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# Tuna Market Analysis 2024: Netherlands

# Market Analysis: Netherlands

MSC forecast data for April 2023-March 2024 shows that a total of 10.946 tonnes of MSC-labelled tuna has been consumed in The Netherlands. This is the result of continuous growth with an increase of approximately 96.48% compared to levels in 2020/2021. By far, most of these volumes come from Skipjack Tuna, with 97,2% forecasted in 2023/24. The remaining volumes are near-equally divided over Albacore and Yellowfin Tuna. Most of the consumption of MSC labelled products takes place within the product categories canned (40,6%), chilled (30,0%), food to go (17,1%), ready meals (6,5%) and frozen (5,4%).

According to market research of GfK (2023) for the period of April 2022-March 2023, the general Dutch tuna consumption is mostly attributable to the product categories canned (50.5%), salad spread (33.2%) and pizza (15.1%). Within the canned category, tuna is also the most consumed species (accounting for 50.2%), with herring, salmon, sardines and anchovies completing the top five. Mainly A-brands such as Princes, Statesman, John West, Deep Blue, Rio Mare and Fish Tales are driving these canned tuna volumes with a total market share of 68.2%. These volumes are complemented by private label brands of retailers such as Lidl, Aldi, Jumbo and Superunie. All retailers and brands are ranked by size in volume of canned tuna.

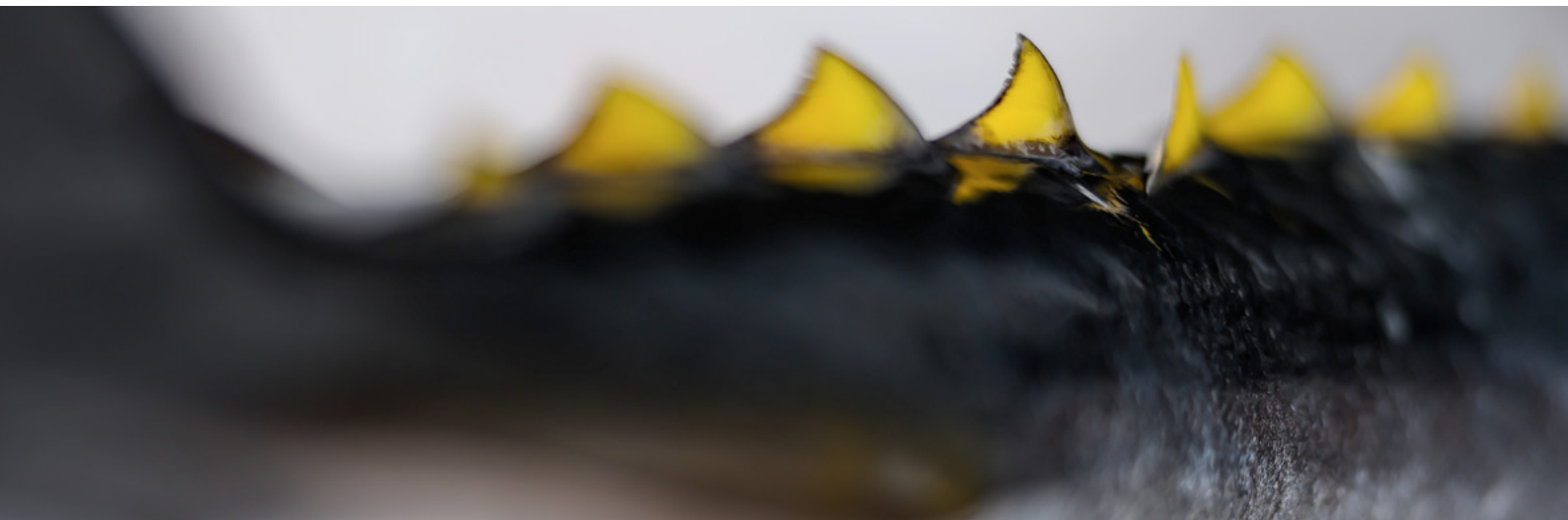
Three key points stand out when contrasting the MSC data with the GfK data:

- 1. GfK data covers consumption at home, whereas MSC data encompasses both at-home and out-of-home consumption, although the majority occurs at home.**
- 2. GfK data is based on volumes sold, while MSC data is based on declared volumes (sold and inventory).**

**3. GfK data pertains to FY22/23, whereas the MSC data reflects FY23/24.**

Still, this comparison shows that the penetration of MSC-labelled tuna in The Netherlands is at a record-high! Commitments of brands, such as Fish Tales and Princes, to source 100% MSC certified tuna have made this possible. This development is also strengthened by Jumbo and Superunie only selling MSC certified canned tuna with their private label. ALDI and Lidl have also made an important step by committing themselves to 100% MSC certified tuna for their fixed (non-promotional) assortment.

The global market has never seen such availability of source-able MSC certified tuna. This should also remove prior impediments to commitments of all Dutch brands and retailers in ensuring that all sourced tuna originates from healthy stocks that are fished with sustainable practices. Indeed, this availability should be considered as providing a facilitative capacity to take the final steps toward a Dutch market with 100% MSC certified tuna. Globescan (2022) research also shows that Dutch consumers desire more third-party certified sustainable seafood, with 71% expressing the need to only consume seafood originating from sustainable sources. Furthermore, 74% of Dutch consumers believe that claims regarding sustainability should be assessed by an independent organization. This also drives this trust in the MSC label to support these claims that has been given by 81% of the Dutch consumers. With such levels of availability and consumer demand for sustainable tuna products, partners should feel motivated to strengthen commitments and pursue further successes.



# Market Data: Netherlands Tuna

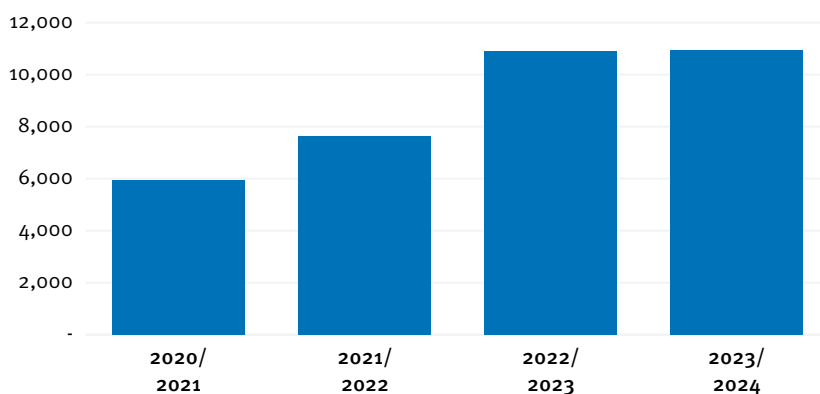
## Top five Dutch brands or companies by volume sold

	2024	2023
ALBERT HEIJN	1	1
LIDL	2	2
PRINCES	3	4
SUPERUNIE	4	3
JUMBO	5	5

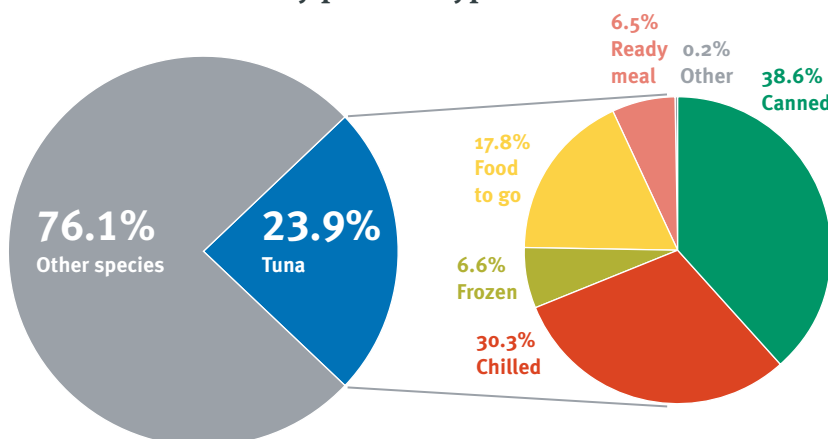
“In our experience, the global tuna supply chain broadly consists of like-minded businesses that want long term sustainable stocks, to increase transparency and build consumer trust. We see the science-led, independent MSC blue tick as the key tool to do just that”

Juliette Mille, Senior Sustainable Sourcing Manager, Princes

## MSC labelled tuna volume, metric tonnes



## MSC labelled tuna by product type





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Find out more: [msc.org/tuna](https://www.msc.org/tuna)

Contact us: [info@msc.org](mailto:info@msc.org)



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