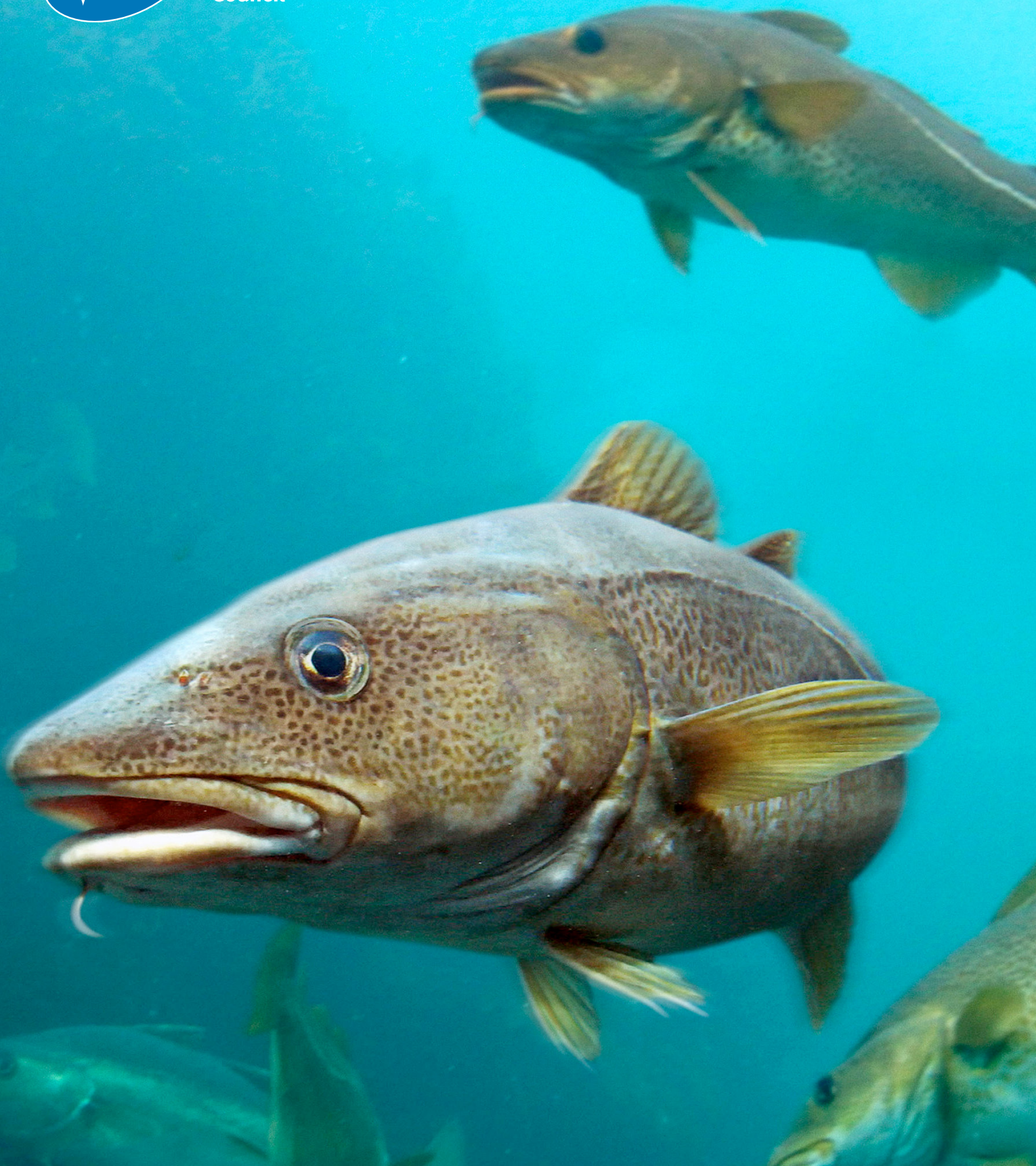




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Whitefish Market Analysis 2024: Denmark

Market Analysis: Danish whitefish

WHITEFISH HAS ALWAYS BEEN the soul of Danish seafood cuisine, from elegant fillets at fine dining restaurants and breaded fillets on smørrebrød to retail products like fish cakes and roe. From April 2023 to March 2024, 2,675 metric tonnes of MSC labelled whitefish were consumed in Denmark. The consumption is distributed across several species and categories, but this analysis do not include products with a mix of whitefish and other species, such as fish cakes with cod and salmon.

The whitefish consumption is allocated between three categories: chilled (44%), frozen (44%), and canned (12%). These volumes together accounted for 14% of the total MSC labelled products sold in Denmark for the 23/2024 period. During this time, whitefish consumption decreased by 5% compared to the 22/2023 period. Which is a trend that is also evident across several seafood categories.

The overall decline in whitefish consumption is primarily driven by the significant decrease of Atlantic cod since 2019. Although, the trend for whitefish shows a slight decline, certain species have experienced a significant increase in volume. Pollock is currently the most consumed species, with a 52% increase since 2019. Together, these two species account for almost half of the total MSC consumption of whitefish in 2024. The shift of distribution between the dominant species since 2019 is likely due to an increased supply of MSC certified pollock, the suspension of North Sea cod in 2019, and increased

consumer price sensitivity. Other whitefish species such as plaice (16%), Pacific cod (9.7%), and saithe (6.9%) are at lower levels and have been fluctuating over the years.

The MSC certified whitefish is led by the private label brands of the retailers Rema 1000, LIDL and Salling Group and the brands by producers such as Jeka Fish, Royal Greenland and Espersen.

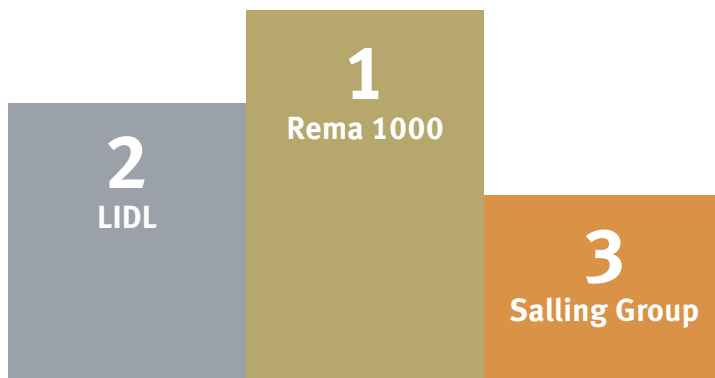
It is worth noting that a large proportion of whitefish in Denmark is consumed as part of a mixed product, either as fish cakes, in canned roe products or as frozen, breaded fish 'filets', made from a mix of different species of whitefish. However, it is challenging to calculate the amount of whitefish in mixed products, with the methodology used in this analysis. MSC data indicates that the consumption of MSC certified whitefish mirrors global trends of a broader decline in the consumption of wild-caught fish, driven by macro-economic factors. However, the MSC consumer survey (Globescan)^[1] indicates that around 70% of Danish seafood consumers believe that all seafood must be fished sustainably in order to protect the oceans and that these claims should be supported by third party organizations rather than producers'. Which emphasises the importance of retailers' and producers' continued commitment to a sustainable seafood industry. ●

[1] Globescan (2024): Understanding seafood consumers | Marine Stewardship Council (msc.org)



Market Data: Danish whitefish

Top three Danish retailers by volume sold



70%

of Danish seafood consumers believe that we need to switch to sustainable seafood sources

69%

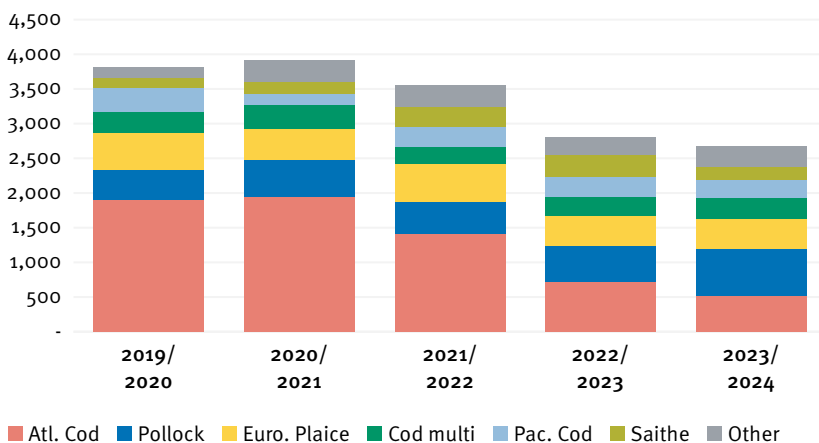
of Danish seafood consumers say that supermarket's and brand's claims about sustainability need to be clearly labelled by an independent organization

76%

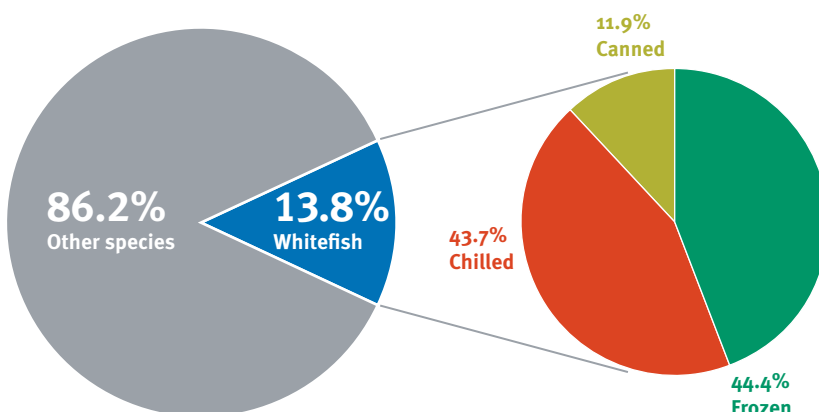
of the Danish consumers that know the MSC label have trust in MSC

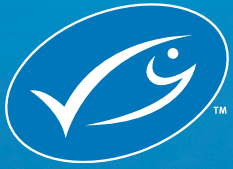
Source: Globescan: MSC Consumer Insights 2024 - Denmark Report

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



Volume of MSC labelled whitefish sold in Denmark by product category





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

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