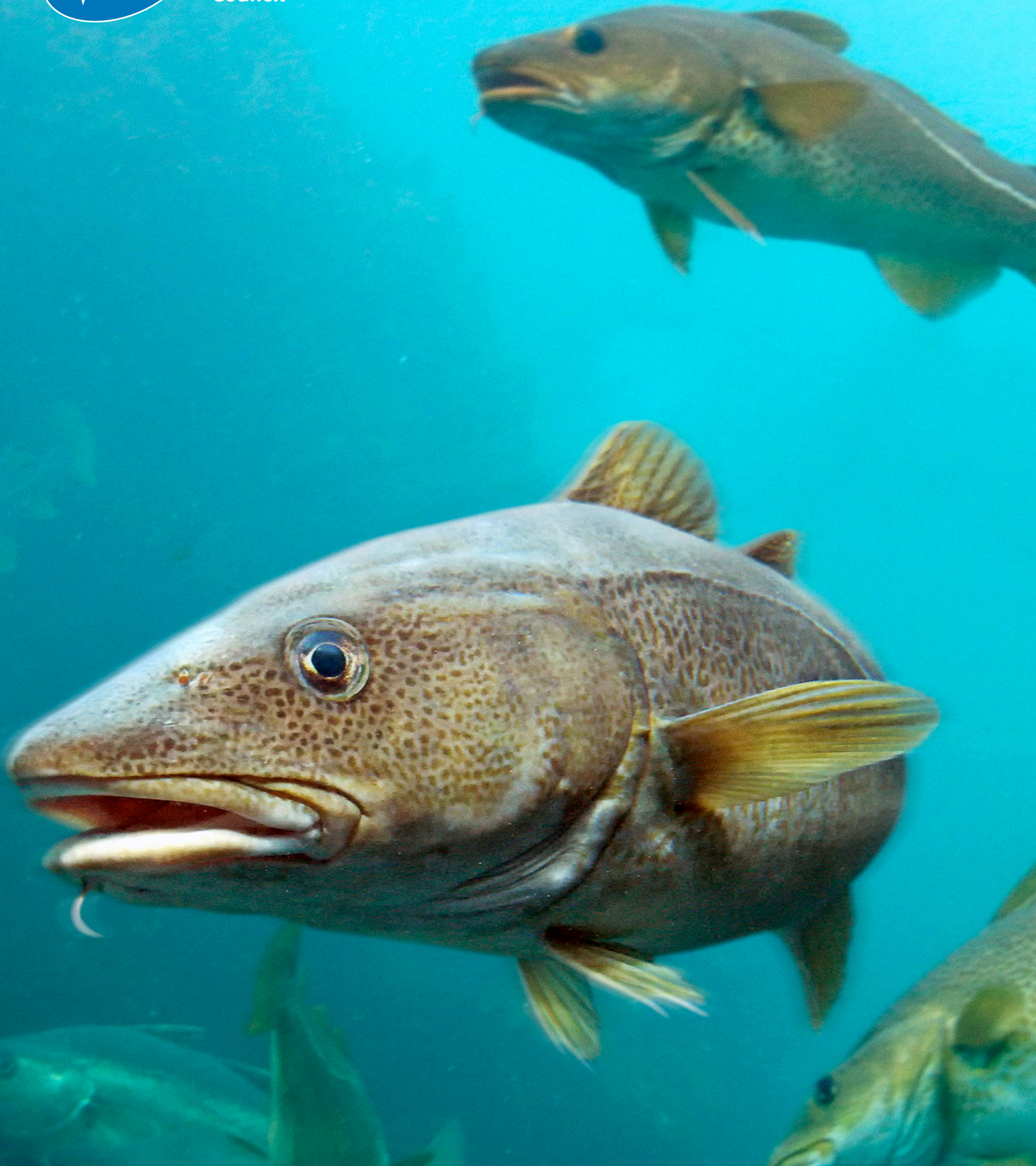




Marine
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Whitefish Market Analysis 2024: Belgium

Market Analysis: Belgian whitefish

WHITEFISH REMAINS OF particular interest, as it accounts for 30.7% of all the MSC labelled volumes in Belgium. MSC data for April 2023 to March 2024 shows that 11,409 metric tonnes of MSC-labelled whitefish has been consumed, of which 51% came from Alaskan pollock (5,836 tonnes). The second most MSC labelled whitefish volumes come from Atlantic cod with 4,249 metric tonnes consumed in 2023/24, which is 37% of all whitefish volumes in the Belgian market and has increased slightly over the last year by 200 metric tonnes. Yellowfin sole has decreased over the last year by 31% to a total consumption of 299 metric tonnes. Haddock and Saithe make up the rest of the top five consumed whitefish species in the Belgian market and have remained relatively stable over the last few years.

MSC certified whitefish is predominantly sold within the frozen category, both plain and prepared, accounting for almost 66% of all whitefish sales in the market. The chilled category makes up most of the remaining volumes in the market, with 26% being allocated to this category. A marginal amount of whitefish is then being consumed as pet food, fresh fish or in food service. Generally speaking, there is a

trend shifting away from chilled and fresh fish and this is no different for whitefish. The chilled category has decreased with almost 1,500 metric tonnes year on year, whereas the frozen category has remained more or less stable.

While still important for the market, MSC labelled whitefish volumes in Belgium have reached their lowest point in five years. Price inflation has had a big impact on fresh fish. Since the price inflation crisis, prices of cod have surged with consumers decidedly looking for cheaper alternatives.

Nomad Foods (with the Iglo brand) is the biggest market partner with MSC labelled whitefish volumes in the Belgian market and proportionally also accounts for the most products. They are followed by private label brands of Lidl, ALDI, Colruyt Group and Carrefour. Virtually all whitefish in the frozen assortment of these partners have the MSC label. Naturally, this is also only possible due to the MSC certified suppliers. After Nomad Foods, Mowi Belgium NV is responsible for most of the whitefish supply in Belgium, followed by Pickenpack Seafoods GmbH and Multi Fish NV. ●



Market Data: Belgian whitefish

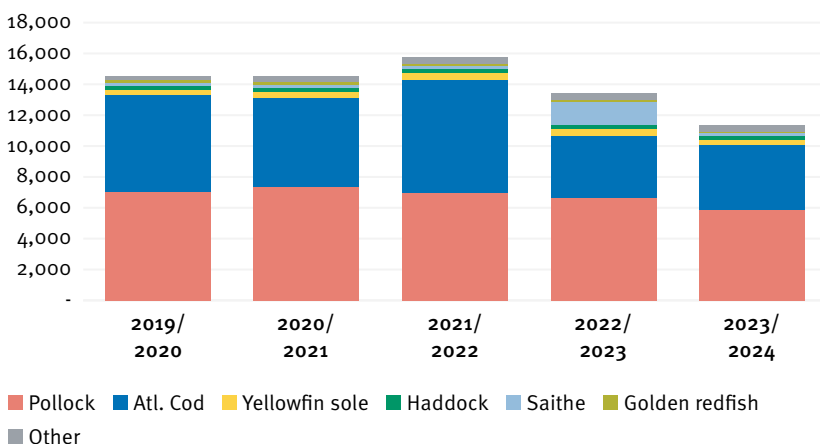
Top three Belgian retailers by volume sold



“Iglo is the first frozen food brand with 100% MSC and ASC certified fish. Our aim is to encourage people to make sustainable food choices by increasing the availability of sustainably caught fish in Belgium. “

Aurore Gustin, Interim Brand Manager Iglo Belgium

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



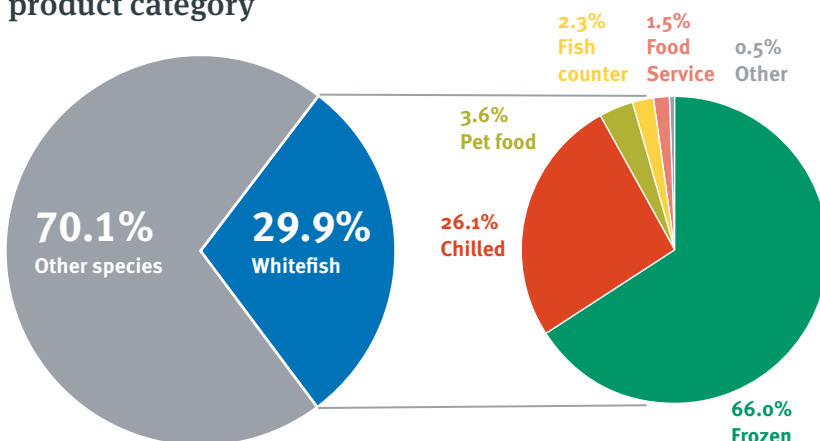
74.3%

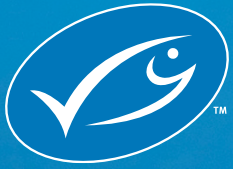
of global whitefish catch is MSC certified

6 million+

metric tonnes of certified whitefish is in the MSC program

Volume of MSC labelled whitefish sold in Belgium by product category





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

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