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Tuna Market Analysis 2024: Belgium

Market Analysis: Belgian Tuna

MSC forecast data for April 2023-March 2024 shows that a total of 7,887 tonnes of MSC-labelled tuna has been consumed in Belgium. These volumes are mainly consumed within five categories, being: canned (51,4%), chilled (26,4%), food to go (12,5%), ready meals (5,4%) and frozen (3,5%). The most popular species of tuna in Belgium is Skipjack (66,6%), followed by Yellowfin (17,7%). MSC-labelled Yellowfin tuna has seen a significant increase over the last year, growing 107%.

Research acquired by MSC from GfK (GfK, 2023) for April 2022-March 2023, shows that the canned (65%), salad spread (27%) and pizza (5,5%) categories make up most of the overall tuna consumption in Belgium.

Deep diving into canned, tuna is also the species which is most consumed, making up 59% of all canned consumption in Belgium. Within canned tuna, it is mainly private label brands that dominate the Belgian market, with retailers such as Colruyt, Aldi, Lidl, Delhaize and Carrefour accounting for a 70% market share. In addition, the market is completed by A-brands such as Rio Mare, Saupiquet, Imperial, Statesmen and Fish Tales (supermarkets and brands ranked by size order in volume of canned tuna). Three things are of note when comparing the MSC data with the GfK data:

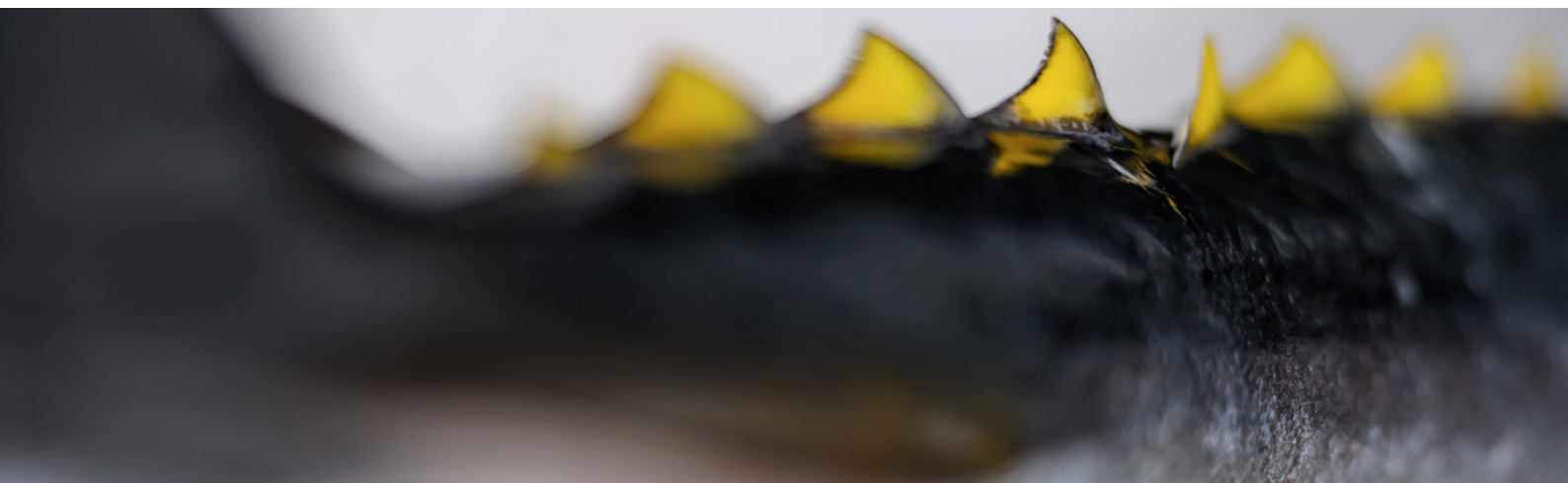
- 1. GfK data entails only at-home consumption, whereas MSC data entails both at- and out-of-home consumption, though the vast majority is consumed at home.**
- 2. GfK data is calculated on volumes sold, MSC data is calculated on volumes declared (sold and inventory)**
- 3. GfK data is calculated for FY22/23, whereas the**

MSC data is reporting on FY23/24

Nevertheless, the comparison in data shows that the penetration of MSC-labelled tuna in Belgium has never been higher. This is driven by 100% MSC certified tuna sourcing commitment by commercial partners like Aldi, Lidl, Fish Tales and Délío. Aside from these commitments, other partners have also taken important steps in their sustainable tuna sourcing, as we note an increase in volumes of MSC-labelled tuna at Colruyt Group, Albert Heijn and Rio Mare. These commitment and steps from Lidl, Aldi and Colruyt are especially important, since they represent the three biggest commercial brands when it comes to tuna volumes sold in Belgium. Most of the growth in MSC tuna is to be had at retailers like Carrefour and Delhaize.

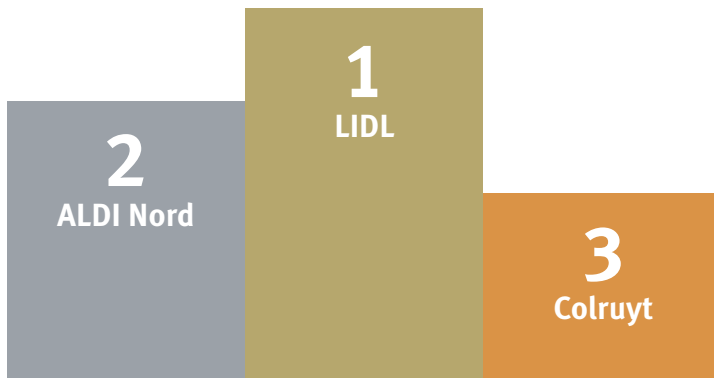
As outlined earlier in the report, globally, there has never been more MSC certified tuna available for commercial partners to source. Belgian brands and retailers should therefore take this opportunity to take the last remaining steps to close the gap and only offer MSC certified sustainable tuna. From a consumer perspective, there is also an appetite for more third-party certified sustainable seafood. Figures from Globescan^[1] (2022) show that 68% of Belgian fish consumers believe that only fish and seafood should be consumed from sustainable sources. In turn, 72% of Belgian fish consumers think it is important that sustainability claims are substantiated by independent organisations (not supermarkets or brands) and 81% say they trust the MSC label.

[1] Globescan (2022): Understanding seafood consumers | Marine Stewardship Council (msc.org)



Market Data: Belgian Tuna

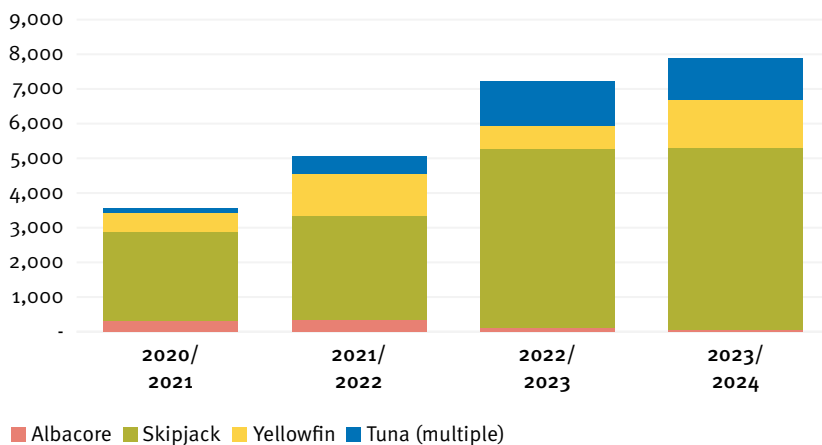
Top three Belgium retailers by volume sold



“It’s high time that every brand embraces MSC as a minimal standard for tuna products to make sure basic standards are being met in tuna fisheries.”

Tim Hendriks, Head of Operations, Fish Tales

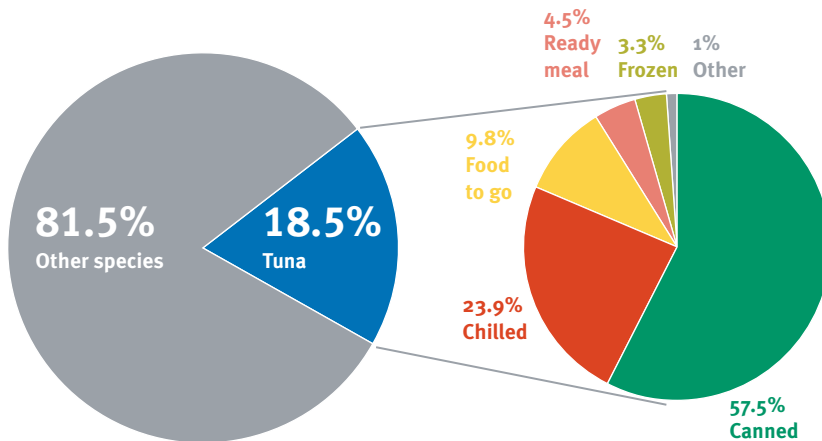
MSC labelled tuna volume by species, metric tonnes



“Our then new seafood sustainability policy (with a focus on MSC and ASC) and the favorable price of MSC certified tuna. In addition, we were still able to offer a market-based price, so there was also no (negative) feedback from our customers.”

Lien Broothaers, Manager Corporate Responsibility, Aldi BE on Aldi BE changing their sourcing policy for tuna to 100% MSC in 2019

MSC labelled tuna by product type





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