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Tuna Market Analysis 2024: Poland

Market Analysis: Polish Tuna

Over the past five years, there has been a significant increase in the number of tuna products labeled with the MSC logo available to Polish consumers, as well as in the volume of certified tuna sales. Until 2020, MSC-certified tuna products constituted a marginal share in Poland. However, since the MSC organization began intensive communication about tuna fisheries, publishing the first Compendium of Knowledge on Sustainable Tuna Fisheries in the country in 2022, the market has received a clear signal for action.

In 2021, the Rio Mare brand, in collaboration with MSC Poland and WWF Poland, launched the “Together for Oceans” campaign, significantly increasing interest in tuna products originating from MSC fisheries. Meanwhile, in 2022, Princes made a long-term commitment to switch its entire tuna portfolio to MSC certified. Importantly, they fulfilled this commitment, thereby becoming a leader in the Polish market, a feat acknowledged with the Top Tuna Brands award in 2023. Additionally, Graal – key Polish brand became involved in the MSC Program by introducing 2 canned tuna products, available in most stores across Poland.

Between the years 2020 and 2021, there was a twofold increase in the number of products (41 in Polish language and many multilingual products). This growth

was reflected in the volume of certified tuna sales, which increased significantly from around 100 tons in 2020/21 to approximately 1,350 tons in 2022/23. Based on forecasts, this volume is expected to exceed 1,100 metric tons in 2023/24.

The MSC tuna market mainly comprises skipjack cans (89%), still lacking other formats such as jars, salads, sushi, steaks, or chilled products. Interestingly, there is a significant share of the Pet food category (7.9%).

The total tuna consumption in Poland is approximately 0.63 kg per person, ranking fifth among wild fish. However, MSC tuna products in Poland account for less than 5% of the entire MSC program in the country, mostly absent from private label retailer offerings. Although occasional products under Lidl, Aldi, and Kaufland private labels appear, they are not consistently featured in their offerings or promotions to facilitate consumer access. Furthermore, other leading retailers have yet to initiate their actions.

Despite the considerable increase in MSC tuna availability in Poland, it is expected to be just the beginning of further dynamic changes. Only the engagement of a sufficient number of key partners can positively impact the entire tuna market.



Market Data: Polish Tuna

Championing Sustainable Canned Tuna: Princes & Graal

Princes Company in Poland is dedicated to using only 100% MSC-certified products and is leading the way in promoting and educating about sustainability. They actively communicate this commitment through their website and social media, and in April 2024, they launched strong marketing efforts in stores. Meanwhile, Graal Company, with a large market presence, is also striving to be a top player in the tuna category.

“The trend is clear. Sustainability is becoming a key element of overall brand equity and product quality. So, it’s a must.”

Luciano Pirovano, Chief Sustainability Officer, Bolton Food & Tri Marine

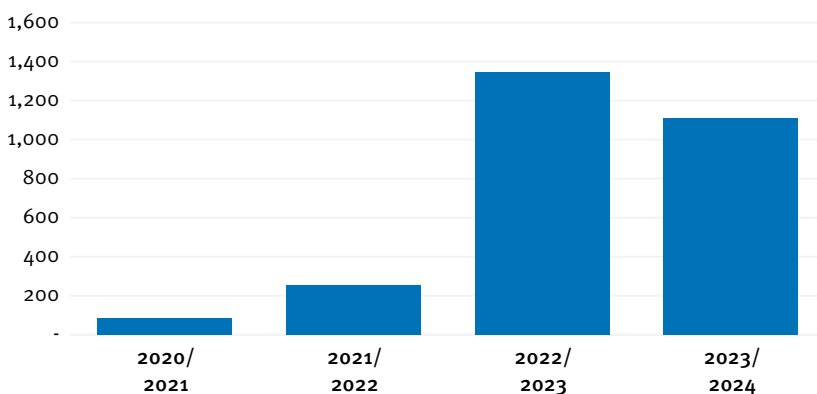
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new active tuna MSC products in last 12 months

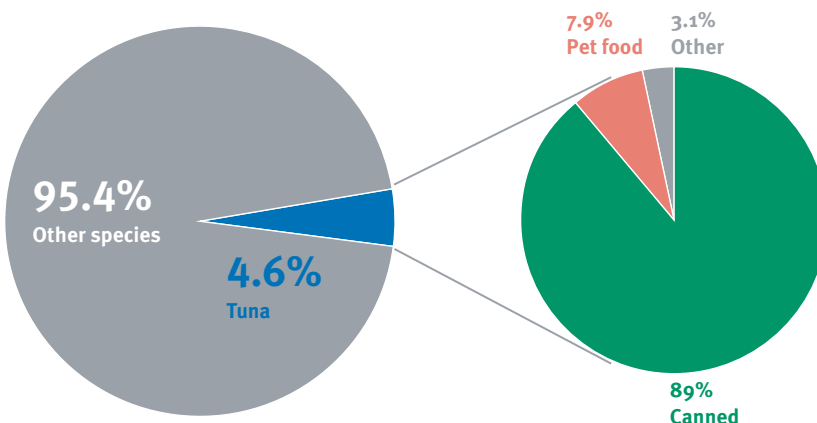
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Chain of Custody certificate holders in Poland with tuna in scope

MSC labelled tuna volume, metric tonnes



MSC labelled tuna by product type





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