



Marine
Stewardship
Council

A DECADE OF CHANGE

Sustainability now a
mainstream concern of
U.S. seafood consumers

October 2026



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FOREWORD

The last decade has seen major change across the globe – profound political shifts, a global pandemic, social justice movements, major technological and medical advancements, and the impacts of climate change. Fast forward to today and Americans are experiencing an affordability crisis and volatile geopolitics. All of these things combined shape how they experience day-to-day life and their values.

Despite the near constant challenges of the last ten years, I am incredibly optimistic and hopeful about U.S. consumer attitudes to our planet, the food they consume, and the concept of sustainability and preserving our planet for future generations. Ten years of consumer research has made it clear: sustainability is no longer a niche request for U.S. consumers; it's the expectation. But sustainability claims alone are not enough; they want evidence and proof.

Food is an essential resource for all, and consumers are asking tougher questions about where their food comes from, how it is produced, and whether sustainability claims can be trusted. As policymakers and businesses grapple with how to feed a growing global population while staying within the limits of our planet's resources, seafood has a unique offer. Compared with terrestrial animal proteins, wild-caught seafood can provide highly nutritious food without extensive resources¹. When wild fisheries are managed sustainably, they are more resilient to climate change and maintain biodiverse marine ecosystems².

As the **Marine Stewardship Council** (MSC) approaches its 30th anniversary in 2027, these insights offer an opportunity not only to reflect on three decades of impact in sustainable fishing around the world, but to look ahead and ensure that we can continue to reward these efforts with market demand.



\$16 BILLION+

global sales of MSC
labeled products and
seafood in 2026

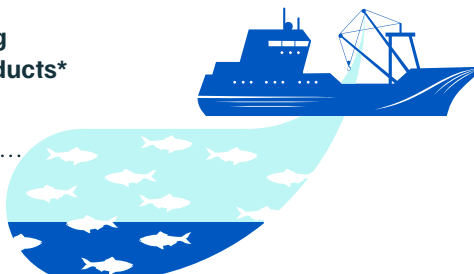


73

countries offering
MSC labeled products*

20%

of all wild-caught seafood
by volume is now engaged
in the MSC program*



*data as of March 31, 2026

MSC labeled products and seafood sales have surpassed \$16 billion USD globally in 2026 with MSC labeled products available in 73 countries³, putting sustainable seafood within reach of more consumers than ever before. 20% of all wild-caught seafood by volume is now engaged in the MSC program and certified fisheries have delivered hundreds of improvements in recent years benefiting fish populations, habitats, management, and vulnerable species, supporting overall marine biodiversity and ocean health.

I find myself astounded by this progress with the global landscape presenting so many challenges that compete for the headspace of the everyday consumer.

This report provides a valuable analysis of U.S. consumer sentiment and values over the last ten years. As the public conversation around food continues to evolve – shaped by social, economic, technological, political, and environmental factors globally – seafood’s story is not just about what is on the plate; it’s about the role our ocean, fisheries, and seafood choices can play in building a more sustainable future for our food systems and our planet overall. That requires more government support for fisheries science and management, more seafood industry collaboration to enable sustainable fishing, more reporting on fisheries and seafood by journalists, and more consumer engagement to empower them to make a difference with their everyday actions.

Laura McDearis

U.S. Program Director
Marine Stewardship Council



1 [Blue Foods Assessment](#)

2 [MSC](#)

3 Data as of March 31, 2026

THE RISE OF THE MAINSTREAM CONSCIOUS CONSUMER IN THE U.S.

Introduction

Understanding how consumers perceive sustainability helps identify what issues matter most to people and how they think, feel, and act toward environmental issues. For ten years – 2016 to 2026 – the MSC and [GlobeScan](#), an independent insights and advisory firm, have tracked how consumers think about seafood, ocean sustainability, ecolabels, and the MSC program.

**THE RESEARCH IS THE LARGEST STUDY OF ITS KIND:
MORE THAN 20,000 SEAFOOD CONSUMERS WERE SURVEYED
ACROSS 23 COUNTRIES IN 2026 ALONE.**

With a decade of research, that amounts to tens of thousands of seafood consumer perspectives, offering solid insight into the global seafood consumer psyche. In the United States, the focus of this report, nearly 15,000 U.S. seafood consumers (n=14,879) shared their perspectives over the past decade of research dating back to 2016¹. Now, with a decade worth of data, we're able to discern key trends that provide valuable insight into the decisions that U.S. consumers make when they purchase their food and how this has evolved – or remained consistent – over time.



BETWEEN 2016 AND 2026, U.S. CONSUMERS HAVE INCREASINGLY EMBRACED SUSTAINABILITY AS A CORE EXPECTATION IN SEAFOOD PURCHASING. IN FACT, U.S. CONSUMER SUPPORT FOR SUSTAINABILITY HAS STEADILY CLIMBED TO MATCH LEVELS TRADITIONALLY ONLY SEEN AMONG EUROPEAN CONSUMERS.

The trends identified in this research clearly demonstrate how U.S. consumers are now more informed, values-driven, and focused on evidence to back up claims on the products they purchase. While price remains a key consideration, American shoppers increasingly rely on trusted labels and certifications to navigate purchasing decisions and identify products that align with their personal priorities.

As sustainability becomes a mainstream expectation, understanding consumer interpretation of sustainability is increasingly important for businesses, policymakers, and sustainability organizations alike. Concerns about greenwashing have heightened consumer scrutiny and skepticism toward environmental messaging, and the resulting fear of criticism or potential misinterpretation has led some organizations to limit communication about legitimate sustainability efforts, a practice known as “greenhushing”. Neither exaggeration nor silence is helpful for sustainability. Instead, there needs to be a greater focus on providing businesses and consumers with credible, independently verified information that is transparent, evidence-based, and backed by recognized standards.



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1 The findings draw on six waves of online consumer research conducted in 2016, 2018, 2020, 2022, 2024, and 2026. Respondents were recruited through national consumer research panels. The latest wave was conducted from February 2 to March 21, 2026, and included 3,784 U.S. consumers, of whom 2,500 were seafood consumers.

10 TRENDS SHAPING AMERICA'S SEAFOOD APPETITE

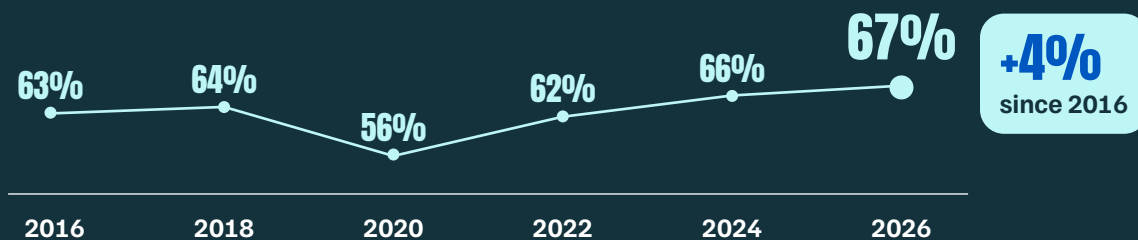
1 AMERICANS EXPECT 'SUSTAINABLE' SEAFOOD TO BE THE DEFAULT

A decade ago, many were already thinking that all seafood should be sustainable, and that expectation remains high today.

This expectation is underpinned by consistently high concern about ocean health among U.S. seafood consumers, matching high concern seen across Europe.

The idea that sustainable sourcing is essential for protecting ocean health has become more mainstream. It reflects a growing consumer view of sustainability as built-in or integrated to products rather than an add-on.

Fig. 1.1: Seafood should come only from sustainable sources



2 HEALTH AND SUSTAINABILITY ARE BECOMING MORE CONNECTED

Fig. 2.1: Agreement that ecolabeled fish and seafood is better for health

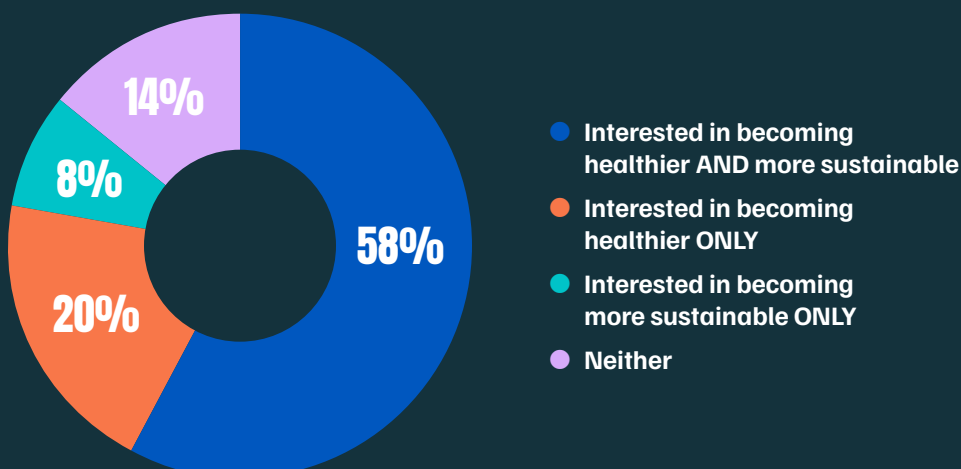


Health is becoming more closely connected with perceptions of sustainable seafood, although the shift is gradual. Agreement that ecolabeled fish and seafood is better for health now stands at 53%, significantly higher than the 46% in 2018.

The MSC research echoes consistent themes from GlobeScan's Healthy and Sustainable Living study that over half of American consumers want to be both healthier and more sustainable, while very few are interested in living more sustainably without also prioritizing health.

In 2026, 73% of U.S. consumers said choosing the right healthy protein is a priority when shopping for food. This suggests that consumer messaging around healthy protein choices may complement the seafood category, paired with a credible environmental and nutritional message.

Fig. 2.2: Desire to change lifestyle to be healthier AND more sustainable



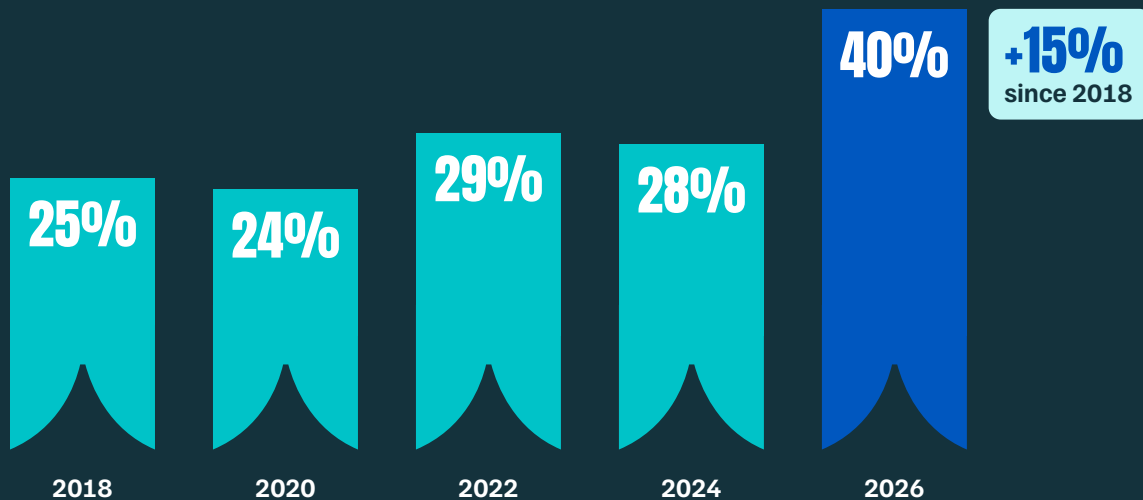
3 CONSUMERS ARE NOTICING ECOLABELS MORE OFTEN WHEN SHOPPING

One of the clearest behavioral shifts over the last decade is the growth in consumers saying they notice ecolabeled products while shopping.

Respondents who said they noticed ecolabels more rose from 25% in 2018 to 40% in 2026, an increase of 15 percentage points. This suggests that ecolabels are becoming more visible in retail environments, easier to identify during purchase decisions, and being used as tools to help navigate buying seafood.

Generationally, millennials are most likely to notice ecolabels while shopping, closely followed by Gen Z.

Fig. 3.1: Notice ecolabeled products when shopping



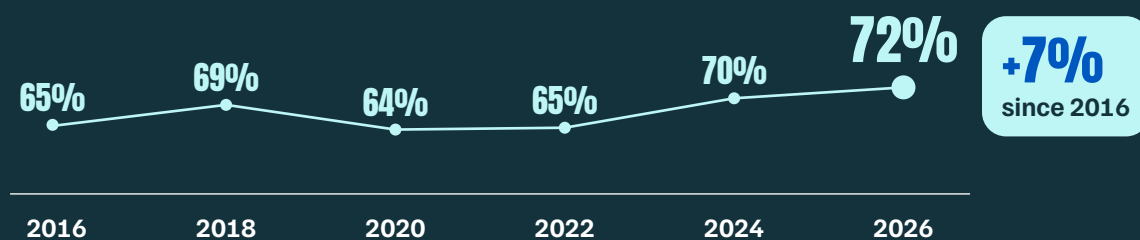
4 INDEPENDENT VERIFICATION HAS BECOME MORE IMPORTANT

Consumers are increasingly looking for sustainability claims to be independently verified, reinforcing the value of credible third-party certification. In 2016, 65% agreed that retailers' and brands' sustainability and environmental claims should be clearly labeled by an independent organization; by 2026, this had risen to 72%, an increase of 7 percentage points.

The finding is particularly relevant in a skeptical market: in 2026, 53% said they did not trust most environmental or green claims made about the products they buy.

The shift suggests that consumers increasingly expect companies to show proof behind environmental claims, and that without independent verification, claims are less credible. In a crowded sustainability landscape, independent verification provides an important signal that claims have been assessed against an external standard.

Fig. 6.1: Sustainability claims should be clearly labeled by an independent organization

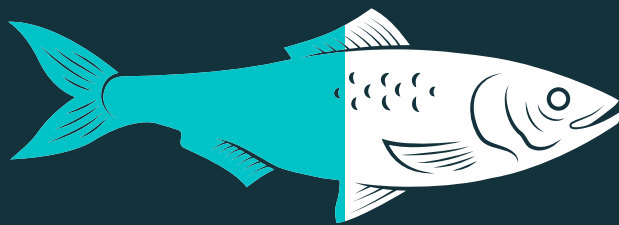


5 PRICE IS (STILL) KING AT THE GROCERY STORE, BUT GREATER VISIBILITY OF ECOLABELS HELPS SHOPPERS CHOOSE

While ecolabels are becoming more noticeable, there are still practical barriers that can prevent sustainable seafood from becoming the preferred choice.

Price has remained steady as the fifth most important consideration when buying seafood in every wave since 2018, following safe to eat, fresh, taste, and health benefits – which have also remained consistent over the years. At the same time, willingness to pay more for certified sustainable seafood has remained broadly stable, moving from 51% in 2018 to 55% in 2026, after falling to 48% in 2022.

Taken together, the findings suggest that greater label visibility paired with cost-effectiveness are helping guide shoppers at point of purchase.



55% U.S. consumers are prepared to pay more for certified sustainable seafood (up 7% from 2022)



6 TRANSPARENCY IS A KEY DRIVER OF TRUST, AND CONSUMERS INCREASINGLY TRUST THE LABEL

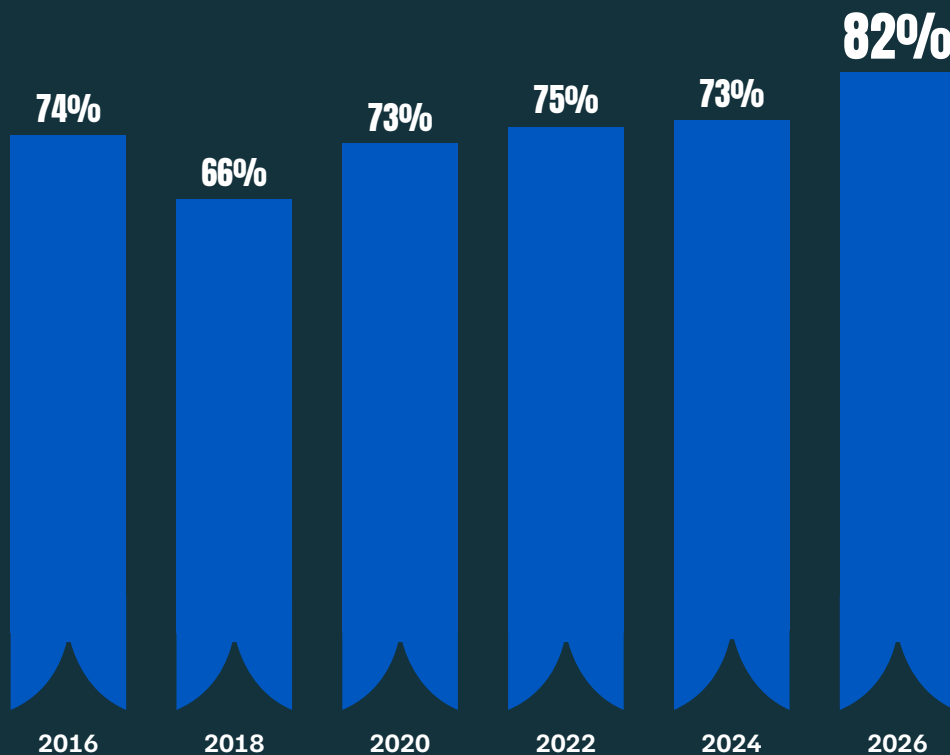
As consumers continue to look for transparency with certifications, transparency is also emerging as one of the MSC's clearest areas of reputational progress. The proportion strongly associating the MSC with being open and transparent rose from 41% in 2018 to 55% in 2026, an increase of 14 percentage points, one of the most substantial movements across the tracked MSC attributes.

Trust in the label has seen varied growth, starting at 74% in 2016 and ultimately reaching 82% in the last wave of research, with some dips in between. The MSC's strong reputation of openness paired with high trust can help distinguish credible certification from less transparent environmental messaging or self-claims.

55%
of consumers
feel the MSC
is an open and
transparent
organization

+14%
since 2018

Fig. 6.1: Trust in the MSC label



7 THE MSC LABEL HAS ENTERED THE MAINSTREAM CONSCIOUSNESS

The MSC has made significant progress in building visibility in the U.S. over the last decade. Label recognition has jumped from only one in five American consumers in 2016 to more than one in three in 2026. This growth has accelerated in recent years, with a rapid uptick in awareness post-pandemic, between 2022 and 2026.

Not only are more consumers recognizing the MSC label, but a growing number say they see it often, suggesting MSC certified products are becoming more visible at shelf level and appearing more consistently in shoppers' baskets.

Fig. 7.1: Have seen the MSC label



8 THE MSC LABEL IS INCREASINGLY SEEN AS A PRACTICAL SHOPPING TOOL

The MSC blue fish label is increasingly functioning as a trusted symbol for shoppers who want to choose sustainable seafood. The proportion saying the label helps them identify sustainable seafood quickly and easily rose from 77% in 2016 to 86% in 2026, an increase of 9 percentage points.

This marks an important evolution in how the MSC is perceived. The label is not only communicating an environmental standard; it is helping consumers reduce complexity at point of purchase through a recognizable cue they can use when comparing products.



86%

of U.S. consumers said the MSC label helps identify sustainable seafood quickly and easily (up 9% from 2016)



9 FISHING INDUSTRY INCREASINGLY RECOGNIZED AS CONTRIBUTING POSITIVELY WELL TO OCEAN HEALTH

Belief that the fishing industry is contributing to protecting the ocean jumped from 22% in 2016 to 37% in 2026, representing a consistent 15 percentage-point climb over a decade. This trend demonstrates a shift in the narrative in U.S. consumers' perspective that not only do fishers and the industry have a high responsibility for helping protect the ocean, but that they are now making a positive difference.

This trend, paired with consistently high trust in the MSC label, suggests that positive stories featuring fishers or fishing activity that also demonstrate impact on the water can pair well with independent certification to have a strong impact on consumer choice and point of purchase.



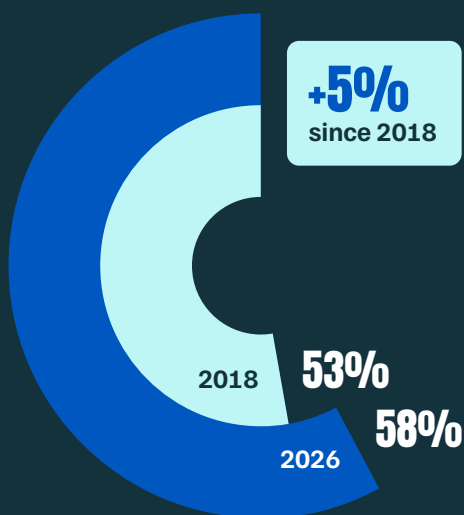
10 CONSUMERS INCREASINGLY BELIEVE THEIR CHOICES CAN PROTECT SEAFOOD FOR THE FUTURE

Consumers are increasingly likely to believe that their seafood purchases can make a positive difference by helping ensure healthy fish populations will be available for future generations. They are more optimistic about the state of the ocean, its ability to rebound, and the difference they can make through their seafood choices.

Consumers' association of the MSC with ensuring seafood will be available for future generations increased, from 53% in 2018 to 58% in 2026, a rise of 5 percentage points.

This suggests consumers may be increasingly connecting an individual purchase of ecolabeled seafood with longer-term benefits for fish stocks and future seafood supply.

Fig. 10.1: The MSC ensures seafood will be available for future generations



CHARTING THE FUTURE OF SUSTAINABLE SEAFOOD

Ten years of consumer research reveals a clear and consistent shift in how Americans think about seafood sustainability and certification. What began as interest in environmental sustainability has evolved into an expectation that seafood is sourced sustainably, verified by trusted third parties, and supported by credible information. The findings show that consumers are increasingly connecting sustainability with health and long-term environmental stewardship, while being more discerning about self-claims made by brands and retailers. Certification can provide the trusted assurance that shoppers increasingly seek in a crowded and often skeptical sustainability landscape. At the same time, consumers are demanding greater transparency and stronger proof behind environmental claims, reinforcing the value of trusted, independent certification.

The research highlights significant progress in awareness, trust, and understanding of the MSC's role. Consumers are increasingly recognizing the MSC blue fish label, associating it with transparency, rigorous standards, and independent verification, and viewing it as a practical tool for choosing sustainable seafood. As sustainability moves from a differentiator to an expectation, the MSC blue fish label offers shoppers a trusted symbol that can help them make informed choices.

These shifts have been enabled by decades of work by the MSC in partnership with fisheries and the seafood industry to expand the availability of MSC certified seafood to consumers. This effort has involved working closely with retailers, seafood suppliers, processors, and other industry stakeholders to increase the presence and visibility of MSC labeled products on store shelves. The MSC has also invested in educating American seafood consumers about what the blue fish label represents and in empowering them to make choices that align with their values. Together, these efforts have helped build consumer awareness and understanding of the MSC label, making it easier for shoppers to recognize and choose seafood that meets MSC's sustainability standards.



As more fisheries enter the MSC program, the potential impact extends beyond what consumers see on store shelves to the health and resilience of the ocean itself. Each fishery that meets the MSC standard represents another opportunity to support the long-term productivity of wild fish populations and ocean habitats. The growing diversity of MSC certified seafood, from familiar species such as salmon, tuna, and cod to less widely known species like quahogs, scup, and squid, also demonstrates that sustainable fishing can be applied across a wide range of fisheries, regions, and fishing methods. In the U.S. alone, 90% of fisheries by volume are MSC certified¹. That certification translates to greater transparency and accountability through a clear, independent framework for evaluating how fisheries operate and how certified seafood moves from the water to the marketplace. Through rigorous assessments and audits, the program gives greater visibility into the practices behind certified products creating accountability for participating fisheries and supply-chain partners.

The seafood consumer research paints a clear picture of a future where sustainability is more mainstream. With more MSC labeled products on shelves than ever, it also makes sustainability more accessible to more consumers. MSC labeled seafood can be found in a wide diversity of products and price points, from canned fish and microwaveable meals to frozen filets, as well as supplements and pet food. It's on the shelves at large national retailers like Walmart and Costco, as well as regional grocery stores and natural grocers. The MSC blue fish can be found at McDonald's as well as in the corner bodega.

The choices made today will shape the future of the ocean and the future of seafood itself. With growing pressure on marine ecosystems, a global population approaching nine billion², and increasing demand for seafood, supporting well-managed fisheries is essential to maintaining healthy fish populations, resilient ocean ecosystems, and thriving coastal communities. The expansion of the MSC program and the growing diversity of certified seafood show that sustainable fishing is not simply a niche option, but an increasingly accessible part of the seafood marketplace and an essential component of sustainable food systems.



1 MSC

2 United Nations



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