



Marine Stewardship Council

# SUSTAINABLE TUNA HANDBOOK

2022 Update | Global Edition



# THE MSC SUSTAINABLE TUNA HANDBOOK

The MSC's Sustainable Tuna Handbook is a comprehensive guide to sourcing sustainable tuna. Available for free at [msc.org/tuna](https://www.msc.org/tuna) it is packed with explainers, data, case studies and insights from around the world. It busts the myths, answers the questions and delivers the knowledge readers need to confidently source and sell sustainable tuna.

This briefing provides an update to key MSC data and insights. It serves to supplement the still relevant context and case studies presented in the 2021 Handbook. Readers may also be interested in a new briefing explaining the implications of the new MSC Fisheries Standard (version 3.0) for tuna fisheries. The new Standard, published in October 2022, includes significant improvements, in particular the requirements for harvest strategies, which will impact the certification of tuna fisheries from mid-2023. This briefing is also available at [msc.org/tuna](https://www.msc.org/tuna).

© istock.com / Aleksander Kamasi Front cover Tuna noodle salad © David Loftus

## GROWTH OF MSC CERTIFIED TUNA

2021 and 2022 saw continued growth in both the number of MSC certified tuna fisheries and the volume of MSC certified catch. In the year from September 2021, 19 tuna fisheries achieved MSC certification, taking the total to 91. With this, the volume of MSC certified tuna catch increased 24% from 1,982,000 tonnes in September 2021 to 2,460,000 tonnes in September 2022. Close to half of the world's commercial tuna catch is now MSC certified.

This growth was a result of long-term commitments by several significant fisheries to achieve MSC certification, including the Spanish Association of Large Freezer Tuna Vessels (AGAC) which achieved MSC certification for tuna catch in all four oceans in July 2022, following more than 10 years of work to improve its sustainability (page 10). Also in July 2022, TUNACONS' Eastern Pacific Ocean tropical tuna fishery became the first Ecuadorian fishery to achieve MSC certification for yellowfin tuna following a fishery improvement project (FIP) started in 2016. And in October 2021 the Philippine Tuna Handline Partnership became the first fishers' organization in the Philippines to achieve certification to MSC's globally recognised standard for sustainable fishing, following a 10-year FIP supported by WWF.

Helping to incentivise this growth is an increasing demand from consumers, retailers, seafood brands and supply chain companies throughout the world, to supply and source sustainable tuna (page 7).

These commitments and the demand for certified seafood they create drive improvements in the way tuna fisheries are managed. Many fisheries implement significant changes to reduce their environmental impacts before entering independent assessment to the MSC Standard. Improvement continues once fisheries are certified, as they work to close the conditions of certification. For example, with support from the Ocean Stewardship Fund, the MSC certified Echebstar tuna fishery in the Indian Ocean is carrying out research working with AZTI (members of the Basque Research and Technology Alliance), to better understand and mitigate the impacts of derelict Fish Aggregating Devices (FADs) on coral reefs and other vulnerable ecosystems. It has also been working to design and construct biodegradable FADs.

In the three years to March 2022 MSC certified tuna fisheries delivered 38 improvements as conditions of

their certification. These included 12 improvements to reduce impacts on Endangered, Threatened and Protected species and bycatch, 3 improvements to stock status and harvest strategies and 22 improvements to fisheries management, governance and policy (page 12).

### The challenge of harvest strategies

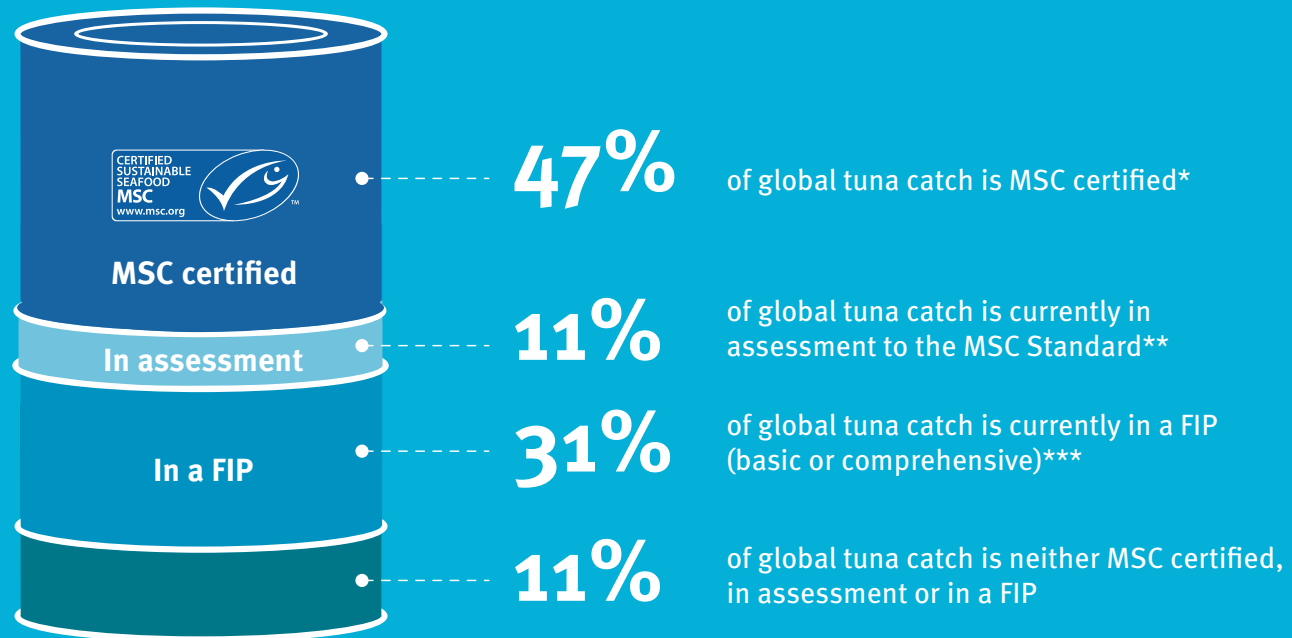
Progress in sustainable tuna fishing could be undermined however, if international governance in the Western Central Pacific fails to adopt a long-term strategy to ensure the continued health of the world's most commercially important tuna stock. The Western Central Pacific is home to more than half the world's skipjack tuna, and 81% of MSC certified sustainable tuna catches.

Despite the region's strong track-record in sustainable fishing resulting in healthy tuna stocks, the continued certification of tuna fisheries in the Western Central Pacific will require the 26 nations responsible for tuna fishing in the region, to agree to rules aimed at ensuring stocks never become overfished. The MSC is urging members of the Western Pacific Fisheries Commission (WCPFC) to support the adoption of these rules, to ensure the long-term health of this vital tuna stock, at its upcoming annual meeting in December 2022.

Recognising this challenge, the MSC's new Fisheries Standard (version 3.0) includes a new framework to help incentivise and facilitate the adoption of state-of-the-art harvest strategies. In recognition of the significant increase in expectations of RFMO-managed fisheries, already certified fisheries will be given an additional five years in which to meet these requirements. More detail of these requirements and how other improvements to the MSC Standard impact tuna fisheries is available in a new briefing which can be downloaded from [msc.org/tuna](https://www.msc.org/tuna).



# MSC CERTIFIED TUNA

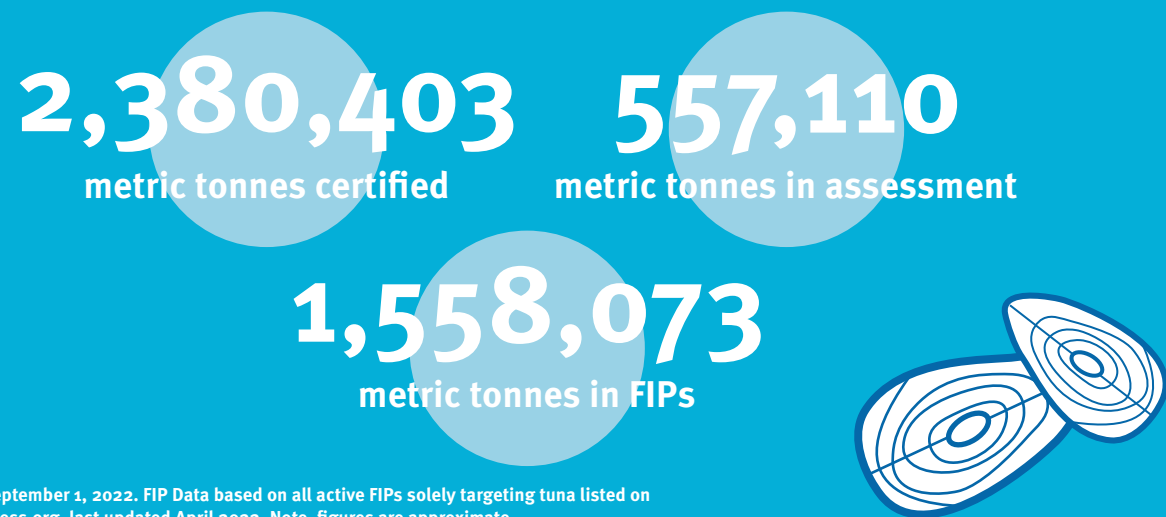


\* 91 certified tuna fisheries \*\* 36 tuna fisheries in assessment  
 \*\*\*Based on all active FIPs solely targeting tuna listed on Fisheryprogress.org, last updated April 2022.  
 Note, figures are approximate. Data as of September 6, 2022  
 % is compared with total commercial tuna catch in 2020 as reported by the UN FAO

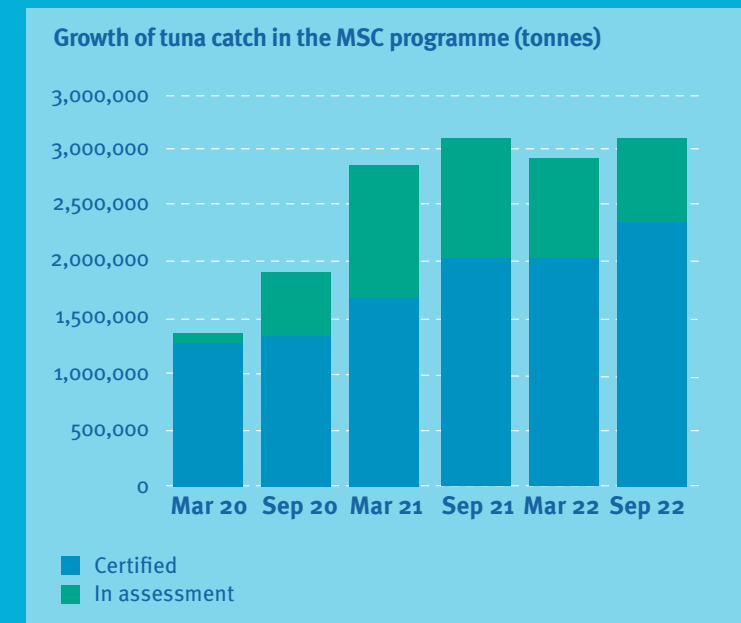
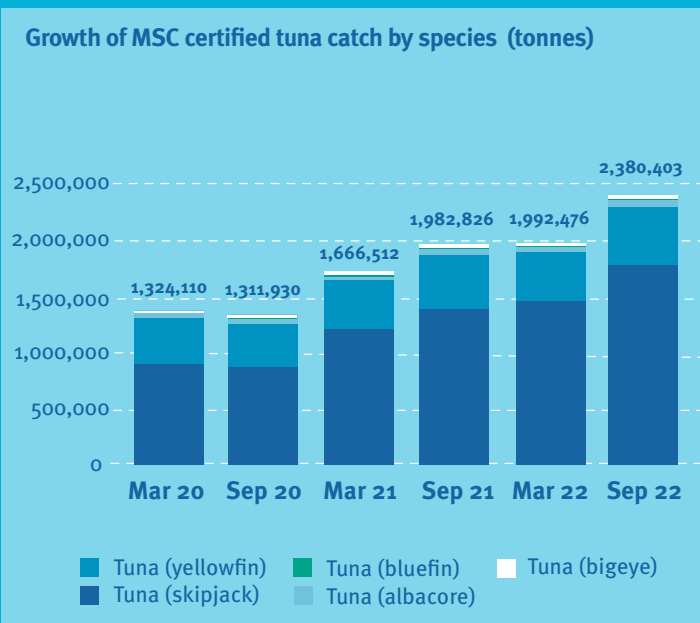


© Echebastrifleet Slu

## Volume of tuna in the MSC program and in a FIP



Data as of September 1, 2022. FIP Data based on all active FIPs solely targeting tuna listed on Fisheryprogress.org, last updated April 2022. Note, figures are approximate.



Total catch volumes include major market species: albacore, bluefin, yellowfin, bigeye and skipjack tuna





Sales of tuna with the blue MSC label reached 136,000 tonnes, more than double the amount sold five years ago

©Anthony J Rayburn/American Tuna

## A GROWING MARKET FOR TUNA WITH THE MSC LABEL

Demand, sales and production of certified sustainable tuna continues to grow on a global scale. 2021/22 saw sales of tuna with the blue MSC label reach 136,000 tonnes, more than double the amount sold five years ago (48,000 tonnes). Retailers have been instrumental in driving growth in MSC certified tuna sales, particularly for canned tuna, as they seek to meet consumer demand for sustainably sourced seafood.

In May 2021, for example, **Lidl Germany** began the switch to using MSC certified skipjack tuna in its private-label brand, Nixe – the blue MSC label now appears on Nixe tuna cans across the region. Lidl Germany is not alone in this commitment. All 10 of Germany’s top retailers have started to switch their private label tuna cans to MSC certified tuna – up from 4 retailers in 2019. As a result, 40% of tuna sold in German retail is now sourced from MSC certified sustainable fisheries – up from 8% in 2018.

In October 2021, **US retailer Walmart** began a partnership with The Nature Conservancy and the Marshall Islands to supply MSC certified canned skipjack tuna, for its Great Value brand, with profits being directed back into Pacific Island communities.

In May 2022, in a step towards meeting its commitment to labelling 100% of its tuna as MSC certified by 2025, **Tesco**, the UK’s largest supermarket, introduced three new MSC labelled canned tuna products sourced from Papua New Guinea.

### Tuna brands are also playing a vital role in transforming the tuna industry.

**The Bolton Group**, which owns tuna processor Tri Marine, has launched MSC labelled products through its brands such as Rio Mare and Saupiquet in Italy, Germany, and France. By 2024 Bolton has pledged to source 100% of its tuna from MSC certified fisheries or from those working to meet the MSC Standard through robust FIPs.

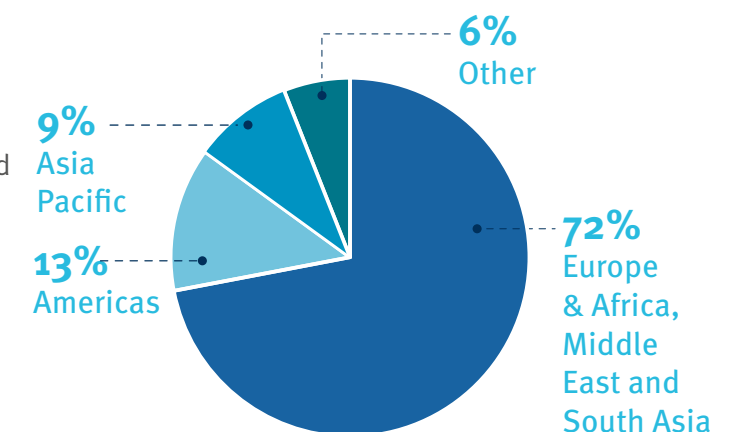
In August 2022, **Mitsubishi-owned Princes** announced a target for 100% of its UK branded, canned tuna to carry the MSC label by 2025.

If achieved, this commitment will mean five times more MSC labelled tuna on sale in the UK. The commitment comes off the back of five years support for FIPs.

**Princes Group** is pushing ahead with this commitment in other European countries too. The Netherlands is on track to be the first nation with 100% MSC labelled Princes canned tuna in September 2022, and Poland will follow suit shortly after.

**American Tuna** was the first company to market MSC certified tuna in the US, sourced from the American Albacore Fishing Association, which was the first MSC certified tuna fishery in the world. The business started in 2007 with just eight pallets and a single MSC certified tuna product caught one-by-one in the North Pacific. Today, the company supplies 33 MSC certified tuna products from several fisheries to multiple retailers.

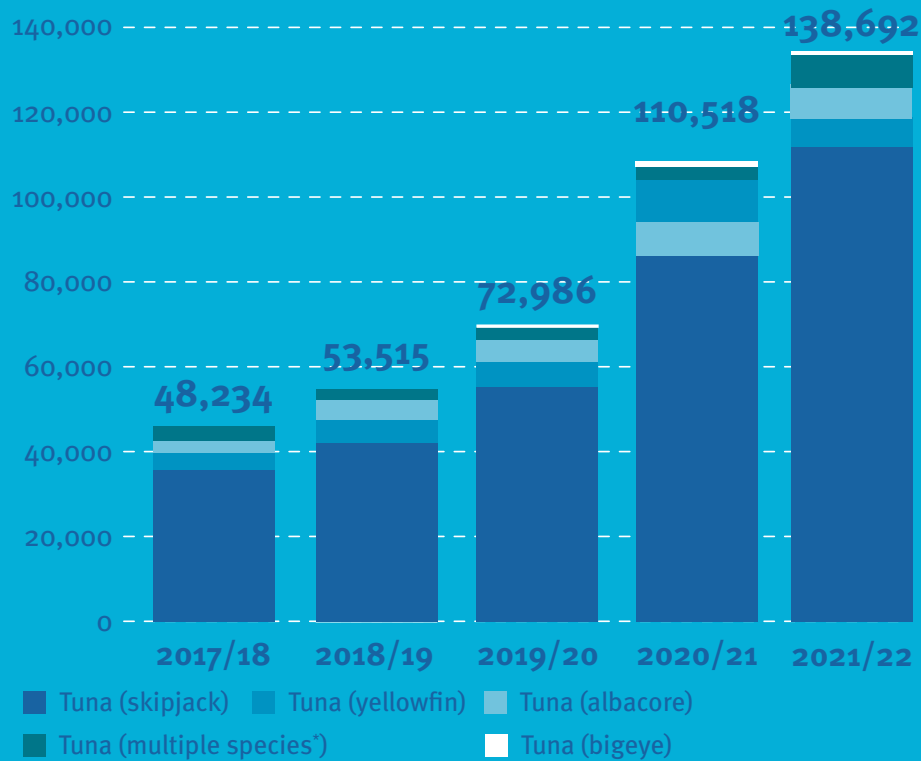
### Distribution of MSC labelled tuna by volume sold in 2021/2022 by region\*



\*Data for financial year 1 April 2021 to 31 March 2022

# MSC LABELLED TUNA PRODUCTS GLOBALLY

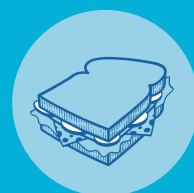
Volume of MSC labelled tuna sold by species



## MSC labelled tuna by format in tonnes (2021/22)



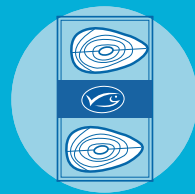
Preserved  
**92,183**



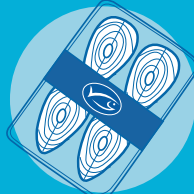
Retail food to go/  
Ready meals  
**27,350**



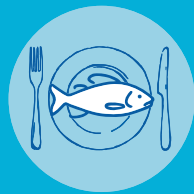
Pet food  
**7,996**



Chilled  
**5,756**



Frozen  
**4,748**



Foodservice  
**221**

## Top 6 markets for MSC labelled tuna products (tonnes) 2021/22

**DACH**  
(Germany, Austria, Switzerland)  
**48,547**

**Southern Europe**  
(Spain, France, Italy, Portugal)  
**23,413**

**Benelux**  
(Belgium, Luxembourg, Netherlands)  
**12,784**

**Oceania**  
**9,749**

**UK & Ireland**  
**8,551**

**US & Canada**  
**4,059**



In 2022 ...



**202**  
brands sold  
MSC labelled  
skipjack tuna  
up from 49  
in 2015

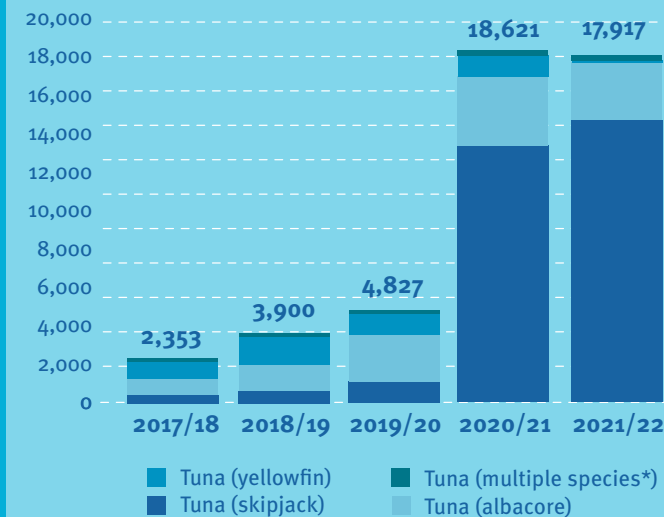


**106**  
brands sold  
MSC labelled  
yellowfin tuna  
up from 1  
in 2015

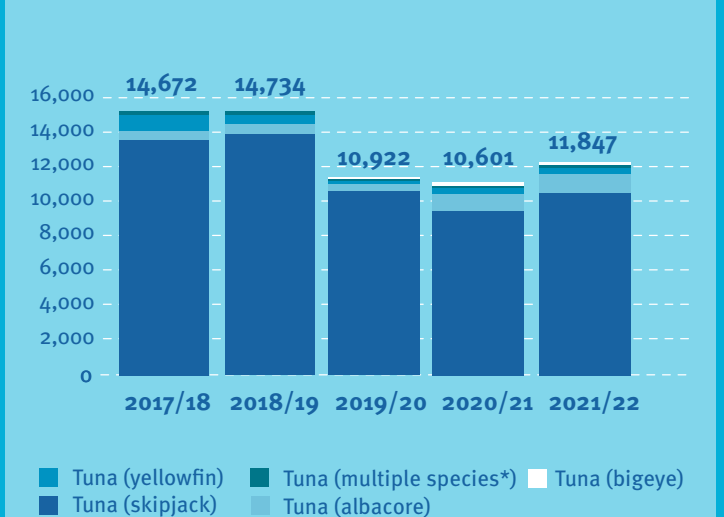


**122**  
brands sold  
MSC labelled  
albacore tuna  
up from 76  
in 2015

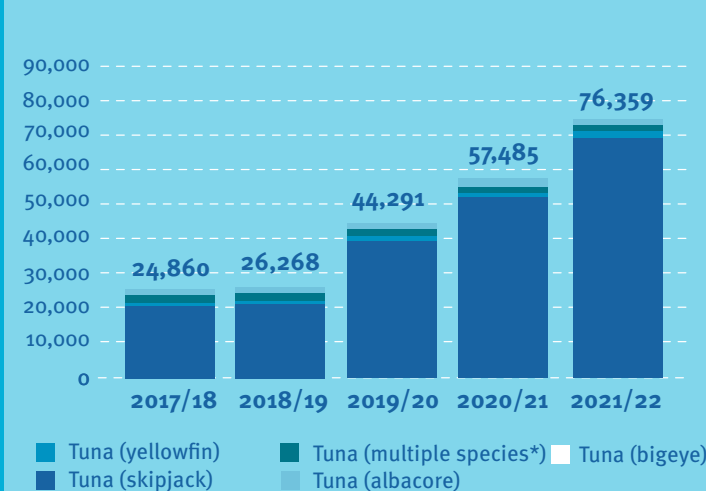
Volume of MSC labelled tuna sold by species in America (tonnes)



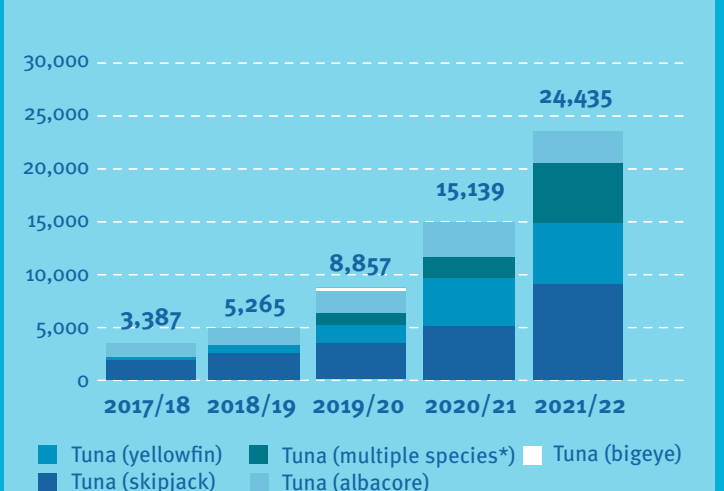
Volume of MSC labelled tuna sales Asia Pacific (tonnes)



Volume MSC labelled tuna sold North & Central Europe (tonnes) (25 countries)



Volume of MSC labelled tuna sold Southern Europe & AMESA (tonnes) (10 countries)



Data for financial year 1 April 2021 to 31 March 2022  
Tuna multiple indicates products containing seafood from more than one fishery, and/or tuna species.



## CASE STUDY

# AGAC FOUR OCEANS INTEGRAL PURSE SEINE TROPICAL TUNA FISHERY

**Gear type:** Purse seine | **Tonnage:** Skipjack: 145,992 | **Yellowfin:** 47,046 | **Bigeye:** 2,877  
**First UoC Certified:** 8 December 2021 | **Last UoC Certified:** 11th of July 2022

Following two years of assessment by independent auditors, in 2022 the Spanish tuna association AGAC (Asociación de Grandes Atuneros Congeladores / Association of Large Freezer Tuna Vessels), became the first fishery to gain certification to the MSC Fisheries Standard for sustainability for tropical tuna catch in all four oceanic regions.

The certified catch accounts for 3% of the world's total tropical tuna catch and includes 44 purse seine vessels catching yellowfin tuna in the Eastern and Western Pacific, and the Atlantic Oceans; skipjack tuna in the Western Pacific and Indian Oceans; and bigeye tuna in the Western Pacific.

AGAC is also the first purse seine fishery using both free school and Fish Aggregating Device (FAD) methods to achieve certification in the Atlantic Ocean.

## 10 years of improvements

In 2012, AGAC introduced a Code of Good Practice (CGP), with compliance annually verified by the independent scientific organization AZTI (Members of the Basque Research and Technology Alliance). The code addresses impacts on non-target species, including the adoption of non-entangling FADs. In 2016 AGAC entered a Fisheries Improvement Project with the objective of reaching MSC certification.

The independent assessment of fisheries aiming for certification against the MSC Standard is a long process and most fisheries only invest in a full assessment following a favourable pre-assessment. Unusually, AGAC opted to submit its entire fishing operation - covering twelve tropical tuna stocks around the world - for full assessment, despite knowing not all would achieve certification. The process has meant an unparalleled and independent assessment on the state of sustainability of all tropical tuna stocks around the world.

Over 2,000 crew members from the AGAC fleet contributed ideas on effective solutions to sustainability challenges. Association members also made a total investment in new technologies, operations and research of more than €17 million (£14.5 million).

## Commitments to go further

In addition to working on improving the sustainability of those fishing operations which failed to achieve certification at the full assessment, AGAC has agreed to deliver a total of 56 binding and non-binding conditions of improvement that will be implemented over the coming years, with subsequent positive impacts on the Ocean.

In the Western Central Pacific Ocean, like for all certified fisheries in the region, ongoing certification will require the agreement of an effective harvest strategy by the WCPFC (page 3).

In the Atlantic Ocean the fishery will need to work alongside other certified fisheries to implement well-designed Harvest Control Rules.

There is also a need to enforce the sustainable total allowable catch (TAC) for yellowfin which has been adopted by the International Commission for the Conservation of Atlantic Tunas (ICCAT).

In the Indian Ocean, the fishery's action plan includes the effective implementation of the Harvest Control Rule established for skipjack, as well as many other aspects to better quantify the impacts of drifting FADs on marine ecosystems, among other such habitat related issues.

In the Eastern Pacific, the conditions for yellowfin catches are focused on improving the information on fishing impacts on Endangered, Threatened and Protected (ETP) species and the management of habitats.

“AGAC’s members are first and foremost interested in maintaining the health of the resources on which our livelihood depends. Achieving MSC certification after so much work, investment and effort on the part of all the OPAGAC-AGAC family encourages us to continue these efforts.”

AGAC CEO, Julio Morón



© Neo/MSC



© AGAC.fishing



# SUMMARY OF CONDITIONS - AUGUST 2022

| Performance Indicator          | AAFA & WFOA  | Australian ETBF | Cook, FSM & RMI | Echebstar | Indonesia pole-and-line | Maldives | N Atl albacore artisanal | PNA | Sorong | SATHOAN | Solomon | Tri Marine WCPO | Usufuku |
|--------------------------------|--------------|-----------------|-----------------|-----------|-------------------------|----------|--------------------------|-----|--------|---------|---------|-----------------|---------|
|                                | Stock Status |                 |                 |           |                         |          |                          | 🐟   |        |         | 🐟       |                 |         |
| Stock rebuilding               |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| PCR V1.3                       |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Harvest Strategy               | 🐟            |                 | 🐟               | 🐟         | 🐟                       | 🐟        |                          | 🐟   | 🐟      |         | 🐟       | 🐟               |         |
| Harvest Control Rules          | 🐟            | 🐟               | 🐟               | 🐟         | 🐟                       | 🐟        | 🐟                        | 🐟   | 🐟      | 🐟       | 🐟       | 🐟               | 🐟       |
| Information/Monitoring         |              |                 |                 |           |                         |          |                          |     |        | 🐟       |         |                 | 🐟       |
| Assessment of Stock Status     |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Primary Species Outcome        |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Primary Species Management     |              | 🐟               |                 |           |                         |          |                          |     |        |         |         | 🐟               | 🐟       |
| Primary Species Information    |              |                 |                 |           |                         |          |                          |     |        | 🐟       |         |                 | 🐟       |
| Secondary Species Outcome      |              |                 |                 |           |                         |          |                          |     |        |         | 🐟       |                 |         |
| Secondary Species Management   |              |                 | 🐟               |           |                         |          |                          |     |        | 🐟       | 🐟       |                 |         |
| Secondary Species Information  |              |                 | 🐟               |           |                         |          |                          |     |        | 🐟       | 🐟       |                 |         |
| ETP Species Outcome            |              |                 |                 |           |                         |          | 🐟                        |     |        | 🐟       |         | 🐟               |         |
| ETP Species Management         |              |                 |                 |           |                         |          |                          | 🐟   |        | 🐟       | 🐟       | 🐟               | 🐟       |
| ETP Species Information        |              |                 |                 | 🐟         |                         |          | 🐟                        |     |        | 🐟       | 🐟       | 🐟               | 🐟       |
| Habitats Outcome               |              |                 |                 | 🐟         |                         |          |                          | 🐟   |        |         |         | 🐟               |         |
| Habitats Management            |              |                 |                 | 🐟         |                         |          |                          | 🐟   |        |         |         | 🐟               |         |
| Habitats Information           |              |                 |                 | 🐟         |                         |          |                          |     |        |         |         | 🐟               |         |
| Ecosystem Outcome              |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Ecosystem Management           |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Ecosystem Information          |              |                 |                 | 🐟         |                         |          |                          |     |        |         |         |                 |         |
| Legal/ Customary Framework     |              |                 |                 |           | 🐟                       |          |                          |     | 🐟      |         |         |                 |         |
| Consultations, Roles and Resp. |              |                 |                 | 🐟         |                         |          |                          |     |        |         | 🐟       |                 |         |
| Long Term Objectives           |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| PCR V1.3                       |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| Fishery Specific Objectives    |              |                 |                 | 🐟         | 🐟                       |          | 🐟                        |     | 🐟      |         |         |                 |         |
| Decision Making Processes      | 🐟            |                 |                 | 🐟         |                         | 🐟        |                          |     |        |         | 🐟       | 🐟               |         |
| Compliance and Enforcement     |              |                 |                 |           |                         | 🐟        |                          |     |        |         |         | 🐟               |         |
| Monitoring and Management      |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |
| PCR V1.3                       |              |                 |                 |           |                         |          |                          |     |        |         |         |                 |         |

Performance indicators with conditions for fisheries listed in the Sustainable Tuna Handbook 2021

- 🐟 Condition that the fishery is working towards
- 🐟 Condition which has been addressed by the fishery

Conditions for all MSC certified fisheries are detailed on [fisheries.msc.org](https://fisheries.msc.org)



Tuna Pole and line © Nice and Serious / MSC fishing

# CONSUMER INSIGHTS



More than 25,000 consumers (20,127 seafood consumers) in 23 countries took part in the research conducted between January and March 2022.

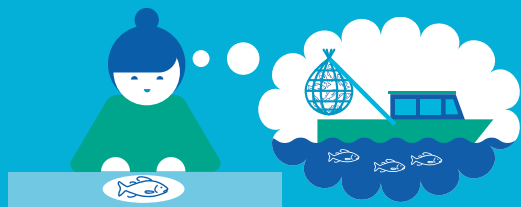
## 74%

of those surveyed said that supermarkets and brands sustainability claims need to be clearly labelled by an independent organisation (up from 71% in 2020).



## 89%

of seafood consumers are worried about the state of the world's oceans.



## 67%

of seafood consumers believe the seafood choices they make can help make a difference to ocean health.

## 48%

of consumers recognise the blue MSC label.

## 78%

of seafood consumers who recognise the MSC logo say they trust the claims of the organisation – up from 69% in 2018.



As the world's most recognised seafood labelling and certification program, consumers are positive that the MSC, and the thousands of organisations committed to using the blue MSC label, are contributing to the health of the world's oceans.



## 75%

of MSC-aware consumers rate the MSC highly for helping to ensure seafood availability for future generations.



## 81%

agree that the MSC label helps to identify sustainable seafood quickly and easily.



## 73%

of seafood consumers agree that in order to save the ocean, we have to consume seafood only from sustainable sources.

Data from: GlobeScan 2022. Consumers surveyed were in Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Singapore, South Africa, South Korea (new in 2022), Spain, Sweden, Switzerland, UK, USA and Portugal.





# CONCLUSION

The past 18 months, since the publication of the Sustainable Tuna Handbook 2021, have seen continued and remarkable growth of MSC certified tuna across the fishing, supply chain and market sectors. This growth follows years of commitments and improvements by tuna fisheries, suppliers and brands to change the way we fish our oceans. Achieving MSC certification is not easy. As highlighted by the examples in this update, fisheries invest years in research, technology and management systems in order to reach the high bar of sustainability demanded of MSC certification. And they continue to improve once certified.

The ambition of the tuna fishing industry to achieve global best practice standards of sustainability is being influenced by multiple factors; Consumers are increasingly worried about the state of our oceans which has caused a growth in recognition, and demand for MSC labelled tuna. Retailers and brands have responded to the demand by increasing their efforts to stock sustainable products and by favouring suppliers with MSC certification, further encouraging fisheries to improve. Lastly, governments, industry associations, and conservation groups are using the MSC Standard as a tool to guide tuna fisheries on a road to improvement.

This movement is having tangible benefits on our oceans and tuna fisheries. Regional Fisheries Management Organisations for example, are introducing new requirements for biodegradable, non-entangling FADs, and fishing operations

are working together to influence change in international management.

These changes demonstrate the MSC's Theory of Change at work, driving improvements in the health of the world's ocean through market demand. Everyone involved should be incredibly proud of the achievements to date.

The path to sustainability is not without its challenges, however. The new MSC Fisheries Standard has sought to address some of the issues facing tuna fisheries through improvements, which will ensure that MSC certified fisheries continue to be leaders in sustainability. The new Standard will increase confidence that shark finning does not take place in certified fisheries, afford greater protection to Endangered, Threatened and Protected (ETP) species, and require fisheries to better manage the impacts of FADs.

Agreeing harvest strategies for tuna fisheries, particularly those in the WCPFC also remains a significant challenge which threatens to undermine the efforts of the past 10 years. But there are positive signs that a harvest strategy for skipjack can still be achieved in time to avoid the suspension of MSC certification in the Western Central Pacific. And with so many highly influential fishing, retail and conservation organisations supporting the ongoing verification of sustainable tuna fishing through MSC certification, there is reason to remain cautiously optimistic for the future.

For more information visit [msc.org/tuna](https://www.msc.org/tuna)