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# Small Pelagics Market Analysis 2025: Germany, Austria & Switzerland

# Germany, Austria & Switzerland Market Overview: Evolution of small pelagic species and MSC in the German speaking markets

SMALL PELAGIC SPECIES PLAY an important role in the German speaking markets (DACH) and have been key to the high availability of MSC labelled products in these markets. However, despite some similarities, seafood consumption of small pelagic fish in Germany, Austria and Switzerland differs significantly. A traditionally popular small pelagic species in both Germany and Austria is herring. In Germany it is by far the most consumed small pelagic species, making up 9.7% of the overall seafood consumption and ranking in fourth position after salmon, Alaska pollock and tuna<sup>1</sup>. Other species in this group available in both Germany and Austria include mackerel and sardines<sup>2</sup>. In Switzerland small pelagic species play a less significant role and the most popular small pelagic species eaten are sardines and anchovy<sup>3</sup>.

While herring has always been popular in Germany, its share of total seafood consumption has started decreasing slightly in recent years, especially as tuna has risen in popularity, with both species having a strong presence in the canned segment. Typical herring products include tinned herring in various sauces as well as marinated herring products such as Matjes, Bismarckherring or Rollmops as well as gourmet

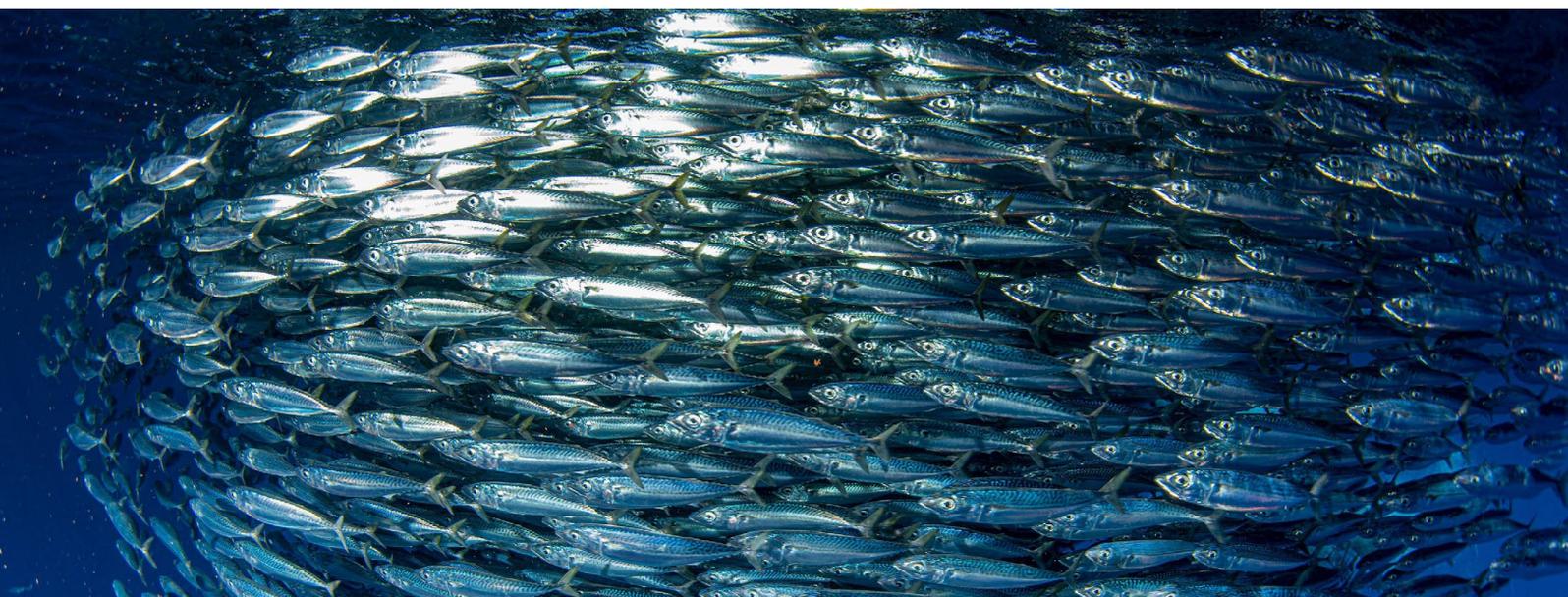
salads. The volume of small pelagic species sold with the MSC label in DACH in 2024/2025 was 42,476 mt, of which 97.5% was herring, 1.1% sardine, 0.9% anchovy, 0.4% sprat and 0.4% jack mackerel. This roughly mirrors the consumption pattern and shows the importance of availability of herring from MSC certified sources in the North Sea, Icelandic waters or the Irish Sea in the market but also highlights room for growth with the other small pelagic species such as Sardine, Anchovy or Sprat.

Historically, herring has been one of the most widely MSC labelled species in the DACH market, due to high volume and availability from MSC certified fisheries. While the volume of MSC labelled herring products has decreased by 60% from 107,377mt in 2019/2020 to 41,398 mt since the suspension of the North East Atlantic small pelagic fisheries, species such as jack mackerel, which has been introduced as a substitute for North East Atlantic mackerel, have seen some positive market developments. ●

<sup>1</sup> *Fischinformationszentrum, 2023*

<sup>2</sup> *NielsenIQ, Global Snapshot Austria, 2023*

<sup>3</sup> *NielsenIQ, Global Snapshot Switzerland, 2023*





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**Find out more:** <https://www.msc.org/species/small-pelagic-fish>

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