

# Tuna Market Report by Species (Skipjack, Yellowfin, Albacore, Bigeye, Bluefin), Type (Canned, Frozen, Fresh), and Region 2024-2032

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## Abstracts

The global tuna market size reached US\$ 43.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 59.8 Billion by 2032, exhibiting a growth rate (CAGR) of 3.4% during 2024-2032. The market is experiencing steady growth driven by the increasing global demand for healthy, protein-rich diets, with consumers gravitating towards seafood options, continuous technological advancements in processing and packaging, and addressing environmental concerns across the globe.

### Tuna Market Analysis:

**Market Growth and Size:** The market is witnessing substantial growth, driven by increasing global demand for healthy protein sources. This growth is fueled by consumer preferences for lean proteins and omega-3 fatty acids, with it being a notable beneficiary. The market is also expanding due to rising disposable incomes and changing dietary habits in both developed and emerging economies.

**Technological Advancements:** Advancements in technology, particularly in processing and packaging, are significant catalysts in the market. Innovations such as vacuum-packed and flavored enhance shelf life and appeal while processing technology improvements ensure quality and nutritional value. These technological strides are crucial for meeting diverse consumer needs and maintaining high industry standards.

**Industry Applications:** It finds widespread applications in various sectors, predominantly in the food industry. It is a key ingredient in numerous culinary preparations, ranging from household cooking to gourmet cuisine. Additionally, the health and wellness sector increasingly incorporates it, given its high protein and omega-3 content, in various dietary supplements and health foods.

**Key Market Trends:** A major trend in the market is the shift towards sustainable and eco-friendly fishing practices. There is also a growing preference for canned and packaged

products, catering to the fast-paced lifestyle of consumers. Furthermore, the market is experiencing a trend towards value-added products, including ready-to-eat and flavored varieties.

**Geographical Trends:** Geographically, the market shows significant growth in regions with heightened health awareness and an inclination towards seafood consumption. Emerging markets in Asia-Pacific are rapidly expanding due to changing dietary patterns and increased spending power. Developed regions such as North America and Europe continue to be strong markets due to established consumption patterns and sustainability initiatives.

**Competitive Landscape:** The market is highly competitive, with a mix of large multinational corporations and local players. Competition is centered around product innovation, sustainability practices, and supply chain efficiency. Key players are focusing on sustainable sourcing and technological enhancements to gain a competitive edge.

**Challenges and Opportunities:** The market faces challenges such as concerns over overfishing and environmental sustainability. However, these challenges present opportunities for innovation in sustainable fishing practices and aquaculture. The growing health consciousness among consumers worldwide also presents significant opportunities for market expansion and product innovation.

**Tuna Market Trends:**

#### Increasing Global Demand for Healthy Protein Sources

The market is experiencing significant growth due to an increased global demand for healthy protein sources. As consumers become more health-conscious, there is a rising preference for lean protein and omega-3 fatty acids, both of which are abundant in them. This trend is especially pronounced in regions with growing health awareness and dietary shifts towards seafood. Moreover, the convenience of canned and packaged products appeals to the fast-paced lifestyle of modern consumers, further bolstering the market. This demand rise is not only limited to developed countries but is also evident in emerging economies, where changing dietary patterns and increasing disposable incomes are playing a crucial role in shaping the market dynamics.

#### Expansion in Aquaculture and Sustainable Fishing Practices

The industry is undergoing significant transformation with the expansion of aquaculture and the adoption of sustainable fishing practices. Along with this, concerns over overfishing and the environmental impact of fishing practices have led to stringent regulations and a shift towards more sustainable methods. Aquaculture, or fish farming, is increasingly being seen as a viable alternative to wild-caught tuna, offering a more

controlled and sustainable way of meeting the rising demand. This shift helps in stabilizing the supply and addresses the environmental concerns associated with traditional fishing methods. In addition, the development of eco-friendly aquaculture techniques is expected to play a critical role in the future growth of the market, balancing the need for production with the imperative of environmental conservation.

### Technological Advancements in Processing and Packaging

The market is also being driven by technological advancements in processing and packaging. Innovations in packaging, such as vacuum-packed and flavored, are enhancing product shelf life and appealing to a broader consumer base. Similarly, advancements in processing technology are enabling manufacturers to maintain the quality and nutritional value of it while ensuring food safety. These technological improvements not only enhance the appeal of products but also enable manufacturers to cater to diverse market segments with specialized products. Moreover, the integration of technology in the supply chain, from catch to consumer, is optimizing operations, reducing waste, and improving the overall efficiency of the market. This evolution is instrumental in meeting the growing global demand while ensuring high standards of quality and sustainability.

### Tuna Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global and country levels for 2024-2032. Our report has categorized the market based on type and species.

### Breakup by Species:

- Skipjack
- Yellowfin
- Albacore
- Bigeye
- Bluefin

Skipjack accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the tuna market based on the species. This includes skipjack, yellowfin, albacore, bigeye, and bluefin. According to the report, skipjack represented the largest segment.

The skipjack segment holds the largest share of the market, primarily due to its widespread availability and affordability. Skipjack is commonly used in canned products and is a staple in many households globally. Its resilience to overfishing compared to other species and its shorter life cycle make it a sustainable option, aligning with the growing consumer demand for environmentally responsible seafood choices. Additionally, the high volume of skipjack catch and its versatility in various culinary applications, including salads, sandwiches, and sushi, contribute to its dominant market position.

On the other hand, the yellowfin segment is notable for its popularity in both fresh and canned forms. Known for its mild flavor and firm texture, yellowfin is a preferred choice for sashimi and high-quality canned products. This segment benefits from its premium positioning in the market, often fetching higher prices than skipjack. The demand for yellowfin is strong in regions with a developed taste for gourmet seafood, although concerns over sustainable fishing practices impact its market dynamics.

Albacore, often marketed as “white tuna,” holds a significant position in the market, especially in the canned sector. Albacore is renowned for its higher fat content and richer taste, making it a preferred choice for consumers seeking a premium product. This segment is particularly strong in markets where there is a demand for high-quality, value-added products.

In addition, the bigeye segment caters primarily to the fresh and sashimi markets, known for its higher fat content and desirable taste. Bigeye is particularly popular in Japanese cuisine and is a staple in upscale sushi restaurants worldwide. The market for bigeye is influenced by the global sushi and sashimi trend, but it faces challenges due to concerns over stock depletion and sustainable fishing practices.

Moreover, the bluefin segment, although smaller in comparison to others, is highly valued, especially in the luxury seafood market. Bluefin is renowned for its exceptional quality and is a prized ingredient in high-end sushi and sashimi. This segment commands premium prices, particularly for Atlantic and Pacific bluefin varieties.

Breakup by Type:

Canned

Frozen

Fresh

Canned holds the largest share in the industry

A detailed breakup and analysis of the tuna market based on the type has also been provided in the report. This includes canned, frozen, and fresh. According to the report, canned accounted for the largest market share.

The canned segment is the largest in the market, driven by its convenience, affordability, and long shelf life. Canned appeals to a wide consumer base, from households looking for quick meal solutions to individuals seeking healthy, protein-rich diets. This segment benefits from a diverse range of products. The ease of storage and preparation makes canned a staple in pantries around the world.

On the other hand, the frozen segment caters significantly to both retail and food service sectors. This segment allows for the preservation of its freshness and nutritional value over extended periods, making it a popular choice for consumers and chefs who prioritize quality and flavor. Frozen is essential in markets where fresh is not readily available, offering a viable alternative without compromising much on taste and quality. The segment includes a range of products from whole to pre-cut steaks, catering to various culinary needs.

Furthermore, the fresh segment, though smaller in comparison to canned and frozen, is significant, particularly in premium markets and among seafood enthusiasts. Fresh is highly prized for its taste and texture, especially in gourmet cooking and upscale restaurants. This segment includes varieties such as bluefin, yellowfin, and bigeye, which are popular in sashimi and sushi. The freshness factor plays a crucial role in the pricing and distribution of this segment.

Production Breakup by Region:

- Japan
- Indonesia
- Philippines
- Taiwan P.C.
- Republic of Korea
- Spain
- Others

Indonesia represents the leading market segment

The report has also provided a comprehensive analysis of all the major regional markets based on the production, which includes Japan, Indonesia, Philippines, Taiwan P.C., Republic of Korea, Spain, and others. According to the report, Indonesia was the largest market for tuna production.

Indonesia leads in the global market in terms of production region, attributed to its vast maritime territory and favorable fishing conditions. As the largest archipelago in the world, Indonesia benefits from rich marine biodiversity, making it a key player in the industry. The country's extensive fishing fleet and improvements in fishing practices contribute significantly to its dominance. Indonesia's market is bolstered by both domestic consumption and substantial exports, particularly of skipjack and yellowfin. Along with this, the government's efforts to promote sustainable fishing and enhance the value chain are strengthening Indonesia's position as a leading producer.

Additionally, Japan is a prominent player in the market, known for its high-quality products, especially bluefin, which is highly prized in Japanese cuisine. The country's sophisticated fishing technology and stringent quality control measures ensure premium-grade products, especially for sashimi and sushi markets. Japan's market is driven by a strong domestic demand for fresh and high-grade products, supported by a culture that deeply values seafood.

The Philippines is an important producer, with its industry centered in the region of General Santos, known as the "Tuna Capital of the Philippines." The country's tropical waters are conducive to a variety of species, with a focus on yellowfin and skipjack. The Philippines balances between providing for domestic demand and catering to international markets, with a significant portion of its production being exported. Efforts to modernize the fishing industry and adhere to sustainable practices are ongoing, aimed at maintaining the Philippines' competitive edge in the market.

Taiwan Province of China specializes in the harvesting of bigeye and yellowfin, which are major exports. Taiwan's industry benefits from efficient fishing practices and a strategic geographic location, allowing for access to key fishing grounds.

In addition, the Republic of Korea maintains a significant share of the market, with a focus on advanced fishing technologies and efficient supply chains. The country's industry is centered around yellowfin and skipjack, catering to both domestic and international markets. South Korea's commitment to research and development in fishing technologies and sustainable practices positions it as a key player in the market. The country's strategic approach to balancing domestic consumption with export

demands plays a crucial role in its market presence.

Moreover, Spain holds a strategic position in the European market, known for its high-quality canned products. The country's long-standing fishing tradition and modern processing facilities contribute to its strong market presence. Spain caters to the domestic market and is also a significant exporter within Europe. The Spanish industry focuses on sustainable and responsible fishing practices, aligning with the European Union's regulatory framework to ensure the long-term viability of the market.

Consumption Breakup by Region:

- Japan
- USA
- Republic of Korea
- China
- Taiwan P.C.
- European Union
- Others

China leads the market, accounting for the largest tuna market share

The report has also provided a comprehensive analysis of all the major regional markets based on the consumption, which include Japan, USA, Republic of Korea, China, Taiwan P.C., European Union, and others. According to the report, Japan was the largest market.

Japan represents the largest segment in terms of consumption, driven by a deeply ingrained seafood culture and a particular affinity for high-quality products, especially in sushi and sashimi. The preference for premium varieties such as bluefin and bigeye in Japan sets it apart in the global market. This strong domestic demand is supported by sophisticated distribution networks and a willingness to pay premium prices for top-quality products. Additionally, Japan's role as an importer of processed and fresh products further solidifies its position as the leading consumption region.

Additionally, the United States is a major consumer, with a market characterized by high demand for canned and processed products. The versatility and convenience of canned make it a staple in American households. Additionally, there is a growing market segment in the U.S. that prefers fresh and frozen, particularly for culinary applications in restaurants and home cooking.

In the Republic of Korea, its consumption is significant, with preferences leaning towards both fresh and processed forms. The market is driven by a cultural appreciation for seafood and a growing demand for convenient, ready-to-eat products. South Korea's sophisticated supply chains and a strong focus on quality have supported the growth of its consumption market. The country's evolving dietary habits, including increased health consciousness, are further shaping its consumption patterns.

Along with this, China's consumption segment is rapidly expanding, driven by increased urbanization, rising income levels, and a growing middle class. The market in China is diversifying, with a growing appetite for both canned for home use and fresh and frozen varieties in the food service sector.

Taiwan Province of China demonstrates a strong demand, particularly in the form of fresh and frozen products. The region's consumption is influenced by traditional seafood diets and an increasing interest in health and wellness. The market in Taiwan is characterized by a blend of local consumption and a penchant for high-grade, often used in traditional and modern culinary preparations.

In addition, the European Union represents a significant segment of the consumption market, with a strong preference for canned and processed. The EU market is diverse, with variations in consumption patterns across member countries. There is a growing focus on sustainability and traceability in the EU, influencing consumer choices and industry practices.

**Leading Key Players in the Tuna Industry:**

Key players in the market are actively engaging in various strategic initiatives to maintain their competitive edge and adapt to the evolving market dynamics. These companies are focusing on sustainable fishing practices and traceability to address environmental concerns and meet regulatory standards. Innovation in product development, particularly in the realm of packaging and flavor diversification, is a notable trend. In addition, these players are expanding their global reach through strategic partnerships, mergers, and acquisitions, aiming to enhance their distribution networks and market penetration. Emphasis on research and development for sustainable aquaculture practices is also a priority, as the industry seeks to balance environmental responsibilities with market demands. This holistic approach by the key players is instrumental in driving the growth and sustainability of the market.

The market research report has provided a comprehensive analysis of the competitive



landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Thai Union

Tri Marine

Starkist

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Latest News:

October 6, 2022: Starkist introduced StarKist Smart Bowls, its most recent invention. The recently introduced StarKist Smart Bowls are a compact single-serve pouch that contains expertly seasoned grains and healthy veggies paired with wild-caught tuna.

November 3, 2020: Thai Union announced that, in an effort to capitalize on Singapore's potential as a regional hub for food technology, it had opened a new subsidiary there.

August 2, 2023: Tri Marine, in partnership with FlyWire, successfully installed unique, new electronic monitoring (EM) capabilities onboard distant-water tuna longline vessels – the second phase of a planned multi-year collaboration. The work was conducted by a team of colleagues from the USA, Taiwan, and Trinidad. Special thanks are owed to the vessel owners, staff and crews, as well as port and customs staff for their meaningful support and contributions.

#### Key Questions Answered in This Report

1. What was the size of the global tuna market in 2023?
2. What is the expected growth rate of the global tuna market during 2024-2032?
3. What are the key factors driving the global tuna market?
4. What has been the impact of COVID-19 on the global tuna market?
5. What is the breakup of the global tuna market based on the type?
6. What is the breakup of the global tuna market based on the species?
7. What are the key regions in the global tuna market based on production?
8. What are the key regions in the global tuna market based on consumption?
9. Who are the key players/companies in the global tuna market?

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