



MSC UK and Ireland Market Report 2023

4th Edition





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Executive Summary

This fourth edition of the MSC UK and Ireland Market Report highlights the continued commitment to sourcing and selling sustainable seafood from businesses in these markets. It profiles recent trends in MSC labelled product sales and the progress made in both markets in increasing the availability of certified sustainable seafood products. It also draws attention to new and emerging sectors and species in the sustainable seafood space. Data analysed and presented in this report is provided to the MSC by businesses using the ecolabel on products and menus.

Key findings:

- Shoppers in the UK and Ireland spent a record £1.33 billion on MSC certified fish and seafood in 2023, up 5% from the previous year. Volumes of MSC labelled product also increased, rising to 154,543 tonnes – 1% higher than the preceding year. MSC labelled products accounted for an estimated 59% of the value and 58% of the volume of all wild caught fish and seafood sold in the UK retail, an encouraging rise in coverage.
- MSC labelled fish and seafood sales saw considerable shifts by sector and product format. Frozen and preserved products saw growth, whilst chilled products witnessed the steepest decline in sales across all categories – in line with the broader pattern of consumers preferentially choosing more affordable products with long shelf lives during the ongoing cost-of-living crisis.
- MSC sales grew in the foodservice and retail food to go sectors, by 43% and 33% respectively. Following the end of the Covid-19 pandemic, the recovery of the restaurant sector and the return to office working have likely driven these patterns.
- 15,390 tonnes of MSC labelled tuna was sold in the UK last year, a 78% rise from the preceding year and setting a new record for MSC certified tuna sales in the UK. 25% of UK retail tuna sales are now MSC certified. The growth in certified sustainable tuna sales is further explored in the MSC UK Tuna Shopper Report 2024.
- The variety of sustainably sourced species available to UK and Irish consumers continued to grow, with 53 different species sold compared to 49 last year, and 32 ten years ago.
- Whitefish remained dominant in the MSC landscape in the UK and Ireland, accounting for 59% of sales of MSC products in 2023. Atlantic cod, walleye pollock, and haddock are once again the three most sold MSC species in the UK and Ireland by a distance.

Despite ongoing geopolitical and economic challenges, the UK and Irish markets have remained deeply committed to supporting certified sustainable fisheries and the MSC programme. There has been great progress in several key market areas over the past year and the 2023 edition of our Market Report highlights these notable achievements and commitments made across the supply chain that have made this progress possible. The report also outlines where further MSC labelling opportunities still exist or have developed, and how this, in turn, intends to support increased consumption of a wider variety of sustainably sourced fish and seafood, to meet consumer demand.



Introduction

This year, despite continued geopolitical and economic uncertainty, the fish and seafood industry in the UK and Ireland has made progress in furthering its commitment to championing sustainability in several areas. In the catching sector, six fisheries across the UK and Ireland were recertified in 2023, with another two currently in the re-assessment process.¹ To reflect on the progress fisheries in the UK and Ireland have made over the past 20 years, the MSC also published the first ever MSC UK and Ireland State of the Water Report this year, which documented 146 improvements made by MSC certified fisheries in the region.

2023 also provided an opportunity to enshrine sustainable fisheries management into law, as the UK government embarked on the development and delivery of a suite of fishery management plans (FMPs), following the UK's exit from the European Union. The outcome of these FMPs will have a significant bearing on the progress of several fisheries engaged in Project UK Fishery Improvement Projects (FIPs). These FIPs represent the next suite of fisheries in the UK that are most likely to enter full MSC assessment and thus will hopefully increase the availability of local, sustainably sourced seafood.

For the retail sector, the 'big five' species – cod, haddock, salmon, prawns and tuna – continued to account for the majority of MSC labelled products sold in both the UK and Ireland. However, there was also increasing diversification of species in response to the ongoing cost-of-living crisis and the need to offer more affordable alternatives. In most cases, these new alternatives were still sold with the blue MSC ecolabel, reflecting the sectors' steadfast commitment to source from sustainable, well-managed fisheries with certification.

This year the MSC also expanded our annual consumer marketing campaign in the UK from one week to an entire month. In recognition of the importance of blue foods to our health and the health of our planet, Sustainable Seafood September encouraged consumers to eat a wider variety of sustainable fish and seafood while highlighting the popularity of the 'big five' species and the huge array of sustainable products bearing the MSC ecolabel across salmon, tuna, cod, haddock and prawns. This report looks more closely at the role of the 'big five' in the market, analysing which certified species and product formats are experiencing growth, and which are not. It also showcases some of the alternative species and product swaps that are available to both businesses and consumers looking to expand the variety of sustainably sourced products they source, sell or purchase.

With MSC's ambitious aspiration of engaging over one third of the world's marine catch in our programme by 2030, this report and its content, insights and findings, aim to provide valuable information and resources that can help support the theory of change that requires consumers, business and fisheries alike, to further the sustainable seafood movement, and ultimately deliver more sustainable fisheries both here and around the world.

We hope that you enjoy this fourth edition of our report. Please do get in touch with any questions or queries by reaching out to your key contact at MSC, or if you would like to make a general enquiry, you can find our contact details listed at the end of the report.

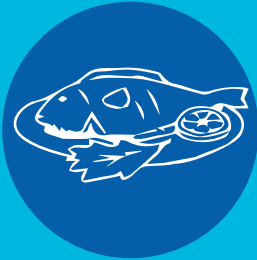
¹As of December 1, 2023. All information on fishery re-certifications and re-assessments is available on MSC's [Track a Fishery website](#).



Note on data: The data used in this report is provided to the MSC quarterly, semesterly, or annually, by businesses using the MSC ecolabel on products and menus. The reporting period is aligned with the last financial year: April 1, 2022 – March 31, 2023. Each product or menu item is registered and reported based on the market in which it is sold. This report includes data from the following regions: the United Kingdom, Ireland, and UK/Ireland (where the same product is sold into both markets). All data presented is from the aforementioned regions unless otherwise specified.

UK CONSUMER INSIGHTS 2023

The results of a YouGov consumer research survey, commissioned by the Marine Stewardship Council (MSC) following our yearly Sustainable Seafood September Campaign, indicate growing awareness of the MSC ecolabel amongst seafood consumers in the UK.



73%
of UK consumers eat seafood at least once a month or more (up from 71% in 2022)



Amongst 18-24 year olds,

62%

2022

70%

2023

said they eat seafood at least once a month or more



There is growing awareness of the MSC ecolabel amongst seafood consumers



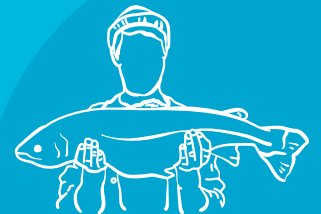
2021



2022



2023



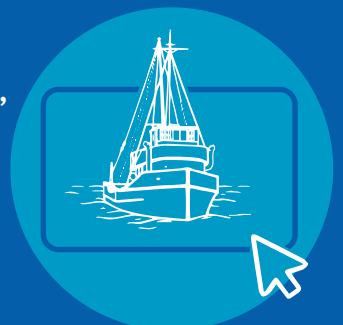
SUSTAINABLE SEAFOOD SEPTEMBER

In 2023, the MSC evolved our annual consumer-awareness campaign into a month-long celebration: Sustainable Seafood September. With the support of our partners, we aimed to make September synonymous with sustainable seafood and encourage consumers to make the switch to only choosing seafood that comes from sustainable sources.



72%
of seafood consumers felt Sustainable Seafood September made them more likely to buy fish with the blue MSC ecolabel when shopping or dining out

During the campaign we aired our TV advert, **All Hands on Deck**, featuring the Shetland crab and scallop fishery.



After seeing the TV advert,

81%

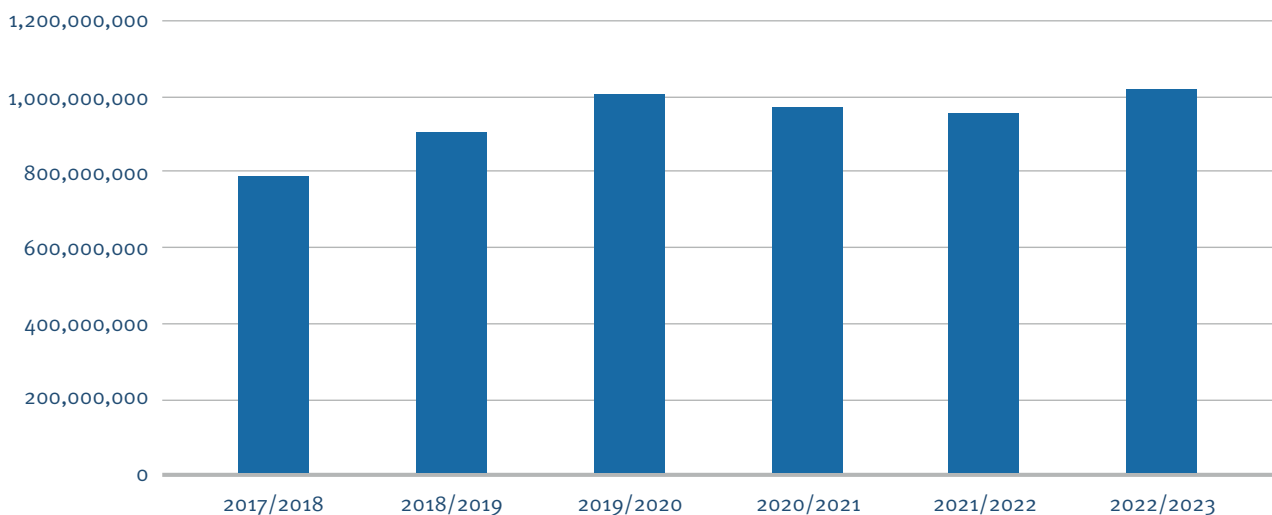
of respondents agreed the TV advert helped them understand what the blue MSC ecolabel means



Total sample size: 2,069
Seafood consumers (e.g. 18+ and eat seafood at least once a month): 1,525

Market Overview

Consumers in the UK and Ireland remain committed to making sustainable choices when purchasing fish and seafood. In fact, YouGov consumer research conducted in September 2023 found that over half (54%) of seafood consumers in the UK agreed that the choices they make when they buy fish or seafood can have a positive impact on the ocean.² Consumer spending on MSC certified fish and seafood hit a record high of £1.33bn in 2022/23, up 5% from the previous year and surpassing the 2019/20 record of £1.31bn. This growth is all the more encouraging in the context of a significant cost-of-living crisis, showing that MSC certified products can remain accessible to those needing to control their spending. In terms of value, total seafood sales in the UK rose 1.3% to £4.13bn, whilst the volume of seafood purchased dropped 6.4% to 375,324 tonnes – largely a symptom of high inflation rates in the UK in 2022.³ Within this, MSC labelled products accounted for an estimated 59% of the value and 58% of the volume of all wild caught fish and seafood sold in the UK retail sector.⁴ This is up from 54% and 51% respectively the preceding year, a promising rise in label coverage for MSC certified products.



Graph 1. MSC Product Cost-Value (£) in the UK/Irish Market⁵

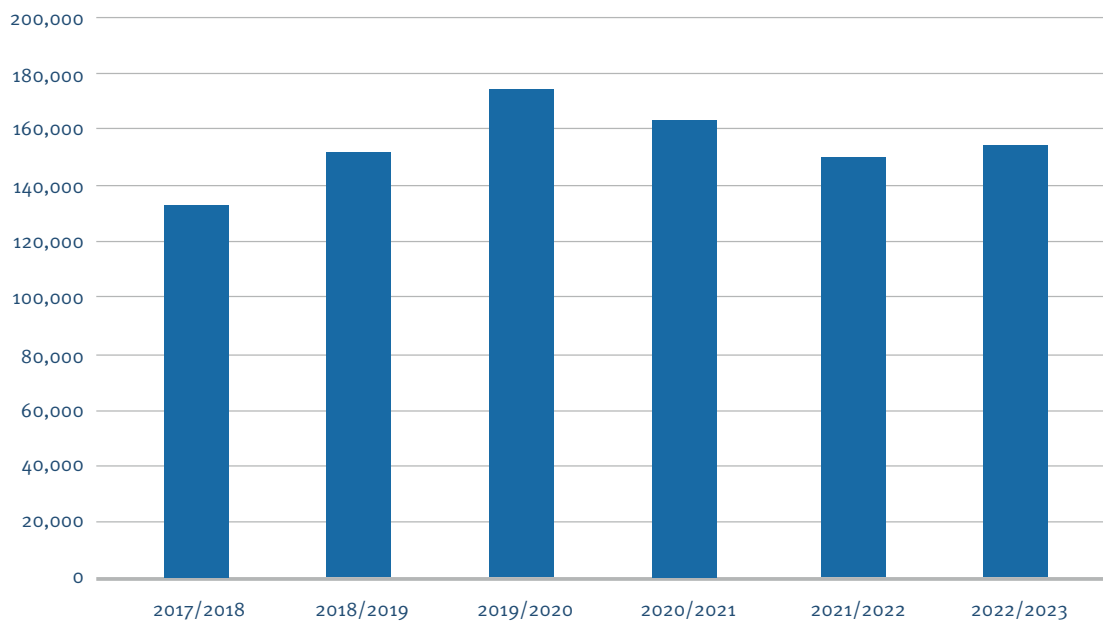
Volumes of MSC certified fish and seafood also rose in 2022/23, with 154,543 tonnes of MSC certified fish and seafood being sold in the UK and Ireland this financial year. While this is 1% higher than the preceding year, it remains substantially lower than the pre-pandemic high of 175,309 tonnes in 2019/20. This is a result of high inflation in the retail sector, as well as the suspension of MSC certified mackerel fisheries in the North East Atlantic, that previously constituted a substantial share of MSC labelled products in the UK and Ireland, 9% by value at the time. Despite these dynamics, the volume increase in 2022/23 was largely due to particularly impressive growth in certified skipjack tuna sales, which rose from 7,971 tonnes in 2021/22 to 14,782 tonnes in 2022/23. There is now more than three times as much MSC certified tuna sold in the UK and Ireland, by volume, than there was in 2020/21. With public commitments to sustainable sourcing becoming increasingly ambitious on MSC certified tuna, this figure is expected to rise further over the coming years.

²The YouGov survey commissioned by MSC was conducted at the beginning of October 2023 with a sample size of 2,069, of which 1,525 were seafood consumers.

³Data from Seafish, Seafood in Multiple Retail (2023 Update).

⁴Calculated using Seafish, Farmed Seafood in Multiple Retail (2023 Update).

⁵Data collected on the cost-value of consumer-facing MSC registered products demonstrate strong continued growth over the past five years in the UK/Irish market (see Graph 1). A 30% mark-up is applied to these cost-value figures to estimate consumer spend.



Graph 2. Volume of MSC Labeled Product (tonnes) Sold in UK/Irish Market

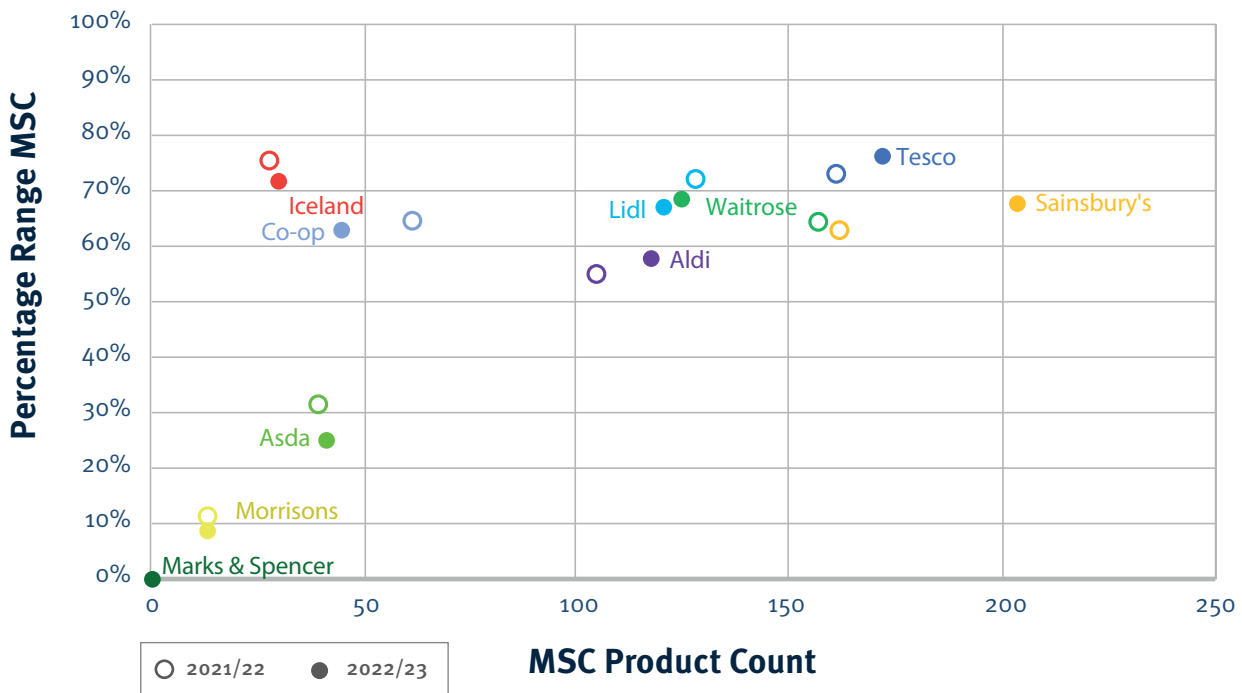
The UK economy continues to be affected by external factors such as the war in Ukraine and the cost-of-living crisis; yet, the last financial year has demonstrated that sustainable seafood can remain relevant to people's everyday lives as well as remain readily accessible, in spite of these challenges. The progress in MSC labelled product sales, that made 2022/23 a record year for the UK and Ireland, was largely driven by consumers purchasing more frozen and preserved products. Specifically, frozen cod products such as fish fingers, fish cakes, and fillets, along with canned skipjack tuna, have been the main catalyst for record MSC labelled product sales, all of which are convenient options for consumers who are increasingly conscious of constraints on their time and budget. Furthermore, despite ongoing financial difficulties for restaurants, the foodservice sector has shown an impressive recovery in terms of MSC certified fish and seafood sales, finally surpassing 2019/20 figures after three years of struggling with the impacts of the pandemic on business.

The range of species available to UK consumers continued to expand to new heights as well, with 53 unique species sold with the MSC label in this market during 2022/23 – up from 49 in the previous year. Exciting new developments included yellowtail flounder being sold in the UK with the blue MSC ecolabel attached for the first time in four years. The types of MSC certified products available to UK and Irish consumers is also continuing to diversify, with 2022/23 seeing Planet Paleo become the first British brand to sell MSC certified marine collagen. This constant growth in sustainable options for consumers is encouraging, as it shows that an increasingly diverse range of fisheries and businesses are joining the sustainable seafood movement in the UK and Ireland.



UK Supermarkets

Most UK retailers continued to demonstrate their commitment to sourcing certified sustainable seafood last year. In 2022/23, nine of the ten leading UK supermarkets sold 111,592 tonnes of MSC certified seafood under their own brands, a growth of 5% from the preceding year. While marginally below the record MSC volume sales of 2020/21, this growth shows a sector that has held firm in its commitment to offering certified sustainable seafood, despite challenges such as the suspension of North East Atlantic mackerel in 2021. This was furthermore a record year for sales value in this sector; in 2022/23, UK consumers spent £994 million on MSC seafood under retailer own-brand products.



Graph 3. UK Retail Landscape, showing progress against previous year on number of MSC products and percentage of wild seafood range labelled

Strong MSC label coverage continues to exist in almost all the UK's ten leading supermarkets (see Graph 3), with seven using the blue ecolabel on more than 50% of their wild seafood range. Sainsbury's, winner of **MSC UK Supermarket of the Year 2023** at the [tenth annual MSC UK Awards](#), sold the most MSC labelled products, surging up to 204, while Tesco had the highest percentage, at 76% of its wild seafood range bearing an MSC ecolabel. Waitrose upped their percentage range to 69% and sold 125 MSC labelled products, whilst Lidl and Aldi (the latter winning the **MSC UK Mid-size Store Retailer of the Year 2023**) sold 121 and 118 products respectively. Aldi's percentage range grew thanks to their launch of new MSC certified tuna products, while Lidl's percentage range dropped from 72% to 68%. Iceland and Co-op remained strong in terms of percentage range, with 73% and 63% respectively of their wild seafood being MSC labelled, although both declined from 2021/22 levels. Asda increased their MSC labelled product total from 39 to 41, whilst Morrisons remained the same as the previous year at 14 certified products. Marks and Spencer remain without any MSC labelled products under their own brand in their stores.

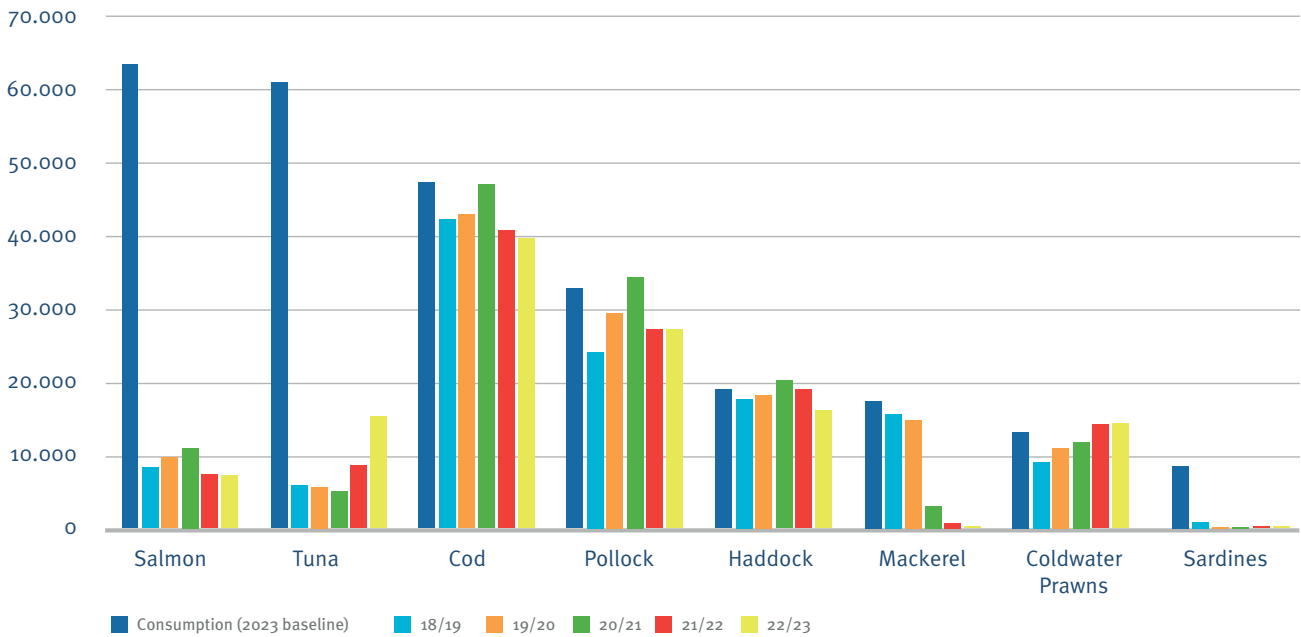
Label Coverage by Species

The range of MSC labelled products available in UK retail varies by species and format, although there has been notable progress in increasing availability in several areas. The ‘big five’ species – cod, haddock, prawn, salmon and tuna – accounted for 62% of all MSC labelled product sold.

Sales of whitefish dropped between 2021/22 and 2022/23 (explored in more detail later in the Focus on Whitefish), in line with overall market trends. Despite this, label coverage on whitefish remained the highest amongst all species groups last year. Using Seafish data on seafood sales in UK retail from 2023 as the baseline and comparing it to MSC volumes sold, 84% of cod, 83% of pollock and 84% of haddock products sold in UK retail last year carried a blue MSC ecolabel (see Graph 4).⁶

MSC label coverage of coldwater prawn products also remained strong. With the launch of new value-added products like prawn toast from Tesco and Sainsbury’s, and sushi from Aldi, the volume of certified prawn sales last year was at a record high. Thanks to the incredible versatility of the species, there remains great opportunities to utilise coldwater prawns in a variety of formats and categories.

Tuna saw the greatest progress amongst the top species sold in retail, with a 78% increase in the volume sold with an MSC label between 2021/22 and 2022/23. With this increase, 25% of all tuna sold in retail last year was MSC certified. The drivers behind this growth are explored in more detail in the MSC UK Tuna Shopper Report 2024.



Graph 4. MSC Coverage of Top Species in UK Retail by Volume of MSC Labelled Product Sold (tonnes), compared to Seafish benchmarks

⁶Data taken from Market Insight Factsheet: Seafood in multiple retail (2023 update). [Seafood in multiple retail \(2023 update\)](#) - Seafish

Beyond the ‘big five’ species, MSC label coverage is more variable. MSC labelled mackerel sales dropped to nearly nothing as the final stock of fish caught before the fisheries were suspended in March 2019 was fully exhausted. There continued to be a very limited number of sustainable, MSC labelled sardine products available to shoppers in the UK, particularly following the closure of a number of retail fish counters which had often featured MSC certified Cornish sardines. As a result, only 1% of all sardines sold in UK retailers last year carried a blue MSC ecolabel. For fans of the iconic pilchard, more work is needed to realise the potential of the only certified sustainable sardine (*Sardina pilchardus*) fishery in the world, right here in the South West of England. While big brands and retailers in Europe and America are taking advantage of this opportunity, it has yet to become a part of the permanent range for most UK retailers.

Anchovy lovers, on the other hand, were offered a greater variety of sustainably sourced choices, with Lidl, Sainsbury’s, Tesco and Waitrose all selling certified products last year. Together, this contributed to a third of all anchovies being sold with a blue MSC ecolabel. With many UK retail products not currently bearing an MSC ecolabel that could, there is an opportunity to grow this further, to the point where the majority is sustainably sourced.

There was a greater variety of certified scallops on sale, with nine retailers (Asda, Aldi, Lidl, Morrisons, Ocado, Sainsbury’s, Tesco, Waitrose and Whole Foods Market) offering products under their own brand. This included four species of scallop – Patagonian scallop (*Zygochlamis patagonica*), Atlantic scallop (*Placopecten magellanicus*), Yesso scallop (*Mizuhopecten yessoensis*) and King scallop (*Pecten maximus*) – and represented 60% of all scallops sold in UK retail last year.⁷

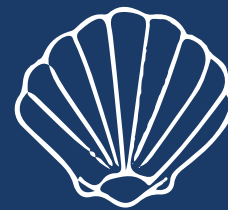
⁷Note: some scallops sold in UK retail are farmed, and therefore would not be eligible to carry a blue MSC ecolabel. However, the total volume of scallops sold in UK retail in the Seafish Market Insight Factsheet: Seafood in multiple retail (2023 update) does not separate farmed from wild-caught product. Therefore, it is difficult to accurately determine what percentage of wild-caught scallops are MSC certified.





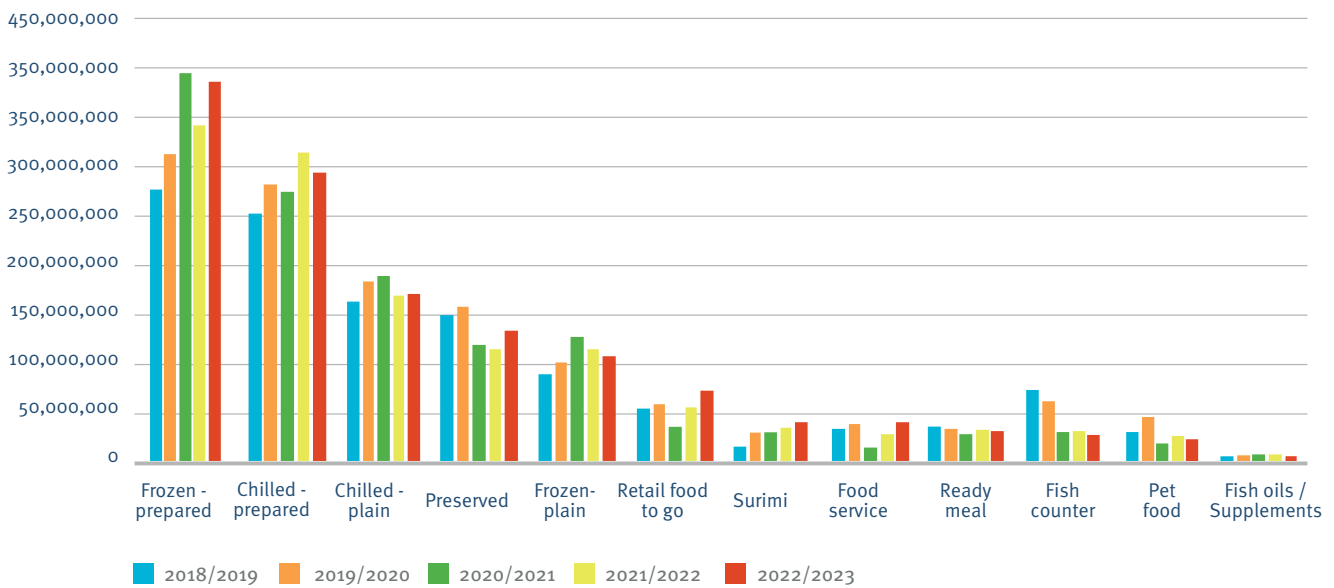
Species in Focus: Patagonian Scallops

The Patagonian scallop fishery was the first scallop fishery in the world to achieve MSC certification in 2006 and the species has become increasingly popular in the UK. Within the past five years, the number of MSC labelled Patagonian scallop products has increased from 3 to 13, with the volume sold increasing by 173%. This growth has been driven by retailers rewarding the fishery for its longstanding commitment to sustainability more and more. In 2017/18, MSC labelled Patagonian scallops were only available at Sainsbury's and Waitrose; last year, seven retailers (Aldi, Asda, Morrisons, Ocado, Sainsbury's, Tesco, and Waitrose) sold them under their own brand in either a chilled or frozen format.



Label Coverage by Product Category

Whilst the world has finally emerged from the Covid-19 pandemic, ongoing economic difficulties continue to shape shoppers’ buying habits. The biggest growth in MSC sales was in frozen-prepared products, with consumer spending in this category rising from just below £343m in 2021/22 to £385m in 2022/23. This rise, along with the 15% growth in preserved products, is likely a result of the ongoing cost-of-living crisis, as shoppers increasingly choose products that are affordable, simple to cook, and have a long shelf life. Overall, sales of MSC frozen products rose by 8% this year, whereas sales of chilled products declined by 4%. This trend towards affordability and longer shelf-life is also observable in surimi (commonly marketed as seafood sticks), often a more inexpensive source of protein, growing by 22%, whilst MSC certified fish oils and supplements sales declined by 26%.



Graph 5. UK/Irish Market Labelled Product Sales (£) by Category

However, the cost-of-living is not the sole driver for changing MSC sales patterns. Retail food to go sales rose by 33%, with the return to in-person working post-pandemic creating demand for quick and convenient food in the form of meal deals. Furthermore, the foodservice sector that struggled so much during the Covid-19 pandemic has finally surpassed its 2019/20 MSC certified fish and seafood sales levels, growing by an encouraging 43% this financial year. Fish counter sales remain at approximately half of their pre-pandemic levels, as the number of supermarkets with fresh fish counters continues to dwindle. Finally, following impressive growth figures the preceding year, ready meals and pet food sales remained fairly stable this year, declining by a modest 5% and 9% respectively.



Fish Counters

The fish counter landscape has undergone significant changes in recent years, with sales of MSC certified fish and seafood last year at approximately half of their pre-pandemic levels. The decline in counter sales over the past five years, exacerbated by the impacts of Covid-19 and recent closures, reflects shifting consumer behaviours. Convenience has emerged as a crucial factor driving consumer choices, driven by a lack of confidence and skill in preparing and cooking fish. As a result, the popularity of fish counters in supermarkets has dwindled, with only Waitrose, Morrisons and Whole Foods continuing to operate them in store.

In line with these trends, sales of MSC certified fish at UK fish counters experienced a 13% decrease in value from 2021/22 to 2022/23. The variety of MSC certified species available at fish counters also decreased slightly, with 27 different species sold in 2022/23, down from 28 in the previous year. Cod and haddock remained the top-selling MSC certified species, although new sustainably sourced species have become available recently. Whole Foods introduced squid with an MSC label earlier this year, while Waitrose, winner of **MSC UK Fish Counter of the Year** for six consecutive years in October 2023, continued to offer the widest variety of MSC labelled species at their counters.

While fish counters in brick-and-mortar retailer locations have traditionally been important platforms for buying and selling fish, consumer habits are evolving. The growth of e-commerce and online shopping (see Focus on E-Commerce) is evident. During the pandemic, shoppers were forced to explore new ways of buying groceries. As a result, some consumers, who may have been sceptical about purchasing fish online in the past, are now realising that these platforms offer an incredible diversity of fish and seafood which can be delivered directly to home. They also offer a way for consumers to connect more closely with the country's coastal fishing communities.

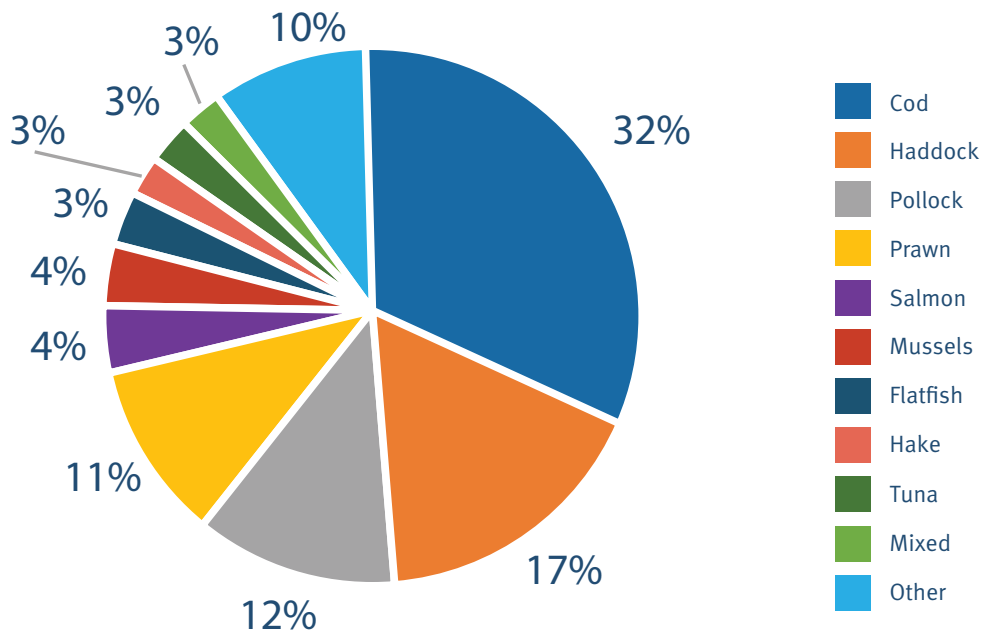
One of the platforms that has sought to capitalise on this trend is the Rockfish online seafood market, which offers fresh fish direct from the quayside in Brixham, Devon. The direct-to-home delivery business is a newer offering from the Rockfish group. Through its model, the online market is able to help consumers enjoy a diverse range of fish and seafood all year round. With most retail fish counters now closed, e-commerce sites like this have an opportunity to fill the void by educating and inspiring seafood lovers and helping them to bring the restaurant experience into their own homes.



Chilled and Frozen

Chilled and frozen product sales accounted for 72% of all MSC labelled fish and seafood sold in the UK last year. While this is marginally lower than the figure of 74% in the preceding year, this is a result of growth in other categories rather than any considerable decline in chilled or frozen product sales. On the contrary, MSC certified chilled and frozen product sales continued to grow in 2022/23, with £936 million spent by UK consumers on MSC-labelled products within these categories, 1% higher than the preceding year. Volumes across this range declined by 2%, with 104,152 tonnes of MSC-labelled product being sold in chilled and frozen formats, consistent with the broader pattern of shrinkflation across the retail sector.

The number of sustainable choices continued to grow across the categories as well, with 403 different MSC-labelled frozen products available to UK consumers in 2022/23, up from 381 the preceding year. Cod, haddock, and pollock continued to dominate MSC labelled frozen products, accounting for 72% of all products within this range. Despite this, there remained considerable species diversity amongst MSC certified frozen products, with 23 different species sold in UK retail with the blue MSC ecolabel, up from 21 the year before.



Graph 6. Percentage of MSC Labeled Chilled and Frozen Products in the UK by Species

Chilled products accounted for 34% of total MSC-labelled UK product sales by value in 2022/23. This is a drop from last year, likely due to chilled fish products being more expensive and having shorter shelf lives than their frozen and preserved counterparts, both very relevant factors for shoppers during a cost-of-living crisis. Although the ‘big five’ species (salmon, tuna, cod, haddock, coldwater prawns) accounted for 90% of sales value for chilled products, a wide range of chilled species options remained available to shoppers, with 29 different species sold with an MSC label. New MSC certified entrants into the chilled space included lemon sole being sold under the Fish Said Fred brand, as well as in Tesco as part of the retailer’s Finest range. MSC certified Yesso scallops were also sold as a chilled retail product for the first time since 2016, returning to the shelves at Aldi following a seven-year hiatus.

Species in Focus: Squid

Having only entered the UK market with an MSC label in 2020, certified squid is an exciting new alternative to the 'big five' species that make up the bulk of UK seafood consumption. This new development is largely due to Tesco, who have introduced three new MSC certified squid products. Sourced from the North West Atlantic, Tesco MSC certified raw squid rings were first introduced in 2021/22, followed by a prepared squid option last year and the UK's first certified calamari in early 2023. Following the successful certification of the California market squid fishery in the summer of 2023, there are further opportunities for increasing the availability of certified squid in the market.



Partner in Focus: Birds Eye

Birds Eye have consistently sold more MSC labelled frozen fish and seafood than any other brand in the UK, including retailer own-brand. Following changes within some of its source fisheries that impacted the brand's ability to access MSC certified raw material for a period, Birds Eye once again returned to offering 100% MSC and ASC certified fish and seafood in 2023. In recognition of their longstanding commitment to and leadership in sustainable seafood sourcing, Birds Eye won the **MSC UK Frozen Brand of the Year** for a record tenth year in a row at the MSC UK Awards in October 2023.



Ready Meals

During the pandemic, there was a notable surge in shoppers allocating more of their time and money into preparing homemade meals. However, the resumption of busy daily routines has led consumers to revert to faster and more convenient ready meal options.

Haddock, pollock, and cod continue to be the most prevalent species used in MSC labelled ready meals, particularly as the central ingredient in fish pies. Last year, 23 different fish pie products were sold with a blue MSC ecolabel in the UK. Other popular certified ready meal options included pre-pack fish and chips, prawn toast, cod mornay, kedgeree, and seafood risottos and pastas.

As consumer budgets face increasing pressure and younger shoppers appear less confident in cooking fish and seafood, ready meals can offer a more affordable option to a meal out, while also making preparation easier and more accessible. This offers an opportunity for brands to innovate and work to increase consumption levels of fish and seafood, which is currently on the decline.

Product in Focus: Sainsbury’s Prawn, Chilli and Garlic Ravioli



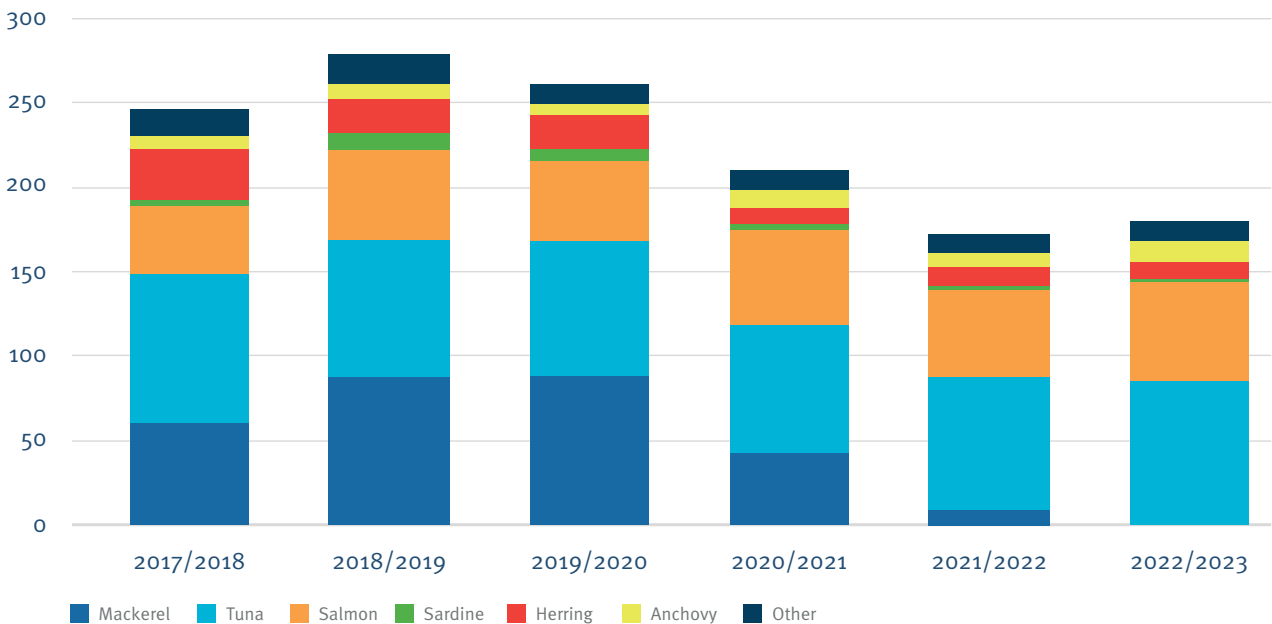
In 2022, Sainsbury’s made an innovative addition to their ready meal range with the launch of their Prawn, Chilli & Garlic Ravioli, the first MSC labelled prepared ravioli in the UK market. Recognising that consumers often struggle in finding meal inspiration, lack confidence in cooking fish, and are growing more mindful of sustainability, Sainsbury’s addressed these concerns with the development of this new product. It demonstrated the retailer’s commitment to sustainable sourcing across all food categories, including something as unique as a fresh filled pasta meal.



Preserved and Canned

In 2022/23, shoppers in the UK purchased just over 16,000 tonnes of MSC labelled preserved and canned fish and seafood products, a 42% increase from the previous year. While this is still below the category’s peak in 2018/19, when mackerel was still MSC certified, it does show an encouraging increase in availability of sustainably sourced options. This growth was primarily driven by new tuna product launches (see MSC UK Tuna Shopper Report 2024) as Aldi, Sainsbury’s and Tesco all expanded their MSC labelled range last year. There are now more MSC certified tuna products on the UK market than ever before, which is great news for consumers looking for sustainable options.

Certified mackerel products, on the other hand, had all but disappeared (see Graph 7) as brands and supermarkets no longer had any remaining stock of raw material caught before the suspension of all North East Atlantic mackerel fishery certificates in March 2019. Amongst other pelagic species, MSC label coverage was more variable. Lidl, Sainsbury’s, Tesco and Waitrose all offered certified anchovies last year, either as part of their own permanent range or as a special. John West and Princes continued to sell MSC labelled herring in a tin, while Lidl remained the only retailer to do so under its own brand. Certified sprat products were available from Thai Union’s King Oscar brand while the only sardines available with a blue MSC ecolabel continued to be from the artisanal brand, The Pilchards Works, or from Tesco, which launched a product sourced from Cornwall and canned in Scotland in August 2022.



Graph 7. MSC Labelled Preserved Product Count by Species in the UK/Ireland

Canned salmon with an MSC label continued to be a core component of many brand and retailer ranges, including John West, Princes, Aldi, Coop, Lidl, Sainsbury’s, Tesco, and Waitrose. The convenience retailer, Spar, also introduced MSC certified canned salmon under its own brand in the UK for the first time last year.

More niche species were also available in a preserved or canned format, bearing the blue MSC ecolabel last year. The Ocean Crown brand continued to offer certified jarred cockles source from the Limfjord in the North of Denmark, while cooked Cantabrian octopus could be found on shelves in Selfridges under the El Viejo Pescador brand. With several UK-based cockle fisheries, including Thames Estuary, Burry Inlet, Dee Estuary and Poole Harbour, there could be a good opportunity to launch local, UK-caught products with an MSC label going forward.

Focus on Whitefish

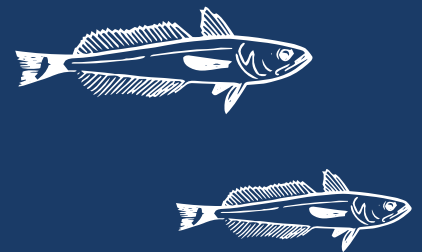
Whitefish has been a major driver of growth in the MSC programme since the organisation's inception over twenty-five years ago. New Zealand hoki was the world's first whitefish fishery to achieve MSC certification in 2001, and when Alaska pollock, the world's largest whitefish fishery, followed suit in 2005, this opened up new opportunities for many businesses in the UK, Ireland and across the world to increase their range of MSC labelled products. Today, around 75% of all whitefish landed globally (or roughly 6,412,000 tonnes) is caught by fisheries engaged in the MSC programme.⁸

In the UK and Ireland, consumers purchased over 90,700 tonnes of MSC labelled whitefish products and meals last year, accounting for nearly 59% of everything sold with a label. Atlantic cod, Walleye pollock and haddock have consistently been the top three MSC labelled species sold in both markets throughout most of the last decade. While this remained true in 2023, there was also an increased number of alternative MSC certified whitefish options available to shoppers and diners in the UK and Ireland, likely driven by changes to sourcing because of geopolitical dynamics and the high cost of cod and haddock.⁹

One of the beneficiaries of this shift was saithe, commonly sold and marketed as coley. Aldi, Lidl, Tesco and Waitrose have all offered MSC labelled coley under their own brand for a number of years, but earlier this year Tesco further expanded its range with the introduction of Soy & Ginger Miso Coley Fillets and Flatfish owned Wild Harbour brand launched a Coley Fillets Skin On & Boneless product. Perhaps the biggest shift, however, was towards hake, which is widely available from several fisheries around the world, and often a less expensive alternative to cod and haddock.

Species in Focus: Hake

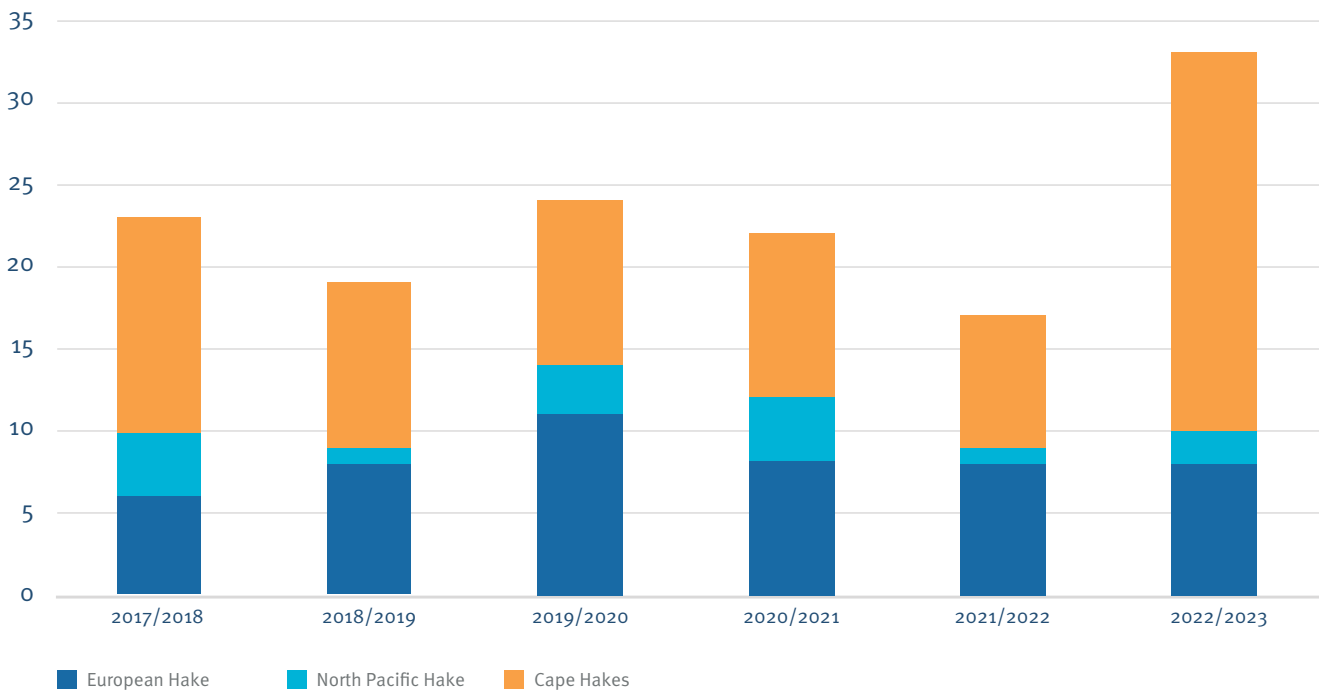
An estimated 47%, or just under 600,000 tonnes, of the global hake catch is now engaged in the MSC programme.¹⁰ This covers five different species (North Pacific hake (*Merluccius productus*), Southern hake (*Merluccius australis*), European hake (*Merluccius merluccius*), Deep-water Cape hake (*Merluccius paradoxus*) and Shallow-water Cape hake (*Merluccius capensis*)) from nine certified fisheries and one In-Transition to MSC (ITM) fishery. While all but Southern hake can be found in the UK with an MSC label, Cape hake benefitted most from retailers and brands looking for whitefish alternatives to cod and haddock with the number of labelled products nearly tripling between 2021/22 and 2022/23 (see Graph 8).



⁸From [The Marine Stewardship Council Annual Report 2022-23](#). Engaged means certified, in assessment, in-transition to MSC, or suspended. Percentage calculated based on UN FAO data, 2021.

⁹SeafoodSource, [High price drove UK to import less haddock and cod in 2022, but pay more for it](#). March 30, 2023.

¹⁰Percentage calculated based on UN FAO data, 2021.



Graph 8. Number of MSC Labeled Hake Products by Species¹¹

Lidl and Waitrose shoppers saw the biggest increase in MSC certified hake options, with the retailers increasing their ranges from one to eight and four to seven products respectively between 2021/22 and 2022/23.¹² Tesco had the next largest range, with four labelled products sold across chilled, frozen and fish counter formats, while Aldi introduced two new products last year. Iceland and Amazon also launched own-brand MSC certified hake products for the first time, while Sainsbury’s demonstrated its support for local fisheries with the introduction of a British hake product as part of its Taste the Difference range. Earlier this year, Asda continued the trend by significantly increasing its own MSC certified hake range with three new products.

Brands also played a role in raising the profile of hake as an alternative whitefish option. New England Seafood included two Cape hake products as it expanded the range of its Fish Said Fred brand, which is now 100% MSC and ASC certified. Ocean Fish also provided shoppers with a local option when its Hook, Line and Sinker Cornish Hake and Garlic Butter launched on Ocado last year. The product, which won the **MSC UK Product of the Year 2023** award, has since been joined by two other hake options under the Hook, Line and Sinker range.

¹¹Note: Cape hakes include Shallow-water Cape hake (*Merluccius capensis*) and Deep-water Cape hake (*Merluccius paradoxus*)

¹²Note: this includes products that were part of the permanent range and those sold as part of a special or promotional range.



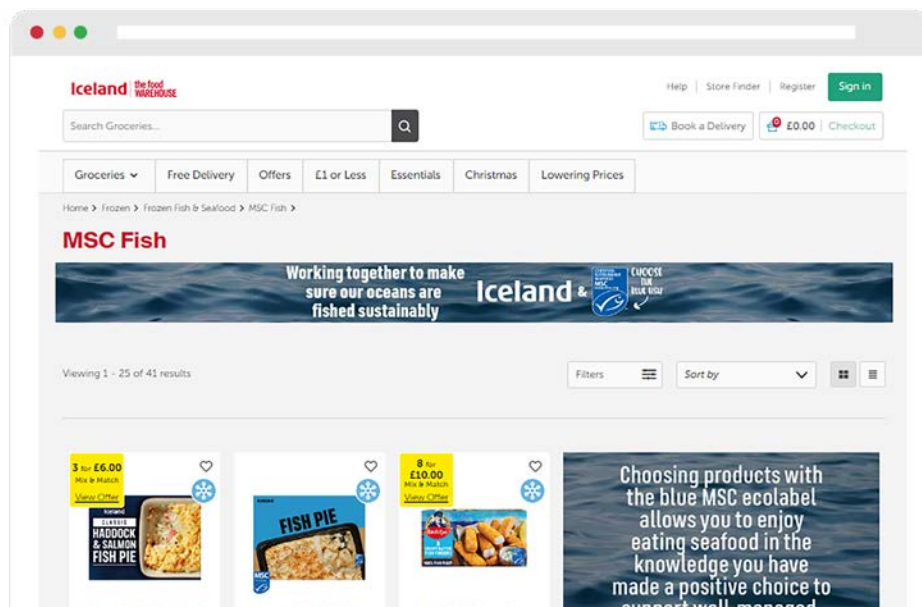
Focus on e-Commerce

The world has now emerged into a new post-Covid reality, but the pandemic has had a lasting impact on the way we shop and eat. In the UK, online grocery sales skyrocketed as the country went into lockdown. Between January and July 2020, the online share of grocery rose from 8% to 13%, while e-commerce accounted for 60.5% of all growth in seafood sales.¹³ Although online grocery's market share has now dropped to 11% (compared to 15% at the start of 2021), that figure is still far higher than what it was before the pandemic.¹⁴

For the seafood industry, the rising profile of e-commerce platforms offers unique opportunities to connect with consumers in new ways and address some of the barriers to increasing fish and seafood consumption. Over the past year, a growing number of retailers and brands have looked to capitalise on this. Ocado updated the product pages for all its own-brand MSC certified fish and seafood to include more information on where the product is sourced from and how the fishery is operating sustainably. Each page also highlighted the individual species' unique attributes and directed shoppers to relevant recipes, with the aim of inspiring and building confidence in cooking fish and seafood.

Recipe boxes provide another channel for telling engaging stories about the provenance and sustainability of fish and seafood, while also working to make the product more accessible to more people. Gousto became the first recipe box businesses in the UK to offer MSC certified fish and seafood when they introduced labelled Atlantic cod and haddock under their own brand in 2017. Mindful Chef followed several years later with a range of labelled products sold in their boxes under the LEAP and Fish Said Fred brands. The business was recognised for its commitment, winning the **MSC UK Newcomer of the Year** award in 2022.

In addition to offering new ways of inspiring and educating consumers, e-commerce platforms can also help environmentally conscious shoppers use their purchasing power more effectively, by making it easier for them to find sustainably sourced products. Sainsbury's was the first UK retailer to do this when it launched an online 'Sustainable Seafood Shelf' as part of MSC UK's inaugural Sustainable Seafood Week in September 2020. Waitrose and Ocado followed with similar shelves covering all chilled seafood, while Iceland became the latest UK retailer to introduce an MSC shelf in March 2023 (see below). For consumers who are increasingly time poor but more concerned with making environmentally positive choices, these shelves offer a quick and easy way to find sustainable seafood options.



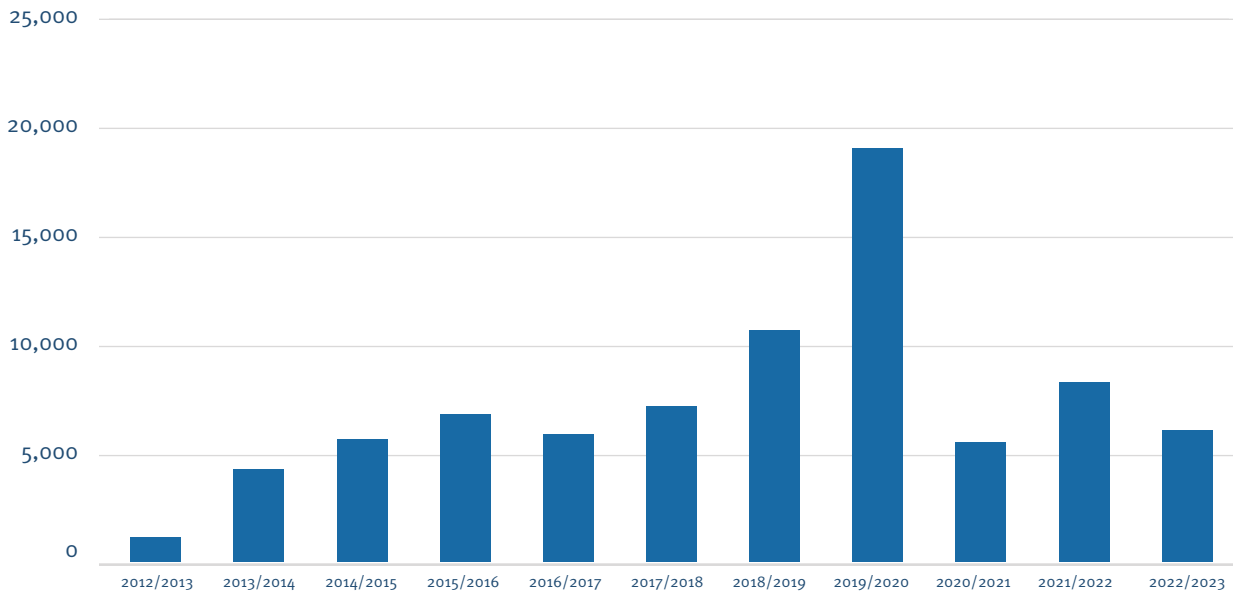
The power of online platforms to promote sustainable seafood extends beyond their direct engagement with shoppers. Unlike traditional retail, e-commerce is less limited by shelf space. This can give smaller brands, which may not otherwise have an opportunity, a platform to reach wider consumer audiences. Ocado has been that platform for a number of brands that have committed to selling certified products, including Hook, Line and Sinker, Delicious, Woofs and Picard. It has also allowed newer brands, such as LEAP and Fish Said Fred, to introduce a wider range of MSC certified products beyond what can be found in brick-and-mortar retail. By providing opportunities for these brands, Ocado is playing a leading role in increasing the availability of sustainable seafood to shoppers in the UK.

¹³See [MSC UK and Ireland Market Report 2021](#)

¹⁴The Grocer, [How to get ahead of the curve on e-commerce campaigns](#), 16 March 2023.

Pet Food

MSC certified and labelled pet food experienced strong growth over the past decade. Sales peaked in 2019/20 but then dipped following a temporary change in packaging for Sheba and Whiskas brand pet food in 2020/21. While figures have fluctuated since, they have not yet been close to returning to 2019/20 levels (see Graph 9).



Graph 9. MSC Labeled Pet Food Sales (tonnes) in the UK and Ireland

Five years ago, the UK was the second largest market for MSC labelled pet food, behind Germany. By 2022/23, France and the US had surpassed the UK market. There is significant room for growth in sustainable pet food in the UK and Ireland, with many certified sources available for the most popular species used in the products - salmon, tuna, cod. Mars, a longstanding MSC partner, remains the UK market leader in offering the largest range of certified pet food products through its brand Sheba. Yet, under retailer own-brand, there remains a lack of labelling, despite commitments from many UK supermarkets to sell MSC labelled fish and seafood across other product categories. Among the nine major UK retailers selling pet food, only Aldi, Lidl and Coop offer their shoppers options with an MSC ecolabel. Analysis of MSC data, based on in-store and online product research, and published in the [MSC UK and Ireland Market Report 2022](#), reveals limited options for conscious consumers seeking sustainably sourced pet food in UK supermarkets.

For conscientious pet owners, the blue MSC ecolabel allows them to make environmentally responsible choices for their pets in line with their values. For the pet food industry, it can help brands and retailers meet the demands of an increasingly eco-conscious consumer-base while also driving positive environmental change by recognising and rewarding fisheries that are operating sustainably.



Supplements

Global demand for marine-derived supplements continues to rise. Between 2020 and 2021, the global trade of fish oil grew, surpassing \$2.5billion globally for the first time. Yet the small pelagic fisheries from which many fish oils are derived face numerous threats. Climate change is causing many species to migrate, creating new management issues; meanwhile, unsustainable fishing practices are jeopardising many small pelagic fisheries, as well as impacting broader marine food webs.

Currently, 20% of the global small pelagic catch is MSC certified; yet, as a result of climate-related migration and connected management issues, three MSC certified small pelagic fisheries in the North East Atlantic (mackerel, Atlanto-Scandian herring and blue whiting) were suspended in 2019 and 2020, restricting the global availability of sustainable fish oils. Despite these challenges, several major small pelagic fisheries are currently in Fishery Improvement Projects (FIPs), raising hopes for future growth in MSC certified fish oils across the sector.

In 2022/23, UK and Irish shoppers spent an estimated £5.01m on MSC certified fish oils and supplements. While this is a decline from the previous year, the UK remains the largest market for MSC labelled supplements outside of Scandinavia and North America. Furthermore, increasingly diverse options became available to UK consumers seeking MSC certified supplements; Planet Paleo broke new ground in the UK with their MSC labelled collagen range (see image below), whilst American brand Dr. Mercola introduced a herring caviar oil product to the UK market, the first of its kind. With sustainability an ever-growing topic of interest within the health and beauty world, there remains substantial potential to expand the range of MSC certified options available to supplements shoppers.

Partner in Focus: Planet Paleo

Planet Paleo is a collagen brand under the umbrella of health product company, Living Planet Distribution. Last year, Planet Paleo became the first British brand ever to sell MSC certified collagen, with its entire marine range carrying the blue MSC ecolabel. There were four different products in this range, including neutral-tasting collagen as well as strawberry and cacao flavours.

Marine collagen is often made using surplus ingredients of white fish that would otherwise go to waste. Through products like these, the growing supplements industry is creating an opportunity for well-managed fisheries to utilise more of their catch, and benefit from their commitment to sustainability, by reaching new consumer audiences. In recognition of their leadership in this area, Planet Paleo was awarded **MSC UK Newcomer of the Year 2023**, becoming the first ever supplements company to win an MSC UK Award.



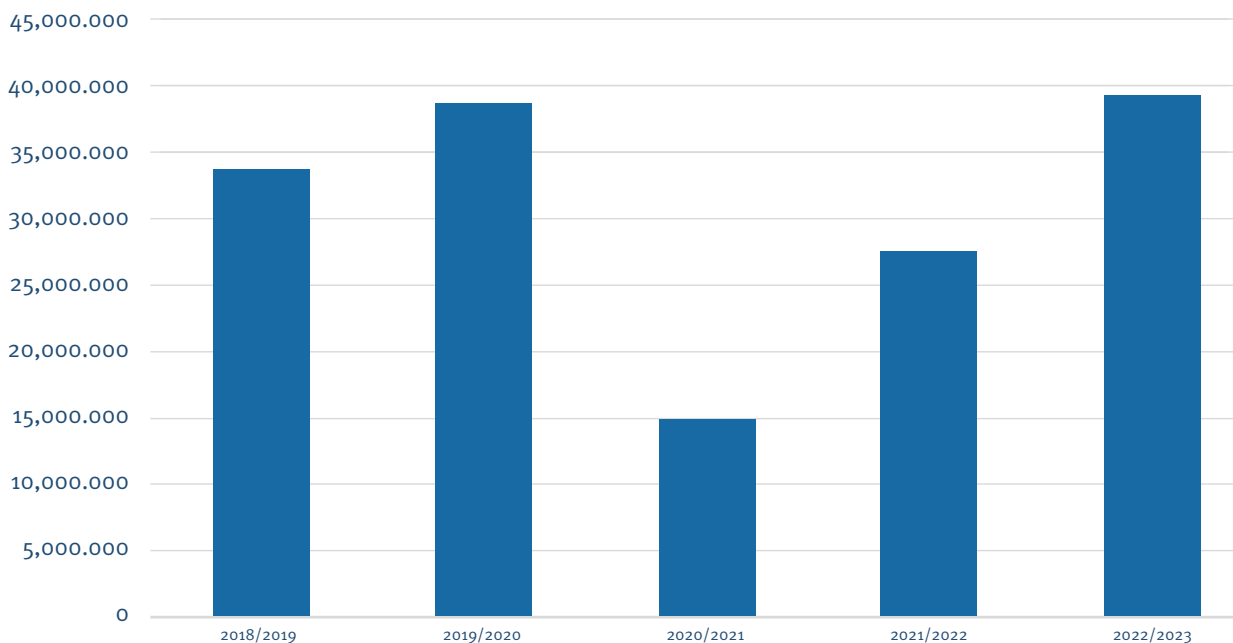
¹⁵Fish oil (HS: Fats) Product Trade, Exporters and Importers | The Observatory of Economic Complexity (oec.world).

¹⁶MSC Briefing 01 (2021): Small Pelagic Fisheries.

Foodservice

The restaurant sector has faced an incredible degree of uncertainty in recent years. Challenges of prolonged periods of lockdown and other trading restrictions imposed as a result of the Covid-19 pandemic have been further exacerbated by rising costs, labour shortages and changing consumer purchasing behaviour as a result of hybrid working becoming more commonplace.

Despite these challenges, sales of MSC labelled fish and seafood at foodservice outlets have recently exceeded pre-pandemic levels, experiencing a 43% increase from the previous financial year (see Graph 10). While this has likely resulted from inflation, foodservice businesses in the UK and Ireland, as well as internationally, have increasingly shown strong support for MSC certified fisheries, reflecting resilience in the face of the industry's recent difficulties. Last year, a wide range of species, including cod, hoki, haddock, pollock, prawns, scallops, herring, hake, sardines and plaice, contributed to the diverse MSC certified offering available across the UK foodservice sector.



Graph 10. Consumer Spend £ on MSC Labelled Fish and Seafood in Foodservice in the UK & Ireland¹⁷

Sales of MSC labelled fish and seafood in the UK have been predominantly driven by McDonald's and its iconic Filet-O-Fish and Fish Fingers, as well as by the pub chain JD Wetherspoons, Wahaca, Premier Inn hotel group owner Whitbread, and IKEA. Longstanding partners Rockfish, co-owned by MSC ambassador Mitch Tonks, sold five different certified species on its menu, including Cornish hake, redfish, haddock, prawns and whitebait. For history enthusiasts visiting Titanic Belfast, MSC certified fish and chips are now available at the popular tourist destination. When The Pantry - one of the venue's three onsite restaurants - got certified in November 2022, it became the latest restaurant to start using the blue MSC ecolabel on its menu in the UK and Ireland.

Overall, the foodservice industry in the UK appears to be on a 'path to recovery' post-Covid-19, however such recovery is being hindered by the current cost-of-living crisis as consumers look for ways to reduce their expenses.¹⁸ Despite the challenges of the past two years, the sector has moved forward with resilience and with new entrants into the MSC programme, like Titanic Belfast, it appears that sustainability is once again becoming an industry focus.

¹⁷A 30% mark-up is applied to wholesale fish and seafood purchase figures to estimate consumer spend.

¹⁸Intrafish. Analyst: UK foodservice recovery stagnating, return to pre-pandemic dining levels still years away, 1 December 2023.



JOHN LAVERY, OWNER
FISH CITY, BELFAST

Partner in Focus: Fish City

Fish City, an award-winning seafood restaurant and fish-and-chip takeaway located in the heart of Belfast embarked on its sustainability journey in 2013. In 2014, it became the first fish and chip business on the island of Ireland to achieve MSC certification. The business was recognised for its commitment to sustainability at the **MSC UK Awards in 2023**, winning both the **MSC UK Foodservice Champion of the Year 2023** and **MSC UK Marketing Champion of the Year 2023**. Over the past decade, Fish City has played a crucial role in introducing certified sustainable seafood to diners in Northern Ireland, emerging as a pioneering force in the region's foodservice industry. The restaurant is also committed to educating the next generation about the significance of safeguarding our oceans, having initiated a seafood sustainability programme for schoolchildren in Belfast that has been running since 2014.

Looking Forward: 2024 Outlook

Consumer preferences and spending behaviour will continue to evolve and adapt in the year ahead in response to growing anxiety around environmental issues and geopolitical and economic uncertainty. Following the MSC's Sustainable Seafood September campaign, a YouGov survey found that awareness of the blue MSC ecolabel amongst UK seafood consumers had increased from 54% in 2022 to 56% in 2023, while 67% said the campaign made them interested in sustainable seafood, up from 63% in 2022.¹⁹

The seafood sector is well positioned to capitalise on this growing interest by promoting the benefits of 'blue foods'. To do that, however, it will need to more effectively address a number of barriers to increasing consumption, particularly perceptions around cost and lack of confidence in cooking fish. From an environmental standpoint, there is also more opportunity to promote the lower carbon footprint of many types of seafood relative to other proteins, and to further leverage tools like the blue MSC ecolabel to assure consumers about the sustainability of the products they are buying.

For retailers, brands and foodservice businesses, the 'big five' species – cod, haddock, prawns, salmon and tuna – will likely remain the most popular with shoppers and diners in the UK and Ireland. MSC certified options are already widely available for all these apart from tuna, where further progress can certainly be made. The year 2024, however, could see a significant rise in the availability of sustainably sourced tuna options, if Tesco and Princes fulfil their commitments to selling 100% MSC certified tuna by 2025 (see MSC UK Tuna Shopper Report 2024). Data projected by the MSC based on current sales figures for this financial year (2023/24) suggest that consumer spend on certified sustainable tuna could increase by 75% to £180 million, while spend on all MSC labelled products this year could reach a new high of just over £1.4 billion.

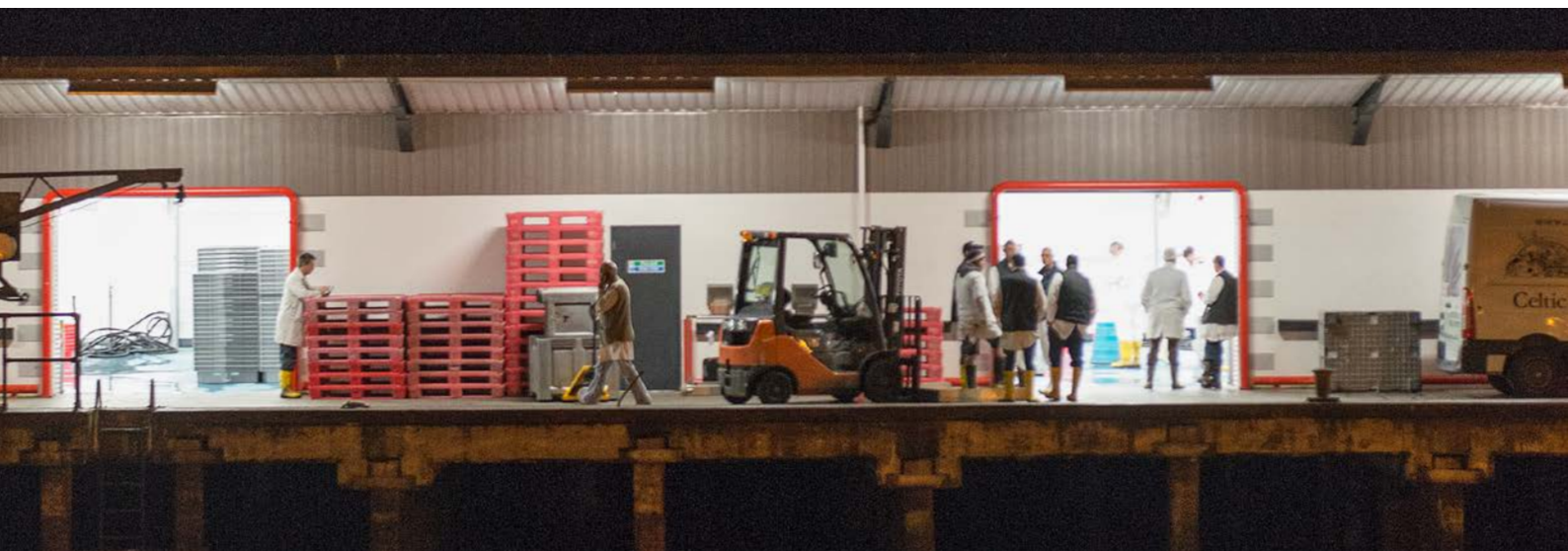
Next year will also be a pivotal one for the fisheries engaged in Fishery Improvement Projects (FIPs) as part of [Project UK](#). With 20% of the national catches of the UK and Ireland currently certified²⁰ and these FIPs due to end in April 2024, these fisheries represent the greatest immediate opportunity for expanding the range and volume of certified fish and seafood caught in both countries if any were to enter assessment and successfully meet the MSC Standard.

There has been notable progress in 2023, with many fisheries renewing their commitment to MSC certification, advancements in a number of the Project UK FIPs and increased availability of certified species and products across several different categories. With the support of partners from across the industry, September became a month to celebrate sustainable seafood. While challenges remain, we should celebrate the progress that has been made and embrace the opportunities that lie ahead.

MSC is entering a new strategic period, and our focus is set on engaging over one third of the world's fisheries in our programme by 2030. This has become an important cornerstone of our work, and its success will rely upon the global sustainable seafood movement making further progress on their sourcing commitments, as well as new partners joining the effort in the UK and Ireland. We are grateful for the continued support of all our MSC partners across the UK and Ireland and are looking forward to building on the successes of the past year in 2024.

¹⁹The YouGov survey commissioned by MSC was conducted at the beginning of October 2023 with a sample size of 2,069, of which 1,525 were seafood consumers.

²⁰MSC UK and Ireland State of the Water Report 2023







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