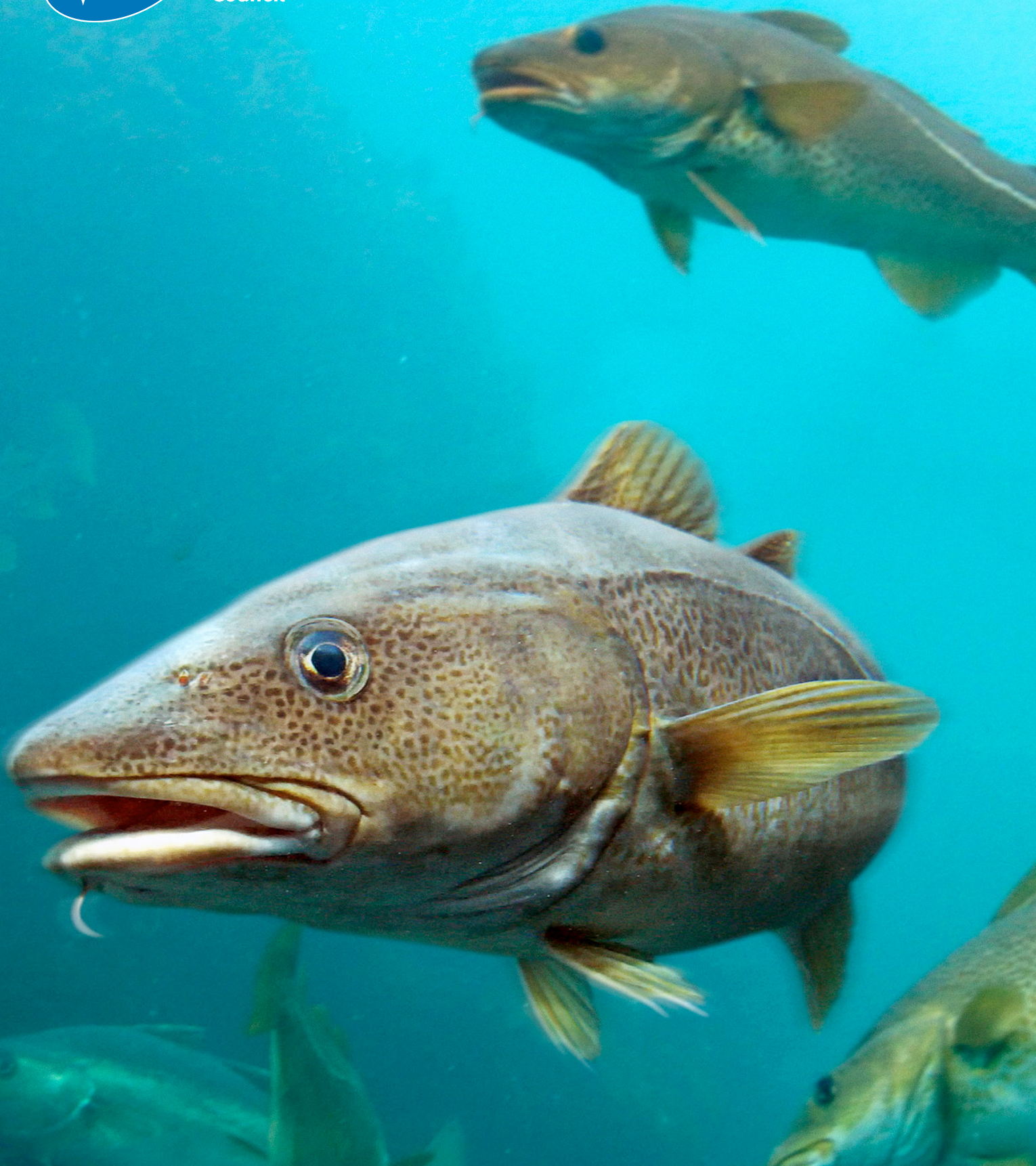




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Whitefish Market Analysis 2024: Netherlands

Dutch Market Analysis: whitefish

WHITEFISH REMAINS OF particular interest, as it accounts for 29.9% of all the MSC labelled volumes in the Netherlands. MSC data for April 2023-March 2024 shows that 13,932 metric tonnes of MSC labelled whitefish have been consumed here, of which 69.7% came from Alaskan pollock. The second-most MSC labelled whitefish volumes come from Atlantic cod, which also accounts for most of the total decline, with 57.5% fewer volumes than in 2019/2020, falling to 2,604 metric tonnes. The volumes of Cape hake have remained relatively stable but have shown difficulty surpassing 500 metric tonnes. Saithe volumes have almost doubled between 2022/23 and 2023/24. Blue grenadier (also known as hoki) has seen considerable growth in the last few years, with record volumes of 368 metric tonnes in 2023/24, more than tripling the volumes of 2022/23. Most of this follows from the new luxury salads of Albert Heijn. Furthermore, while it is economically the most important target species for the Dutch demersal fleet only 149 metric tonnes of European plaice was consumed locally in 2023/24. To put this in contrast, 1,769 metric tonnes of European plaice were landed and imported in June 2023 alone.

MSC certified whitefish is predominantly sold as frozen seafood and accounts for 70.2% of all volumes. However, 18.8% is sold chilled, particularly as the Dutch delicacy 'kibbeling', with most retail sales carrying the MSC label. Despite this, Dutch consumers favour freshly prepared kibbeling from fishmongers. In 2022, 66% of the 20,300 metric tonnes consumed were purchased from fishmongers, 12% from restaurants and fast-service outlets, 9% from supermarkets, and the remainder distributed across online sales, canteens, and wholesalers. While

it's unclear how much kibbeling is made from Alaska pollock versus other whitefish like Atlantic cod or pangasius, the data highlights significant potential for fishmongers to increase their use of MSC certified whitefish. All the more important are the 11 committed MSC certified fishmongers who act as ambassadors in The Netherlands. These include the recently certified Vishandel Wennekes, who promotes sustainability and the importance of MSC certified seafood in the Dutch Achterhoek region. However, a substantial increase in MSC certified whitefish volume is not expected among fishmongers, who often view the CoC certification and logo licensing fees as significant obstacles to communicating sustainability.

While still crucial, MSC labelled whitefish volumes in the Netherlands have reached their lowest point in five years. Food price inflation has increased the cost of seafood, prompting consumers to seek alternatives, which likely impacted the market's whitefish volumes.

Nomad Foods (with the Iglo brand) is the biggest market partner with MSC-labelled whitefish volumes in the Dutch market and proportionally also accounts for the most products. They are followed by private label brands of Albert Heijn and Lidl, Vis Marine (from Superunie), and Jumbo. Virtually all whitefish in the frozen assortment of these partners have the MSC label. Naturally, this is also only possible due to the MSC certified suppliers. After Nomad Foods, Pickenpack Seafoods GmbH is responsible for most of the whitefish supply in The Netherlands. They are followed by Mowi Lemmer BV and Seafood Connection B.V., which recorded increases of 20.7% and 6.2% in volume, respectively. ●



Dutch Market Data: whitefish

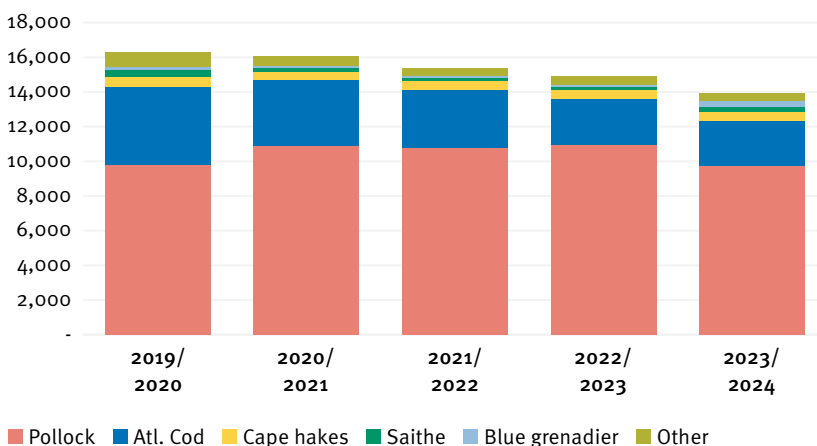
Top five Dutch brands or companies by volume sold

	2024	2023
IGLO	1	3
ALBERT HEIJN	2	-
LIDL	3	1
SUPERUNIE	4	2
JUMBO	5	5

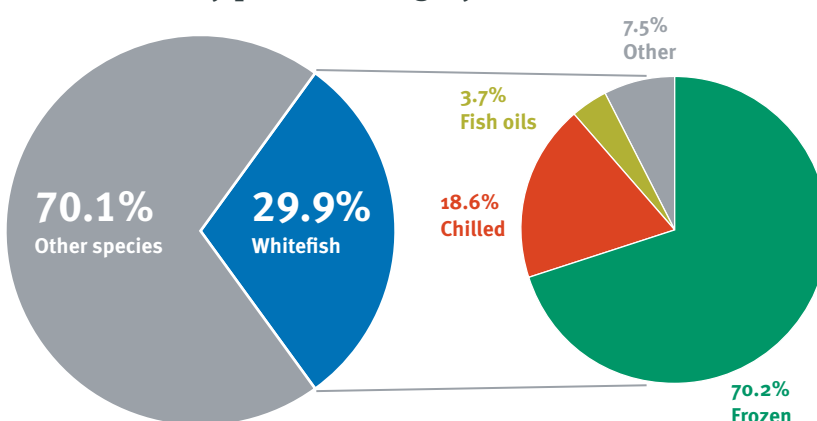
“Through MSC certification of Seafood Connection’s products we assure our customers that they can enjoy seafood from sustainable fishing practices, backed by real scientific research. Customers expect transparency regarding certification and a clear theory of change towards more sustainable fishery practices. MSC assures that our seafood is sustainable from source to plate and is widely recognized as one of the best partners to work together with in order to assure sustainability through a widely known brand.”

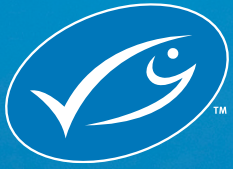
Jozua Koffeman, Corporate Social Responsibility Officer at Seafood Connection

MSC labelled whitefish sold in the Netherlands by volume (metric tonnes) and species



Volume of MSC labelled whitefish sold in the Netherlands by product category





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Find out more: <https://www.msc.org/species/whitefish-yearbook>

Contact us: info@msc.org



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