Marine Stewardship Council

Sustainable Tuna Yearbook 2025

Market data, innovations and insights from communities protecting our ocean

Contents

A Year in Tuna

– 2.8 million tonnes of MSC certified tuna catch
– More than 300,000 metric tonnes of MSC labelled tuna
– 182 engaged fisheries harvesting 57% of global tuna catch

Celebrating momentum

TUNA COUNTS. It's a popular fish with consumers and an important species when it comes to sustainability. Currently, 2.8 million tonnes of MSC certified tuna is being landed annually, accounting for half of the global wild tuna catch.

With sustainability increasingly a priority issue for retailers, brands and consumers, the market continues to deliver on sustainable tuna. The latest figures reflect an impressive growth in MSC labelled tuna up 24% year-on-year to around 300,000 metric tonnes in 2024/25. For consumers, this translates to a wide increase in sustainable tuna options at retail – with new developments in food-to-go, foodservice and pet food.

While Germany/DACH and the USA continue to lead the market in volumes of MSC labelled tuna, the UK and Ireland have seen healthy growth driven primarily by increased availability of certified canned products. In Canada, too, the market for MSC certified sustainable tuna has grown exponentially in the two years ending in 2024, with the volume of MSC labelled tuna sales up an impressive 582% – almost all of this is canned.

Many of our partners continue to play a key role in keeping momentum going for sustainable tuna: Walmart and Bumble Bee in the US, Lidl, Aldi and Rio Mare in Europe, are all leading the way in their respective markets. While a number of brands continue to advance towards their goal of achieving 100% MSC labelled tuna.

The growing availability of sustainably sourced tuna products is only possible as a result of the 182 tuna fisheries engaged in the MSC program around the world. Keeping those fisheries operating to the MSC's Fisheries Standard is critical to ensure stocks remain healthy.

We are looking forward to celebrating more momentum and innovation in the year ahead. The MSC Sustainable Tuna Yearbook 2025 provides a comprehensive view of the current state of the tuna sector and highlights success stories. We hope it will inform and inspire you to join us on this remarkable journey towards a more resilient and sustainable tuna industry.

The rise of MSC certified tuna

54%
of global tuna catch is MSC certified

3%
of global tuna catch is currently in assessment to the MSC Standard

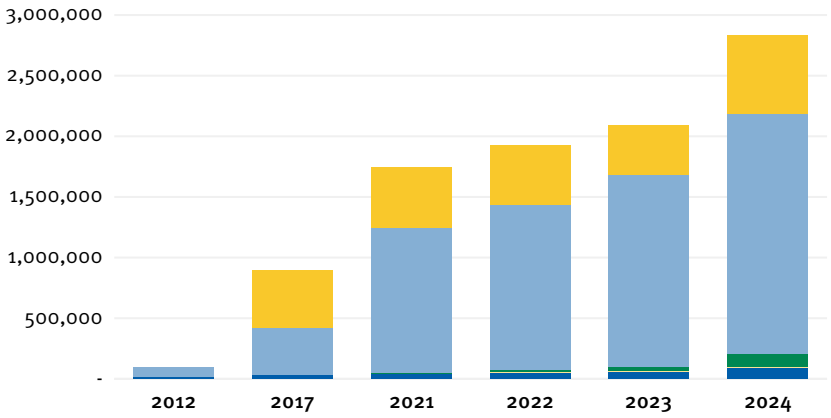
0.46%
of global tuna catch is currently in the MSC Improvement Program

14%
of global tuna catch is currently in a FIP (basic or comprehensive)

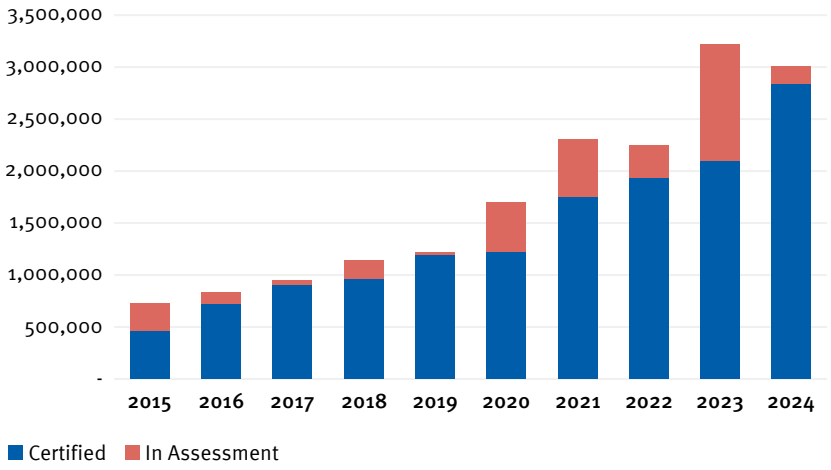
29%
of global tuna catch is neither MSC certified, in assessment or in a FIP

Suspended tuna catch is negligible

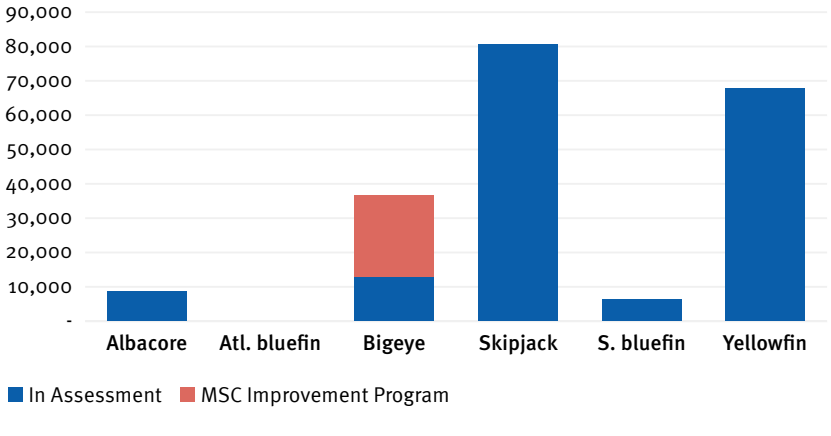
Certified tuna volumes by year, metric tonnes



Growth of tuna in the MSC program, metric tonnes



Tuna catch in the pipeline to MSC certification, metric tonnes

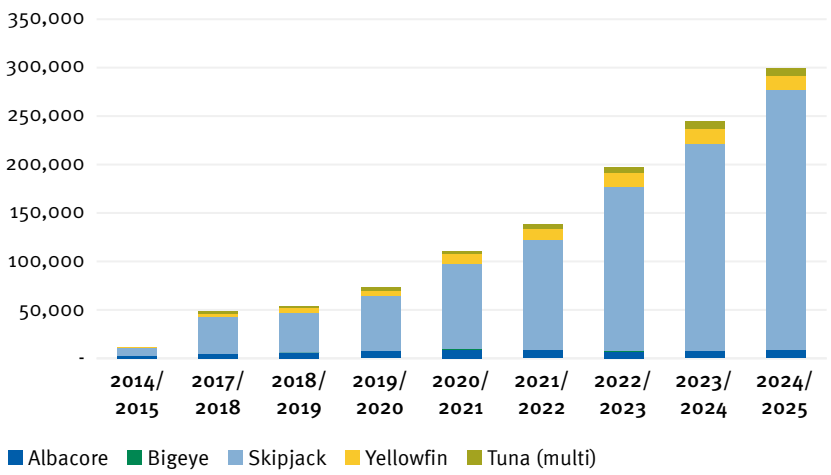


Fisheries data on this page is correct as of 31 December 2024.

Historical data is used to present current views of ocean capture. Due to a 1–3 year reporting delay, recent catch figures are continually updated.

Strong market momentum

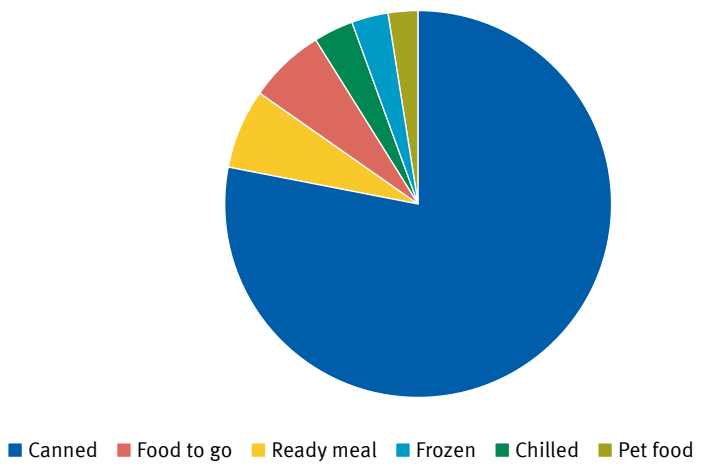
MSC labelled tuna volume by species



Top ten countries by volume

Country	Total tuna volume (2024/25)
Germany	63,984
USA	54,636
United Kingdom	40,485
‹Multiple›	18,852
France	15,780
Canada	14,586
Italy	12,727
Switzerland	11,023
Australia	10,345
Netherlands	8,442

MSC labelled tuna by product type, 2024/2025



Commercial data on this page is correct as of 31 March 2025. Forecast data included in 2024/2025.

Market and species analysis of global tuna

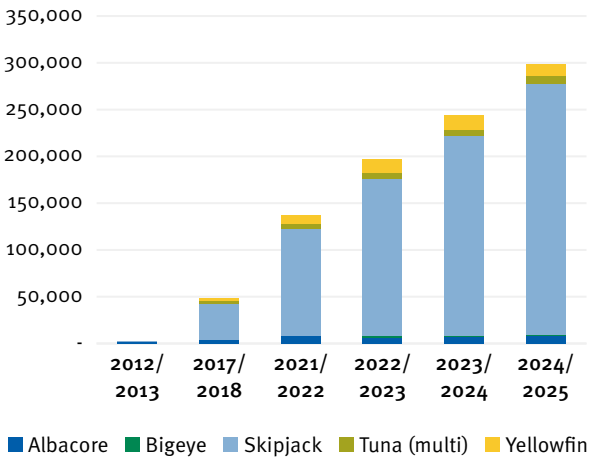
261
brands sold MSC labelled Skipjack Tuna up from 49 in 2015

140
brands sold MSC labelled Yellowfin Tuna up from 1 in 2015

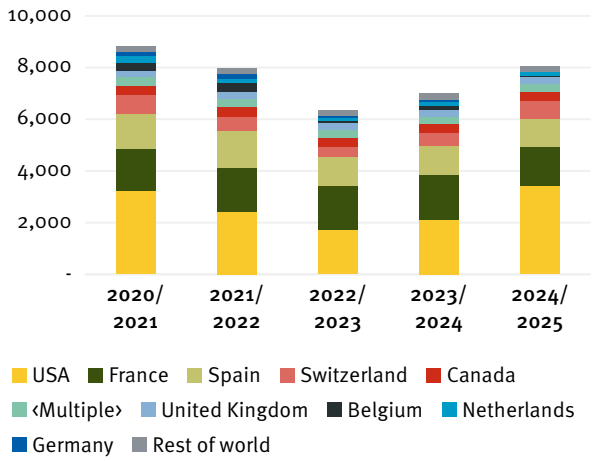
137
brands sold MSC labelled Albacore Tuna up from 76 in 2015

Commercial data on this page is correct as of 31 March 2025. Forecast data included in 2024/2025.

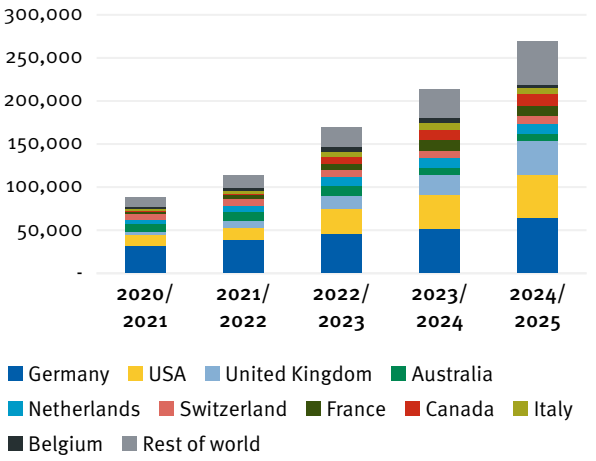
Global labelled volume, metric tonnes



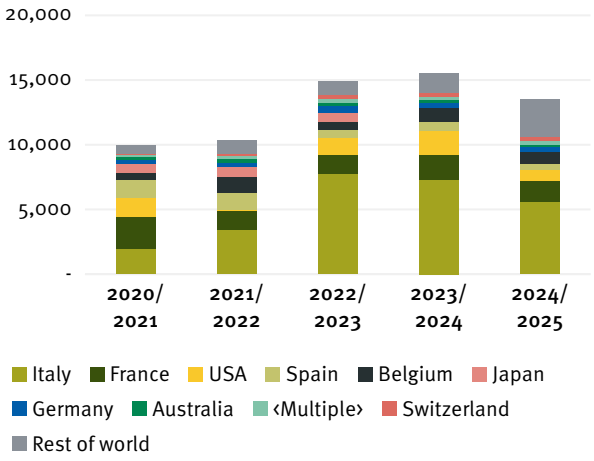
MSC labelled albacore, metric tonnes



MSC labelled skipjack, metric tonnes

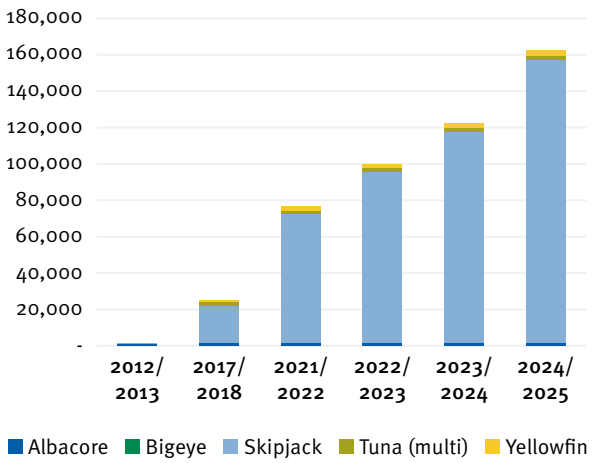


MSC labelled yellowfin, metric tonnes

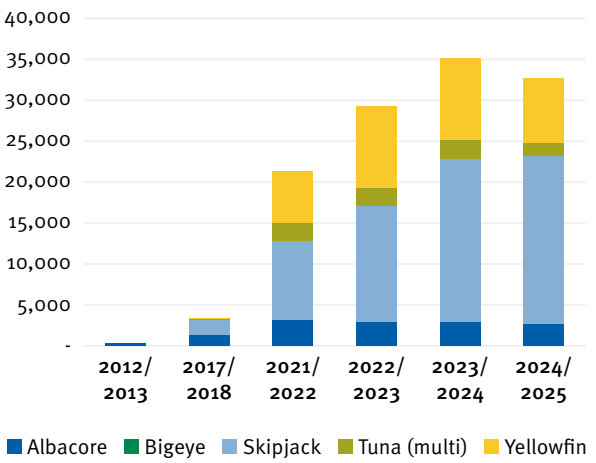


Regional analysis of global tuna

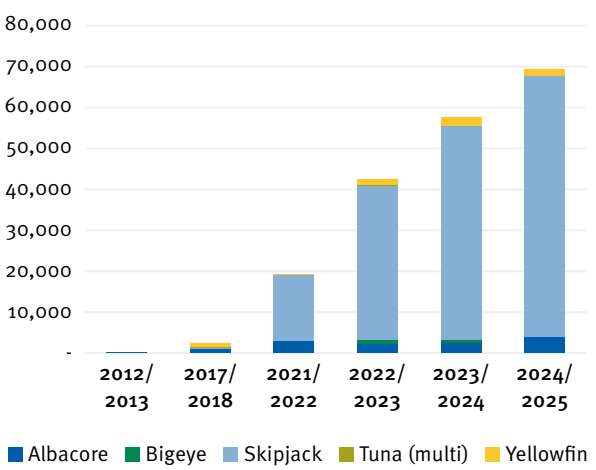
N. Europe & C. Europe labelled volume



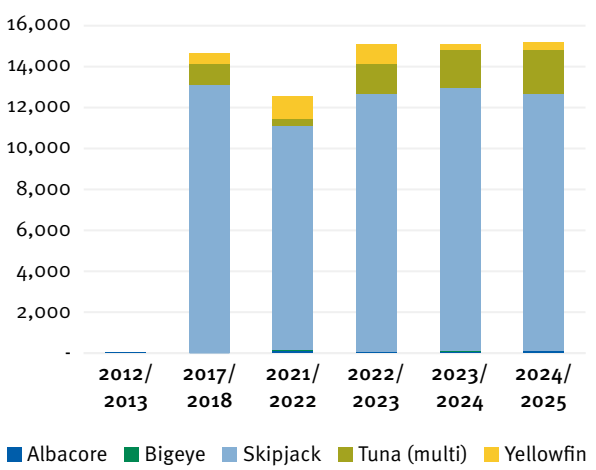
S. Europe & AMESA labelled volume



Americas labelled volume



Asia-Pacific labelled volume



Commercial data on this page is correct as of 31 March 2025. Forecast data included in 2024/2025.

Impact on the Water

– Fisheries become world first to meet Section SE of the new MSC Standard
– Pioneer fishery achieves certification with MSC Improvement Program
– Building on progress made in Ecuador tuna

WCPO Skipjack and North Pacific Albacore Achieve Major MSC Sustainability Milestones

KEY TERMS

Fish stock: The community from which catches are taken in a fishery. The term implies that a particular population is a biologically distinct unit.

Harvest Control Rules (HCRs): Measures that require catch to be adjusted in response to stock changes.

Harvest Strategy (HS): The combination of monitoring, stock assessment, harvest control rules and management actions taken by a fishery to ensure the target stock remains healthy and sustainable.

Regional Fisheries Management Organisation (RFMO): International bodies made up of representatives of nations with a shared interest in the management and conservation of fish stocks in a defined region.

SIGNIFICANT STRIDES HAVE BEEN MADE in the management of tuna fisheries in the Western Central Pacific Ocean (WCPO) for skipjack and North Pacific albacore. The Regional Fisheries Management Organisations (RFMOs) overseeing these stocks were the first in the world to successfully implement rigorous harvest strategies to meet certification under the latest version of the MSC Standard, which is an exemplary achievement.

Following the implementation of a robust harvest strategy in December 2023, WCPO skipjack, the world's biggest tuna fishery, has now addressed all associated conditions required for certification to the MSC.

North Pacific albacore achieved a breakthrough by having a stock-wide management plan adopted across two Regional Fishery Management Organisations (RFMOs): the Western Central Pacific Fisheries Commission (WCPFC) and Inter-American Tropical Tuna Commission (IATTC). It is the first tuna stock to achieve this distinction and similarly to WCPO skipjack, has met all the relevant conditions on the sustainability of the stock associated with MSC certification.

To ensure ongoing MSC certification, Section SE of the MSC Fisheries Standard version 3.1 requires all tuna fisheries operating across multiple RFMOs to develop and implement harvest strategies and harvest control rules. WCFPC managed tuna fisheries were set pre-defined milestones to deliver world-leading harvest strategies, and WCPO skipjack tuna was the first MSC engaged tuna stock to achieve the Section SE milestones.

These achievements mark a significant step forward in global fisheries management, setting a benchmark for other fisheries and ensuring that the world's most important tuna stocks are managed sustainably.

Case study: Success in South Africa

Fishery: South African albacore tuna pole and line fishery
Gear type: pole and line
Tonnage: 3,985mT
First certified: August 2024

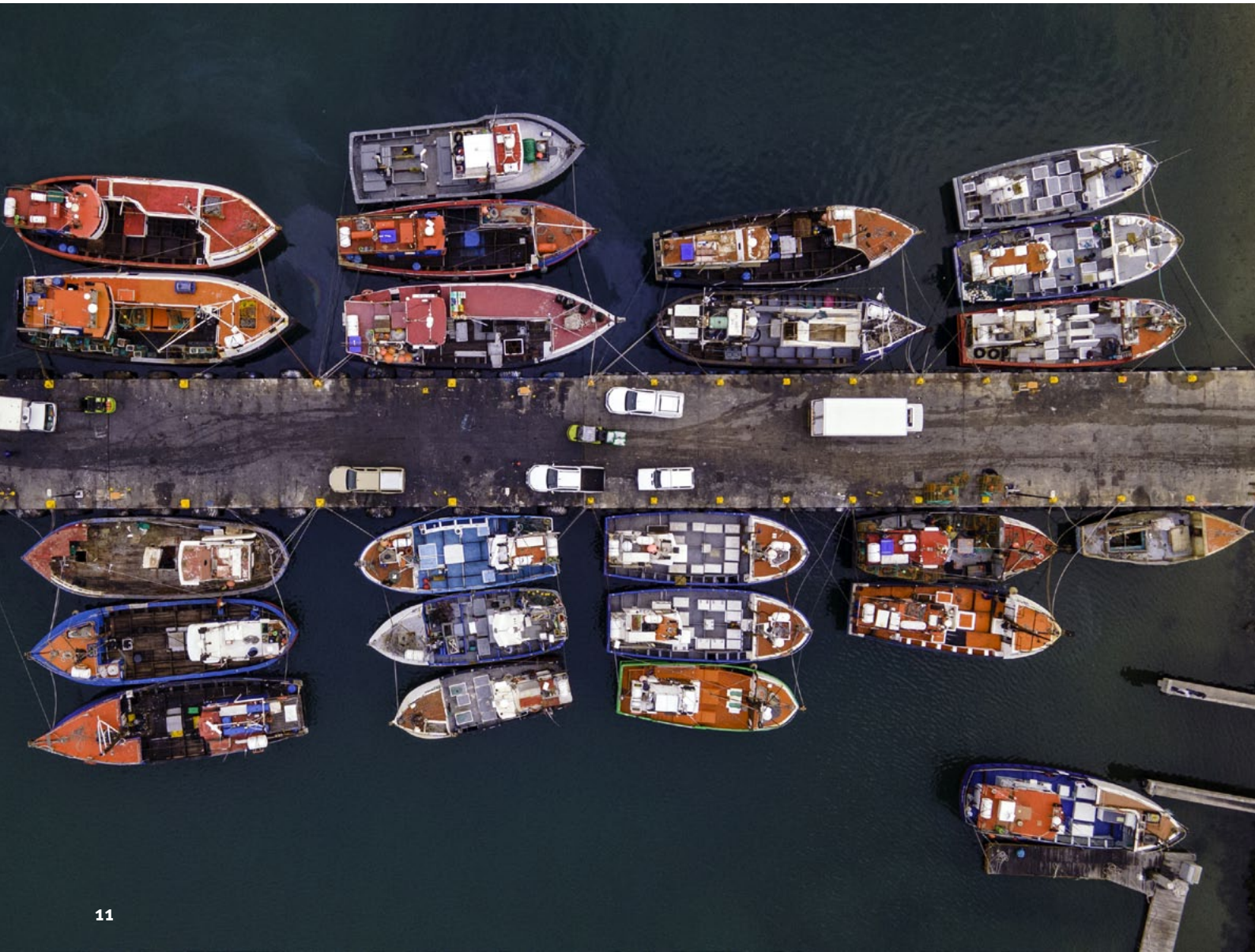
KEY TERMS

ETP species: Endangered, Threatened or Protected Species - In MSC assessments, auditors will determine if a species should be considered as ETP by seeing if they are included in relevant national legislation and international agreements.

Fish stock: The community from which catches are taken in a fishery. The term implies that a particular population is a biologically distinct unit.

IN AUGUST 2024, A COMPONENT OF THE South African albacore tuna pole and line fishery, represented by tuna trading company ICV Africa, became the first fishery to successfully achieve MSC certification after taking part in the Improvement Program, formerly known as In-Transition to MSC (ITM). A second client group from the same fishery, represented by the South African Sustainable Tuna Association (SASTUNA), an alliance of tuna marketers representing the fishery, became MSC certified a few months later in December 2024.

The MSC first engaged with the fishery in 2018 through the four-year Fish for Good pathway project, funded by the Dutch Postcode Lottery. This initiative aimed to help fisheries in South Africa, Indonesia, and Mexico transition to more sustainable fishing



practices. In 2020, the fishery joined the MSC Improvement Program, designed to guide fisheries in improving their practices over a five-year period to meet the MSC's rigorous Standard. After passing its entry requirements, the fishery then applied for, and received, funding from the MSC's Ocean Stewardship Fund to support the costs associated with making improvements to their practices.

Participating in the MSC Improvement Program enabled both ICV Africa and SASTUNA to make measurable, independently verified progress towards certification.

To meet the Standard, the fishery first needed to gather data on its impacts on both the albacore stock and the wider ecosystem. Management measures implemented include the appointment of an expert observer team to collect at-sea catch information and keep accurate records of any unintentional interactions with endangered, threatened and protected (ETP) species, though such interactions are rare. Fishing crew also participated in training to ensure the safe handling and release of ETPs that interact with fishing gear.

This fishery achieving MSC certification shows that there are viable pathways for all types of fisheries to adopt responsible practices and, when needed, make improvements to achieve global best practice for fisheries sustainability.

Case study: Excellence in Ecuador

Fishery: The Eastern Pacific Ocean tropical tuna - purse seine (TUNACONS) fishery
Gear type: purse seine
Tonnage: 211,000mT
First certified: July 2022

KEY TERMS

Condition of certification: A requirement to achieve outcomes that increase a current performance indicator score to 80 or above.

Fish Aggregating Devices (FADs): Floating structures made from plastic or natural materials with hanging appendages to attract fish. These can be free floating (known as drifting FADs or dFADs) or anchored to the seabed (known as anchored FADs or aFADs).

Fishery Improvement Project (FIP): Multi-stakeholder initiatives that aim to help fisheries work towards sustainability.

THE EASTERN PACIFIC OCEAN TROPICAL TUNA - purse seine (TUNACONS) fishery provides us with an excellent example of the positive changes that can occur when different stakeholders come together to achieve the common goal of helping a fishery obtain certification to the MSC Fisheries Standard. TUNACONS consists of five founding companies: Negocios Industriales Real NIRSA S.A., Servigrup, Eurofish, Grupo JADRAN, and Tri Marine, with the first three in that list hailing from Ecuador, the fourth from Panama, and the fifth from the US. Since 2024, three more companies have joined: PESDEL, Manacripex, and Pacifictuna.

In 2017, the fishery entered a Fishery Improvement Project (FIP) with the goal of entering full assessment in three years. They engaged in a variety of activities aimed at helping the fishery become more sustainable and able to meet the high bar of the MSC Standard. These included working with biodegradable FADs, implementing a best practices code of conduct

from the Inter-American Tropical Tuna Commission (IATTC) to reduce the incidental capture and improve the handling of vulnerable species, supporting the research of stock assessments of tropical tuna populations, and working on initiatives like Cuidando Galapago which is aimed at reducing ghost gear (fishing gear that is lost and ends up in the ocean).

Perhaps most notably, the fishery achieved 100% observer coverage - where all operations are observed by humans or electronic monitoring - on its Panamanian and Ecuadorian vessels by 2018. The fishery has 33 class 6 (above 363 mt) vessels, which have been required by IATTC to carry observers since 1992. However, the 10 vessels that are between classes 3 and 5 were not required to carry observers, though the fishery began to do so voluntarily.

In 2022, the fishery obtained certification for the yellowfin portion of the fishery, and the following year, skipjack was added to the certificate. In March 2025, bigeye was added within scope as well. Assessors placed a condition on the fishery because they were concerned that the bigeye stock had reached beyond the point where new generations are sufficient to replace the old (known as the Point of Recruitment Impairment) but after the IATTC published a study, the assessors deemed stock levels satisfactory to close the condition.

The tuna industry, from harvest to processing, plays a key role in Ecuador's economy. Ecuador has the largest tuna fleet and catches more than any other country in the Eastern Pacific. Its processing industry is highly capable, handling between 550,000 and 600,000 tons of tuna annually. This is significant because of the revenue it generates: 80% of the tuna processed in Ecuador is exported, making it the second-largest tuna exporter in the world. Since achieving MSC certification, there has been substantial growth in the export value of MSC tuna from Ecuador, which has increased more than 200% in the last year. The MSC certification of the TUNACONS fishery marks an important step taken by the Ecuadoran tuna sector towards sustainability and ensuring that future generations may enjoy the Eastern Pacific's tuna.

Tuna essentials

– Gear types, how fishers catch tuna
– Tuna species, from skipjack to bluefin
– Glossary of terms

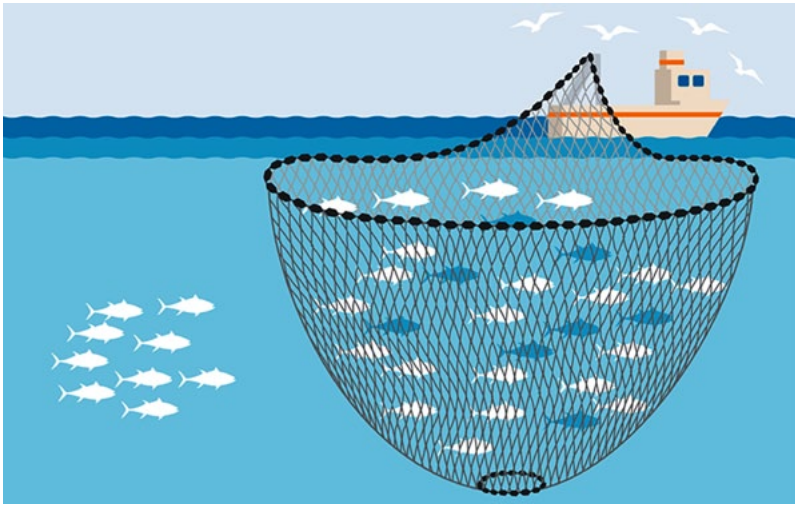
Gear types

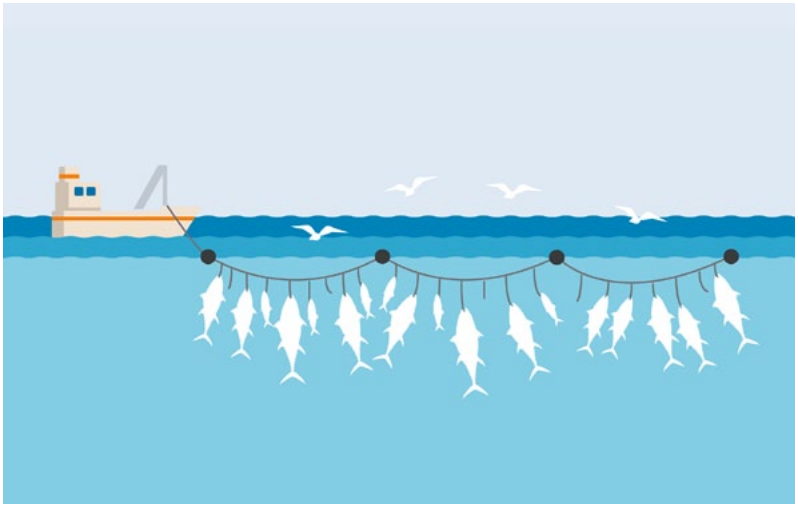
Tuna can be caught using various gear types and methods. The type used depends on the size of the tuna and depth at which it swims, the size of the fishery and its location.

Every assessment against the MSC Fisheries Standard considers the gear type used and its impact on the marine environment.

PURSE SEINE

A vertical 'wall of net' used to encircle a school of fish. The net is pulled closed from the bottom – like a purse – preventing the catch from escaping. Purse seines can be used to catch tuna congregating around fish aggregating devices (FADs) or on free swimming schools. The majority of skipjack and yellowfin are caught using this method.



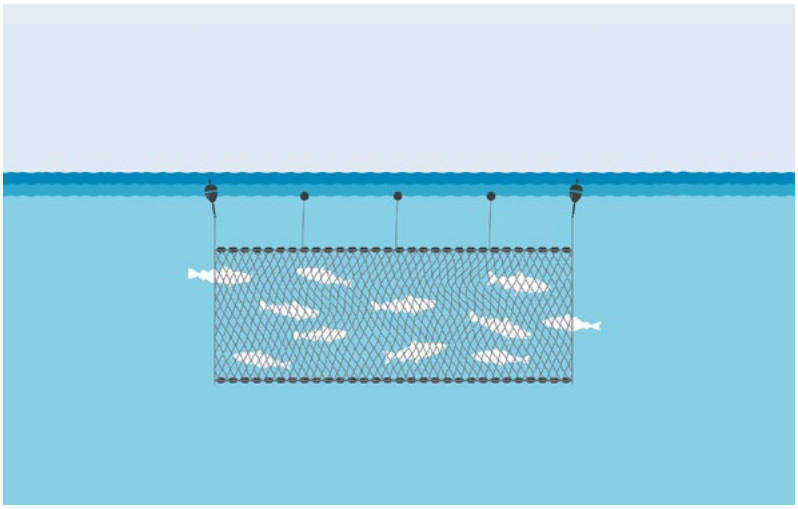


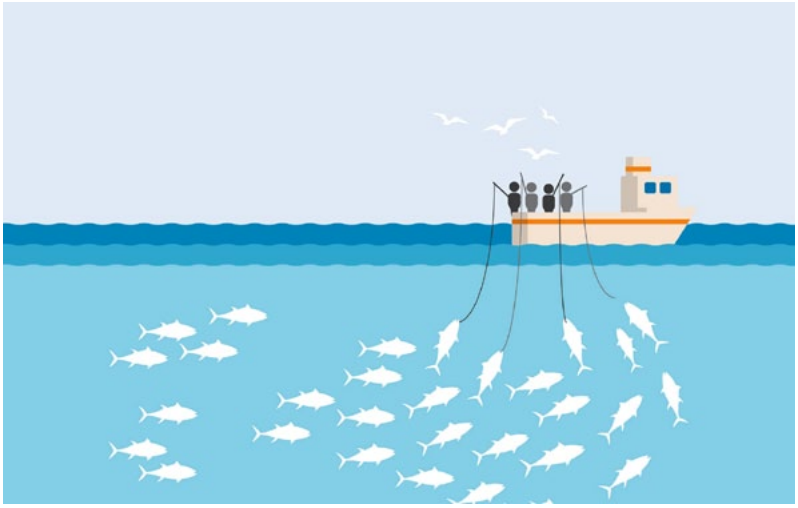
LONGLINE

A line trailed behind a boat with baited hooks attached at regular intervals. The length of line can vary from several hundred metres to more than 50 kilometres. This method is typically used to catch albacore, bigeye, and bluefin, which can be found in deeper water.

GILLNETS

A ‘curtain’ of netting hanging in the water, which fish swim into and get trapped. There are two types of gillnets, ‘set’ and ‘drift’. Set gillnets are anchored, either to poles fixed to the seabed or an anchor system, whereas drift gillnets are suspended using weights and floats. This method is most commonly used to catch yellowfin and skipjack.



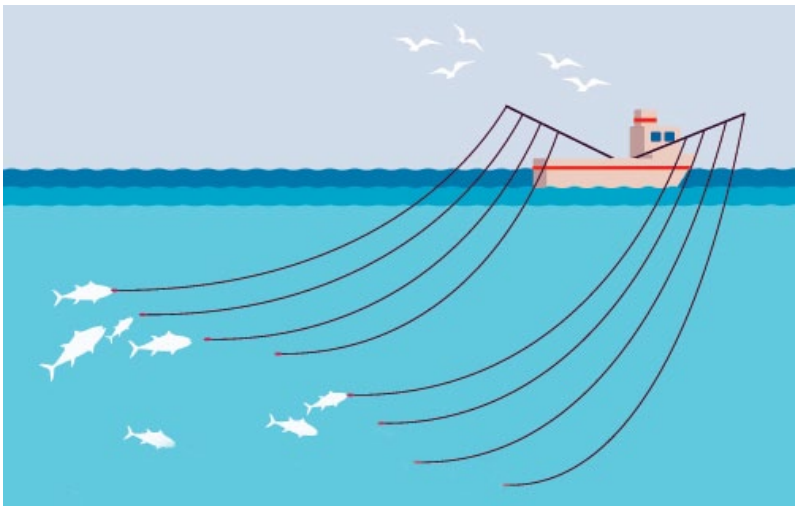


POLE & LINE

Used to catch tuna one by one using hand-held poles with barbless hooks attached to a line. Pole and line gear can also be used to catch fish that congregate around FADs, or free swimming schools. This method is most commonly used to catch skipjack and albacore.

TROLLING

Trolling is a type of handline fishing. Multiple fishing lines, baited with hooks, are towed behind a vessel. The lines can be hauled in by hand or mechanically. This gear type can be used to catch albacore, bluefin and yellowfin tuna.



Tuna species

Worldwide there are 23 stocks of the major commercial tuna species: five skipjack, four yellowfin, four bluefin, six albacore, and four bigeye stocks.

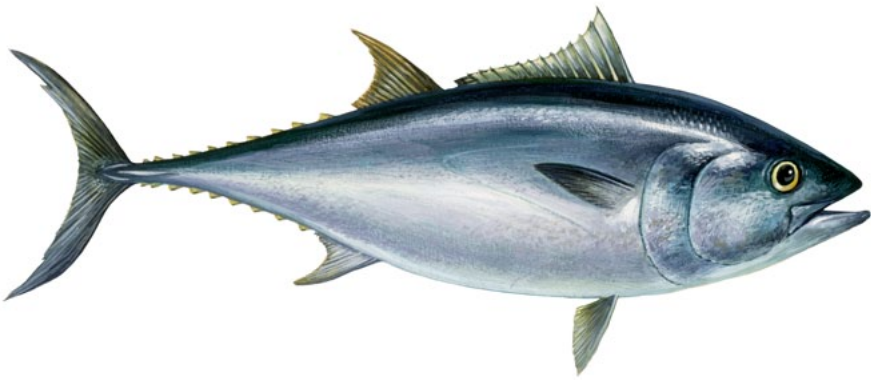
The International Seafood Sustainability Foundation (ISSF) found that 87% of the total commercial tuna catch comes from stock at healthy levels of abundance, 2% of the total catch comes from overfished stocks and 10% of the catch comes from stocks at an intermediate level of abundance.

*ISSF Status of the World Fisheries for Tuna (March 2025)

ALBACORE TUNA

Albacore tuna is often found in deeper waters than other tuna species. The species has a life span of 10-12 years and matures at approximately two to five years. They are highly productive, producing up to 2.5 million eggs every time they spawn. Albacore is also known as 'longfin tuna', or 'white tuna' due to its light flesh. Its dryer texture makes it ideal for canning and it is often sold fresh or in olive oil.

Species name: Thunnus alalunga **Distribution:** Global (temperate and tropical regions)
Proportion of global tuna catch: 4% **Volume MSC certified:** 90,019 tonnes



BLUEFIN TUNA

There are three different species of Bluefin tuna: Atlantic, Pacific and Southern. Bluefin are the largest of the tuna species and can have the longest lifespans, with Atlantic bluefin growing up to three metres in length and living for more than 25 years. High demand for bluefin led to overfishing and put stocks at risk. Implementation of a recovery plan and careful fishery management helped rebuild the Eastern Atlantic stock.

Species name: Thunnus thynnus (Atlantic Bluefin), T. orientalis (Pacific Bluefin), and T. maccoyii (Southern Bluefin) **Distribution:** Global
Proportion of global tuna catch: 1% **Volume MSC certified:** 654 tonnes

BIGEYE TUNA

Bigeye tuna can reach up to two metres in length. This tuna species grows more slowly than yellowfin or skipjack but matures relatively early at around three years. Typically, Bigeye live at lower depths than yellowfin and skipjack tuna, so have a thick layer of insulating fat. This fat adds moisture, which makes bigeye popular for sashimi markets.

Species name: Thunnus obesus **Distribution:** Indian, Pacific and Atlantic Oceans (tropical and subtropical regions)
Proportion of global tuna catch: 7% **Volume MSC certified:** 113,692 tonnes

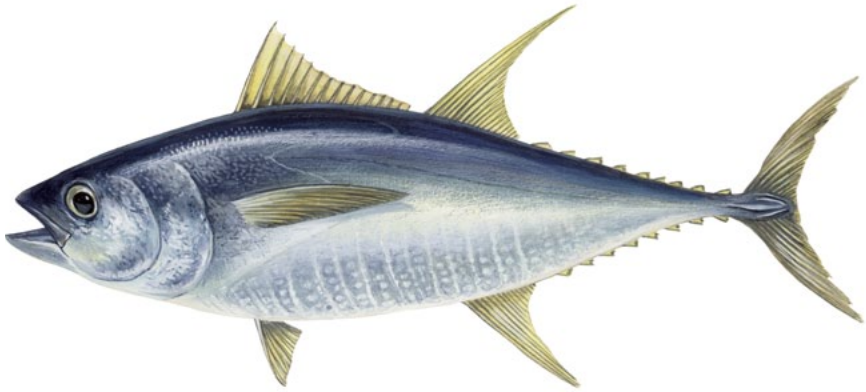
SKIPJACK TUNA

Skipjack tuna are widely distributed and live in the open ocean, feeding near the surface. They are the smallest of the major commercial tuna species, growing up to 80 centimetres in length, and the most abundant. Despite their relatively short lifespan of approximately seven years, they mature rapidly (after one year) and can reproduce throughout the year. Skipjack is popular among consumers. It is generally the most affordable of the tuna species and usually sold canned.

Species name: Katsuwonus pelamis **Distribution:** Atlantic, Indian and Pacific Oceans (Tropical regions)
Proportion of global tuna catch: 57% **Volume MSC certified:** 1,978,039 tonnes

YELLOWFIN TUNA

Yellowfin tuna can grow up to two metres in length and live up to 18 years. They mature by three years and can reproduce throughout the year making them highly productive. Juvenile yellowfin can often form schools with skipjack and juvenile bigeye tuna. Also known as 'ahi', yellowfin tuna is firm with a mild taste and can be canned or sold as fresh or frozen fillets.



Species name: Thunnus albacares **Distribution:** Pacific, Indian and Atlantic Oceans (tropical and subtropical regions)
Proportion of global tuna catch: 31% **Volume MSC certified:** 646,588 tonnes

Glossary

Best practice score: A score of 80 or higher against a performance indicator in the MSC Fisheries Standard that results in a pass without requiring additional improvements.

Biomass: The total weight of a fish population (or portion thereof) in a given area.

Bycatch species: Unwanted catch that includes undersized or surplus fish for which fisheries do not have a quota, endangered, threatened and protected species, and other unwanted marine species.

Conformity Assessment Body (CAB): Third-party certification body accredited to carry out assessments against the MSC Fisheries Standard.

Condition of certification: A requirement to achieve outcomes that increase a current performance indicator score to 80 or above (see also **Best practice score**).

Conditional pass: Awarded to fisheries that achieve MSC certification but are required to make improvements to ensure all performance indicators meet global best practice (a score of 80 or above) within the five-year duration of a certificate.

ETP species: Endangered, Threatened or Protected Species - In MSC assessments, auditors will determine if a species should be considered as ETP by seeing if they are included in relevant national legislation and international agreements.

Fish Aggregating Devices (FADs): Floating structures made from plastic or natural materials with hanging appendages to attract fish. These can be free floating (known as drifting FADs or dFADs) or anchored to the seabed (known as anchored FADs or aFADs).

Fishery Improvement Project (FIP): Multi-stakeholder initiatives that aim to help fisheries work towards sustainability.

Fish stock: The community from which catches are taken in a fishery. The term implies that a particular population is a biologically distinct unit.

Harvest Control Rules (HCRs): Measures that require catch to be adjusted in response to stock changes.

Harvest Strategy (HS): The combination of monitoring, stock assessment, harvest control rules and management actions taken by a fishery to ensure the target stock remains healthy and sustainable.

Maximum Sustainable Yield (MSY): MSY is the largest catch that fishers can take from a fish stock each year without affecting future years.

MSC Chain of Custody Standard: Certification to this standard ensures an unbroken chain where certified seafood is easily identifiable, separated from noncertified products, and can be traced back to another certified business.

Performance indicators (PIs): Twenty-five PIs sit under the three principles of the MSC Fisheries Standard (see Principles), and fisheries are assigned a score for each. Principles: Fisheries in assessment are scored against the three core principles of the MSC Fisheries Standard: 1) Sustainability of the stock, 2) Ecosystem impacts, 3) Effective fisheries management.

Regional Fisheries Management Organisation (RFMO): International bodies made up of representatives of nations with a shared interest in the management and conservation of fish stocks in a defined region.

Total Allowable Catch (TAC): Catch limits that establish the total amount of fish that can be taken from a stock.

Unit of Assessment (UoA): The target stock(s) combined with the fishing method/gear and practice (including vessel type/s) pursuing that stock, and any fleets, or groups of vessels, or individual fishing operators or other eligible fishers that are included in an MSC fishery assessment.

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