



MSC UK Tuna Shopper Report

January 2022

Introduction

Tuna – shoppers across the UK love it, whether in a salad, a sandwich or as sushi. It is one of the ‘big five’ species (alongside cod, haddock, salmon and prawns) that accounts for a staggering 60 to 80% of all seafood consumed across the country¹. Despite its iconic status, tuna hasn’t always made headlines for the right reasons. If the global catch of tuna continues to increase, as it has done for many years, there is an urgent need not only to reduce our impact on those stocks that are already overfished, but to protect and effectively manage those currently in a healthy state.

Worldwide, there are 23 stocks of the five major commercial tuna species: skipjack, yellowfin, bluefin, albacore, and bigeye. The health of these stocks and environmental impact of fishing activity varies by

species, ocean and the type of fishing gear and methods used. Globally, 65% of tuna stocks are at a healthy level of abundance, 22% are at an intermediate level, while 13% are overfished².

Shoppers across the UK are becoming increasingly concerned about the challenges facing our oceans. According to YouGov research, 78% believe that in order to save the oceans, we must consume fish and seafood from sustainable sources only. This is having an impact on the choices people make when buying fish and seafood, including tuna. As such a popular part of our diet, shoppers recognise that they have an important role to play in safeguarding the future of these environmentally and economically

important species, by choosing to buy and eat fish that has been sustainably caught.

The aim of the first ever **MSC UK Tuna Shopper Report** is to provide insights into what shoppers care about when it comes to buying and eating tuna, and, for the environmentally conscious, what sustainably sourced options are available in our supermarkets. It is being published alongside the **MSC UK and Ireland Market Report 2021** to offer an in-depth analysis of one of the country’s most popular fish to buy and eat. It highlights the growing availability of tuna from MSC certified fisheries and decreasing number of MSC labelled tuna products available to shoppers in the UK.

¹Elise Uberoi, Georgina Hutton, Matthew Ward, and Elena Ares, 16 November 2021. UK Fisheries Statistics. House of Commons Library

²ISSF, 2021. Status of the World Fisheries for Tuna: September 2021. ISSF Technical Report 2021-13. International Seafood Sustainability Foundation, Washington, D.C., USA. Available at: <https://www.issf-foundation.org/downloads/26023/>

Methodology

To deliver this first ever **MSC UK Tuna Shopper Report**, the MSC UK and Ireland team commissioned two sets of independent research:

1. In February 2021, YouGov conducted a research survey on tuna consumption and attitudes towards sustainability with UK consumers. These findings have shed a light on why shoppers choose tuna, what influences their decision in the supermarket, and what expectations they have when it comes to sustainable sourcing decisions and ecolabels.

The results of this YouGov research are summarised throughout the Report but if you would like a more detailed analysis, please get in touch (our contact information is at the end of the report).

2. MSC also commissioned DTO Research to conduct a review of all tuna products (excluding pet food, fish counter items, and products on sale at sushi kiosks) available in all major retailers across the UK. In October 2021, shoppers visited two large retail outlets of each of the ten largest supermarkets – Asda, Aldi, Co-op, Iceland, Lidl, Marks & Spencer, Morrisons, Sainsbury's, Tesco, and Waitrose. We also decided to explore a new retailer on the block, Amazon Fresh, as it opened its first stores in the UK last year and has plans for expansion across the country. The shoppers purchased every tuna product on sale in store during their visit. The environmental claims, including the presence of a blue MSC ecolabel, on each product pack were reviewed and the tuna itself was donated for consumption. Their findings are presented in the following MSC UK Tuna Shopper Report.

Please note: This report, and the methodology used to capture product-level data, is designed to reflect the MSC certified, sustainably sourced tuna options for a shopper in the UK at a specific moment in time. Seasonal or promotional products available in supermarkets during other points in the year may not be captured in these findings. DTO Research did not survey online retailers, such as Ocado, but this report does mention the products available on those platforms based on MSC's own research.



Executive Summary

This first edition of the MSC UK Tuna Shopper Report provides a summary of the sustainable tuna landscape in the UK retail sector, highlighting which brands and supermarkets sell MSC labelled tuna. It also examines how extensive their certified ranges are, and where these certified products can be found – whether it be in the canned aisle, the freezer or in a sandwich or a salad. The report delves into how certified tuna sales in the UK compare to other regions, and how the global demand for sustainable tuna is being met by an increasing number of certified fisheries around the world. The data used to analyse MSC labelled product sales over time, presented in this report, is provided to the MSC by businesses using the ecolabel on products and menus.

Key Tuna Consumer Insights

- 78% of UK consumers believe that in order to save the oceans, we must consume fish and seafood from sustainable sources only
- 71% of tuna consumers in the UK agree that they want to do their best to buy sustainably caught tuna
- 75% of tuna consumers in the UK agree that if they knew an independent and trusted ecolabel on the product packaging would guarantee that the tuna has been caught sustainably, they would be more likely to choose that over a product without one

Key Market Insights

- Shoppers conducting research for this report found that 18% (62 of 342) of all tuna products on sale in October 2021 across the UK's leading supermarkets carried a blue MSC ecolabel, indicating they were sustainably sourced and labelled
- MSC labelled tuna products were available to UK shoppers in six supermarkets: Waitrose, Sainsbury's, Morrisons, Amazon Fresh, Tesco and Aldi. 73% of all tuna products in Waitrose carried a blue MSC ecolabel, while 40% of those available in Amazon Fresh and 27% of those available in Sainsbury's were MSC certified

- Waitrose is currently the only supermarket in the UK to use the blue MSC ecolabel on 100% of its own brand canned tuna, while Charles Basset and The Nice Fishermen are the only independent brands to do so
- Waitrose and Tesco are currently the only supermarkets where shoppers can find MSC labelled tuna on fish counters, or in a frozen or chilled format
- Waitrose, Sainsbury's and Amazon Fresh are the only supermarkets to use MSC certified tuna in all their own brand 'to go' meal options (e.g. sandwich, sushi, salads/deli fillers)
- According to MSC's own data, there has been a decline in the number of sustainable tuna products available to UK shoppers in recent years. Four years ago, the UK accounted for nearly 17% of the volume of all MSC labelled tuna sold globally. Last year, that figure had dropped to 5%
- 34% (1,981,384 tonnes) of the global tuna catch is MSC certified with another 19% (1,110,101 tonnes) currently in assessment against the MSC Standard
- Many retailers are failing to meet their customers expectations to sell certified sustainable tuna, despite supply availability growing in recent years



CONSUMER INSIGHTS: THE UK TUNA SHOPPER

69%

of British consumers eat tuna*



*sample size: 2,181



22%

of British consumers who eat tuna eat canned tuna at least once a week



and

11%

eat a tuna sandwich at least once a week



71%

of tuna consumers agree that they want to do their best to buy sustainably caught tuna



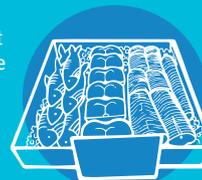
75%

of tuna consumers agree that if they knew that an independent and trusted ecolabel on the product packaging would guarantee that the tuna has been caught sustainably they would be more likely to choose that over a product without an ecolabel



1 in 4

tuna consumers agree that they find it difficult to make the right choice when looking for tuna because they are confused about what to look for



51%

of tuna consumers seek out/choose products that carry an ecolabel

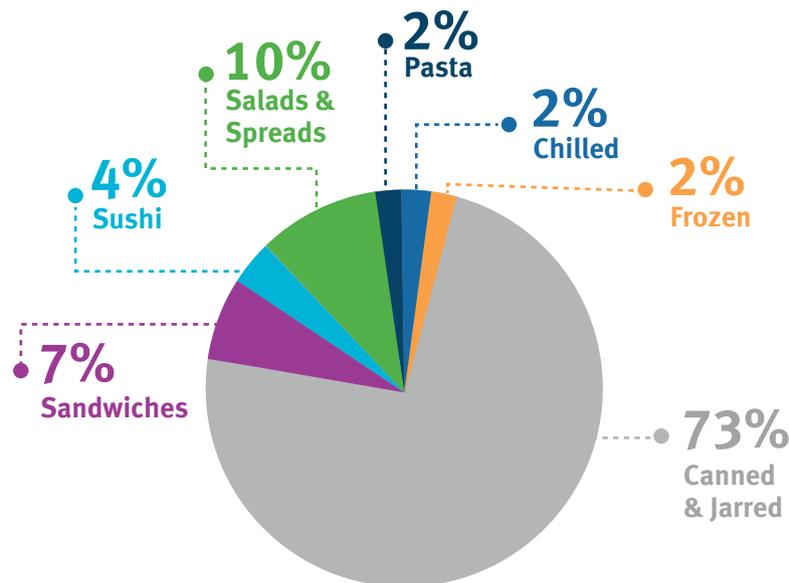


Tuna in UK Supermarkets

During the first stages of the Covid-19 pandemic, concerned shoppers stockpiled groceries in preparation for the national lockdowns that followed. With the foodservice industry largely shutdown for long periods, retail seafood sales, particularly of frozen and ambient products, performed exceptionally well. For a period, this surge in sales put tuna at the top of the list of most popular seafood purchases by volume (mt) in the UK. Although salmon has since reclaimed this position, shoppers still spent nearly £430 million on 66,631 tonnes of tuna products between June 2020 and June 2021³. While this was down on the previous year, it is still higher than pre-pandemic levels, and tuna remains the second most popular choice for seafood shoppers across the country.

In October 2021, a group of shoppers visiting the ten major UK supermarkets and an Amazon Fresh store in London, were able to purchase 342 different tuna products. Of these, nearly 63% were sold under a supermarket's own brand, while the remainder were sold by third party brands, with John West and Princes accounting for the majority. Ambient products sold in a can or a jar were by far the most prevalent, but tuna was also to be found in other supermarket aisles and in many different formats.

Tuna in UK supermarkets by Product Type/Format⁴



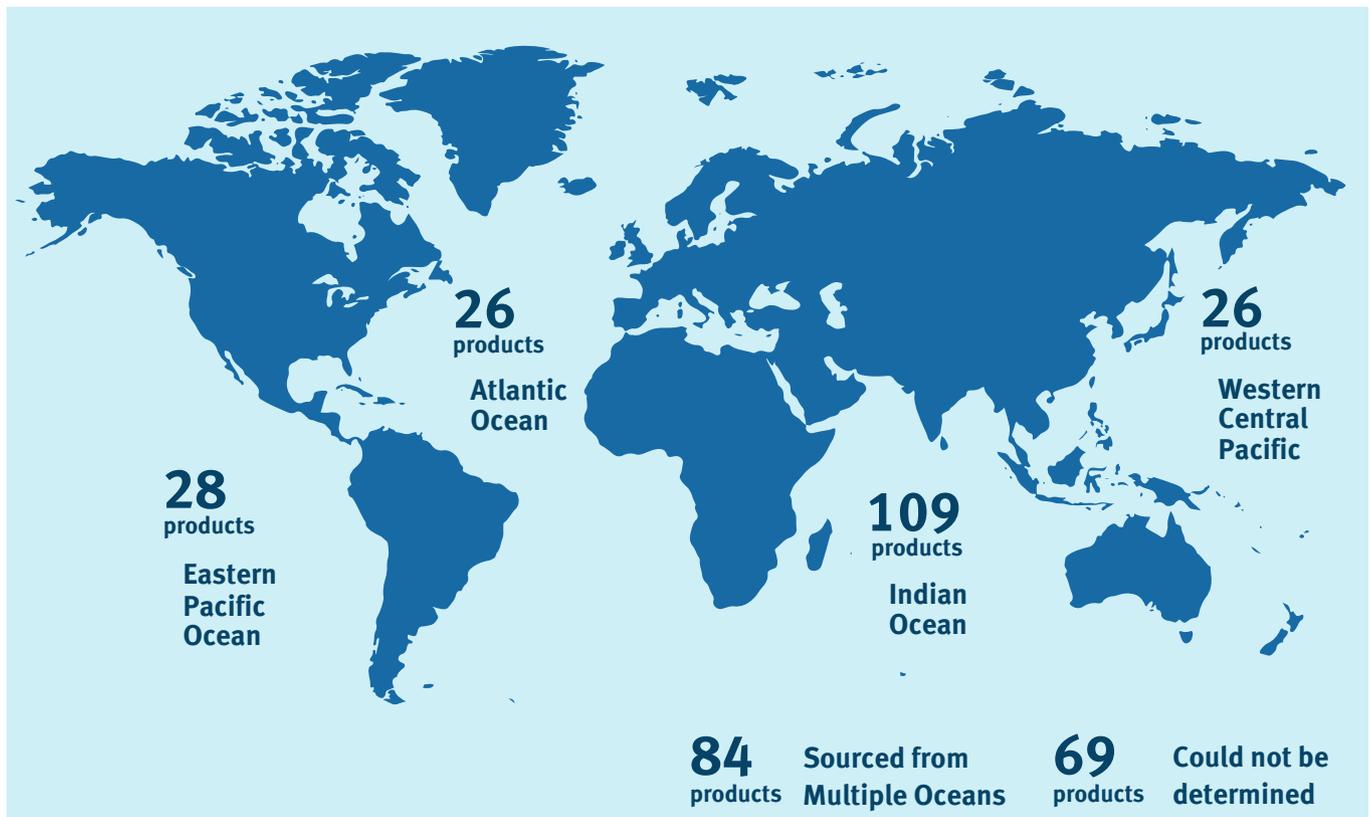
³Seafish. Market Insight Factsheet: Seafood in multiple retail (2021 update). [Seafood in multiple retail \(2021 update\)](#) – Seafish

⁴Canned and jarred products include ambient products sold in pouches and pots. Salads and spreads do not include any ambient products.

The amount of information available on the origin of the tuna varied by product, with 80% indicating which ocean or oceans it was sourced from. Tuna caught in the Indian Ocean accounted for 32% of all products on sale, while 25% indicated the tuna was sourced from multiple oceans. 20% could not be accurately determined, either because no ocean was listed or the origin was too broad (e.g. *Pacific Ocean*).

Ninety-five products also included the specific Food and Agriculture Organization (FAO) area or areas in which the tuna was caught on the packaging.

Number of Tuna Products by Ocean of Origin



Sustainable Tuna in Supermarkets

For the environmentally conscious tuna shopper in the UK, options are limited – only 18% (62 of 342) of all tuna products on sale in October 2021 were MSC certified. These certified products were sold under eight different brands and available in six supermarkets – Aldi, Amazon Fresh, Morrisons, Sainsbury's, Tesco, and Waitrose. Waitrose had the greatest sustainable tuna offering across all brands and formats, with more than half of products on sale carrying a blue MSC ecolabel (37 of 51). With 14 certified products, Sainsbury's offered the second largest selection of MSC tuna products, representing over a quarter of their total tuna range, while four of the ten tuna products on sale in Amazon Fresh also had an ecolabel on pack. Less than 10% of the remaining supermarkets' tuna ranges carried a blue MSC ecolabel, with some offering none at all.

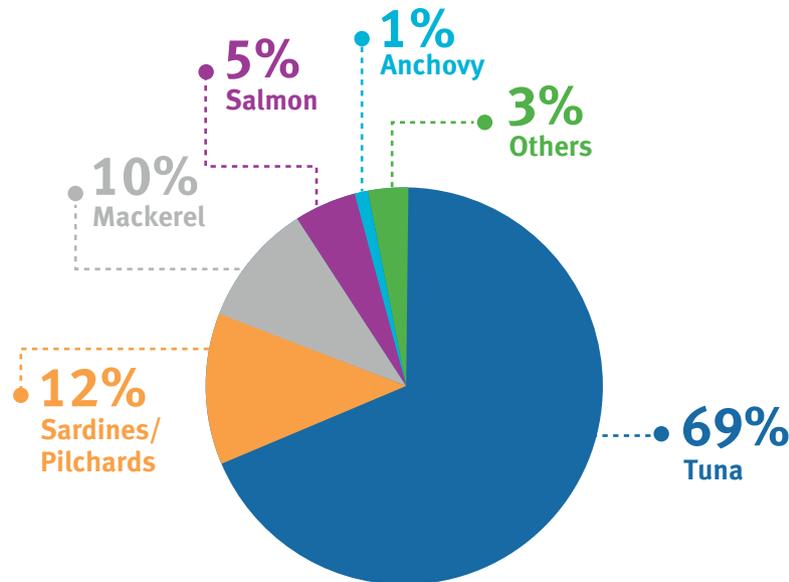


The following sections provide a more detailed analysis of the types of sustainably sourced products available, and which brands are offering MSC certified tuna for the UK shopper.

Cans, Tins and Jars

When it comes to buying, preparing or cooking tuna, the can is king. According to our YouGov research, over 1 in 5 tuna consumers (22%) eat canned tuna at least once a week. When it comes to store cupboard staples, tuna accounted for 65% of the value and 69% of the volume of all seafood bought in the ambient aisle in the UK last year.

UK Ambient Seafood Sales Volume (mt) by Species⁵



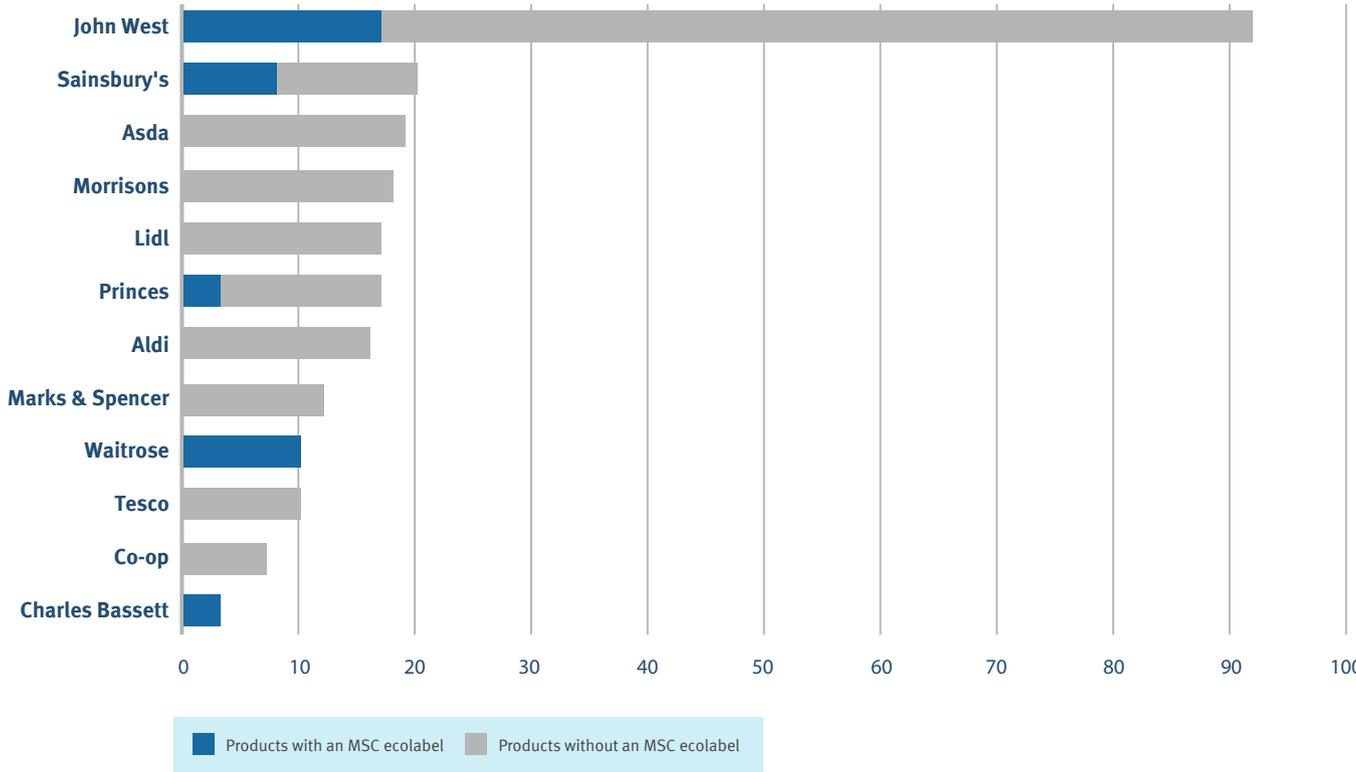
Between July 2020 and July 2021, shoppers in the UK bought 61,928 tonnes⁶ of canned, tinned or jarred tuna in the supermarket – the equivalent weight of 4,895 double-decker London buses. Of that, only 4% was sold with the MSC blue ecolabel.

⁵The data presented in this graph includes sales between July 2020 and July 2021. The original source is Seafish. [2021 Seafish Ambient Seafood in Multiple Retail Factsheet – Seafish. September, 2021.](#)

⁶Seafish. [2021 Seafish Ambient Seafood in Multiple Retail Factsheet – Seafish. September, 2021.](#)

For the canned tuna lover committed to buying certified sustainable products, the options are limited. According to our shopper research, Waitrose, Sainsbury’s and Morrisons are the only supermarkets offering MSC labelled canned tuna, and Waitrose and Sainsbury’s are the only supermarkets selling certified sustainable products under their own brand. All Waitrose brand canned and jarred tuna is certified sustainable (see box below), while eight of the twenty Sainsbury’s brand products carry a blue MSC ecolabel. For a number of years, Sainsbury’s entire canned tuna range was MSC certified, however, due to changes in sourcing, this is no longer the case. In Morrisons, shoppers were also able to purchase three Princes and two John West products in October 2021 that were MSC certified.

Ambient Tuna Products by Brand
(only includes brands selling 3 or more products)



Championing Sustainable Canned Tuna: Waitrose



Waitrose is currently the market leader when it comes to certified sustainable tuna. It is the only supermarket in the UK to use the blue MSC ecolabel on 100% of its own brand canned tuna products. The retailer, which has sourced and labelled its ambient range from the Maldivian pole and line skipjack tuna fishery since its certification in 2012, also offers two certified sustainable jarred albacore tuna options. Going beyond its own canned tuna lines, Waitrose also offers an extensive range of MSC labelled products from other brands. Of the 25 John West tuna can or pot products available at Waitrose, 17 carry a blue MSC ecolabel – a much wider offering of MSC certified John West products than any other supermarket in the country. Another three MSC labelled canned albacore products from artisanal brand Charles Bassett are also available for those who prefer white tuna. In a clear testament to its leadership in sustainable tuna sourcing, 73% of all ambient tuna products sold across brands at Waitrose are MSC certified.

With 92 different products, John West has by far the most extensive range of tuna products of any brand in the country. Its 17 products carrying the blue MSC ecolabel were, however, only available at Waitrose and Morrisons, meaning consumers looking for the MSC ecolabel on John West products can't find it in every supermarket they visit. None of John West's products on sale in Amazon Fresh, Asda, Co-op, Iceland, Sainsbury's, or Tesco, were found to be MSC labelled. The three MSC labelled Princes' canned tuna products could also only be found in Morrisons, although the brand was also on sale in Asda, Co-op, Lidl, Sainsbury's, and Tesco, without the label. Supermarkets, therefore, have a role to play in ensuring that certified sustainable tuna is available not only on their own products, but also on that of their customer's favourite brands as well.

Online retail platforms were not included in the scope of the research conducted by shoppers in October 2021; however, Ocado does offer a range of certified canned products for sustainable tuna lovers. The purely online retailer is the only outlet that sells The Nice Fishermen brand, which uses the blue MSC ecolabel on all four of its canned tuna products. Ocado also carries the MSC

labelled Charles Bassett brand products available at Waitrose and stocks a range of Rio Mare brand tuna, some of which is certified.

Our shoppers did not find any MSC labelled ambient tuna products on sale in Lidl or Aldi in the UK, although the retailers do carry the blue ecolabel on canned tuna products elsewhere in Europe. However, both supermarkets have offered a certified albacore product in a jar in the past. Lidl has also included other MSC labelled tuna products for fixed periods or as part of promotions. Therefore, it should be acknowledged that there may be periods throughout the year where there is greater availability of certified sustainable tuna for UK shoppers, as seasonal or promotional products may not have been captured in the research carried out in October 2021.

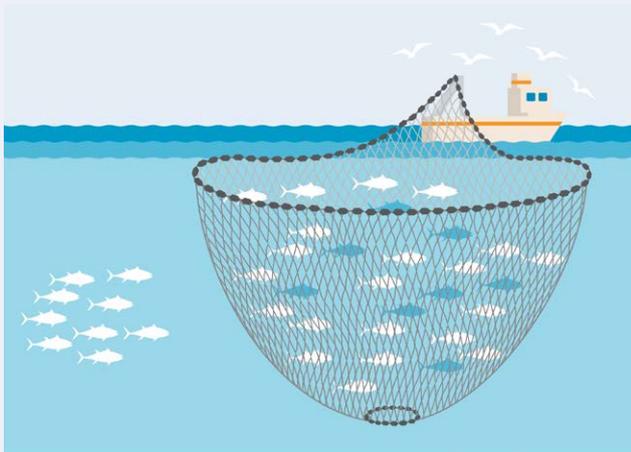
With a growing number of certified tuna fisheries around the world (see section on Sustainable Tuna Around the World), there are opportunities to increase MSC ecolabel coverage on products. This is particularly true for ambient tuna, where consumers were only able to choose from 41 certified sustainable products of the 250 being sold across the UK's major supermarkets.

Catching for Cans

Most ambient tuna sold in the UK is the skipjack species (*Katsuwonus pelamis*), although jarred and canned albacore (*Thunnus alalunga*) and yellowfin (*Thunnus albacares*) products are available. Tuna are caught by a variety of gear types and fishing methods, and fisheries will have vastly different impacts according to how the fishing gears are used, and where the tuna is fished. Purse seine and pole and line methods are used to catch tuna near the surface e.g. skipjack, small yellowfin, and albacore, and are the most common fishing methods used to catch the canned tuna we eat in the UK.

Purse Seine

Volume of MSC Certified Purse Seine Caught Skipjack worldwide: 1,388,108 tonnes
Volume of Purse Seine Caught Skipjack in Assessment worldwide: 882,393 tonnes



Purse seine fishers locate a school of tuna and set a net around it in a circle. The bottom of the net is pulled closed – like a purse – and the fish are brought on board. Purse seines can be used to catch fish congregating around fish aggregating devices (FADs)⁷ or on ‘free schools’ of tuna. Purse seine fishing represents 65.7% of global tuna catches (approximately 36% associated with FADs, 27% ‘free school,’ and 3% dolphin sets)⁸. There are currently 14 MSC certified purse seine tuna fisheries (as of December 31, 2021), two of which have components in assessment. There are another five purse seine tuna fisheries undergoing assessment for the first time. Of the 14 certified purse seine tuna fisheries, eight include components using FAD sets. Purse

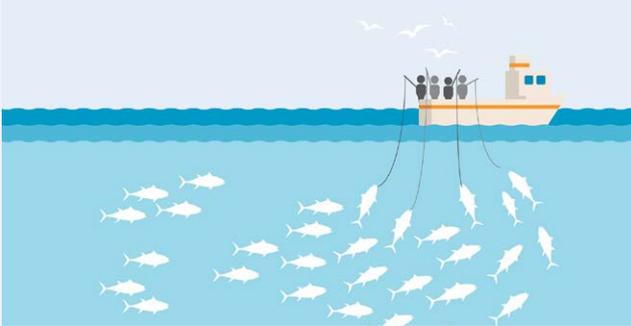
seine tuna fisheries catching free-school tuna and tuna associated with FADs now need to seek certification for their entire catch and cannot compartmentalise it. These new requirements apply for all new fishery assessments from 25 September 2020, and from 25 March 2023 all certified fisheries will need to meet these requirements.

⁷MSC. 2018. Purse seine. Available at: <https://www.msc.org/what-we-are-doing/our-approach/fishing-methods-and-gear-types/purse-seine>

⁸ISSF, 2021. Status of the World Fisheries for Tuna: September 2021. ISSF Technical Report 2021-13. International Seafood Sustainability Foundation, Washington, D.C., USA. Available at: <https://www.issf-foundation.org/downloads/26023/>

Pole and line

Volume of MSC Certified Pole and Line Caught Skipjack worldwide: 113,253 tonnes
Volume of Pole and Line Caught Skipjack in Assessment worldwide: none currently



When fishing with pole and line, fishers first locate a school of tuna and often scatter small live bait fish and spray water onto the sea surface. This creates the illusion of an active school of prey, sending the tuna into a feeding frenzy, where they will bite anything they see. Fishers then line up, equipped with hand-held poles with barbless hooks. Once a tuna bites, the fisherman flicks it up over their head and onto the deck⁹. Like in purse seine fishing, pole and line fishing can also be used to catch fish that congregate around FADs, or on ‘free schools’ of tuna.

Pole and line fishing represents 7.8% of global tuna catches¹⁰. There are currently 8 MSC certified pole and line tuna fisheries around the world (as of December 31, 2021), as well as several certified handline tuna fisheries.

More information on tuna stocks, fishing methods, impacts, and individual fisheries is available in the **MSC Sustainable Tuna Handbook**.



⁹MSC. 2019. Pole and line. Available at: <https://www.msc.org/what-we-are-doing/our-approach/fishing-methods-and-gear-types/pole-and-line>

¹⁰ISSF, 2021. Status of the World Fisheries for Tuna: September 2021. ISSF Technical Report 2021-13. International Seafood Sustainability Foundation, Washington, D.C., USA. Available at: <https://www.issf-foundation.org/downloads/26023/>

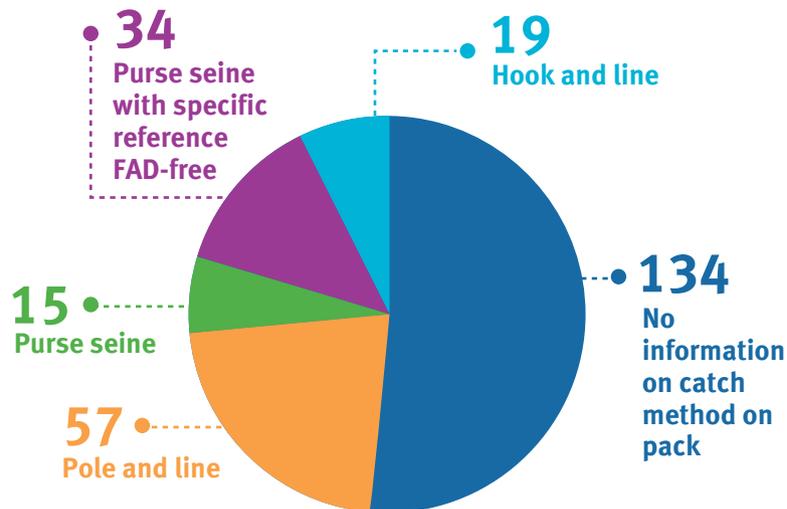
Communicating on Pack

There are many complex issues affecting tuna fishing, due to the species' highly migratory nature and the impacts of gears used to harvest tuna. As a result, it is one of the only species of fish or seafood that many supermarkets have developed specific sourcing policies for. In some cases, a retailer may stipulate that they will only buy tuna caught using a certain fishing method, from a fishery that has achieved MSC certification, or that is in a Fishery Improvement Project (FIP) working towards sustainability.

Our shoppers found that the availability of information on pack regarding how tuna was caught varied by product and brand. Over half of the 250 ambient tuna products on sale (54%) did not have any information regarding method of catch on pack, while over a fifth included messaging around pole and line caught tuna, and 34 products specifically referenced the tuna being caught without FADs.

Information on Catch Method on Pack of Ambient Tuna Products

(units below are number of products)



Note: some products referenced multiple catch methods on pack or referenced hooks and lines (hand lines and pole lines (hand operated)). Any language used on pack is captured in the chart above.

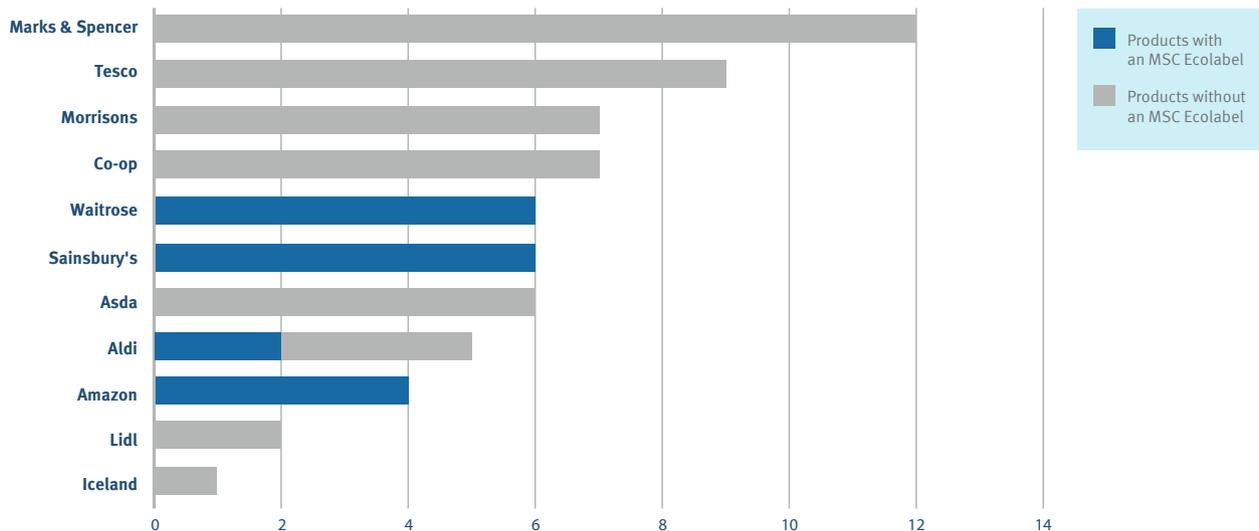
Tuna to Go

Salads, sandwiches and sushi – tuna is a staple in many of our favourite on-the-go meals. In fact, our YouGov survey of tuna consumers in the UK found that 11% of respondents eat a tuna sandwich at least once a week. And according to our shopper research, every supermarket, apart from Iceland and Lidl, sells at least one of this popular sarnie under their own brand. Sainsbury’s, Waitrose, and Amazon Fresh were the only supermarkets, however, to offer tuna sandwiches with the blue MSC ecolabel. Our shopper research also found that every supermarket, including Amazon Fresh, sold at least one tuna salad or deli filler product under its own brand.

Sushi has also grown in popularity and some supermarkets now have permanent sushi kiosks available for shoppers, with the most prevalent outlets being Sushi Daily and Sushi Gourmet. Although sushi kiosks were not included in the scope of research for this report, Aldi, Co-op, Morrisons, Tesco and Marks & Spencer all offer pre-packed sushi selections under their own brand. Aldi’s *Fish Selection 150g* was the only one of these to include MSC certified tuna.¹¹ Sainsbury’s also offered an MSC certified mixed sushi product, while Waitrose has sold an MSC tuna sushi wrap under the Taiko brand, but these products were not found by our shoppers during their research.

Of the 70 ‘tuna to go’ products purchased by shoppers for this research, 18 had a blue MSC ecolabel or claim on pack.

Tuna Sandwich, Sushi and Salad Products by Supermarkets Own Brand



¹¹Due to the presence of other non-MSC fish in the selection, there is no MSC label on pack but the product has been registered with MSC and there is a claim about the origin of the tuna on the back of pack.

Championing Sustainable Tuna to Go: Amazon Fresh, Sainsbury's and Waitrose



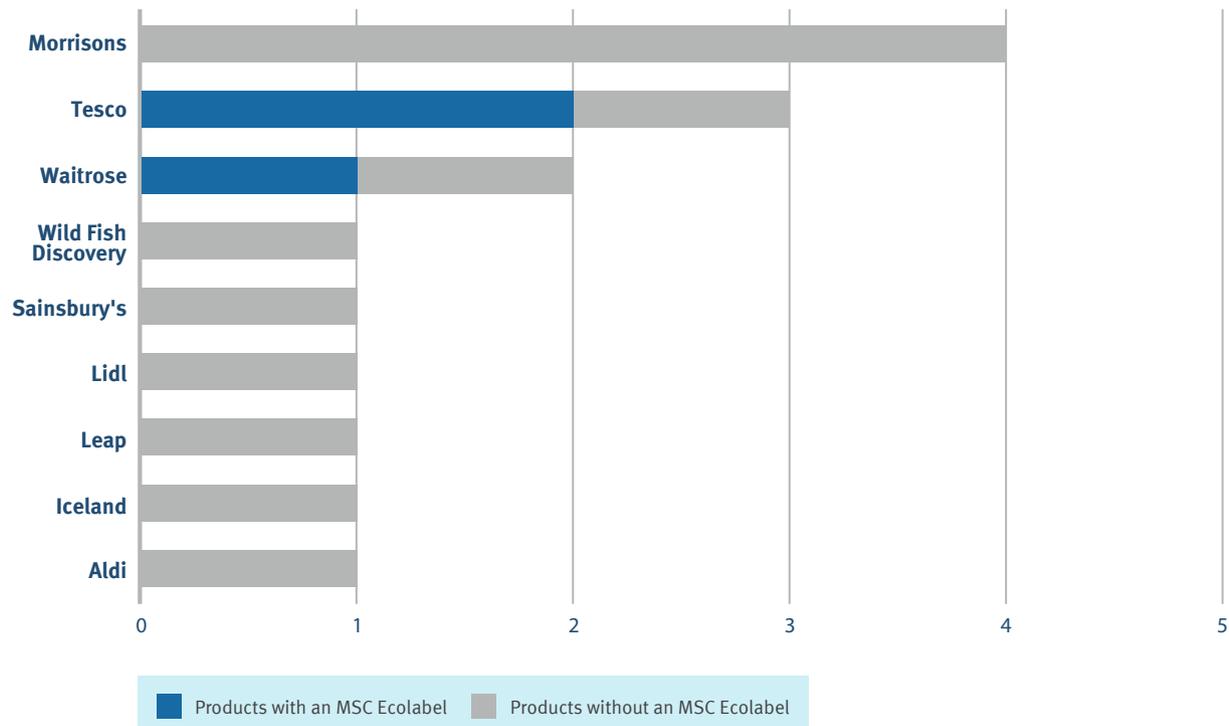
In early 2021, Amazon Fresh opened its first 'contactless' grocery store in Ealing, West London, and has since expanded across the capital. Shoppers at the 'just walk out' stores can choose from a range of Amazon-brand MSC products, including two tuna sandwiches and two tuna salads. Amazon Fresh joins Sainsbury's and Waitrose in using a blue MSC ecolabel on 100% of its own brand 'tuna to go' products, demonstrating great leadership from all three supermarkets in offering sustainable tuna options to shoppers in the UK.



Fresh and Frozen

Albacore and yellowfin tuna steaks can be found in frozen aisles or are often sold chilled, either as pre-packed products or on fish counters. Although often referred to as ‘fresh’ by shoppers, most tuna on chilled shelves is previously frozen for quality and safety reasons. The availability of these products is far more limited compared with ambient products. However, our shoppers were still able to purchase seven frozen yellowfin products, five chilled yellowfin products and three chilled albacore products. Of these, three were found bearing the blue MSC ecolabel. Products sold on fresh fish counters were not included in the scope of this research.

Fresh and Frozen Tuna Products by Brand



While Tesco and Waitrose are the only supermarkets currently offering chilled or frozen MSC tuna, shoppers in the UK were able to find certified yellowfin steaks in the frozen aisle of Lidl for several years (but no longer), and Aldi is set to expand its sustainable tuna range with the introduction of its first frozen MSC yellowfin product in February as a Valentine's Day special.

Championing Sustainable Fresh, Frozen and Fish Counter Tuna: Tesco and Waitrose



Tesco and Waitrose have made progress in expanding their sustainable tuna offering into new product formats in recent years. In late 2019, Waitrose became the first retailer in the UK to sell fresh MSC certified albacore tuna on its fish counters. Tesco followed suit, introducing the first MSC certified yellowfin tuna on a UK fish counter in early 2021. In March 2021, Waitrose claimed another first – launching the UK’s first MSC chilled pre-pack yellowfin and albacore products. Initially the three products were introduced in 32 stores, but the retailer is continuing to roll them out to more locations (note: the graph above does not capture all of these products as they may not have been introduced yet at the stores visited by our shopper). Tesco also introduced MSC labelled frozen and chilled yellowfin products last year, building on its commitment to achieving 100% MSC label coverage across its tuna range by 2025.

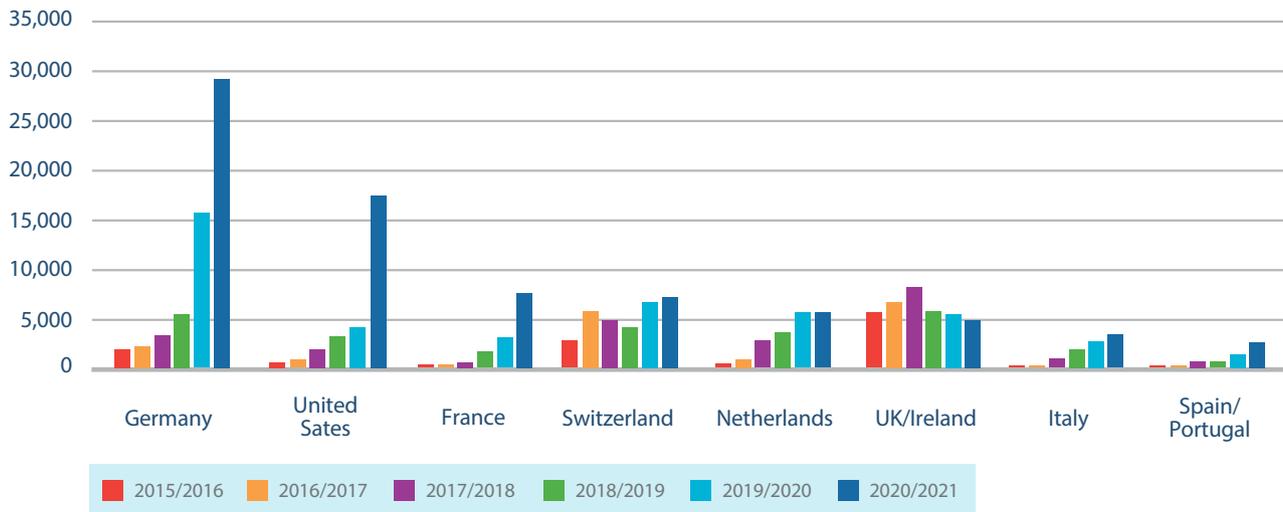


MSC Tuna in the UK

For years, the UK was one of the leading markets in the world when it came to certified sustainable tuna. Recently, however, there has been a reduction in the number of sustainable tuna products available to shoppers. Four years ago, the UK accounted for nearly 17% of the volume of all MSC labelled tuna sold globally. Last year, that figure had dropped to 5%.

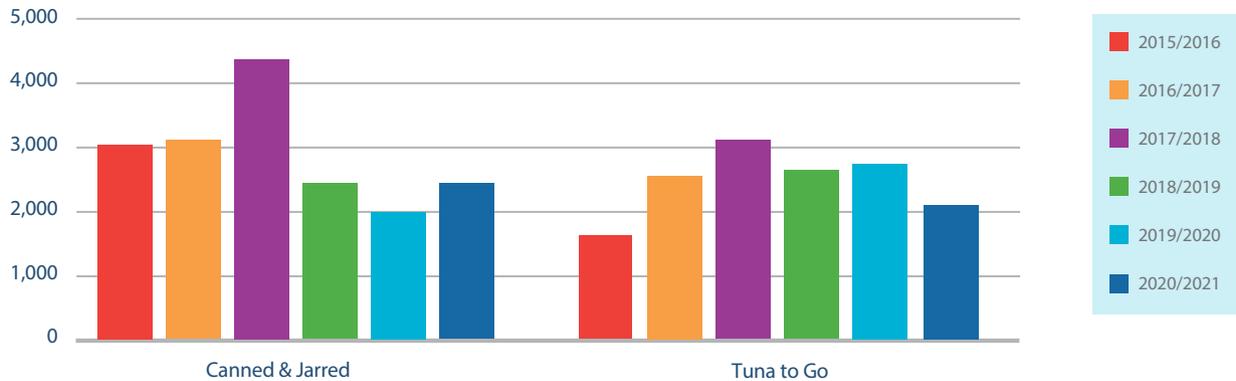
As sustainably caught tuna has become more available, businesses, particularly in Europe and North America – including some that also sell tuna in the UK – are increasingly offering new MSC tuna products, and as a result, recognising and rewarding certified tuna fisheries. Sales of certified sustainable tuna in Germany, the United States, France, Switzerland and the Netherlands have all continued to grow and now surpass that of the UK market. In the past year, some of the brands that have made strong progress in their commitment to sourcing tuna caught by MSC certified fisheries include Edeka, Netto, Walmart, Bumble Bee, Petit Navire (a sibling of John West in the Thai Union family), Princes in the Netherlands and Lidl in both Germany and France.

Globally, while sales of MSC labelled tuna hit over 100,000 tonnes for the first time last year, the volume of certified product sold in the UK dropped by a further 12% over the previous year (see graph below). This has been driven largely by changes in sourcing decisions, which have meant reductions in the use of the blue MSC ecolabel on some brands’ and supermarkets’ tuna ranges.



MSC Tuna Sales in the United States and Europe by Volume (mt)

The majority of MSC labelled tuna products sold in the UK in recent years have either been in a can or jar, or in a ‘to go’ format, either as a salad, sandwich or deli filler. And although sales of MSC labelled tuna in the UK have been on the decline in general since 2017/18, there have been some fluctuation depending on product format. This is evident in recent years, where the Covid-19 pandemic has impacted consumer behaviour.



MSC Labelled Tuna Sales in the UK by Product Format (mt)

As shoppers prepared for the national lockdowns that followed the outbreak of the Covid-19 pandemic, sales of ambient products, including canned tuna, soared. As a result, MSC labelled canned and jarred tuna sales rose by 23% between 2019/20 and 2020/21, reversing two consecutive years of decline. At the same time, with many people being told to work from home for extended periods, sales of popular supermarket grab-and-go lunch options, like tuna sandwiches, salads and sushi, dropped by nearly 25% from the previous year.

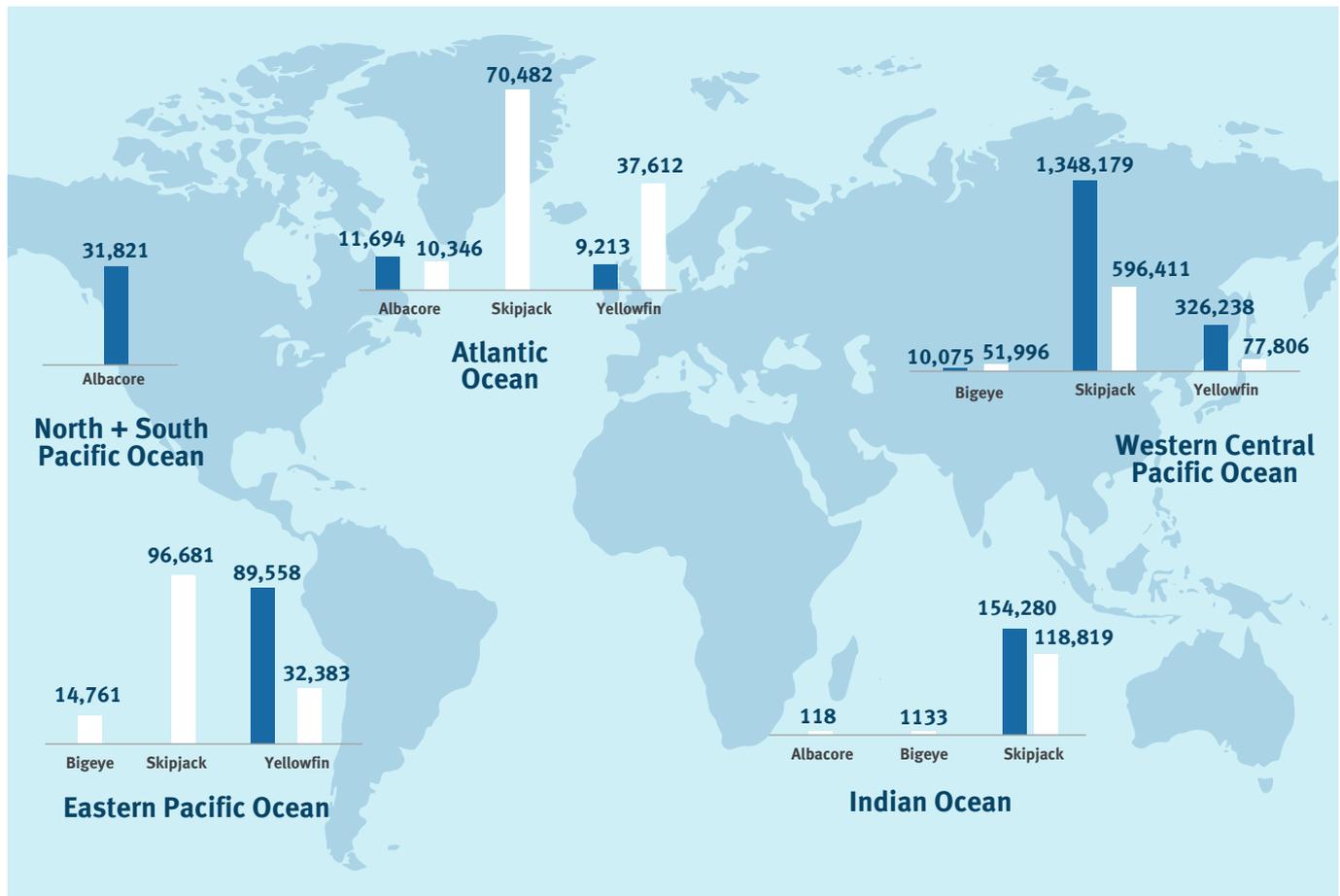
As highlighted in the section on fresh and frozen tuna above, there is increasing availability of MSC labelled tuna products in these formats, with several new options being introduced during this financial year (2021/22). Although these still represent a significantly smaller volume of product compared to ambient and tuna-to-go products, it is encouraging to see shoppers in the UK being given a greater variety of certified sustainable tuna products to choose from.



Sustainable Tuna Around the World

The increase in MSC labelled tuna sales globally has been made possible thanks to a growing number of certified tuna fisheries. In 2014, 14% of the global tuna catch was MSC certified. Today, some 34% (1,981,384 tonnes) of global tuna catch has achieved certification, with a further 19% (1,110,101 tonnes) currently in assessment.

Volume (mt) of MSC Certified and In Assessment Tuna by Species and Ocean



Many MSC certified tuna fisheries have conditions, namely, areas where improvement must be made in order to maintain their MSC certification. One of these areas is shared by the majority of MSC certified tuna fisheries and relates to the ongoing management of tuna stocks. The effective management of highly migratory species, like tuna, is incredibly challenging, but is critical for the long-term sustainability of the species. Tuna are managed at the international level by Regional Fisheries Management Organisations (RFMOs), but management at this level, involving as many as fifty member countries in one RFMO, can be slow. This poses a risk to the continued MSC certification, and long-term sustainability, of certain tuna fisheries, which requires that certified fisheries adopt best practice management strategies. A number of major supermarkets and tuna brands in the UK have demonstrated great international leadership in calling for RFMOs to improve the management of these globally important fish stocks.

Advocating for Sustainable Tuna: The Global Tuna Alliance (GTA)



The Global Tuna Alliance (GTA) was formed in the UK in 2019 by a group of companies representing different levels of the tuna supply chain, with the aim of improving tuna sustainability. Since its formation, the group has looked to leverage the power of the supply chain to bring change. It has actively engaged with RFMOs and their member countries to advocate for improved management of and traceability within tuna fisheries.

Many of the UK's leading retailers and tuna brands, including Asda, Aldi, Morrisons, M&S, Harrods, Tesco, Waitrose, Co-op, Sainsbury's, Princes, New England Seafood (owner of the Leap brand), and Kelly Deli (owner of sushi kiosk chain Sushi Daily) are members of the GTA. Through their participation in pre-competitive initiatives, like the GTA, these businesses have demonstrated great leadership in advocating for the development of sustainable tuna fisheries.



Conclusion

Across the globe, it is becoming increasingly possible for consumers to choose certified sustainable tuna. This is because a growing number of tuna fisheries are achieving MSC certification and brands, supermarkets and restaurants are rewarding these commitments to sustainable fishing and putting the blue MSC ecolabel on their products. This continued upward trend, however, has not continued in the UK, where availability of MSC labelled tuna products has declined for several years. As we look ahead, we hope this first edition of our MSC UK Tuna Shopper Report has provided insight into a considerable area of opportunity for the UK market, to provide shoppers with the sustainable tuna they are actively seeking. To summarise some key takeaways from our research:

- Most consumers in the UK want to do their part by buying sustainably caught tuna
- There are limited options for shoppers looking for MSC labelled tuna products in UK supermarkets
- As more fisheries meet the MSC Standard, the availability of certified sustainable tuna continues to increase
- The market has an important role to play by rewarding fisheries that have committed to operating sustainably and meeting the expectations of consumers in the UK by offering a greater selection of MSC certified tuna products

The UK market has, and continues to be, a world leader in supporting certified sustainable fisheries. However, it has now fallen behind other regions when it comes to providing certified sustainable tuna to consumers. With the availability of tuna species and a variety of catch methods and formats now in a positive place in terms of supply, UK brands and retailers have a perfect opportunity to provide tuna shoppers with what they are looking for and match the availability of certified sustainable wild options seen across the other big five seafood species.



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All data in this report is correct as of 1 December 2021, unless otherwise stated.
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