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Small Pelagics Market Analysis 2025: UK & Ireland

UK & Ireland Market Overview: Gaps in certified catch present opportunities

FOR SEVERAL YEARS, MSC CERTIFIED small pelagic fish have played an important role in the UK and Irish market. But, as with many regions, the availability of certified sustainable products has been severely impacted by fisheries management challenges across the globe. Between 2017 and 2020, small pelagics consistently accounted for more than 10% of consumer spending on MSC labelled products in the UK and Ireland but due to fishery suspensions, this figure has shrunk to below 2% since 2022.¹

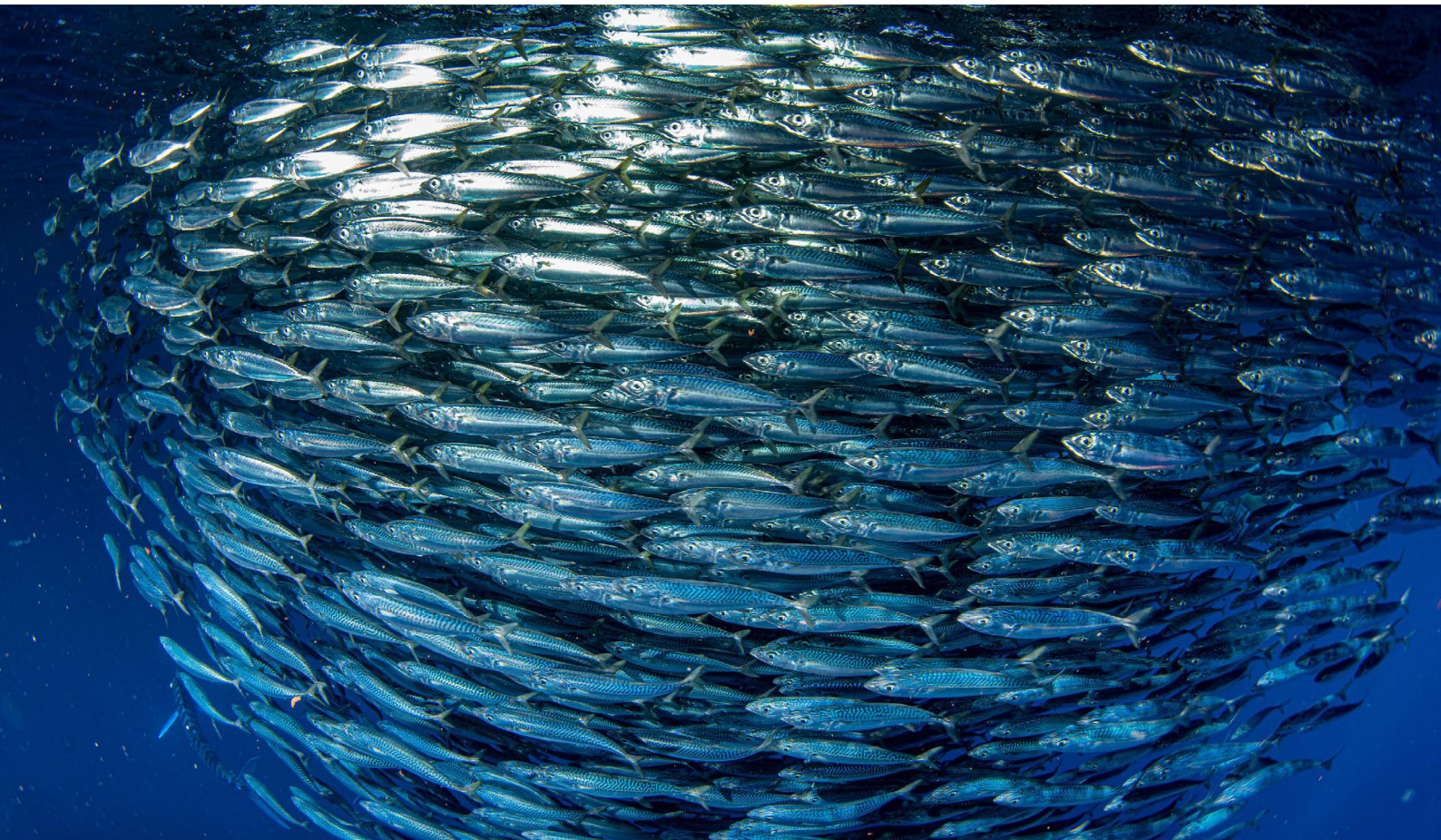
The loss of North East Atlantic mackerel has been especially disruptive, with mackerel constituting almost 10% of all MSC volumes sold in the UK and Ireland in 2017/18.

Currently, none of the mackerel consumed in the UK and Ireland is MSC certified. Certified sardine options also remain limited, with only 1% of total products sold in supermarkets bearing an MSC label.² These species represent substantial gaps in all UK retailers' ranges of MSC products. MSC certified jack mackerel has been

introduced as an alternative to Atlantic mackerel in some European countries, including Germany and the Netherlands, but it has yet to be sold with a label in the UK. With the availability of MSC labelled sardine products being so limited, and with Cornwall having the only certified European pilchard fishery in the world, this presents a market opportunity to grow the availability of sustainable pelagic fish products in the UK. With the Iberian sardine purse seine fishery currently in assessment, it is possible that there will be additional important labelling opportunities in future.

Anchovies, by contrast, are more widely available with a blue MSC ecolabel, with 43% of total volume sold in UK supermarkets being MSC certified last year. These are predominantly sold in preserved format, but there is also a growing quantity of chilled MSC anchovies available, including at Sainsbury's and Waitrose.

Currently, four major British retailers (Asda, Sainsbury's, Tesco, and Waitrose) offer MSC labelled anchovies under their own-brand permanent ranges,





whilst for lovers of smoked herring, Asda, Lidl, Sainsbury's, and Tesco all sell own-brand MSC certified sustainable kippers, as do John West and Princes. Over the past year, thanks to these brands, the volume of MSC certified herring and anchovy grew by 18% and 58% respectively.

Outside of traditional supermarket aisles, the UK and Ireland is also host to some innovative businesses working with omega-3 oils derived from small pelagic fish. Irish supplement supplier Naturalife sell MSC-certified oils from Antarctic krill under their Cleanmarine brand, whilst Healthspan, the Guernsey-based online business, also offers certified sustainable krill oil. Both businesses have been MSC certified since 2011, demonstrating longstanding commitment to the programme. Across species, price points, and

product formats, there is strong consumer demand for certified sustainable fish and seafood in the UK and Ireland. While the availability of MSC labelled product options is growing for species like anchovies and herring, there remains substantial room for growth elsewhere, particularly for sardines and mackerel. With the NHS urging the UK public to eat two portions of fish per week, including one serving of oily fish, these important species provide a health benefit that packs a flavour punch too. ●

¹ The market data used in this piece is provided to the MSC quarterly, semesterly, or annually, by businesses using the MSC ecolabel on products and menus.

² Data on overall consumption taken from *Total Seafood in Multiple Retail (2024 Update) — Seafish*. This is then compared against MSC's reported figures to calculate % coverage.



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

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