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Whitefish Market Analysis 2024: United Kingdom

Market Analysis: UK whitefish

WHITEFISH HAS BEEN A LEADING catalyst for the growth of the MSC programme since its inception more than 25 years ago. In the 2022/23 financial year, UK consumers purchased over 90,000 metric tonnes of MSC labelled whitefish products and meals, accounting for nearly 59% of total MSC labelled sales. Throughout the past decade, cod, haddock, and walleye pollock have consistently been the top three highest selling species with the blue MSC ecolabel in the UK. After experiencing a slight decline following the pandemic (where frozen product sales were exceptionally high), sales of these species (and whitefish generally) have begun to grow once again.

The UK's retail sector has held firm in its commitment to offering certified sustainable whitefish for many years now, with nine of the ten leading UK supermarkets offering MSC certified own-brand whitefish products. Household brands have also been crucial in promoting MSC certified whitefish in the UK, with Birds Eye selling large amounts of MSC-labelled frozen whitefish products in formats such as their famous fish fingers and breaded cod fillets. The majority (60% by volume) of MSC labelled whitefish sold in the UK is frozen, in both frozen-plain formats such as fillets and in frozen-prepared formats such as fishcakes. MSC labelled whitefish is also available in UK foodservice outlets, such as in the McDonald's Filet-o-Fish and the JD Wetherspoon fish and chips.

Many of the MSC certified source fisheries supplying the UK market have been longstanding champions of sustainability – New Zealand hoki was the world's first whitefish fishery to achieve MSC certification in 2001 and Alaska pollock, the world's largest whitefish fishery, became certified in 2005. These two

certifications opened up opportunities in the UK for businesses to start selling whitefish with the blue MSC ecolabel. Since then many other whitefish fisheries all over the world have followed suit to meet demand for certified sustainable whitefish products.

While certified cod, haddock, and walleye pollock remain particularly important to the UK market, alternative whitefish species, such as hoki or hake, have become available as MSC certified options. The volume of MSC labelled hake sold in the UK more than trebled between 2013 and 2023. This includes Cape hake from South Africa and Namibia, European hake from UK fisheries, and North Pacific hake from the US & Canada. Retailers have been crucial in increasing in the availability of MSC-labelled hake, with Waitrose leading the way by offering eight own-brand MSC labelled hake products across the past year. Brands have also been important in promoting MSC hake, with Hook, Line & Sinker selling chilled hake from the MSC Cornish hake gill net fishery to their customers online.

Going forward, whitefish will continue to be an essential component of certified sustainable fish offerings at retailers and foodservice businesses across the UK. With economic conditions continuing to be a challenge, the often affordable cost of MSC certified whitefish, particularly in a frozen format, and the breadth of options, in terms of species and source locations, provides an invaluable demonstration that sustainability does not have to cost the earth or the ocean. The network of retailers, brands, suppliers, and fisheries that have enabled so much MSC certified whitefish to reach consumers are therefore crucial players in driving the MSC's broader theory of change, in the UK and globally. ●



Market Data: UK whitefish

Championing Sustainable Whitefish: Birds Eye

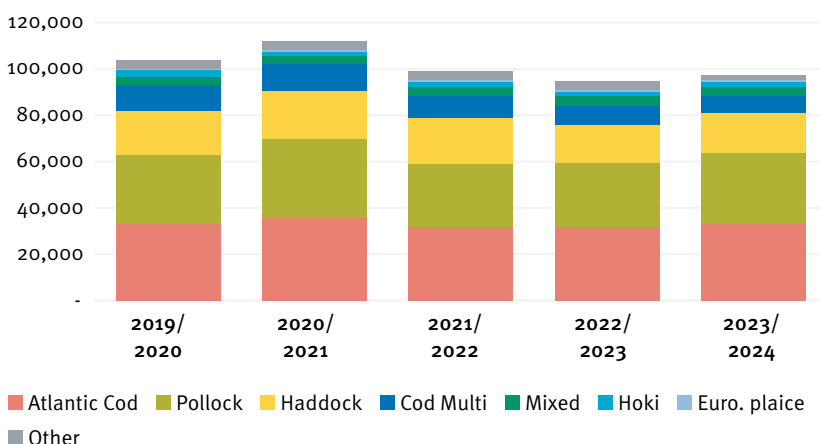


Birds Eye have consistently sold more MSC-labelled whitefish (by both value and volume) than any other brand in the UK, including retailer own-brand. Birds Eye returned to offering 100% MSC and ASC certified fish in 2023, demonstrating their drive to always offer certified sustainable options to their customers. In recognition of their longstanding sustainability commitments, Birds Eye won Frozen Brand of the Year for a record tenth consecutive year at the MSC UK Awards 2023.

“Customers expect transparency regarding certification and a clear theory of change towards more sustainable fishery practices and aquaculture.”

Adam Smith, Category Trading Manager at Iceland, UK

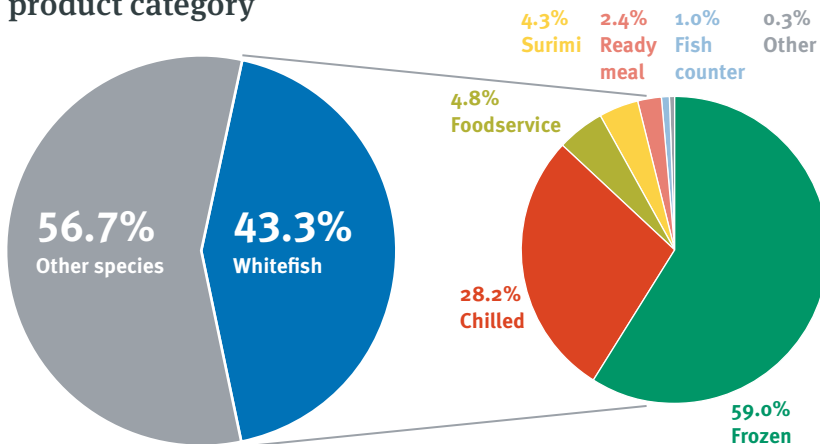
MSC labelled whitefish sold in the UK by volume (metric tonnes) and species

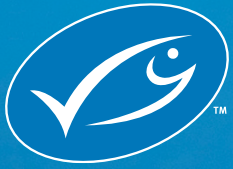


“Cod and haddock are important species for New England Seafood and we are committed to sourcing and supplying them from sustainably managed fisheries. Our commitment not only meets the minimum sourcing requirements of our customers but also aligns with the growing importance consumers place on sustainability in their purchasing decisions.”

Dominic Collins, Group Procurement Director, New England Seafood International

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





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

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