Food and Agriculture
Organization of the
United Nations

Tuna

Weaker demand for non-canned tuna; skipjack prices firm amidst lower WCPO catches

In 2024, global tuna trade rose significantly in quantity (28 percent) and value (3.32 percent) in comparison with 2023 due to increased demand for canned tuna among consumers. For example, the United States of America, which is the largest market for ready-to-eat products, imported a record high volume of canned and prepared tuna at 230 557 tonnes. Other major areas of market growth in 2024 were several countries in Latin America and the Asia-Pacific. Meanwhile, Thailand retained its position as the leading producer of canned and processed tuna, increasing its share in the global market from 31 percent in 2023 to 32.67 percent in 2024.

Global supplies

In comparison with the last quarter of 2024, January–March 2025 started with lower catches of tuna in the major fishing areas worldwide. Frozen skipjack prices recorded a rising trend despite weaker demand for end-products in the international trade as well as from the huge tuna canning industry in Thailand and global uncertainty related to the wide-ranging tariffs announced by the United States.

Catches in the Western and Central Pacific Ocean (WCPO) were poor in the first quarter of 2025, improving to a moderate level in April. Fishing in the Eastern Pacific Ocean (EPO) was reasonably good, which kept raw material inventories healthy at the tuna packers' level in Manta, Ecuador. The catch level in the Indian Ocean was moderate-to-good in April, with yellowfin constituting a higher percentage of the landings; as a result, prices weakened for yellowfin but increased for skipjack. In the Atlantic Ocean, where a 45-day Fish Aggregation Device (FAD) fishing closure period began on 17 March 2025, tuna catches were slow with a higher percentage of yellowfin.

Trade and markets, by product

World trade of tuna in 2024 increased significantly in both quantity and value at 4 million tonnes (+28 percent) and USD 15.67 billion (+3.32 percent) in comparison with 2023. Frozen tuna (whole and dressed) comprised 59 percent of the total volume, followed by semi-processed and processed tuna (37.5 percent) and higher-value frozen tuna fillets (2.48 percent).

Global tuna trade

Volume +28% ↑

Value +3.32% ↑

Raw materials for canning and other uses

In 2024, imports of frozen raw material (whole tuna and semi-processed cooked loins) increased moderately in Southeast Asia and Europe in comparison with 2023. Specific to whole frozen tuna, according to the INFOFISH Trade News, 2024 imports were higher year-on-year in Thailand, Viet Nam, the Philippines and China. These supplies were mostly processed into cooked frozen loins for export, with the exception of Thailand where the focus was on the processing of ready-to-eat products.

Over 225 000 tonnes of cooked frozen loins entered the international trade in 2024; the top importers were Spain, Thailand, Italy, France and Portugal. During 2020–2024, annual imports of cooked frozen tuna loins were stable among the European tuna packers, ranging from 180 000 to 190 000 tonnes; the main suppliers were China, Ecuador, Papua New Guinea, Philippines and Solomon Islands.

World: Imports of fresh, frozen and processed tuna, 2022–2024 (in tonnes and million USD)

	2022	2023	2024	% change 2024/23
Product group				
Fresh/chilled, dressed (G&G)	99 310	93 553	100 309	+7.52
Frozen, whole and dressed	2 148 768	1 927 587	2 366 212	+22.78
Frozen loins/ fillets	198 995	165 100	197 747	+19.39
Prepared/ processed	1 568 439	1 402 067	1 570 323	+11.98
Total tuna (all types), in tonnes	**3 811 217**	**3 147 335**	**4 027 101**	**+27.96**
Value in USD million	**16 378**	**15 169**	**15 673**	**+3.32**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Fresh and frozen tuna (non-canned)

Japan

While remaining the world's top market for high-value non-canned tuna in 2024, Japan recorded a drop in imports of air-flown fresh tuna. On the other hand, an increase was noted for frozen tuna (including fillets) at 204 307 tonnes, up by 6.09 percent over 2023.

Imports of frozen tuna fillets increased by 30.13 percent year-on-year at 64 300 tonnes; the top suppliers were China, Republic of Korea, Malta, Türkiye and Tunisia. Of this total, bluefin, yellowfin and bigeye fillets constituted 27 133 tonnes, 16 539 tonnes and 13 343 tonnes, respectively.

Japan: Imports of fresh and frozen tuna, 2022–2024 (1 000 tonnes)

	2022	2023	2024	% change 2024/23
Product group				
Fresh, whole/dressed	5 207	5 100	4 527	-11.24
Frozen, whole	139 040	143 160	140 007	-2.20
Frozen, fillets	57 175	49 413	64 300	+30.13
Total	**201 422**	**197 673**	**208 834**	**+5.65**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

This year's Spring Festival season (April–May 2025) brought greater demand for sashimi tuna in the restaurant and catering trade due to the increased number of foreign tourists, particularly from the Far East.

Tuna imports - Japan

Fresh and frozen +5.65% ↑

United States of America

The general demand for non-canned tuna in the United States in 2024 mirrored the trend in Japan where supplies mostly came through imports. US imports of fresh tuna were stable at the 2023 level (slightly over 23 000 tonnes) while increases were noted for frozen tuna fillets and steaks which are used in the sashimi as well as non-sashimi trade.

US imports of the higher-value non-canned tuna (fresh and frozen) crossed 70 000 tonnes with a Customs-declared value of USD 908 million, representing rises of 8.8 percent in quantity and 8.23 percent in value against 2023. Viet Nam and Indonesia were the top suppliers, with an equal share of 37 percent each in the total imports. In 2022, Viet Nam replaced Indonesia as the top exporter of frozen tuna fillets and steaks to the US market.

United States: Imports of fresh and frozen tuna, 2022–2024 (1 000 tonnes)

Product group	2022	2023	2024	% change 2024/23
Fresh, whole/dressed	22 739	23 376	23 305	-0.30
Frozen, whole	9 001	4 760	4 234	-11.05
Frozen, fillets	47 971	36 891	43 203	+17.11
Total	**79 711**	**65 027**	**70 742**	**+8.79**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Tuna imports - United States

Fresh and frozen +8.79% ↑

During the first quarter of 2025, the market retained this positive trend with a 21 percent rise in imports of non-canned tuna.

European Union

In 2024, the EU market recorded an increase in imports of higher-value non-canned tuna, consisting mainly of frozen fillets with a smaller volume of air-flown fresh tuna. Japanese restaurants were the main users of fresh tuna while much of the whole frozen tuna was used to process end-products. The top import markets for frozen tuna fillets were Spain, France, Italy, Portugal and the Kingdom of the Netherlands.

European Union: Imports of fresh and frozen tuna, 2022–2024 (1 000 tonnes)

Tuna/Product group	2022	2023	2024	% change 2024/23
Fresh/chilled, dressed	32 391	22 549	28 293	+27.3
Frozen, whole and dressed	172 840	123 972	169 335	+37.4
Frozen, fillets	53 473	38 715	46 460	+21.8
Total tuna, fresh and frozen	**258 704**	**185 236**	**244 088**	**+31.9**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Tuna imports - European Union

Fresh and frozen +31.9% ↑

Other markets

As Japanese restaurants grow in number worldwide, demand for non-canned tuna has increased in the urban metropolises of Southeast Asia, as well as markets in the Far East and Near East. In recent years, Asian markets such as China, Republic of Korea, Thailand and Malaysia have procured 30 000 to 40 000 tonnes of high-quality tuna fillets annually. In 2023, the number of Japanese restaurants in Asia outside Japan was estimated to be 125 000. China houses the largest number (80 000), followed by Thailand.

During the Lunar New Year celebration in January–February 2025, imports of air-flown fresh bluefin tuna were at a record high in China at 168 tonnes in comparison with 132 tonnes imported during the same festive period a year ago. Supplies were mostly procured from Spain. Imports of ultra-frozen bluefin fillets also increased significantly at 122 tonnes in China during this period in response to improved demand; the main suppliers were Malta and Türkiye.

Other markets in the Asia-Pacific also recorded increased imports of sashimi-grade tuna during the Lunar New Year period in 2025.

Canned/processed tuna

In 2024, global imports of processed and canned tuna (HS 160414) totalled 1.57 million tonnes valued at USD 8.63 billion, representing increases of 11.86 percent and 7.87 percent, respectively, compared to 2023. Among the top markets, imports in the United States, the United Kingdom of Great Britain and Northern Ireland, Germany, Japan and Australia consisted mainly of ready-to-eat products, whereas European tuna packers (Spain, Italy, France and Portugal) as well as Thailand imported large quantities of cooked frozen loins for processing into end-products.

World: Top importers of canned/processed tuna January–December (1 000 tonnes)

	2022	2023	2024	% change 2024/23
United States	242.66	217.94	230.55	5.79
Spain	165.87	140.72	173.53	23.32
Italy	130.15	131.55	130.26	-0.98
United Kingdom	96.42	88.11	101.86	15.62
France	98.32	94.08	92.01	-2.20
Germany	94.86	80.21	85.27	6.30
Thailand	53.99	56.21	74.76	33.01
Others	686.16	595.25	682.4	16.64
Total	**1 568.44**	**1 404.06**	**1 570.65**	**11.86**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Canned tuna imports

Global +11.86% ↑

United States +5.79% ↑

Spain +23.32% ↑

World: Top exporters of canned/processed tuna January–December (1 000 tonnes)

	2022	2023	2024	% change 2024/23
Thailand	514.08	444.59	579.49	30.34
Ecuador	246.97	229.59	310.68	35.32
China	130.34	139.39	207.53	48.89
Philippines	92.55	80.66	110.43	36.92
Spain	95.78	103.84	109.94	5.87
Indonesia	72.05	69.62	77.66	11.54
Others	456.69	362.6	389.38	7.46
World Total	**1 608.47**	**1 430.25**	**1 785.12**	**24.82**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Canned tuna exports

Global	+24.82% ↑
Thailand	+30.34% ↑
Ecuador	+35.32% ↑
China	+48.89% ↑

Thailand

The world's leading producer of canned and processed tuna exported 580 000 tonnes of prepared tuna (mostly end-products) valued at USD 2.489 billion in 2024; these figures were 30.40 percent higher in quantity and 20.38 percent in value year-on-year. The share of Thailand in the global exports of prepared/processed tuna (HS 160414) increased from 31 percent in 2023 to 32.67 percent in 2024. The top export destinations in value were the United States, Japan, Australia and Libya. Among the top 20 markets, exports increased to all, except Japan.

Thailand: Exports of prepared and preserved tuna, January–September, 2022–2024 (1 000 tonnes)

	2022	2023	2024
Canned or preserved tuna			
United States	113.55	96.33	121.06
Japan	40.49	45.35	41.88
Libya	33.86	35.22	41.09
Other countries	326.18	267.69	375.47
Total imports	**514.08**	**444.59**	**579.49**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Other major exporters/suppliers (Ecuador, China, Philippines and Indonesia) reported increased shares of cooked frozen loins in their total exports of processed tuna in 2024.

The Americas

Markets in the Americas imported nearly 400 000 tonnes of processed/canned tuna in 2024. Imports increased in all countries year-on-year, except for Guatemala. The overall growth rate of the Latin American tuna markets was 19.26 percent, higher than the whole of the Americas.

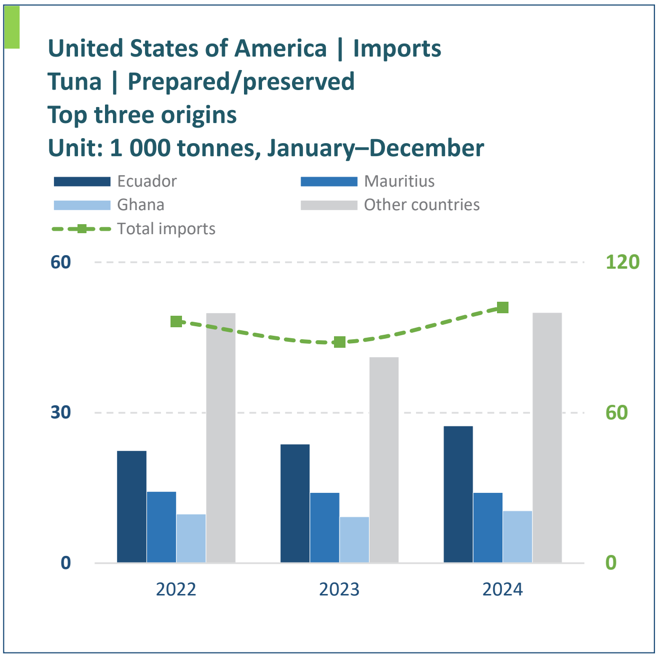
Americas: Canned tuna imports, 2022–2024 (in tonnes)

	2022	2023	2024	% change 2024/24
Markets				
United States	242 660	217 936	230 557	6.00
Canada	37 390	31 157	37 397	19.35
Colombia	33 992	30 176	32 928	9.12
Chile	25 395	24 842	31 861	28.22
Peru	11 632	15 835	19 105	26.66
Argentina	18 781	16 788	17 417	6.25
Mexico	18 767	10 289	16 104	60.00
Panama	5 846	5 234	5 796	9.61
Uruguay	2 245	2 515	2 843	12.00
Guatemala	2 799	2 385	2 352	-1.26
Brazil	1 948	1 135	2 116	90.9
Total, Americas	**401 455**	**358 292**	**398 476**	**11.17**
Total, Latin America	**121 405**	**109 199**	**130 522**	**19.26**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

United States of America

The largest market for ready-to-eat products, the United States imported a record high volume of canned and prepared tuna at 230 557 tonnes in 2024, up by 5.8 percent over 2023. However, in terms of value (USD 1.15 billion), there was a drop of 2.5 percent year-on-year. Among the top five suppliers, Thailand (113 950 tonnes) and Viet Nam (27 915 tonnes) each increased their market shares by 49.4 percent and 12.1 percent, respectively. Imports were stable from Mexico but declined from Ecuador and Indonesia.



Source: Author's own elaboration based on the INFOFISH Trade News. 2024. INFOFISH. [Cited 3 April 2025]. www.infofish.org

Europe

The overall demand for prepared and processed tuna in the European Union and other markets in Europe remained steady during 2024, with increased imports.

European Union imports of semi-processed cooked loins and ready-to-eat tuna totalled 708 805 tonnes valued at USD 4.21 billion, in comparison with 645 717 tonnes and USD3.97 billion in 2023. The top markets in ranking were Spain, Italy, France, Germany and the Kingdom of the Netherlands. Nearly 26 percent of these imports (188 400 tonnes) comprised semi-processed raw materials (cooked frozen loins) brought in by producers in Spain, Italy, France and Portugal to produce ready-to-eat products. The leading suppliers were China, Ecuador, Papua New Guinea, the Philippines and Solomon Islands.

Meanwhile, EU tuna canners exported 251 100 tonnes of end-products (mostly intra-EU trade) valued at USD 1.82 billion. The extra-EU markets were the United Kingdom, Canada, Switzerland, the United States, Morocco and Saudi Arabia.

NENA (Near East and North Africa)

Thailand was the top supplier of canned tuna to the NENA region, reporting a 44 percent rise in exports to some 15 markets in 2024 (212 653 tonnes) as compared to 2023 (147 640 tonnes). The larger markets in the region were Libya, Egypt, Saudia Arabia and the United Arab Emirates, each of which imported 30 000 to 40 000 tonnes of canned tuna in 2024.

Canned tuna imports

European Union +9.76% ↑

Asia-Pacific

Imports of processed/canned tuna in the Asia-Pacific region totalled 233 651 tonnes in 2024, up by 17 percent over 2023. Nearly one-third comprised semi-processed cooked loins imported by Thailand to process into ready-to-eat products.

Three other markets, namely Japan, Australia and New Zealand, generally import higher-value end-products. Malaysia and Singapore are recent additions to this group.

Asia-Pacific: Imports of canned tuna, 2022–2024 (in tonnes)

	2022	2023	2024	% change 2024/24
Import markets				
Thailand	53 986	56 208	74 758	+32.14
Japan	68 808	70 254	68 634	-2.85
Australia	49 184	39 287	47 754	+20.51
New Zealand	7 322	6 733	8 569	+26.86
Malaysia	4 475	4 728	8 108	+71.48
Republic of Korea	1 984	4 898	6 831	+41.66
Viet Nam	3 657	6 859	6 246	-8.82
Taiwan Province of China	4 775	3 342	3 778	+12.12
China, Hong Kong SAR	3 067	2 874	2 420	-15.79
China	3 018	3 490	2 211	-53.35
Singapore	2 126	1 986	2 143	+7.91
Total Asia-Pacific (including others)	**206 958**	**199 084**	**233 651**	**+17.1**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 3 April 2025]. www.globaltradetracker.com

Canned tuna imports

Asia-Pacific +17.1% ↑

Prices

The low catch situation for frozen skipjack in the WCPO region has kept fish prices firm at around USD 1 600 to USD 1 700 per tonne during January–April 2025 for delivery to Thailand, even though raw material demand at tuna packers' level has been low.

The same trend is seen with European tuna packers where supplies mostly originate from the Indian and Atlantic Oceans. Reflecting these higher prices for round fish, the price for single-cleaned cooked frozen skipjack loins went up by USD 300 per kg in April 2025. In comparison, yellowfin prices remained stable.

In Japan, skipjack landings at the Yaizu port during January–March 2025 totaled 10 419 tonnes with an average price of Yen 240/kg, lower by 29 percent in quantity and 2 percent in average price against the same period in 2024.

Outlook

During late March to early May, the cherry blossom season in Japan created good demand for fresh and frozen sashimi tuna in the country. Thereafter, consumer demand will be seasonally low, particularly during the warm summer months of June and July. Notably, competition from fresh salmon remains strong in Japan's sashimi trade.

Tuna canners in Asia and Europe will continue to cope with lower catches in the main fishing grounds and higher prices for frozen fish and cooked frozen loins. Frozen tuna imports have already slowed down in Thailand, as reflected in the year-on-year 13.8 percent drop during the January–March period at 208 000 tonnes, associated with reduced demand for end-products. Meanwhile, increased US tariffs on imports continue to cause some uncertainty in the international trade.