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Small Pelagics Market Analysis 2025: Latin America

Latin America: A pillar in sustainable small pelagic fisheries

LATIN AMERICA PLAYS A KEY ROLE in the global supply of small pelagics from sustainable fisheries, with Chile and Mexico leading the way in certification and fishery improvement.

In Chile, small pelagics account for more than 70% of wild fishery catches, with jack mackerel as the most important species, reaching over 900,000 metric tonnes in 2023. In the early 2010s, the fishery faced a crisis with declining populations, but thanks to management driven by the South Pacific RFMO since 2011, its recovery has been remarkable. In 2019, it obtained MSC certification, and by 2025, the total allowable catch is projected to be between 1.4 and 1.7 million metric tonnes.

This progress has opened new market opportunities. Before certification, Chilean jack mackerel was mainly exported to Chile, Latin America, and Africa. Today, with the MSC label, markets such as Europe, the United States, and Canada have recognized its sustainable origin. Additionally, innovation has been key in Chile to strengthen domestic consumption, with initiatives such as Jurelmáticas, making this product more accessible to consumers and differentiating it from uncertified imports, reaffirming Chile's commitment to responsible fishing.

Mexico, on the other hand, has strengthened its commitment to sustainable fishing by engaging its small pelagic fisheries with the MSC program. Currently, around 700,000 tons of its catches are either certified or in the process of certification through the MSC Improvement Program. In the Gulf of California, two fisheries have already achieved MSC certification, with the first one obtaining it in 2011. In 2023, the sardine fishery off the western coast of the Baja California Peninsula joined the MSC Improvement Program, ensuring that all small pelagic fisheries in Mexico are now engaged with MSC.

These fisheries ensure a sustainable supply of five species to meet the growing global demand. They also produce millions of canned products that are essential in the Mexican diet and generate marine ingredients such as fishmeal and fish oil. This strategically positions Mexico to meet ASC feed standards, ensuring sustainability throughout the supply chain.

Access to sustainable ingredients is crucial for the growth of other agri-food sectors and global food security. Both Chile and Mexico are proving that responsible fishing not only protects the oceans but also drives economic development and builds consumer confidence in certified products.. ●





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

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