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Small Pelagics Market Analysis 2025: Finland

Market Analysis: Supply chain strives to meet demand for certified seafood

MSC CERTIFIED SMALL PELAGIC FISH play an important role on the Finnish market. Recently however the availability of certified sustainable products has been impacted by fisheries management challenges. Between 2017 and 2020, small pelagics consistently accounted for more than a third of the volume of MSC labelled products in Finland. Now, due to fishery suspensions, this figure has decreased to below 20% since 2022¹. The loss of certificate of Northeast Atlantic herring has been especially damaging, with herring alone having constituted almost 35% of all MSC volumes sold in Finland in 2018/19.

Sustainability & MSC

The market share of MSC has suffered in recent years, mainly due to a few key fisheries failing to meet MSC standard's requirements:

- Atlantic mackerel fisheries were suspended in 2019 due to poor management and overfishing. Pacific jack

mackerel, although widely available in Western Europe, hasn't so far reached the Finnish market to account for the lack of sustainable supply.

- AS (NSS) herring, the largest of the Atlantic herring stocks, does not meet MSC standard's criteria, but alternatives from the North Sea and Iceland are available and already successfully utilized on the Finnish market.

- Baltic herring fishing of the central Baltic herring stock was suspended due to poor recruitment in 2021. The stock in Bay of Bothnia as well as the one in Gulf of Riga have remained more stable and the fisheries certified, which has assured that there is certified Baltic herring available for human consumption on the Finnish market.

- Baltic sprat fisheries lost their MSC certification in 2023, eliminating MSC certified sourcing options. However, international efforts are underway to reintroduce the species into the MSC program, with strong support from the processing industry.





Finnish supply chain committed to sustainability

The Finnish market has stood firmly behind sustainability promises, despite the fishery challenges, thanks to dedicated supply chain that has consistently worked hard to keep MSC certified herring on the plates of the Finnish consumers. Suomen Sillikonttori, the only herring processor processing Atlantic herring in Finland, went through significant efforts to keep all their products MSC certified. In retail remit, Kesko, Lidl and IKEA have done the same and stuck to their 100% certified commitments. This has resulted in Finland rising through the ranks to be one of the leading markets for MSC certified herring globally.

The continued commitment from the Finnish Baltic herring fishery, managed by the Finnish professional

fishermen's association SAKL, ensures there is also significant domestic supply of Baltic herring available on the Finnish market. The Finnish fishery has worked hard for sustainability – in 2024 alone, it made 6 improvements to its performance and management.

Across species, price points, and product formats, there is strong consumer demand for certified sustainable fish and seafood in Finland. With the government guidance encouraging the public to eat two to three portions of fish per week, including one oily, these important species provide a health benefit that packs a flavour punch too. ●

¹ The market data used in this piece is provided to the MSC quarterly, semesterly, or annually, by businesses using the MSC ecolabel on products and menus.



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Find out more: www.msc.org/fi/lajit/pienet-pelagiset-kalat

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