Food and Agriculture Organization of the United Nations

Tuna

Stronger demand for frozen and ready-to-eat products

Dwindling tuna catches in the Western and Central Pacific Ocean (WCPO) led to price rises for frozen skipjack during the first quarter of 2025. Tuna canners in Southeast Asia subsequently reduced their imports of whole frozen raw material. Meanwhile, the three-month FAD fishing closure in the WCPO will restrict catches till September.

Trade and markets, by product

The international trade of fresh and frozen tuna during January–March 2025 totalled 603 391 tonnes, down by 7.65 percent as compared to the same period a year ago. This was due to reduced demand for high-value fresh tuna and whole frozen raw materials used in processing prepared and canned products.

Specific to the global import volume of fresh tuna, the year-on-year shortfall was 44.80 percent over the corresponding period in 2024. Among the top five markets (the United States of America, Thailand, Portugal, Japan and France) imports increased in the United States and France, but fell in the other markets. Imports of whole frozen tuna, which are generally meant for canning (except in Japan), declined in contrast to high-value frozen tuna fillets which saw a rise by 9.3 percent year-on year; the leading importers of frozen tuna fillets during this period were Japan, the United States, Spain, the Republic of Korea and Portugal.

Tuna imports

Global	-7.65% ↓
Fresh tuna	-44.80% ↓

Global imports of fresh and frozen tuna (including fillets), January–March, in tonnes

Tuna /product group	2021	2022	2023	2024	2025	% change 2025/24
Fresh/chilled, dressed	17 417	16 829	15 770	22 190	12 228	-44.80
Frozen whole and dressed	540 690	480 860	472 283	588 044	544 304	-7.48
Frozen tuna fillets	39 176	45 750	37 660	43 051	47 098	+9.30
Total tuna, fresh and frozen	**597 283**	**543 439**	**525 713**	**653 285**	**603 391**	**-7.65**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

Frozen raw materials for canning and other uses

During the Q1 2025 review period, global imports of frozen skipjack were 25 percent lower year-on-year at 261 700 tonnes but increased for yellowfin (+20 percent at 145 668 tonnes). Among the top five markets, imports declined in Thailand (-14.10 percent) and Viet Nam (-8 percent) but rose in Côte d'Ivoire (+50 percent), the Philippines (+33.33 percent) and Japan (+19.35 percent).

In recent years, tuna canners in Thailand have continued to replace whole frozen tuna with semi-processed cooked frozen loins for processing into end-products, in line with what has been happening in the tuna canning plants in Europe. Imports of cooked loins in Thailand increased by 16 percent year-on-year at 39 479 tonnes during January–June 2025, mainly coming from China, Indonesia and Viet Nam. Imports of whole frozen tuna during this period reduced by 25 percent at 377 223 tonnes, 70 percent of which comprised skipjack, followed by yellowfin at 20 percent.

During January–March 2025, 83 808 tonnes of cooked frozen tuna loins were imported in the European Union, 33.87 percent higher than the same period in 2024. China had the lion's share in this supply (36 percent; 30 349 tonnes); the other top suppliers were Indonesia (18 percent; 15 392 tonnes) and Ecuador (12 percent; 9 869 tonnes). A sharp year-on-year rise of 84 percent was noted for Indonesia.

Global tuna imports

Frozen skipjack -25% ↓

Frozen yellowfin +20% ↑

Cooked tuna loin imports

Thailand +16% ↑

European Union +33.87% ↑

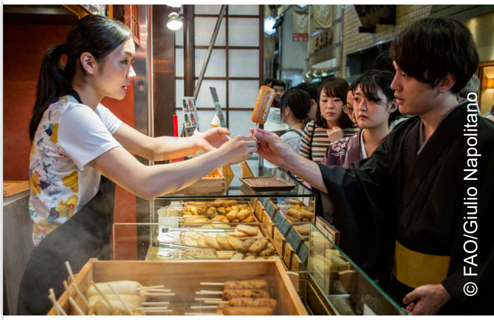
Fresh and frozen tuna (non-canned)

Global trade of the higher-value fresh and frozen non-canned tuna started to recover from February until May 2025 in conjunction with celebrations linked to welcoming the Lunar New Year in Southeast Asia and the Far East. Business in the restaurant and catering trade was brisk during this period in Japan, China, Taiwan Province of China, the Republic of Korea, Singapore, Malaysia and Thailand.

Japan

This year's cherry blossom (late March to early April) and the Golden Week (late April to early May) celebrations in Japan were rewarding for the hotel, restaurant and catering (HORECA) sector as a record number of foreign tourists visited the country during this period to join the festivities. This trend continued during the summer months of June to August, with the Japan National Tourism Organization reporting approximately 21.5 million visitors from January to June. Consequently, unlike previous years, the post-Golden Week demand for sashimi tuna at the Toyosu auction market was steady during January–June 2025, notwithstanding lower demand from local consumers in June because of the hot weather.

The "Golden Week" is a collection of four Japanese national holidays (*Shōwa* Day, Constitution Memorial Day, Greenery Day and Children's Day) within a seven-day period, falling this year from 29 April to 5 May. Along with the Spring Festival celebrations, overall business was boosted for high-value seafoods, including tuna, in the catering and restaurant trade.



During January–March 2025, Japanese imports of fresh and frozen tuna, including fillets, increased by 13.26 percent year-on-year at 55 251 tonnes, which was the highest volume in five years. This positive trend continued into Q2 2025, bringing the total import volume in the first half of 2025 to 148 904 tonnes (131 606 tonnes in H1 2024). Of this trade, 60–70 percent comprised higher-value non-canned tuna. The main users were supermarkets and the catering trade (restaurants, sushi outlets and family-style restaurants).

Overall trade of sashimi-grade tuna (bluefin, bigeye and yellowfin) reached a record high during the April–May Golden Week season. Reportedly, large requisition of imports was made for frozen tuna in advance during the first half of April.

Japan tuna imports

Fresh and frozen +13.26% ↑

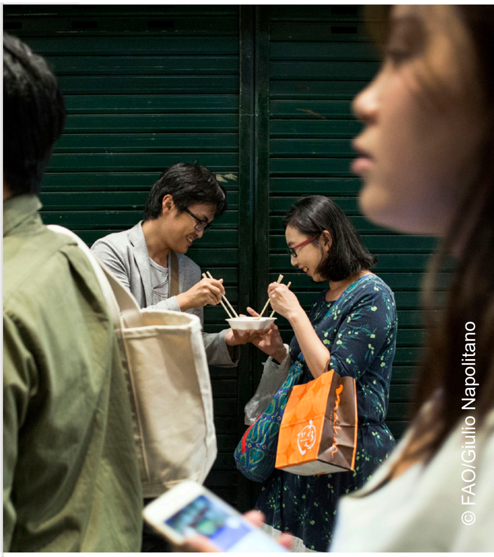
Japan imports of fresh and frozen tuna January–March (1 000 tonnes)

	2023	2024	2025	% change 2025/23
Fresh, Whole/dressed	965	869	671	-22.78
Frozen, whole	34 466	31 434	37 862	20.45
Fillet, frozen	11 354	16 478	16 718	1.46
Total	**46 785**	**48 781**	**55 251**	**13.26**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

Chinese tourist arrivals surge

According to the Japan Tourism Agency, Chinese tourists are driving a recent surge in the tourism sector, with their arrival rates exceeding the pre-pandemic 2019 levels. A total of 3.13 million Chinese nationals visited Japan during January–April 2025 in comparison with 2.89 million recorded during the same period in 2024. The monthly increases were 135.7 percent in January, 57.3 percent in February, 46.2 percent in March and 43.4 percent in April 2025, as compared to the same months last year. Previously, Chinese tourism in Japan was defined by large group tours and shopping sprees. These days, more travellers from China, especially younger people, are seeking experiences related to Japanese cuisine, culture and scenery.



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United States of America

Of the total imports of non-canned tuna into the United States during the first quarter of 2025, frozen tuna fillets/steaks had the highest share at 62.5 percent. The main suppliers were Indonesia, Viet Nam, Thailand, Japan and Taiwan Province of China. During this period, the market imported over 10 000 tonnes of frozen tuna fillets, 43 percent higher than the volume in the same period last year. In addition, 15 tonnes of high-priced whole frozen bluefin (generally used in Japanese restaurants) were imported during Q1 2025.

Consumer demand for high-value tuna in the US market is rising and in the first quarter of 2025, the country remained the world's largest importer of air-flown fresh tuna. A total of 3 220 tonnes of yellowfin, bluefin (1 500 tonnes) and bigeye (937 tonnes; 747 tonnes in Q1 2024) were imported from Mexico, Panama, Brazil, Spain and Costa Rica.

USA imports of fresh and frozen tuna
January–March (1 000 tonnes)

	2023	2024	2025	% change 2025/23
Fresh, whole/dressed	5 500	5 167	5 874	+13.68
Frozen, whole	1 116	1 150	915	-20.43
Fillet, frozen	7 656	7 661	10 308	+34.55
Total	**14 272**	**13 978**	**17 097**	**+22.31**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

Fresh and frozen tuna imports

United States +22.31% ↑

European Union

During the first quarter of 2025, EU imports of whole dressed frozen tuna (Atlantic/Pacific bluefin, Southern bluefin and bigeye) and frozen tuna fillets increased to 52 934 tonnes and 12 336 tonnes, respectively. However, imports of fresh air-flown tuna weakened by over 45 percent from 6 223 tonnes in Q1 2024 to 3 398 tonnes in Q1 2025.

European Union: imports of fresh and frozen tuna January–March (1 000 tonnes)

	2023	2024	2025	% change 2025/2024
Fresh/chilled, dressed	4 219	6 223	3 398	-45.40
Frozen, whole and dressed	37 223	48 566	52 934	+ 9.00
Frozen, fillets	7 858	9 719	12 336	+26.80
Total tuna, fresh and frozen	**49 300**	**64 508**	**68 668**	**+ 6.35**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

Fresh and frozen tuna imports

European Union +6.35% ↑

China

The strong growth in China's domestic tourism continues to create good business opportunities in the restaurant sector, including for sashimi trade. Demand for high-value non-canned tuna remains strong in China, particularly from the large Japanese restaurant chains, which are showing increased interest in fresh air-flown tuna and frozen tuna fillets. Fresh tuna imports in China increased by 35 percent in the first half of 2025, reaching 693 tonnes. Atlantic bluefin tuna, primarily sourced from the Mediterranean, accounted for most of the volume at 573 tonnes followed by Southern bluefin tuna from Australia at 109 tonnes. With the recent lifting of restrictions on seafood imports from Japan, further growth in supply is anticipated in the coming months.

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.

Fresh tuna imports

China +35% ↑

Canned/processed tuna

The international trade of semi-processed raw material (cooked frozen loins) and ready-to-eat prepared tuna (HS code 160414) was at a five-year high at 454 000 tonnes during the first quarter of 2025, up by 25 percent year-on-year. The estimated share of semi-processed raw material (cooked frozen loins) in this trade was nearly 23 percent, for which the main buyers are tuna canners in Europe and Thailand.

Exports

During January–March 2025, global exports of semi-processed raw material (cooked frozen loins) and ready-to-eat tuna products increased in comparison with the same period in 2024. Among the top supply sources, Thailand and Spain mostly exported ready-to-eat products whereas Ecuador, China, the Philippines and Viet Nam increased their shipments of cooked frozen loins to Europe and Thailand.

In the period under review, canned tuna exports from Thailand rose by 5.26 percent as compared to Q1 2024; significant rises were also noted for Ecuador (+14.73), China (+13.43) and Indonesia (+12.80) The export growth in Ecuador, China and Indonesia was credited to the increased supplies of cooked frozen tuna loins to European canners.

Canned and processed tuna exports

Thailand +5.26% ↑

Ecuador +14.73% ↑

China +13.43% ↑

World top exporters of canned/processed tuna, January–March (1 000 tonnes)

	2023	2024	2025	% change 2025/24
Thailand	114.60	133.52	140.77	+5.26
Ecuador	53.16	67.32	77.24	+14.73
China	21.84	34.25	38.85	+13.43
Spain	26.05	27.21	27.32	+0.40
Philippines	21.26	25.69	24.71	-3.81
Indonesia	17.96	17.78	20.05	+12.80
Netherlands (Kingdom of the)	12.83	14.64	12.50	-14.59

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

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

	2023	2024	2025
Canned or preserved tuna			
United States of America	21.47	27.14	31.02
Libya	8.70	10.55	13.40
Egypt	5.46	7.44	11.21
Other countries	78.97	88.40	85.15
Total imports	**114.60**	**133.52**	**140.77**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

Imports

The non-producing countries (mainly the United States, the United Kingdom of Great Britain and Northern Ireland, Australia and Canada) were the top importers of end-products in Q1 2025. In the European Union, significant quantities of ready-to-eat tuna products were absorbed, mainly through intra-EU trade. Imports also increased in the Latin American markets of Colombia, Chile, Peru and Argentina in favour of Ecuador, the leading exporter to this region.

World top importers of canned/processed tuna, January–March (1 000 tonnes)

	2023	2024	2025	% change 2025/24
Spain	50.85	50.30	69.96	+89.96
United States of America	57.40	52.02	64.51	+24.01
Italy	41.85	32.42	42.19	+29.93
Germany	20.85	23.86	26.98	+13.02
United Kingdom	21.23	17.91	25.37	+41.34
France	23.59	19.33	23.72	+22.80
Netherlands (Kingdom of the)	12.72	15.32	19.59	+27.45

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

The Americas

Canned and processed tuna imports in the United States, mostly ready-to-eat products, increased by 25.50 percent at 64 512 tonnes during the first quarter of 2025 over Q1 2024, representing a five-year high. The top exporter, Thailand, had a 50 percent share in the total, followed closely by Viet Nam and Ecuador. All three countries recorded historically high exports to the United States during the review period.

In January–June 2025, canned tuna imports in the United States showed 16.51 percent growth against the same period in 2024, with increased supplies from Thailand, Viet Nam, Ecuador and Mexico.

The other large markets in the Americas were Colombia, Chile, Peru and Canada, where imports increased during the January–March review period in favour of Ecuador (except for Canada, where Thailand dominated supplies).

Total imports in the 16 Latin American markets during the review period amounted to 51 544 tonnes.

Canned tuna imports

United States +25.5% ↑

The Americas: Canned tuna imports, January–March, in tonnes

	2022	2023	2024
United States	57 395	52 020	64 510
Colombia	8 227	8 580	11 053
Chile	5 902	5 886	9 743
Peru	3 163	3 676	9 540
Canada	9 013	8 422	9 279
Argentina	5 030	6 233	7 291
Mexico	5 128	4 640	5 849
Dominican Republic	1 598	1 477	2 207
Costa Rica	1 048	1 249	1 717
Panama	1 572	1 486	1 704
Uruguay	665	857	974
Guatemala	592	892	841
Puerto Rico	548	626	655
Brazil	270	217	569
Nicaragua	462	486	427
El Salvador	194	378	396
Honduras	215	136	199
Paraguay	78	215	153
Total, Americas	**101 100**	**97 476**	**127 107**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

European Union

Processed tuna imports in the European Union increased significantly during the first quarter of 2025 at 225 558 tonnes, up by 27.84 percent year-on-year. Of this volume, 37 percent or 83 809 tonnes comprised semi-processed cooked frozen loins which were imported to produce higher-value end-products in Spain, Italy, Portugal and France. Supplies of cooked loins to the EU markets increased from China, Indonesia, Ecuador, Philippines, Viet Nam and Papua New Guinea.

In general, consumer demand for ready-to-eat tuna has been strong in the producing countries in Europe. During the first quarter of 2025, the intra-EU trade of processed tuna was recorded at 65 000 tonnes, including re-exports of cooked loins. Outside of the European Union, the other traditional markets in the continent are the United Kingdom and Switzerland.

Processed tuna imports

European Union +27.84% ↑

European Union: Imports of prepared and preserved tuna, January–March, in 1 000 tonnes

	2023	2024	2025
Canned or preserved tuna			
Ecuador	26.58	32.95	47.87
China	23.08	29.03	30.39
Spain	28.01	26.20	28.31
Other countries	105.92	88.28	118.67
Total imports	**183.60**	**176.46**	**225.24**

Source: Author's own elaboration based on GTT. 2025. Global Trade Tracker. [Cited 1 July 2025]. www.globaltradetracker.com

NENA (Near East and North Africa)

Q1 2025 imports of canned tuna in the Near East and North Africa region were stable in the large markets of Libya, Egypt, Saudi Arabia, Jordan and Kuwait, but softened in the United Arab Emirates, Yemen and Iraq. This trend is likely to persist in view of low catches in the Pacific and some firmness in raw tuna prices.

Asia-Pacific

Japan is the largest import market for canned tuna in the Asia-Pacific region. During the first quarter of this year, canned tuna imports increased in Japan by 6.66 percent at 16 518 tonnes in anticipation of increased summer demand. Australia showed a weaker trend in imports during January–March 2025 at 11 900 tonnes, which is almost the same quantity imported last year. Imports in Malaysia increased by 6 percent at 2 245 tonnes.

Canned tuna imports

Japan +6.66% ↑

Malaysia +6% ↑

Prices

The July–September FAD fishing closure in the Central and Western Pacific Ocean is keeping tuna catches relatively low. However, subdued demand from Thai tuna canners has kept skipjack prices steady at around USD 1 500/tonne (CFR Bangkok) during June–August. Frozen skipjack imports declined in Thailand during the second quarter of 2025 while cooked loins seemed to be more in demand among the Thai tuna canners.

Outlook

Tuna catches in the WCPO (Western and Central Pacific Ocean) will be seasonally low till September because of the FAD fishing closure. Meanwhile, the supply/demand equation will dictate raw material prices in the international trade.

In Japan, the sashimi tuna trade is expected to be sluggish in September but will improve thereafter through the rest of the year when more foreign tourists are expected to visit the country.

Another factor that is expected to impact domestic consumers in Japan is the fact that about 2 000 food items have started to see price increases from July 2025. According to private research firm Teikoku Databank, prices for over 200 products in Japanese supermarkets (particularly processed foods such as pre-cooked rice, pasta sauces, and others) are affected.

Meanwhile, in the United States, sushi restaurant operators have cautioned consumers of price rises because of the high tariffs on imported seafood from late August.

In the European Union, the positive market trend for semi-processed and processed tuna continued during January–June 2025 with a 12.82 percent rise in imports. This may lead to some softening in imports during the third quarter of the year.