



Marine
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Council

Small Pelagics Market Analysis 2025: Czechia

Czechia Market Overview:

Small pelagic fish & MSC certification

THE AVERAGE FISH CONSUMPTION IN CZECHIA is 5.7 kg per person per year, with a total retail market volume of around 50,000 metric tonnes. The seafood market is projected to expand by 4.35% between 2025 and 2029, reaching an estimated €1.36 billion by 2029, reflecting a growing interest in seafood consumption. Despite herring not being a native species, it plays a crucial role in the Czech diet, mainly through imports

Herring Market Dynamics

Herring holds a significant position in the Czech market, commonly consumed in processed forms such as marinated fillets, smoked products, and canned goods. Czechia imports frozen herring, which is further processed into fish salads and smoked products. With the increasing popularity of seafood and the rise of specialty seafood restaurants, herring consumption is expected to grow.

Major retail chains offering herring products include Lidl, Tesco, Albert, Kaufland, Billa, and Makro. These retailers provide a diverse selection, ranging from marinated fillets to canned options. Leading brands apart, retailers in the market include: Varmuža, Lisner, Rügen Fisch – King Oscar, Nordsee, Atlantik

Sustainability & MSC

As small pelagic consumption grows and consumer awareness increases, it is essential for market players maintain sustainable sourcing. A few years ago, small pelagic fish dominated the MSC-certified seafood sector in Central Europe, with over 420 SKUs and 23,000 metric tonnes. Today, the share has fallen by 60%, due to fisheries failing to meet MSC standards¹:

- Atlantic mackerel fisheries have been suspended since 2019 due to poor management and overfishing risks. Pacific jack mackerel, widely available in Western Europe, remains absent in Poland.
- AS (NSS) herring does not meet MSC certification criteria, but alternatives from the North Sea, Iceland, Bothnian Bay, and Gulf of Riga are available and successfully utilized in other markets.
- Baltic sprat fisheries lost MSC certification in 2023, eliminating MSC-certified sourcing options. However, international efforts are underway to reintegrate sprat into the MSC program, with strong support from Graal and Thai Union.

The vast majority of MSC-certified small pelagic products in Czechia are herring, accounting for approximately 3,000 metric tonnes. Other species, such as sardines and anchovies, represent less than 1% of all MSC-certified small pelagic products. Chilled prepared products account for the majority of MSC herring sold, with a small proportion canned.

MSC Market Leaders

MSC-certified small pelagic leading brands include: Penny, Varmuža, Lidl, Albert, Atlantik, Tesco.

The Path Forward

To ensure long-term market stability and secure supply chains, further promotion of sustainable fishing practices and consumer awareness is essential. Expanding the availability of MSC-certified products will not only help preserve fish stocks but also strengthen the industry's resilience and commitment to sustainability. ●





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

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