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UNIVERSITY of
TASMANIA

NAVIGATING SUSTAINABILITY: CANNED TUNA IN AUSTRALIA

Report

Insights and trends in eco-labelling from the Marine Stewardship Council with research and analysis from YouGov and the University of Tasmania

2 May 2025

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EXECUTIVE SUMMARY

Trends, challenges
and opportunities



EXECUTIVE SUMMARY

From ocean to aisle: How sustainability labels are shaping Australia's canned tuna boom

Global surveys show that younger generations are eating less fish, but canned tuna remains a popular choice. That's no surprise: it's affordable, nutritious and versatile. And with more people – especially Gen Z and Millennials – focused on their environmental impact, it's getting easier to find clearly labelled sustainable tuna.

That's a huge relief for eco-conscious shoppers. In Australia's strong canned tuna market, a few brands are leading the way with transparent, verifiable sustainability claims. But others fall short, causing confusion and mistrust.

Clear messaging is key to avoiding greenwashing. Our latest reports, produced with the University of Tasmania (UTAS) and YouGov, show that to keep tuna on the menu, we must prove it's been sustainably sourced – ensuring healthy fish stocks for the future. Claims need to be easy to understand, accurate, and fully supported – not vague promises masking unsustainable practices.

Labels independently verified by a third party are most trusted by consumers and set the benchmark. According to the UTAS study, brands with Marine Stewardship Council (MSC) certification – meeting the world's leading science-based standards endorsed by the UN and FAO – scored significantly better for credibility and transparency.

This report explores how sustainability claims are communicated on food packaging and the role of regulators, consumers, retailers, and certification bodies in ensuring accountability. We hope it helps guide and inspire brands committed to improving their sustainability communications.

- Clearer labelling helps shoppers cut through confusion.
- Consumers trust independent standards more than self-generated claims.
- Brands with MSC labelled products perform well in credible labelling assessments.
- Growing range of sustainable tuna empowers eco-conscious consumers with more choice.



CONSUMER EXPECTATIONS

A hunger for eco-labelling

YouGov[®]

Independent study conducted
13-18 March 2025



CONSUMER EXPECTATIONS

YouGov consumer research

To gain a better understanding about what Australians are thinking when it comes to buying and consuming canned tuna and how they respond to ecolabels, we commissioned YouGov to ask a nationally representative sample of 1,290 Australians aged 18 years and older the following questions.

This study was conducted online between 13-18 March 2025.

YouGov designed the questionnaire in collaboration with the MSC.

Following the completion of interviewing, the data was weighted by age, gender and region to reflect the latest ABS population estimates.





Australian canned tuna consumers

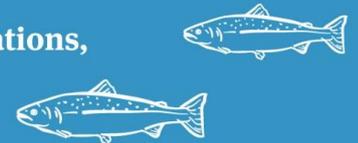


79%
look to see if the tuna they purchase is sustainable.

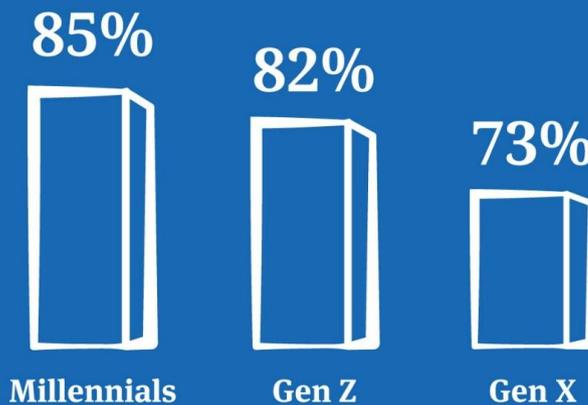
63%
more likely to buy tuna if it has a trusted ecolabel.



52% value ecolabels from independent third-party organisations, more than those from manufacturers or retailers.



Those who say they check sustainability before purchasing canned tuna



This study was conducted online by YouGov between the 13th – 18th of March, 2025. The sample comprised 1,290 Australians, nationally representative. Following the completion of interviewing, the data were weighted by gender, age, and region to reflect the latest ABS population estimates.

CONSUMER EXPECTATIONS

Most Australians are looking for sustainability labelling

New research reveals that more Aussies than ever are eating canned tuna and the majority of them are looking to find out if it's sustainable.

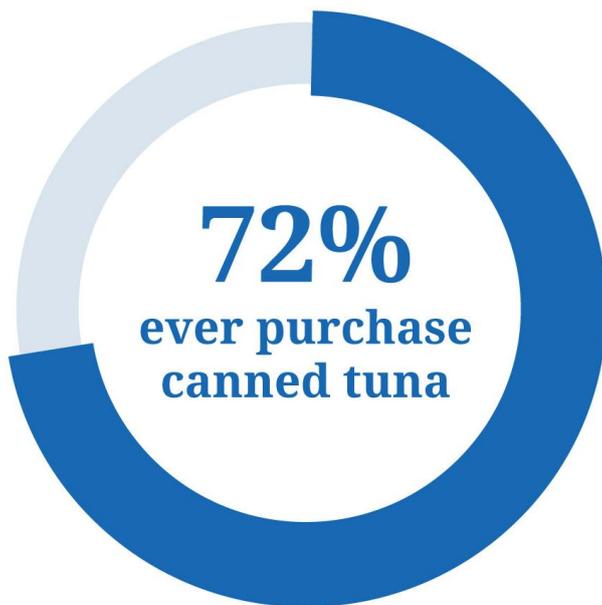
The Marine Stewardship Council (MSC) report reveals that when buying canned tuna most Aussies are trying to seek out sustainably sourced tuna (79%).

Knowing that their seafood is sourced sustainably is becoming increasingly important to consumers.

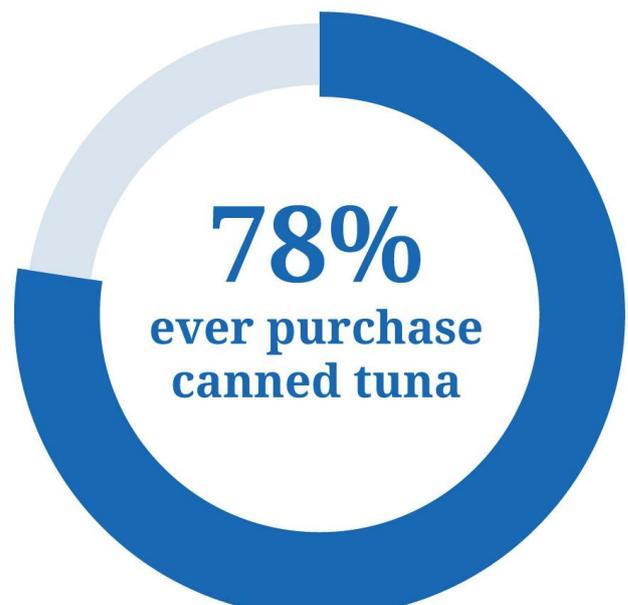
Results from a GlobeScan survey in 2024 found that 91% of Australian seafood consumers are worried about the state of the ocean, with pollution and overfishing ranking as their top concerns.

Canned tuna consumers in Australia

2023



2025



CONSUMER EXPECTATIONS

Aussies love their canned tuna

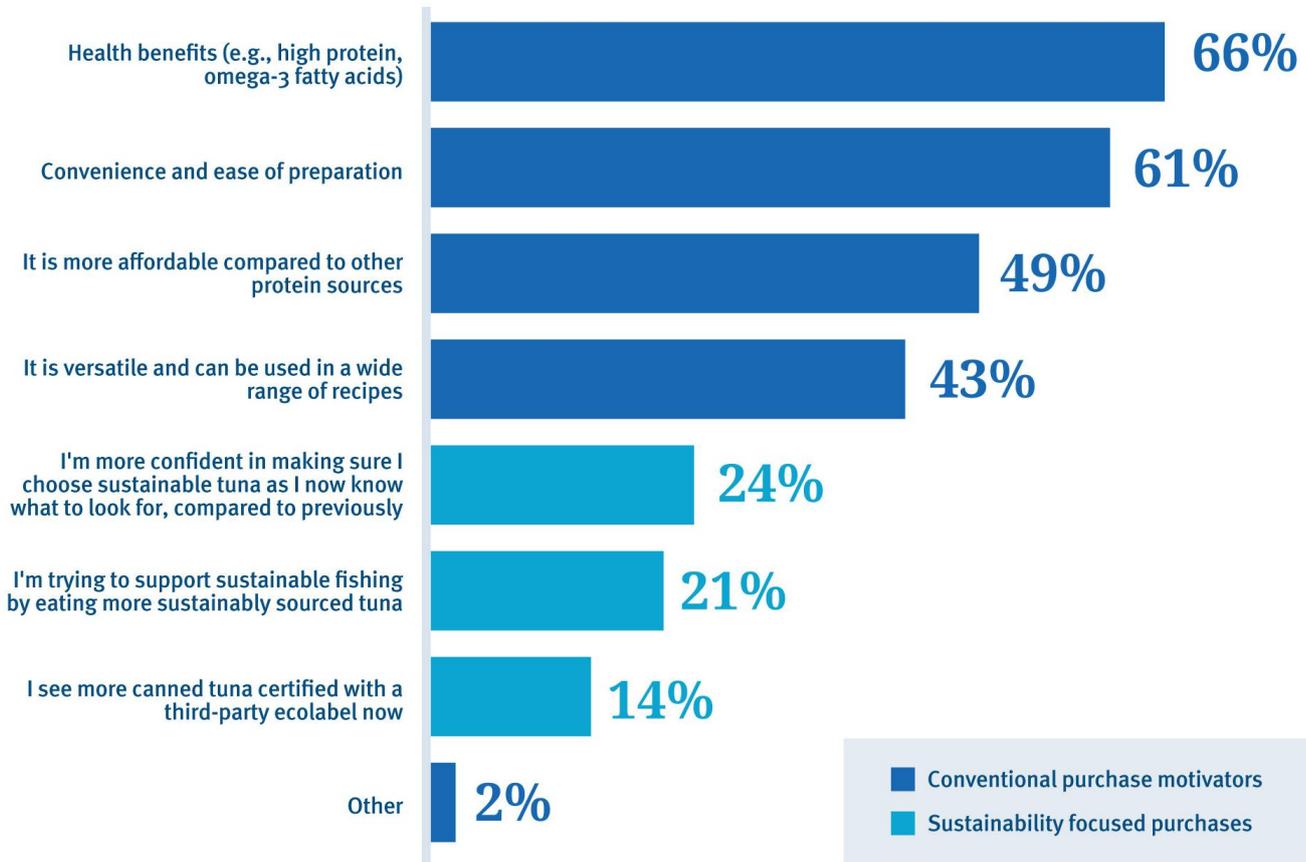
Australians clearly love their tuna. Nearly eight in ten (78%) Aussies are now canned tuna consumers – a steady increase since 2023 (72%).

One in four (26%) of these are eating more canned tuna now compared to two years ago, with 8% eating a lot more.

Those with increased appetites for tuna are more likely to be from younger generations (Gen Z: 39% and Millennials: 32%) as well as parents with children still at home.

But with increased demand for tuna, are consumers able to find an independently verified sustainable choice when out shopping?

Reasons for eating more canned tuna now



CONSUMER EXPECTATIONS

Sustainable labelling is an important factor in people eating more tuna

Although lifestyle factors remain the most important reasons for people eating more tuna, the YouGov report shows that there is a growing awareness around the value of a robust ecolabel.

Almost two-thirds of survey respondents who are eating more canned tuna now compared to two years ago stated health benefits and convenience (66% and 61% respectively) as the main reasons for eating more tuna, followed by it being an affordable protein source (49%) that's versatile for use in a wide range of recipes (43%).

However, over two in five (44%) mentioned sustainability as the

reason for increased consumption of tuna. This included better understanding what to look for and seeking robust assurance of an independent ecolabel:

“I'm more confident in making sure I choose sustainable tuna as I now know what to look for, compared to previously.” (24%),

“I'm trying to support sustainable fishing by eating more sustainably sourced tuna.” (21%)

“I see more canned tuna certified with a third-party ecolabel now.” (14%).

“Australian consumers are increasingly driven by awareness of climate change, plastic pollution, and ethical labour. They favour brands that align with their values and show real commitment to sustainability and reducing environmental impact.” – Anne Gabriel, MSC Program Director, Oceania & Singapore

CONSUMER EXPECTATIONS

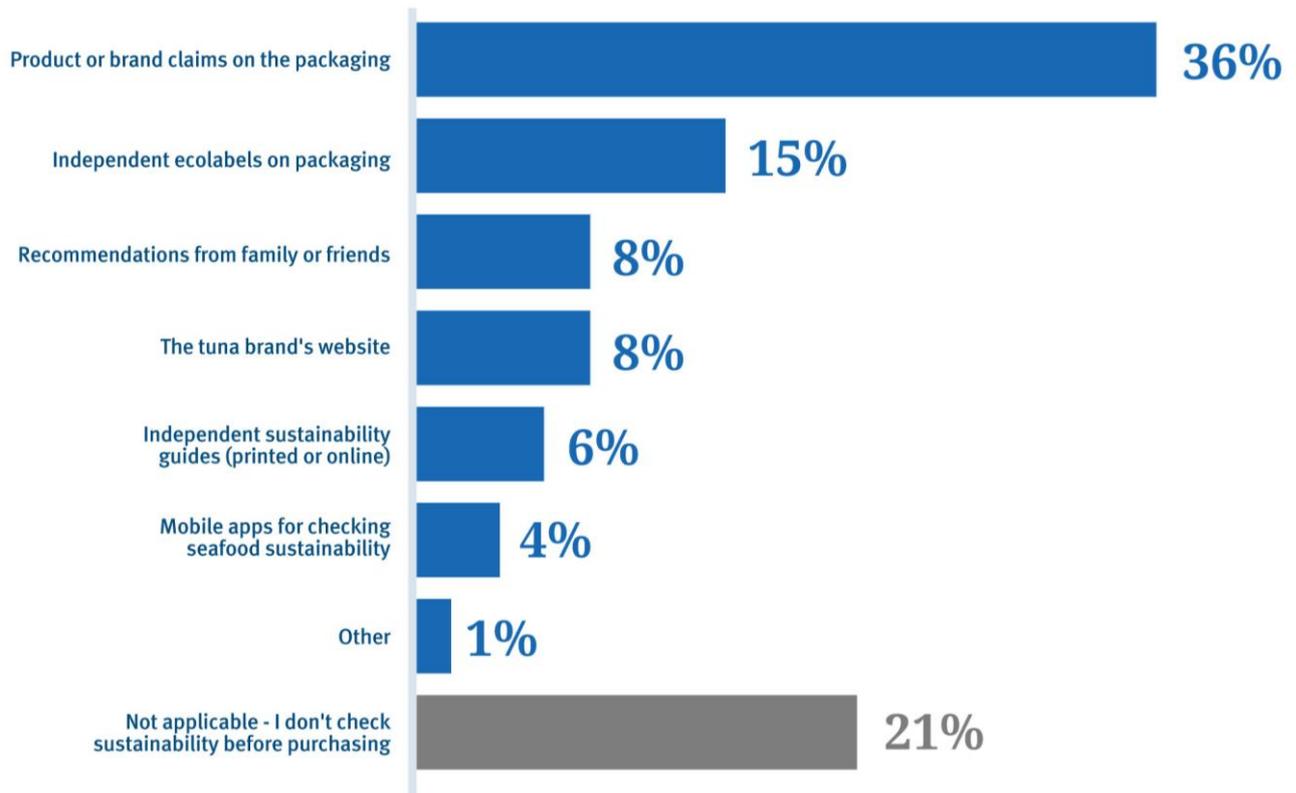
Only a minority of consumers are seeking the gold standard in sustainability labelling

Among Australian canned tuna consumers, only one in seven (15%) is likely to look for independent ecolabels on packaging, the most reliable indication of sustainability.

Just over half (51%), though, are seeking out sustainable information on packaging, including more than one third (36%) who are most likely to look for product or brand claims on the packaging.

It doesn't help that the quality of on-product sustainability information is highly variable and often unreliable. A recent study by the University of Tasmania concluded that sustainability messaging on canned tuna packaging can be vague, unsubstantiated and even too complex for the average consumer.

Main source of sustainable information



CONSUMER EXPECTATIONS

Ensuring claims are credible

According to ISEAL, the global membership organisation for credible sustainability standards, credible claims are clear, accurate, relevant, and backed up by transparent and robust systems.

Claim verification ranked from least to most robust:

- ✘ **Claim is not verified:** This is where no benchmark or measurement is made, such as “We care about the ocean.” Or “Planet-friendly” OR “Ocean-friendly”.
- ✘ **Self-assessed:** This mostly includes claims and logos made by the brand or retailer, such as “All our seafood is responsibly sourced”.
- ✘ **Interested party verified:** This is where an interested party, such as a trade body, makes a blanket claim, such as “All [country x] fisheries are sustainable”.
- ✔ **Third-party verified:** This is where a claim from an independent third party is used, such as “This product comes from a fishery that has been independently certified to the MSC's Standard for wild caught seafood. www.msc.org”

“The majority of Australian canned tuna consumers clearly want to follow through on their good intentions and buy sustainable tuna, but only a handful are well informed enough to look out for a verifiable third-party label that is the gold standard of sustainability.”

– Anne Gabriel, MSC Program Director, Oceania & Singapore

CONSUMER EXPECTATIONS

A seafood ecolabel you can trust

The MSC blue fish tick on a wild-caught product means you can be sure it comes from an MSC certified sustainable fishery. Fisheries are certified by independent, third-party assessments. By looking at each fishery individually using science, fisheries prove and improve their sustainability performance.

The MSC sets a standard that fisheries are required to meet. Its three core principles ensure fisheries maintain productive and healthy fish stocks, minimise their impact on the ocean environment and are well managed.

MSC programs are globally recognised as the world's most credible, science-based standards for sustainable and responsible seafood and are aligned with the UN Sustainable Development Goals.

Wild-caught, sustainable seafood is caught in a way that means there's plenty more fish in the sea now and in the future. Look for the MSC label on wild-caught seafood.





ASSESSING CLAIMS ON CANNED TUNA PACKAGING

Fishing for transparency and a label you can trust



UNIVERSITY of
TASMANIA

Study conducted by the Tasmanian School of Business and Economics, University of Tasmania.



CLAIMS ON PACKAGING

Can we trust sustainability claims on canned tuna?

In February 2025, a team of researchers from the University of Tasmania (UTAS) examined the sustainability claims made by 14 canned tuna brands, assessing them against seven of Australian Competition and Consumer Commission's (ACCC) eight principles for trustworthy environmental claims – excluding Principle 4 which is related to recycling. This provides clear guidance for businesses to support credible claims.

A new report by UTAS has found that stronger regulation and clearer messaging is required for environmental claims on canned tuna packaging. These will help to defy greenwashing and give consumers confidence to make well informed choices around a product's sustainability.

Many seafood purchases are motivated by how well a product's health and environmental benefits are communicated. In a climate where consumers are increasingly concerned about the

environmental impact of their purchases, canned tuna brands are under pressure to be transparent.

While a number of brands selling canned tuna are performing well in terms of sustainability messaging, the study found there is a need for potentially stronger regulatory enforcement, more accessible sustainability messaging and improved accountability among brands.

Their findings revealed significant disparities in how brands comply with ACCC sustainability principles.

Authors: Associate Professor Dan Daugaard, Doctor Sana Ejaz and Doctor Ayobolawole Ogundipe.

Tasmanian School of Business and Economics, University of Tasmania.

Report commissioned by the Marine Stewardship Council.

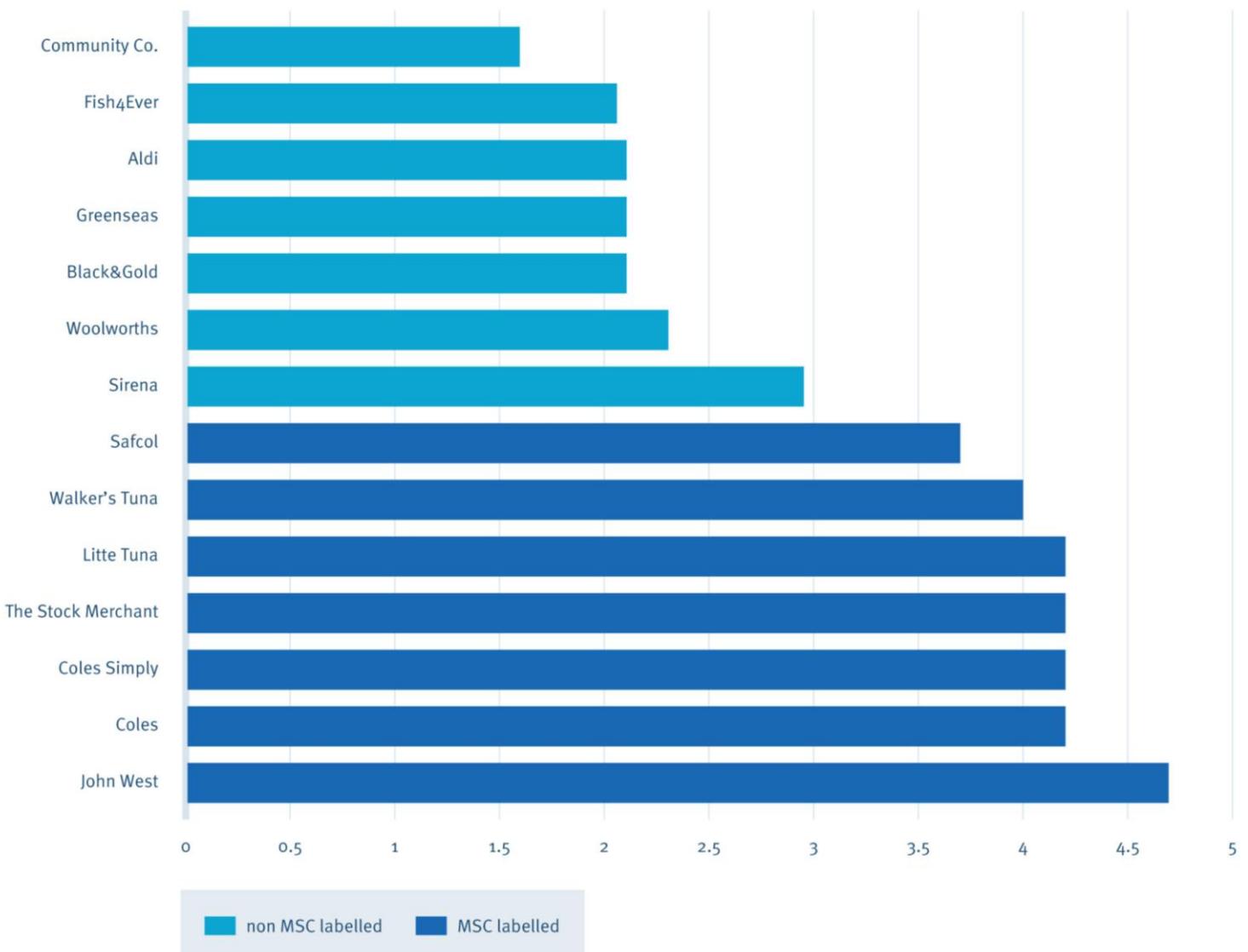
CLAIMS ON PACKAGING

The results

John West, Coles, Coles Simply, The Stock Merchant, Little Tuna, Walker's Tuna and Safcol emerged as the most sustainable brands, consistently scoring higher across multiple principles.

A second group, which includes Community Co., Fish4Ever, Aldi, Greenseas and Black & Gold had the lowest scores with notable opportunities to improve on their sustainability communication and transparency.

Total sustainability scores across brand packaging to ACCC guidelines



CLAIMS ON PACKAGING

Setting a benchmark

Based on scoring patterns, the research concluded that brands with third-party sustainability accreditation, such as Marine Stewardship Council (MSC) certification, achieved a better alignment with the ACCC principles than other brands.

These higher-scoring brands were able to present credible, transparent information communicating their sustainability practices. Their strong alignment sets a benchmark for industry-wide practice.

However, according to the research, there is scope for the ACCC principles to more explicitly reflect the influence and benefits of certification.

In particular, to recognise the way certification provides consumers with confidence that the issues around sustainability communications have been assessed and evaluated by a knowledgeable and well resourced, independent assurance body.



CLAIMS ON PACKAGING

Muddying the waters

Greenwashing – where businesses mislead consumers about environmental benefits – is a growing issue in the food industry, particularly in seafood products, where sustainability claims heavily influence purchasing decisions.

In its Greenwashing Report 2024, the ACCC found that 57% of businesses surveyed were making environmental claims that raised concerns regarding their truthfulness, accuracy, or clarity.

Common greenwashing practices include vague labelling, misleading certifications, and self-declared ecolabels that lack third-party verification (Czarnezki, 2014).

By making misleading claims, they not only harm consumer trust but also disadvantage businesses that are genuinely investing in sustainable practices.

CLAIMS ON PACKAGING

How the brands performed

Brands generally performed well in making truthful claims but lacked sufficient evidence to support them.

There were widespread issues with omitting key information, and broad, unqualified claims were common.

Communication clarity was divided – while some brands effectively conveyed their

sustainability claims, others used overly complex language or technical jargon which makes these claims more difficult to interpret by consumers.

A high level of transparency in sustainability transitions was universally absent, as all brands do not outline their future goals for improving environmental impact.



Sustainability claims on packaging – scores across ACCC principles

Principles	John West	Coles	Coles simply	Safcol	The Stock Merchant	Walker's Tuna	Greenseas	Sirena	Aldi	Woolworths	Community Co.	Fish4Ever	Little Tuna	Black&Gold
1	0.67	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
2	0.83	0.83	0.83	0.83	0.83	0.83	0.67	0.67	0.17	0.17	0.17	0.50	0.83	0.17
3	0.20	0.20	0.20	0.20	0.20	0.00	0.20	0.20	0.20	0.20	0.00	0.00	0.20	0.20
5	1.00	0.67	0.67	0.67	0.67	0.67	0.33	0.67	0.33	0.33	0.33	0.67	0.67	0.33
6	1.00	1.00	1.00	0.50	1.00	1.00	0.00	0.50	0.50	0.50	0.00	0.00	1.00	0.50
7	1.00	1.00	1.00	1.00	1.00	1.00	0.40	0.40	0.40	0.60	0.60	0.40	1.00	0.40
8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Principle 1: Making accurate and truthful claims

Principle 2: Having evidence to back up claims

Principle 3: Not hiding important information

Principle 5: Avoiding unqualified and broad claims

Principle 6: Using clear and easy-to-understand language

Principle 7: Avoiding misleading visual elements

Principle 8: Being direct and open about sustainability transition

The heat map, created by the University of Tasmania research team, highlights a clear divide between brands that actively succeeded in practices aligning with the ACCC principles and those that do not.

The “traffic-light” banding show greater detail on where these brands adhere to sustainability best practices, providing accurate claims, avoiding misleading statements, and ensuring transparency in communications.

In contrast to the top-performing companies, other brands show frequent challenges in aligning with the ACCC principles, as reflected in their multiple red values and lower overall scores.

These brands miss criteria, particularly in areas such as disclosing information. Their results, therefore, suggest potential to improve transparency and evidential support for their environmental claims.

CLAIMS ON PACKAGING

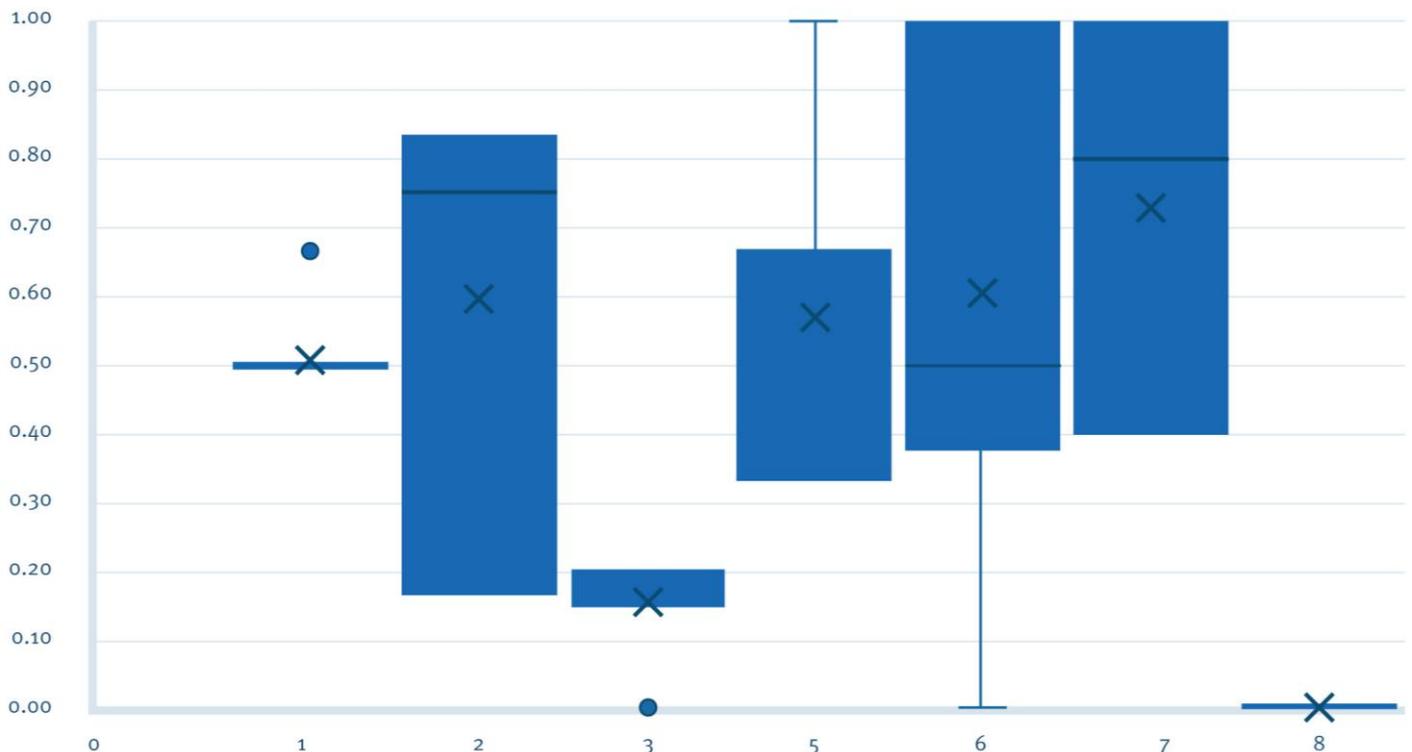
A closer examination of the specific principles highlights some areas of concern across brands.

Principle 8 (Transparency in sustainability transition) and Principle 3 (Disclosure of important information), for example, both showed widespread areas for improvement.

In terms of having evidential support to back up claims (Principle 2), the report's authors suggest there is scope for some brands to improve.

In particular, in providing independent scientific evidence, providing data on supply chains, and obtaining third-party certification.

Sustainability claims – scores across principles



CLAIMS ON PACKAGING

It's worth noting that while the ACCC's principles provide a strong foundation for assessing greenwashing in tuna brand labels, the report's attempt to apply the principles to the tuna brand context revealed some of the limitations of the principles.

For example, the one-size-fits-all approach to different industries may not fully capture the nuances of environmental claims in complex supply chains such as seafood.

In terms of actions that can be taken, the report concluded:

“Greater enforcement and increased penalties (for repeated or severe violations) will ensure businesses take their responsibilities seriously but also mean a revision of the principles and their interpretation.”





MARKET MOMENTUM

Transforming
industry
through
sustainability



Based on the latest
available MSC data



MARKET MOMENTUM

Yes, we can! Growth in the Australian tuna market

Globally the demand for sustainable tuna has grown steadily in the past decade. It's an important species in the MSC program with an estimated 2.8 million metric tonnes of MSC certified tuna being landed annually, accounting for 54% of the global wild tuna catch.

Australians are keen canned tuna consumers. As in many other countries, the popularity of canned tuna has soared in Australia in recent years (see p9.).

In this decade alone, since 2020, there has been 151% growth in options available for Australian consumers when choosing MSC certified canned tuna.

Based on data from the 2024/2025 financial year, consumers now have over 120 different MSC canned tuna products to choose from, meaning a 60% market share of the shelf is now labelled.

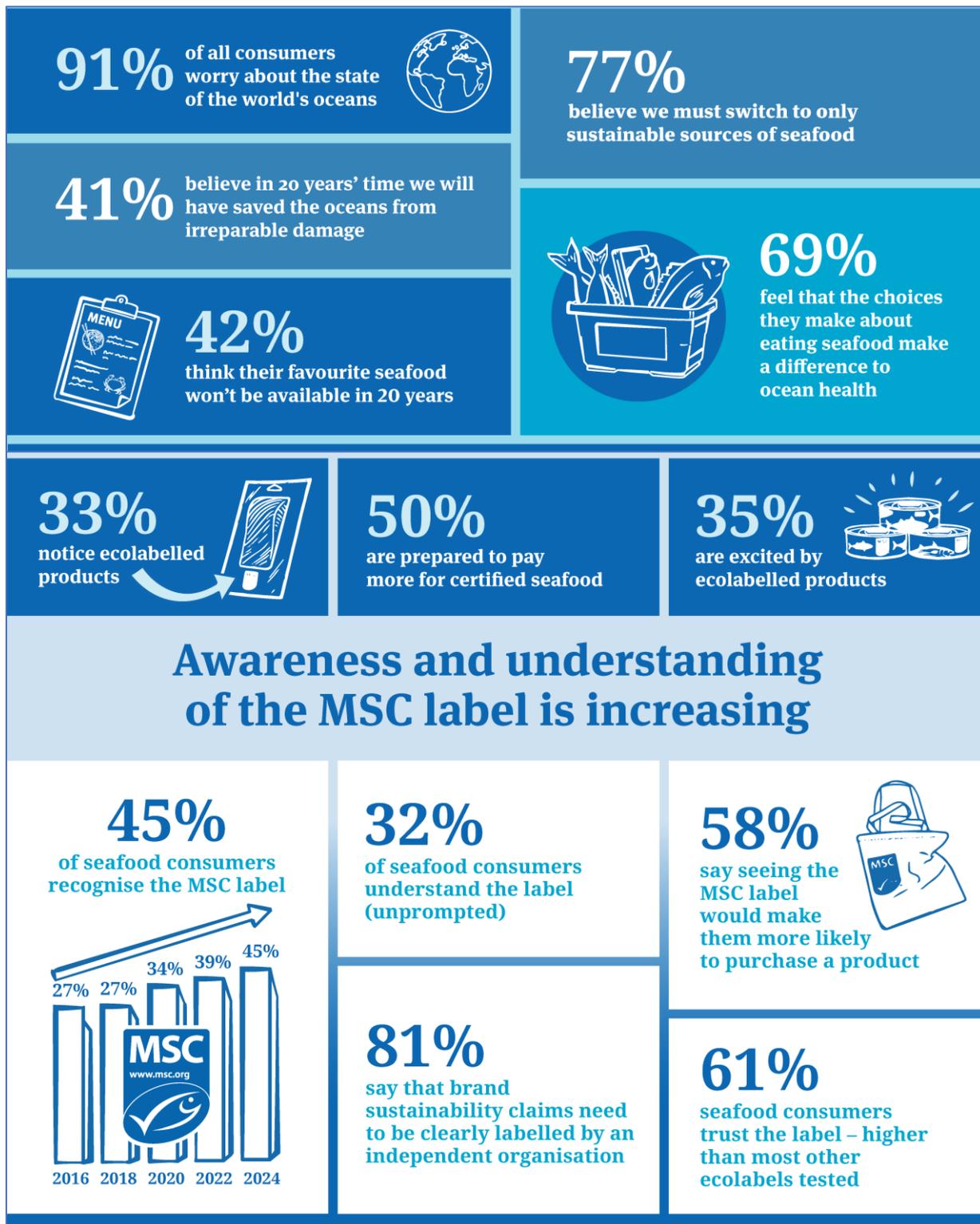
Today there are 11 MSC certified brands offering canned tuna in Australia – with more in the pipeline.

John West currently leads the Australian market with 60 MSC labelled tuna products that can be found in retailers across the country. It is followed by Coles, which has 43 MSC labelled tuna products on its stores' shelves, including four with its Wild Tides brand.



MARKET MOMENTUM

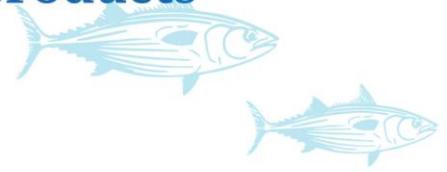
Consumer demand is driving brands to respond



GlobeScan fieldwork was conducted in Australia Jan-March 2024, with a nationally representative sample of 862 respondents.

MARKET MOMENTUM

Tuna brands in Australia by
number of MSC labelled products



John West

Coles

All other brands

“Several brands are setting a strong example with transparent sustainability messaging on canned tuna, yet there remains a significant opportunity for others to better meet the growing demand from environmentally conscious consumers seeking affordable and nutritious protein options.”

– Anne Gabriel, MSC Program Director, Oceania & Singapore

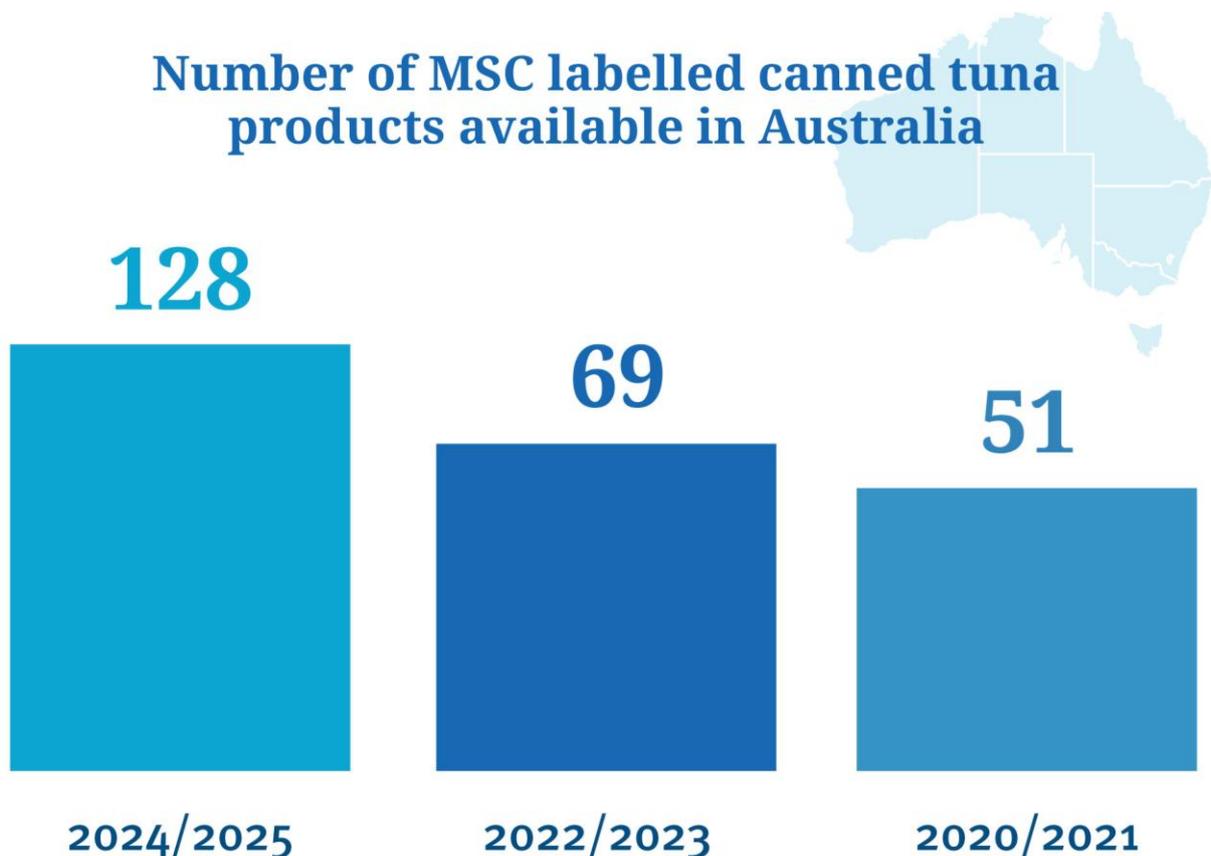
MARKET MOMENTUM

The volume of MSC certified sustainable canned tuna consumed in Australia has grown by 26.7% over the past four years – from 8,484 metric tonnes in the 2020/2021 financial year to over 10,691 metric tonnes in the 2023/2024 financial year.

Recent growth in sales of MSC labelled canned tuna has been driven primarily by consumers seeking healthy, affordable and convenient options but also by the increased availability and awareness of certified canned products.

The latest data shows that canned tuna now represents about 40% of all MSC certified fish and seafood purchased by consumers in Australia – placing Australia 8th globally in sales of MSC certified canned tuna, by volume (financial year 2023/24). Its high ranking shows how much Australians enjoy their tuna, given it is the country with the lowest population (26.6 million) by some distance in this category.

Number of MSC labelled canned tuna products available in Australia

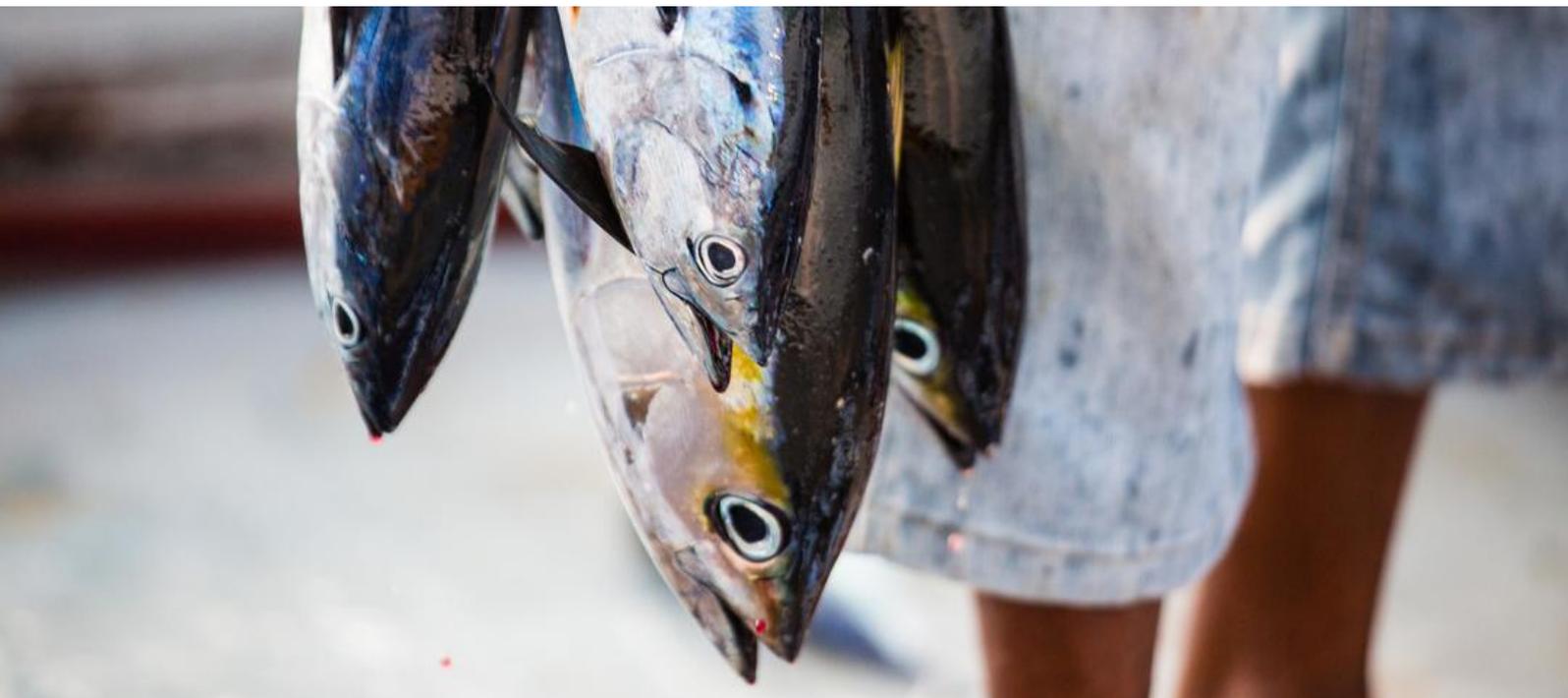


MARKET MOMENTUM

“Over the past decade, and especially in recent years, the availability of sustainable canned tuna in Australia has grown significantly. An increasing number of brands are leading this shift, with more coming on board. This expanding range empowers consumers with greater choice to match their high expectations for responsibly sourced seafood.

Retailers and brands are instrumental in driving this transformation. By embracing and promoting the MSC program, they signal strong industry commitments and help shape the future of sustainable seafood in Australia, influencing both fisheries and consumer habits.”

– Anne Gabriel, Program Director, MSC Oceania & Singapore





PARTNER PROFILES: JOHN WEST



JOHN WEST

JOHN WEST

Simplot, owner of John West Australia and New Zealand, began the transition of John West skipjack tuna products to MSC in 2015 and has been 100% MSC certified for the entire range since early 2016. While the journey for John West yellowfin tuna was more challenging, this range has also been 100% MSC certified since 2022. In July 2025, three new yellowfin tuna flavours will be launched, offering consumers even more delicious options.

These achievements underscore the importance of MSC certification in promoting sustainable fishing practices and ensuring the health of our oceans for the long term.

“Protecting our oceans matters. John West is committed to being leaders in responsibly sourced seafood and maximising the proportion of certified, traceable tuna across our range. This helps safeguard our oceans for future generations, meet consumer expectations and inspire others to follow,” says Phoebe Dowling, Director of Global Food Sustainability at Simplot.

“The MSC ecolabel gives shoppers confidence they’re making a good choice, and we’re proud to have the only 100% MSC certified Yellowfin and Skipjack tuna ranges in the shelf seafood category in Australia.” – Phoebe Dowling





COLES



COLES

Coles has 43 MSC labelled products on shelf, including Coles Tuna Chunks, Pacific brand Yellowfin Tuna and four Wild Tides' branded cans. Last year it became the first Australian supermarket to announce its commitment to having the MSC standard for sustainable fishing and seafood supply chain assurance across its canned tuna range.

Once transitioned, Coles' own brand canned tuna range will contain tuna caught by MSC-certified fisheries and feature the MSC blue fish tick label. This gives customers the assurance they are purchasing wild seafood from a well-managed and sustainable fishery. It also reflects the rigorous efforts by Coles to make sustainable choices more accessible and more convenient for their customers.





LITTLE TUNA AND EAST COAST TUNA CO.



LITTLE TUNA & EAST COAST TUNA CO.

MSC certified in 2021, Little Tuna offers a range of wild tuna steaks in olive oil, chilli, spring water and lemon myrtle. It was joined by East Coast Tuna Co., a new line of canned wild caught Australian tuna launched in January 2025.

“We chose sustainable tuna because protecting our oceans and supporting Australian fishing families is at the heart of everything we do” says Kate Lamason, Founder and Managing Director, Little Tuna and East Coast Tuna Co.

Together, the two brands offer a premium range of sustainably caught Australian tuna, proudly carrying the MSC certification. Little Tuna is locally processed and jarred in Cairns, while East Coast Tuna Co. delivers an affordable, MSC-certified option canned offshore. Both brands feature innovative QR-coded labels, offering traceability and connecting consumers directly to the Australian fishers – setting a new standard in transparency and integrity.

“As the first Australian caught, owned, and made preserved tuna brand, we’re proud to have led the way in offering truly sustainable options,” adds Lamason. “The MSC label helps us keep going – it’s a globally recognised symbol that brings credibility, value and impact to every jar and tin we produce.”

“Australian consumers trust our values, our transparency, and our deep commitment to doing right by our oceans and our fishers. That trust becomes loyalty, and that loyalty helps us get more Australian tuna onto more Aussie shelves.”
– Kate Lamason





WALKER'S TUNA



walker's tuna®

WALKER'S TUNA

Walker's Tuna was launched in 2024 to provide a product that is certified sustainable and gives consumers piece of mind to know they are helping to look after our oceans for future generations.

“We wanted to produce a product using our high-grade sustainably caught MSC Albacore Tuna for Australians and the world to enjoy,” says Heidi Walker, Managing Director of Walker's Tuna.

Released in October 2024, Australian MSC Albacore Tuna in Australian Cold Pressed Olive Oil is available in jars and pouches. It is currently stocked in Woolworths, Harris Farm, IGA and other independent retailers.

“The tuna aisle can be very confusing for consumers and seeing the MSC certification on our products gives people the confidence to make a sustainable choice.”
– Heidi Walker



LOOKING TOWARD 2030

For shoppers, clearer labelling cuts through the confusion. For brands, accountability is no longer optional. And for the future of our oceans, credible information is one of the most powerful tools we have.

With growing pressure from overfishing and environmental change, it's more important than ever that businesses and consumers make informed choices.

We encourage retailers and brands to source canned tuna from fisheries that are

independently certified as sustainable – giving customers confidence that their purchase supports healthy fish populations and thriving ocean ecosystems.

As we approach 2030, let's align our sourcing and purchasing decisions with the UN Sustainable Development Goals – particularly those focused on responsible consumption, life below water, and sustainable economic growth. Together, our choices can drive real change for the health of our oceans and the future of our growing global community.



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CHECK YOUR CANS!*



***OF TUNA**

Look for the MSC label.
Certified sustainable is
healthier for the ocean.





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