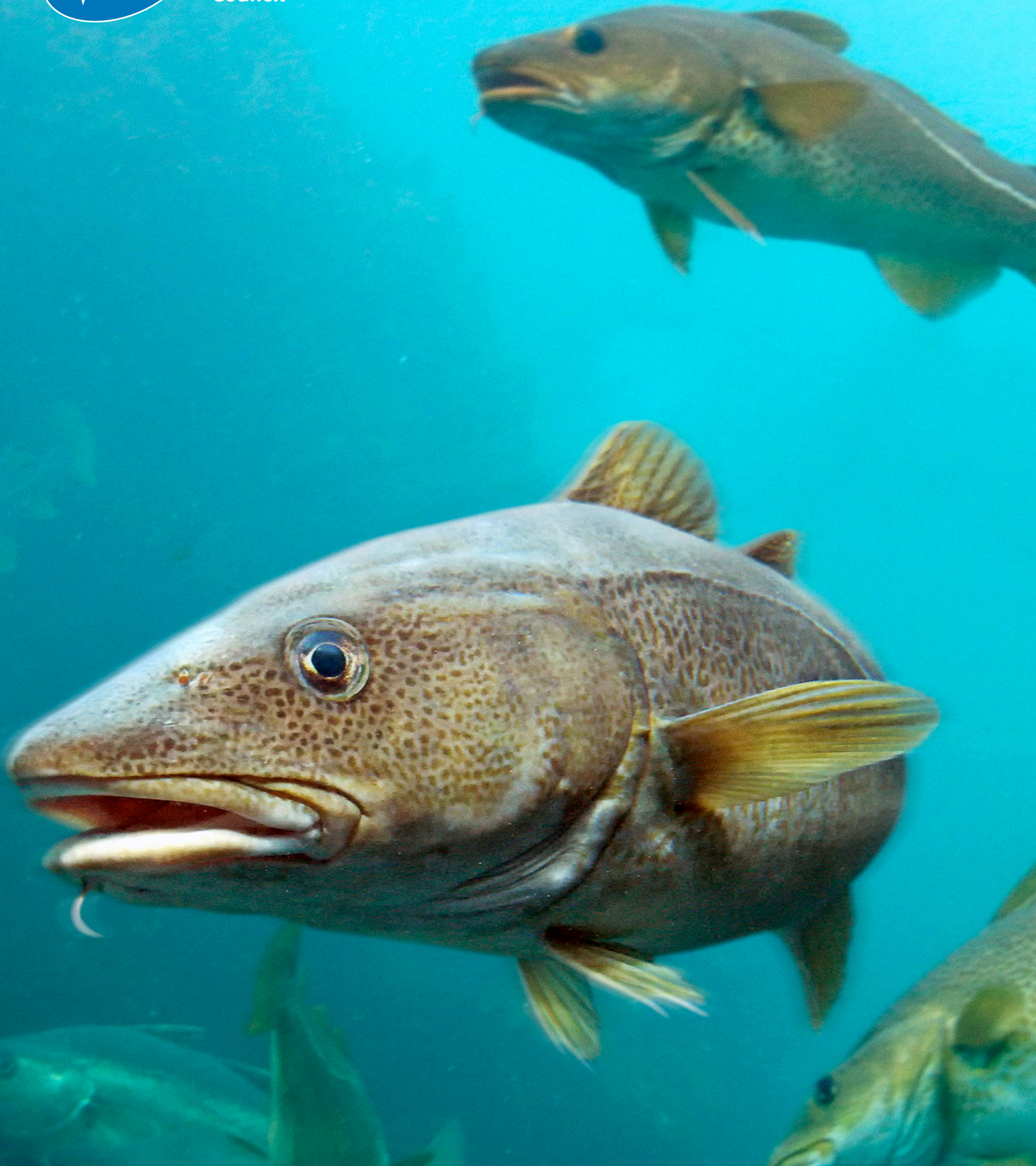




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# Whitefish Market Analysis 2024: Germany

# Market Analysis: German whitefish

MSC LABELED WHITEFISH products have been available in Germany for almost 20 years, especially in the form of frozen products such as fish fingers and “Schlemmerfilets” (breaded fish fillets). They continue to be the backbone of the sustainable seafood market in Germany and provide visibility of the MSC label to millions of consumers. As the leading MSC whitefish market, Germany has enabled the establishment and growth of the MSC certification program by putting the MSC theory of change into action: connecting early sustainability leaders such as the US Alaska pollock fishery with responsible seafood consumers demanding certified sustainable fish products.

This opportunity did not arise because Germans have a special appetite for fish, which in fact ranks well below the world average at 12.5kg per capita in 2023<sup>[1]</sup>. Instead, the successful market uptake was enabled by the combination of national consumption patterns, focusing on a narrow range of species and product types, and a matching certified supply base. Pioneering frozen fish brands like FRoSTA and iglo led the way in connecting the two, making large-scale certified sustainable seafood consumption possible.

Alaska pollock represents one of the top species in the German market, together with salmon, herring, and tuna<sup>[2]</sup>. Most of the salmon, however, comes from aquaculture production, not wild catch. The supply of MSC herring was significantly challenged after the North East Atlantic herring fisheries lost their MSC certificates in 2020, causing the blue label to disappear from many products. Tuna, on the other hand, has seen the biggest growth in MSC volumes sold in Germany in recent years. Nevertheless, whitefish remains by far the biggest species group,

representing 42% of the total German MSC market, with Alaska pollock accounting for 85% of that.

MSC labelled whitefish volumes have seen some significant fluctuations over the last five years. Volumes (product weight) rose from 112,263 metric tonnes in 2019/2020 to 128,765 metric tonnes in 2021/2022, but then declined again to 111,206 metric tonnes in 2023/2024. Most likely, this peak can be attributed to stockpiling of non-perishable frozen products during the covid pandemic. The subsequent decline appears as a normalization of the market to pre-pandemic levels. Strong price increases are the other key reason for this decline, with overall fish and seafood retail prices rising 29.1% from 2020 to 2023<sup>[3]</sup>. Especially the sub-category of fish fingers and other frozen fish products, the most important whitefish segment, suffered a 42.3% price hike<sup>[2]</sup>.

It is important to note that these developments are not specific to MSC whitefish, but in line with overall seafood market developments. When it comes to MSC specific trends, external market data indicates that the share of frozen whitefish volumes sold in German retail has remained steadily above 80%, boasting 89% in 2022<sup>[3]</sup>. So, while German appetite for whitefish might be subject to shifts and changes, the demand for MSC certified whitefish continues to lead the sustainable seafood market, just as two decades ago. ●

[1] FIZ (2024): FIZ\_DF\_2024.pdf (fischinfo.de)

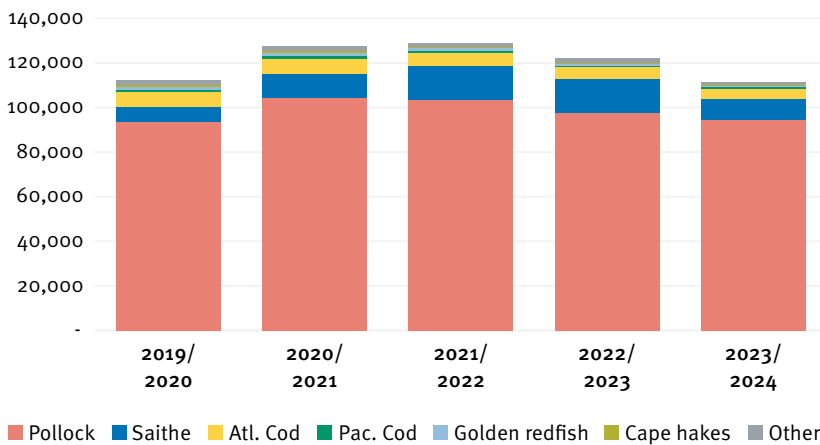
[2] MSC Thunfischbericht 2024: Darf man Thunfisch noch essen? (msc.org)

[3] ASC/MSC-Marktbericht Deutschland 2023: marktbericht-2023-fcb-2a8bb6f470448f825dba61115a3e8e.pdf (msc.org)

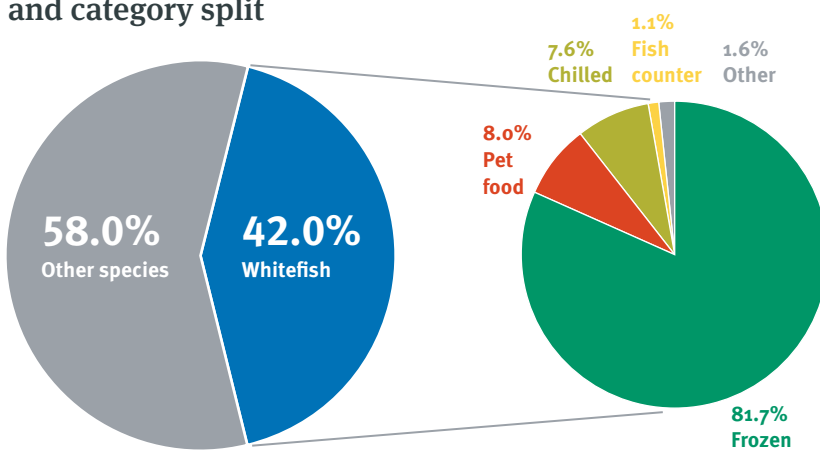


# Market Data: German whitefish

MSC labelled whitefish in Germany – development over time by species



MSC labelled whitefish in Germany – species share and category split



“There is no way around sustainability. Only sustainably caught white fish will allow us to move on with the core of our business: serving valuable fish meals, both now and for future generations. Nevertheless, we always strive to improve the status quo and there are still plenty of things to do even better.”

Felix Ahlers, Management Board Chairman, FROSTA AG

Over

**260**

CoC certified companies with whitefish in scope in Germany

Over

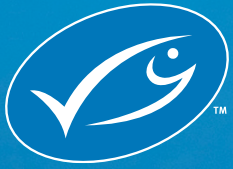
**80%**

whitefish retail sales (volume) in Germany MSC labeled

## Championing Sustainable Whitefish in Germany: iglo



Part of UK-based Nomad Foods, the iconic iglo brand leads the MSC-certified sustainable whitefish market in Germany. Iglo’s 100% MSC-labeled portfolio is the bedrock of sustainable whitefish consumption in Germany, supplying millions of families with all-time favourites such as breaded filets and fish fingers. What’s more: iglo’s frozen fish factory in Bremerhaven is the largest of its kind in the world and at the heart of Germany’s fish processing sector.



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

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