product in Focus: Hook, Line and Sinker Cornish Sardines with Mediterranean Marinade



In June 2021, Cornwall-based supplier Ocean Fish launched a new brand, Hook, Line and Sinker, specialising in British-caught value-added fish products, including MSC certified Cornish sardines and hake. The range, which was developed in collaboration with MSC ambassador, chef, and sustainability expert, James Strawbridge, was picked up by online retailer Ocado in February 2022. Hook, Line and Sinker’s Cornish Sardines with Mediterranean Marinade was also the first of its kind in the UK to market the species using its PGI status and won **MSC UK Product of the Year** at the 2022 MSC UK Awards.

## Product in Focus: Tesco Finest Cornish Sardines in Tomato Sauce



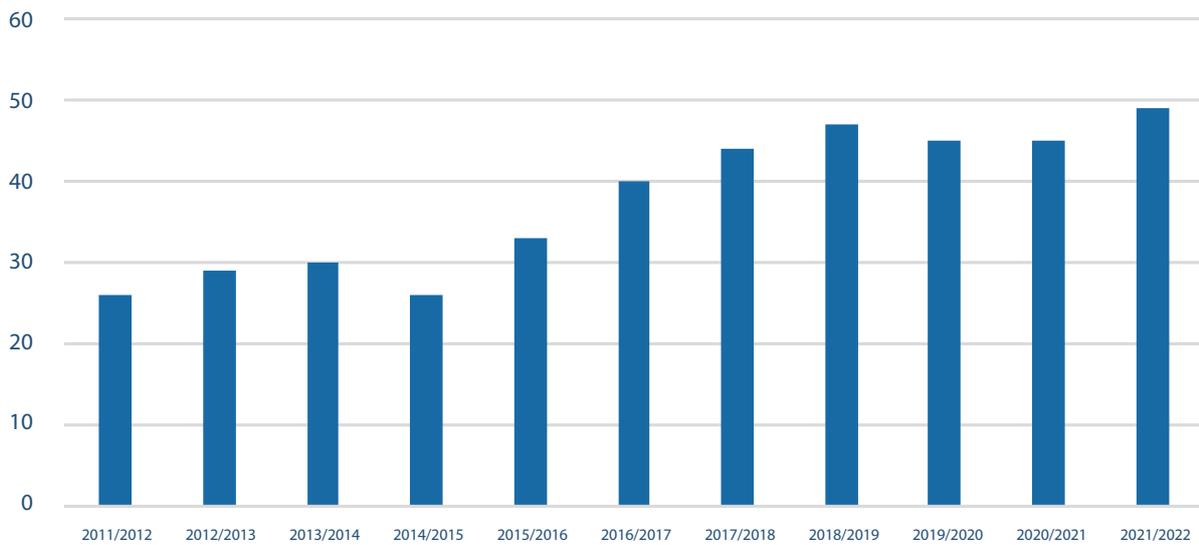
Cornish fishermen have called on retailers to source UK-caught sardines for their canned products for some time<sup>11</sup>. In August 2022, Tesco responded to these calls, launching the first canned Cornish sardine product to be sold under a retailer’s own brand with a blue MSC ecolabel. In another notable move, Tesco chose to work with Fraserburgh-based International Fish Cannery (IFC) to develop the product instead of sending it to a cannery in Spain, Portugal or France where the sardines are usually exported to for processing. IFC, which is owned by the Clark family and has been involved in fish processing for over four generations, is Britain’s only fish cannery. In developing the new product with IFC, Tesco helped to create a domestic supply chain that had not existed before.



<sup>11</sup>The Grocer. Fishermen urge supermarkets to sell UK-caught sardines in own-label tins.

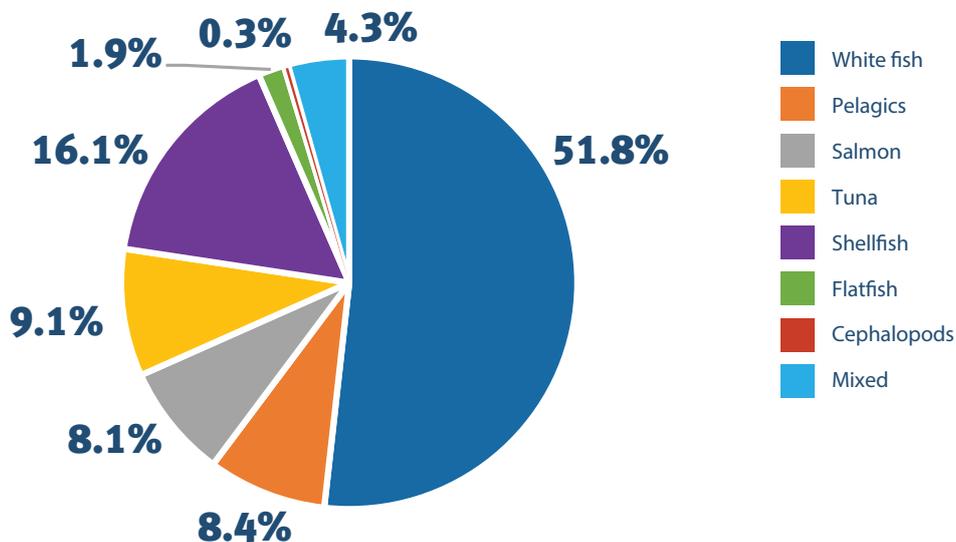
# Growing Diversity of Seafood

Seafood consumers in the UK rarely venture beyond the ‘big five’ species - salmon, tuna, cod, prawns and haddock – which account for a staggering 60 to 80% of all seafood consumed across the country<sup>12</sup>. However, national lockdowns during the Covid-19 pandemic sparked increased interest in home delivery services and gave shoppers the opportunity to support local fishing communities and try new species. While the lasting impact of this remains to be seen, there has been a growing variety of certified sustainable species available for consumers to choose from in the UK and Ireland. Over the past ten years, the number of MSC labelled species at supermarkets, fishmongers and restaurants has increased from 26 to 49 (see Graph 8).



Graph 8. Number of MSC Labeled Species Sold in the UK and Ireland

An examination of MSC labelled products sold in the UK and Ireland last year found that over half (51.8%) were white fish, followed by shellfish which made up 16.1% of the total, and salmon, pelagic species, and tuna which combined for just over a quarter (see Graph 9).



Graph 9. Percent of MSC Labeled Products Sold in 2021/22 by Species Group<sup>13</sup>

<sup>12</sup>Elise Uberoi, Georgina Hutton, Matthew Ward, and Elena Ares, 16 November 2021. UK Fisheries Statistics. House of Commons Library

<sup>13</sup>Mixed refers to products where multiple species from different groups are present (e.g. a pet food product which has a combination of MSC salmon and tuna)

The increasing variety of species being sold with a blue MSC ecolabel has been driven largely by developments on retail fish counters and in the chilled aisle, where more certified cephalopod, flatfish and shellfish products have become available. While MSC labelled mussels, American lobster, and Atlantic scallop have been mainstays in supermarkets in the UK and Ireland for years, Selfridges became the first UK retailer to sell MSC labelled European lobster from Jersey on their counter last year, while Whole Foods also claimed a UK first when it introduced MSC certified red King crab (see page 13). Waitrose also made major commitments to supporting local MSC certified fisheries, introducing Manila clams from Poole Harbour and King scallops from Shetland (see page 13) on their fish counters in the last two years. These efforts have contributed to a 59% increase in the number of MSC labelled shellfish products on offer to shoppers in the UK and Ireland over the past five years.

Although they represent a smaller proportion of the total certified seafood range on the market (see Graph 9), the number of MSC labelled flatfish products has also increased from 16 in 2016/17 to 25 in 2021/22. Plaice and yellowfin sole make up the majority of these products and have been available with a blue MSC ecolabel for the past ten years, while MSC lemon sole was only recently introduced following the fishery in Iceland succeeding in becoming the first (and still only) certified source in 2019.

There have also been significant commitments to sustainability made by fisheries targeting squid and octopus over the past five years. The Western Australia octopus fishery became the second to achieve MSC certification in 2019 for octopus, while Northern shortfin squid and longfin squid caught off the coast of the US Northeast became certified in 2018. Although niche species for the UK retail market, both fisheries have been recognised for their certified status, with Whole Foods introducing MSC octopus to their stores in 2020/21 and Tesco now carrying two labelled squid products from the fishery (which remains the only certified source of squid globally).

In 2021/22, 120 different species were sold with a blue MSC ecolabel globally, up from 82 in 16/17. The fact that 40% of these were sold in the UK and Ireland last year is an incredible testament to the efforts of retailers, brands, and foodservice businesses to prioritise fisheries that have committed to sustainability. With new species currently in assessment or on their journey to sustainability through Fishery Improvement Projects (FIPs) like those in [Project UK](#), there will be more opportunities to meet the expectations of consumers in the UK and Ireland who are interested in expanding the variety of sustainably sourced fish and seafood they eat.

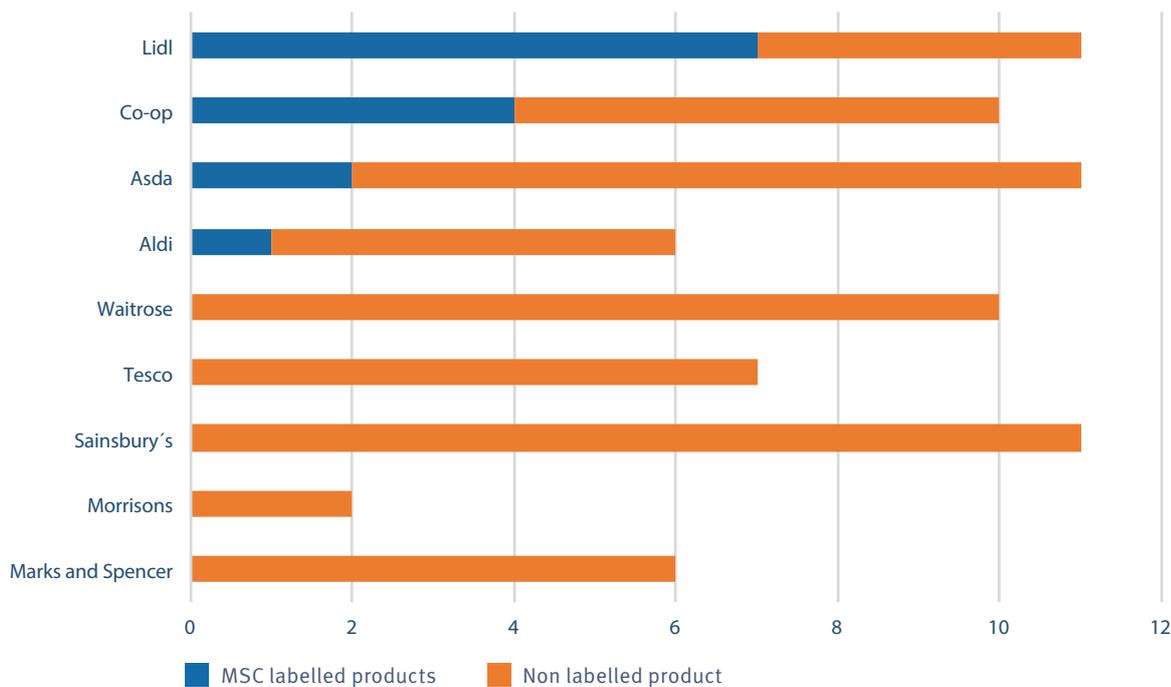


# Pet Food

The demand for independently verified, traceable and sustainably caught seafood is increasing in the UK, with seafood ingredients in pet food being no exception. This shift has been driven by a growing desire from conscious consumers to hold pet food sourcing to the same sustainability standards as products for human consumption.

In the UK and Irish market, the volume of MSC pet food sold has increased by 51% in the last financial year but is yet to return to the record sales seen in 2019/20 (see Graph 10). Salmon, tuna, cod and mixed whitefish remain the most popular species used in MSC labelled pet food, with Woofs currently the only brand to offer MSC certified red fish as part of their pet food range.

Retailers and brands have a growing opportunity to provide sustainably sourced pet food to meet the growing demands of conscious pet owners. Despite the ever-increasing popularity of pets as an extension to the family, and the growing availability of fish and seafood from MSC certified fisheries, there is still limited availability of MSC labelled pet food products available to shoppers across the UK. Out of the nine UK retailers selling pet food under their own brand, only four offered MSC labelled options during the last financial year: Lidl, Aldi, Co-op and Asda (Iceland do not sell any own labelled pet food). According to analysis of MSC data based on instore and online product research, there are limited options for shoppers looking for MSC labelled pet food products in UK supermarkets, as shown in Graph 10.



Graph 10. Own Brand Pet Food Products in UK Retail<sup>14</sup>

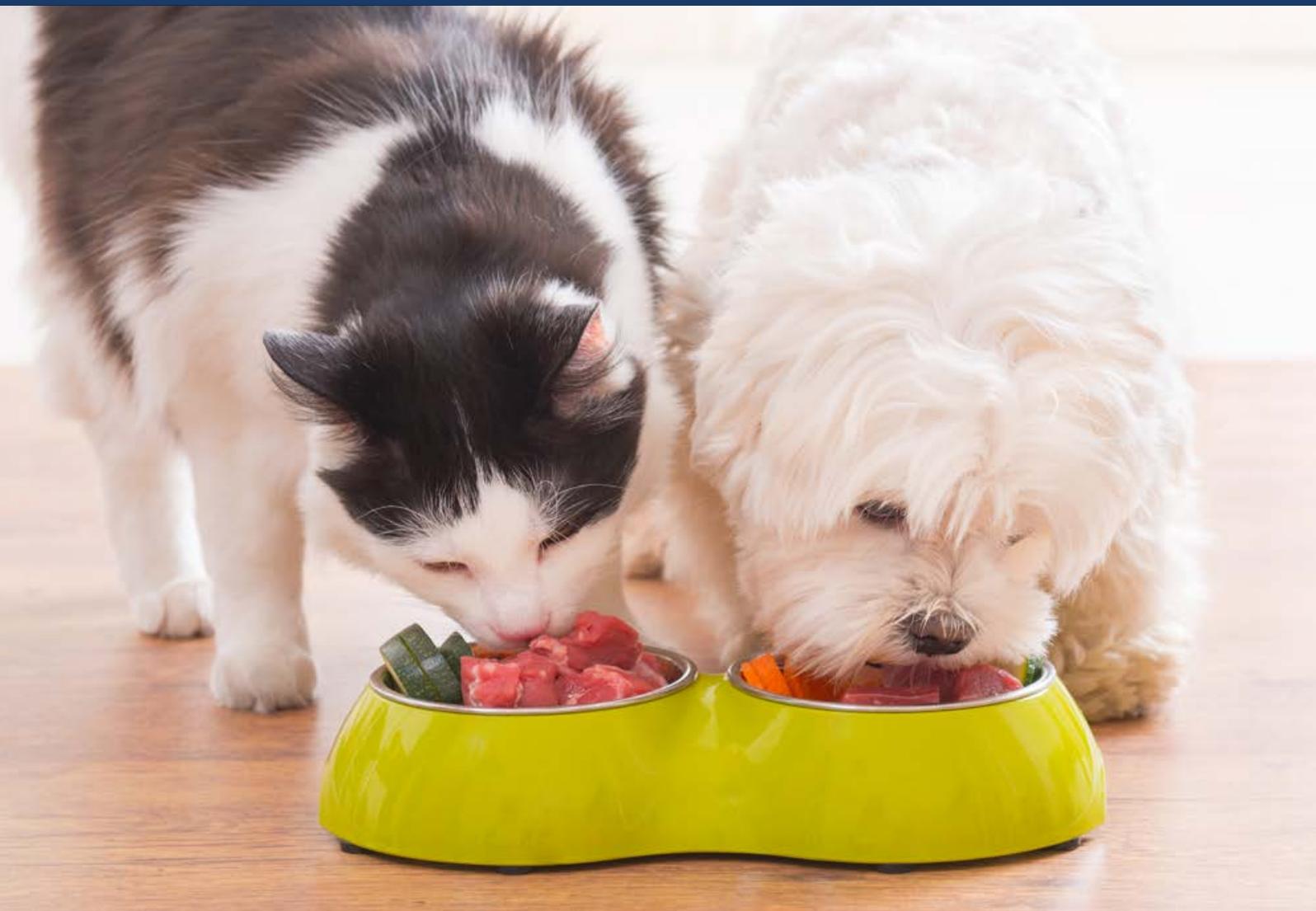
<sup>14</sup>Data presented includes labelled products for sales declared in 2021/22 and unlabelled products identified in store visits in December 2022.



Longstanding MSC partner Mars continues to offer the largest range of certified pet food products through its brand Sheba, while Pets at Home became the newest retailer to introduce labelled pet food under their own brand. With the data presented in mind, the market has an important role to play in rewarding fisheries that have committed to operating sustainably and meeting the expectations of consumers in the UK and Ireland. Pet food remains a sector in which there is substantial space for growth and for retailers and brands to increase their commitments to sourcing sustainable fish and seafood.

## Partner in Focus: Pets at Home

Pets at Home is a British pet supplies retailer selling products including food, toys, bedding, medication, and pet accessories. Last year, the company launched two new MSC labelled cat food products: Deliciously Tasty Tender Cuts in Sauce with Salmon 100g and Deliciously Tasty Luxury Mousse with Salmon 85g. As a leading pet business in the UK, Pets at Home has demonstrated great leadership in bringing more sustainable options to the market, ensuring shoppers can find products that are good for our furry friends, and the ocean too.

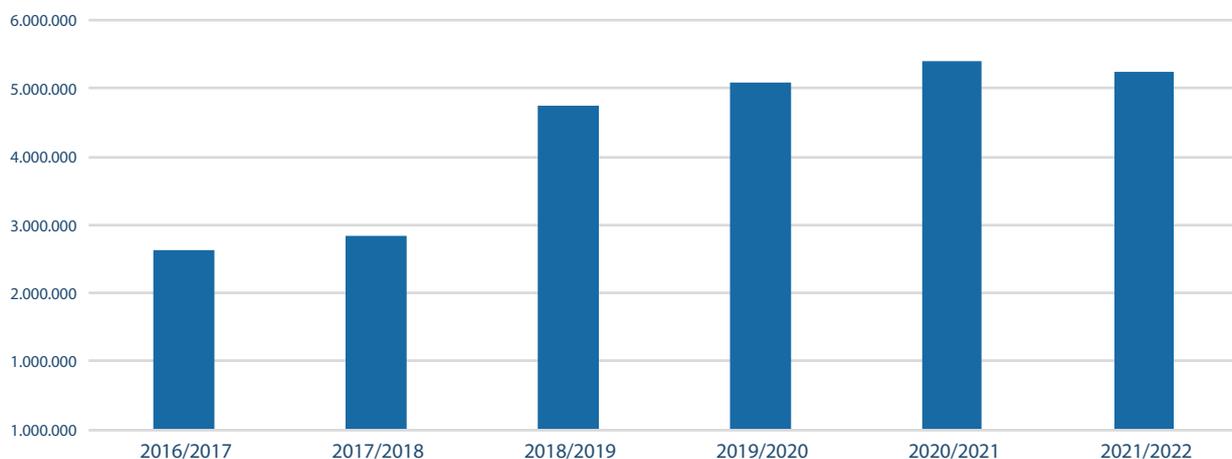


# Supplements

Fish oil and supplements continue to be an emerging and important sector for the sustainable seafood movement. Demand for fish oils, set to grow by 6% globally by 2026<sup>15</sup>, will increase pressure on fish stocks, especially small pelagics, 46% of which are already currently overfished<sup>16</sup>. However, the growing number of brands and consumers that have committed to buying fish oil from sustainable fisheries is helping to turn the tide, by driving a rapid increase in certified sustainable small pelagic and reduction fisheries (see [MSC Small Pelagic Fisheries Briefing 2021](#) for further information). In 2022, landings from small pelagic species engaged in the MSC programme totalled over 4.2 million tonnes, representing around 15% of small pelagic landings worldwide, up from 8% of small pelagic landings in 2016.

However, this important group of species continues to face a number of complex challenges. One of the most notable examples of this is in the Northeast Atlantic, where the mackerel, herring and blue whiting lost their MSC certifications as governments failed to agree on how to share fishery resources in line with scientific advice. These disagreements have been exacerbated by changes to the distribution of small pelagic stocks as a result of climate change. With challenges like these persisting, businesses involved in the trade of fish oils and supplements have an important role to play in choosing to source from fisheries which are operating sustainably.

Last year, shoppers in the UK and Ireland spent just over £6.8 million on over 50 different MSC labelled supplement products (Graph 11). Although a slight decrease from the previous year, several new brands introduced certified products for the first time. Ireland-based Solvotrin Therapeutics launched their Pregnancy Plus product under its Active Iron range which includes iron, multivitamin and MSC Omega-3 DHA capsules, while Morrisons joined Tesco as the second retailer to offer certified supplements across its own brand range. These new brands have joined longstanding sustainability champions Healthspan, Wiley's Finest and Naturalife, in establishing the UK and Ireland as the biggest market for MSC certified supplements outside of North America and Scandinavia.



Graph 11. MSC Labelled Supplements: Product Cost-Value (£) in the UK/Irish Market<sup>17</sup>

Atlantic and Pacific cod, pollock and Antarctic krill are the primary source fisheries for most MSC labelled supplements in the UK and Ireland. However, the range of species used is expanding with American brand Dr. Mercola introduced a herring caviar oil product last year, the first of its kind in the UK.

Marine collagen is another type of supplement that is growing in popularity, with the global market estimated by Future Market Insights to be worth over £1 billion by 2032<sup>18</sup>. In 2021, Dr. Mercola and Norwegian brand Seagarden introduced MSC labelled collagen pills into the UK market to meet the demand for planet-friendly products. Sourced from the skin of MSC North Atlantic and Norwegian Arctic cod, this new range provides a certified sustainable alternative to bovine and porcine collagen.

<sup>15</sup>Fish Oil Market Size Worth \$3,178.28 Mn, Globally, by 2028 at 6.2% CAGR - Exclusive Report by The Insight Partners. The Insight Partners – February 10, 2022

<sup>16</sup>IFFO (2020) [The status of forage fish](#)

<sup>17</sup>Data 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.

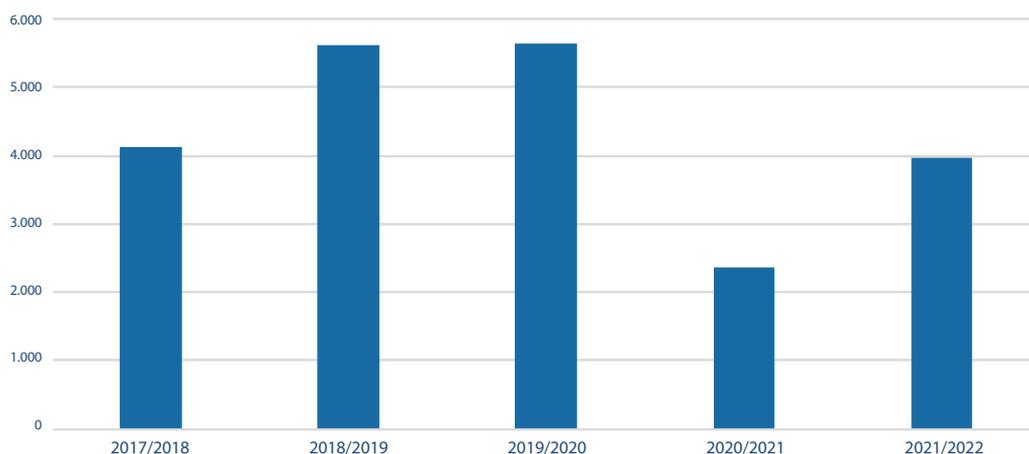
<sup>18</sup>Future Market Insights. Marine Collagen Market Size, Industry Share & Trends – 2032 (futuremarketinsights.com)

# Foodservice

While all industries were affected by Covid-19, the foodservice sector was one of the hardest hit. Lockdowns restricted access to foodservice outlets and consumers stocked up on groceries, the impact of which hit sales of MSC fish and seafood at restaurants hard, which is clearly visible in Graph 12, with MSC volumes falling sharply in 2021.

Despite the challenges of the last few years, foodservice businesses have continued to demonstrate strong support for MSC certified fisheries, both in the UK and Ireland, and abroad. Sales of MSC labelled fish and seafood in the UK and Ireland market rebounded by 68%, as consumers returned to eating out once restrictions were eased. This has given MSC certified businesses the opportunity to regain much-needed customer patronage and once again share a wide range of sustainable seafood offerings to their customers. There is, however, still much progress to be made in order to reach pre-pandemic levels of MSC fish sales in the foodservice sector.

Rockfish, a restaurant group located in the South West of England and owned by MSC ambassador Mitch Tonks, introduced new species such as MSC Cornish hake, and redfish from Iceland, while Ikea offered flatpack lovers MSC pollock for the first time in their restaurants. As consumers returned to eating out more regularly, sales of longstanding MSC partner McDonald's iconic Filet-O-Fish and Fish Fingers returned closer to pre-Covid levels<sup>19</sup>, and MSC certified fish and chips continue to be a firm favourite at JD Wetherspoons, as the 'Fish Friday' club meal deal was extended to run all week long.



Graph 12. Volume (tonnes) of MSC Labeled Fish and Seafood sold in Foodservice in UK and Ireland



Mitch Tonks, Founder and CEO of Rockfish

## Partner in Focus: Rockfish

Rockfish, located in the South West of England and winner of the **MSC UK Foodservice Champion of the Year 2022**, is dedicated to helping more people enjoy delicious, sustainable seafood. Every day their team selects fish directly from the market in Brixham, in addition to sourcing from a number of the most sustainable fisheries in the world. In addition to serving MSC cod and haddock on their restaurant menu, Rockfish have been increasing the variety of MSC certified species available to consumers. These include MSC Cornish hake, landed locally in Brixham, cold water prawns, and more recently, Icelandic redfish. The company is also proactive in encouraging diners to choose sustainable options of species that are less widely consumed.

<sup>19</sup>Data on certified product sales is provided to the MSC by businesses using the ecolabel on products and menus.

# Fish and Chips

MSC certified fish and chip shops play a vital role in educating their customers and ensuring every Fish Friday is a sustainable one. Yet the British tradition is under pressure as shops across the UK and Ireland navigate the economic fallout of the Ukraine war, and enduring impacts of the Covid-19 pandemic and Brexit.

Fish and chip shops were hit particularly hard during the pandemic and the future looks similarly challenging. With rising costs, labour shortages and inflation, both consumers and businesses are feeling the pinch more so than ever.

Some of the more recent challenges for the industry include the Russian invasion of Ukraine, which has driven up the price of fuel and electricity in addition to fish prices and other key ingredients such as potatoes, cooking oil and even the flour used for batter. With the UK's substantial dependence on imported white fish, there will be significant ramifications for the fish and chip sector following the British government announcement that direct exports of Russian white fish would be subject to a 35% tariff as part of its sanctions package.

Despite the challenges, the industry has remained and continues to remain resilient. It has played an important role in recognising and rewarding fisheries that have met the MSC Standard and champions sustainability within the seafood sector. The Bay Fish and Chips in Stonehaven was the first UK fish and chip shop to offer its customers MSC certified sustainable Scottish haddock after the fishery was certified in 2010, making great efforts to become the first businesses to sell it with a label just hours after the first landing of certified fishery. In November 2021 Calum Richardson, owner of The Bay, put MSC Scottish haddock in the headlines once more, when he worked with his supplier, Amity Fish Co, to serve 11,000 fish suppers to delegates at COP26 in Glasgow.

Fish and chip diners have an important role to play in recognising and rewarding the businesses that have committed to sourcing sustainable fish. Globescan consumer research found that diners are increasingly feeling empowered to effect change when they eat out, with 75% now saying that the fish and seafood choices they make can help make a difference to the health of our oceans, up from 67% in 2020. This is encouraging as 82% of seafood diners also agreed that in order to save the ocean, we have to consume fish and seafood only from sustainable sources.

While the fish and chip industry continues to face many challenges, shop owners and diners recognise that without fish, there is no fish and chips. Using the blue MSC ecolabel on menus continues to provide these businesses with a way to demonstrate their support for sustainable fisheries and give their customers an easy way to feel that they too can play a part in protecting the future of our oceans.



# Looking Forward: 2023 Outlook

Fisheries and businesses across the supply chain in the UK and Ireland play a leading role in driving the global sustainable seafood movement forward. Despite the challenges posed by Brexit and the Covid-19 pandemic, the industry has proven its resilience and remained firmly committed to supporting MSC's vision of healthy and productive oceans. Having overcome this unprecedented adversity, it is now faced with the impacts of the Russian invasion of Ukraine and ongoing cost of living crisis.

Climate change and the demands of a global population estimated to reach 10 billion by 2050 also pose major challenges to the long-term health of our oceans. Sustainable fishing has the potential to make fishing operations more resilient to climate change, and well-managed food from our oceans, or "blue foods", will play a critical role in meeting the world's future food needs. It is against this backdrop that MSC has set an ambition to see more than a third of global marine catch certified or engaged in the programme by 2030.

Achieving this will require everyone to play their part, from consumers, to governments, to the catching sector and commercial market. The past year has seen encouraging signs of progress from all. Consumer research conducted this year found that shoppers and diners in the UK increasingly believe that the choices they make can have a positive impact on our oceans and see the blue MSC ecolabel as a way to help them find sustainable seafood quickly and easily.

Governments representing coastal States at Regional Fisheries Management Organisations (RFMOs) have demonstrated a stronger commitment to ensuring the long-term sustainability of fish stocks over the past year. In the Western Central Pacific and Atlantic Ocean, regional RMOs made significant breakthroughs in agreeing on important management measures to safeguard some of the world's largest and most important tuna stocks.

Closer to home, brands, retailers and foodservice businesses in the UK and Ireland have continued to ensure certified fisheries are being recognised and rewarded for operating sustainably. This has been particularly notable for MSC certified fisheries in the UK, with the introduction of new labelled products like sardines from Cornwall and scallops from Shetland. This commitment to support an environmentally sustainable future for UK fisheries has also been demonstrated by the continued progress of [Project UK](#), and growing interest in expanding the project to include additional species. As some of the fisheries engaged in the project approach the end of their FIP timelines, the market can continue to play an important role in recognising their efforts to reach a level of performance that would enable them to meet the MSC Standard. As more fisheries around the world demonstrate that they have met that bar through certification, there will be further opportunities to add the blue MSC ecolabel to packaging, fish counters and menus in the UK and Ireland.

Despite the challenges, there were many successes for the sustainable seafood movement in 2022 that are worth celebrating. We are looking forward to building on those successes with all our MSC partners across the UK and Ireland in 2023.





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## Share with friends and colleagues

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All data in this report is correct as of 1 December 2022, unless otherwise stated. The reporting year is 1 April 2021 to 31 March 2022.

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