

The European market potential for fresh tuna

Last updated:
10 March 2021

Fresh tuna is a high-value product with demand mostly concentrated in Southern Europe (Spain, France and Italy). However, there is also a potentially good demand from trading nations in Northwestern Europe such as Belgium and Germany, which re-export their products to other European countries. Most of the fresh tuna imported by Europe from developing country exporters is yellowfin tuna. In order to sell your products to Europe, quality, sustainability and traceability of your fresh tuna are key areas to cover as an exporter.

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1. Product description

Tuna is part of the mackerel family (Scombridae) and the perch-like order (Perciformes). There are several types of tuna varieties that are used in the fresh tuna business. However, for exporters from non-European countries, the most relevant species to look at is yellowfin, followed by smaller quantities of Atlantic bluefin, Albacore and Bigeye tuna.

Unlike other types of tuna products like canned tuna or frozen tuna, fresh tuna is a special product with equally special requirements to maintain its colour, freshness and quality. Fresh tuna is usually distributed as loins in vacuum, from which steaks are made. Working with complete loins ensures a better quality and longer shelf life. Depending on the end market, each loin weighs about 2 to 4 kilogrammes. In retail, the loins are often packed in Modified Atmosphere Packaging (MAP), which also ensures longer shelf life.

Figure 1: Fresh yellowfin tuna imported from Sri Lanka to the Netherlands



Source: Vishandel Amsterdam

When 'fresh tuna' is referred to in this survey, this concerns all the [Harmonised System](#) codes listed below:

030232	Fresh or chilled yellowfin tunas (<i>Thunnus albacares</i>)
030231	Fresh or chilled albacore or longfinned tunas (<i>Thunnus alalunga</i>)
030235	Fresh or chilled Atlantic and Pacific bluefin tuna (<i>Thunnus thynnus</i> , <i>Thunnus orientalis</i>)
030234	Fresh or chilled bigeye tunas (<i>Thunnus obesus</i>)
030233	Fresh or chilled skipjack or stripe-bellied bonito

In this study, Europe refers to the EU28, which refers to the [28 member countries of the European Union](#). The data used were extracted in 2019 when the United Kingdom was still part of Europe.

2. What makes Europe an interesting market for fresh tuna?

Tuna is an integral part of the diet of millions of Europeans. In fact, tuna is the most consumed marine species in Europe. In 2019, Europe sourced 85% of its fresh tuna imports from within Europe (24,149 tonnes). The remaining 15% came from non-European countries (4,390 tonnes). Despite a niche and limited demand, it could offer an interesting opportunity for developing countries to explore the market.

Tuna is the most consumed marine species in Europe

A [2019 study](#) of the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) shows that tuna is the most consumed marine species in Europe, followed by cod, salmon and Alaska pollock. Tuna consumption in the EU is reportedly 3.07 kg per capita, an increase from 2018 which reached 2.78 kg per capita. Of all the tuna consumed by Europeans, 99.2% is wild-caught and only 0.83% is farmed.

While most of the tuna consumed in Europe is usually canned, there is already a strong affinity for tuna in Europe, a trend which is supported by the increase in imports both from within Europe and from non-European countries.

With the onset of the COVID-19 pandemic, this affinity towards tuna has also increased. It is a familiar fish that is easy to prepare and known to many Europeans. This presents plenty of opportunities for non-European tuna producers to enter the European market and sell fresh tuna.

Fresh tuna is mostly consumed in the food service sector and can be bought in specialised retail stores in fresh or refreshed (defrosted) forms. With limited food service sector opportunities due to quarantine measures, more Europeans are turning to home cooking and experimenting with high-value seafood in their homes. This means that exporters can further explore this niche market for fresh tuna in Europe.

Tips:

Read the 2019 [EUMOFA report](#) The EU Fish Market to learn more about tuna consumption in Europe and adapt your business strategy accordingly.

Check huge European retailers such as Lidl, Aldi, Carrefour, Sainsbury's or Albert Heijn which sell fresh tuna (sushi forms) in their portfolio.

Growing demand for fresh tuna in Europe

As more restaurants and retailers offer fresh tuna in their portfolio, the demand for fresh tuna is also growing in Europe. Many Asian restaurants, especially Japanese, offer tuna-based menus that rely on fresh tuna such as sushi or sashimi to serve to their customers. As these restaurants become more numerous around Europe, more European customers are also exposed to these types of products, hence increasing the demand for these products, too.

This increased demand translates into the overall imports of Europe in 2019, which reached 28,538 tonnes, 55% more than the imports in 2015. Looking at the yearly imports, there is an increasing trend for imports of fresh tuna. However, exporters should note that 85% of the European market share is dominated by European countries. The remaining 15% comes from non-European countries. Despite the low market share from non-European countries, the demand from third countries has been increasing since 2017. In fact, it has grown from 3,944 tonnes in 2015 to 4,390 tonnes in 2019, an 11% increase over 4 years.

Specifically, there is potential in exporting fresh yellowfin tuna and Atlantic bluefin to Europe. Imports of yellowfin tuna (the largest volume of tuna imported by Europe from non-European countries) increased from 2,883 tonnes in 2017 to 3,303 tonnes in 2019. Atlantic bluefin, mainly sourced from Japan, increased from just 31 tonnes in 2015 to 663 tonnes in 2019.

There are 2 main reasons why European importers prefer buying from within Europe. It is cheaper and faster. As fresh tuna needs some care and quality in order to maintain its freshness, nearby countries (mainly France and Spain) have an advantage over non-European countries in terms of transport costs and time of delivery.

According to the latest [EUMOFA report](#), Spain, the EU's main tuna-landing country, accounted for 88% of total volumes and 82% of total value in 2017. The country was thus responsible for the European trend, as national landings increased 1% from 2016, reaching 300,259 tonnes, but with a 3% drop in value, to EUR 804.57 million.

In 2017, yellowfin tuna was among the top 5 species landed in the EU in terms of value and represented 29% of the total value of all tuna.

- Learn more about European tuna landings by looking into Eurostat data on [European tuna catches in major fishing areas](#).

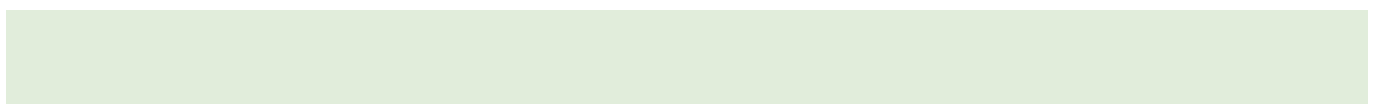
Strong opportunity in sustainable products

European consumers are becoming increasingly aware and demanding about tuna's sustainability. This makes it an interesting market for developing countries that can ensure their products are sustainable.

The Marine Stewardship Council (MSC) is the most recognised and accepted certification to attest for your product's sustainability. It requires tuna fisheries to:

- Have healthy and robust stocks;
- Cause minimal impact to the ecosystem;
- Cause minimal impact to other animals, including bycatch.

In 2018, 16 tuna fisheries were MSC-certified, with 7 fisheries in assessment. MSC-certified fresh tuna is mainly caught in the Pacific Ocean. Albacore, yellowfin and skipjack are the most caught tuna species by MSC-certified fishing companies. European companies, including Sainsbury's, Lidl, Carrefour, Aldi and Ahold Delhaize, have also restructured their supply chains to allow them to commit to MSC-certified seafood.



Tips:

To better understand the European consumer, read [this study](#) from MSC GlobeScan.

Attend the [Seafood Expo](#) and [Conxemar trade fairs to meet buyers and suppliers](#) of fresh or frozen tuna and learn more about your competitors and potential customers. The annual Seafood Expo in Belgium is an ideal place to meet buyers from all over the world. Conxemar is the biggest seafood trade show in Spain, usually held in October, if you want to know more about the Spanish and Southern European fish and seafood industry.

Most European buyers prefer MSC-certified products. To verify which fisheries are MSC-certified, simply visit their [website](#), which also explains the certification process in detail.

3. Which European countries offer the most opportunities for fresh tuna?

The top destinations for fresh tuna are located in Southern Europe, particularly in Spain, Italy and France. There is also a growing opportunity in exporting to trading nations in Northwestern Europe such as Belgium and Germany. This means these countries import products for re-export within Europe. In this section, we will focus mostly on yellowfin tuna, as this presents the biggest opportunity for developing country exporters for the fresh tuna segment compared to other types of tuna. It represents 75% of the fresh tuna imported into Europe from non-European countries, followed by Atlantic bluefin, which holds 15% of the share. This segment is already dominated by Japan. For skipjack tuna, which is mainly sold to Europe as fresh pre-cooked loins for the canning industry, refer to this [CBI study](#).

France

France is Europe's leading importer of fresh tuna from non-European countries and imported a total of 1,707 tonnes in 2019. This number grew from 1,592 tonnes in 2017.

French customers are very particular on the sustainability of the yellowfin tuna. As they also have a huge fishing fleet, they know the standards and quality that fresh tuna should have. Despite having a huge production of its own, France imports 71.4% of its fresh tuna from non-European countries, particularly from Maldives, Sri Lanka, Ivory Coast and the Philippines. France has a long-standing relationship in trade with these countries, particularly since it already has established trade routes in these developing countries. Ivory Coast, for example, formerly a French colony, has entered into fishing agreements with France and other European countries such as Spain and Portugal. France also has an important influence on its fishing fleets, which are mostly made and outfitted in France.

Maldives has been the most important extra-European Union supplier of yellowfin tuna to France. Maldives' artisanal fishermen usually catch their fresh yellowfin using the handline method from the Indian ocean, which is considered 1 of the least disruptive methods and a sustainable way to fish tuna. Check out the [Market Entry study for fresh tuna](#) to learn more about these countries and their exports to Europe.

Tips:

French retailers prefer to sell fresh tuna steaks of about 150-200 grammes in [MAP](#) packed trays.

Check out [Carrefour](#) or [Intermarché](#) in France to see their portfolio of fresh tuna.

Spain

Spain is the third-largest importer of fresh tuna in Europe with 968 tonnes imported in 2019, after Italy and France. However, this country presents a huge potential for non-European countries to explore, as it imports 84% of its fresh tuna purchases from non-European countries, and this number has been growing steadily over the past years. Of the 968 tonnes it imported in 2019, 818 tonnes came from non-European countries. Like France, these imports mainly come from Maldives and Sri Lanka.

Like Italy, Spain has a huge tuna processing industry of its own, and many canners and packers who work in the tuna industry are already very much acquainted with each other. The Spanish industry's love for tuna is deeply ingrained in its economy and culture. This is good news for exporters who want to target not only the fresh tuna segment, but also other types of tuna products.

Tips:

Companies like [Scanfisk Seafood](#) from Spain are specialised in this processing with sales to the retail chains. Higher-level restaurants are their main customers. You can also check out big retailers such as El Corte Inglés/[Supercor](#) in Spain.

Check out the [European Tuna Conference](#) which will be held in Barcelona, Spain in 2021. This is a good networking opportunity to learn about the European tuna market as well as meet the top industry players.

¿Hablas español? If you do not speak Spanish, make sure to hire a Spanish-speaking mediator to effectively negotiate and deal with Spanish companies.

Read the CBI study on [canned fish](#) and [pre-cooked tuna loins](#), which features Spain as an important European player.

Italy

Italy is the largest importer of fresh yellowfin tuna with 2,395 tonnes in 2019. Despite importing the largest volumes of fresh tuna, it mainly sources its tuna from within Europe. Of the 2,395 tonnes it imported in 2019, more than 90% or 2,157 tonnes were from Europe itself. With a total of 238 tonnes, it is the third-largest importer from developing countries.

The volume has been increasing over the previous 4 years. In 2015, Italy was only second to France in importing fresh tuna, with a total of 1,225 tonnes, but its appetite kept growing. In 2019, Italy overtook France as the main importer of fresh tuna in Europe.

Italians have a huge affinity for fresh tuna. They incorporate fresh tuna in many of their dishes, such as pasta, rice or eaten on its own as a grilled tuna steak. They are usually served in restaurants or on cruises or can be sold fresh in wet fish markets or high-level supermarkets.

Belgium

Belgium is not a major player in fresh tuna imports, but it imports 85% of its fresh yellowfin from non-European countries. Of the 231 tonnes it imported in 2019, 197 tonnes were imported from third countries. While the volumes may be low, do not underestimate the power and influence of a trading country when it comes to introducing your products to other European countries, which could potentially be your new markets. Some of

its re-export markets include the Netherlands and France.

Belgian buyers used to import their fresh tuna from within Europe. However, they have shifted to buying from non-European countries such as Maldives and Sri Lanka.

Germany

German buyers went from importing 45 tonnes of fresh tuna in 2015 to 147 tonnes in 2019. They are steadily importing more fresh tuna for re-exports to other European countries. Like Belgium, Germany is also a trading nation, which mainly re-exports the fresh tuna to nearby countries such as the Netherlands or Austria.

While Germans are not huge seafood consumers, there is some potential in tapping into its local market. Germany's tuna market has shown promising growth over the years as the lifestyle of Germans changes and the consumption of red meat decreases. Meanwhile, seafood consumption has been steadily rising among Germans, from 1.11 million tonnes in 2013 to 1.15 million tonnes in 2016.

4. Which trends offer opportunities on the European fresh tuna market?

Fresh tuna in Europe may be a niche market for many developing countries, as they only hold a small percentage of this market. However, as European consumers turn to home cooking and sustainable seafood, there is an opportunity to tap into this market.

Fresh tuna is finding its way into people's homes

The impact of COVID-19 on the demand for fresh tuna has been huge, as the places where this fish is mainly served are fully or partly closed down (restaurants, hotels and caterers). However, fresh tuna has found its way into retail, as more consumers start experimenting and preparing their own food. These fresh tunas are usually found in the take-out menu of Asian restaurants (which could not serve many guests at the moment due to social distancing measures) or in supermarkets in the form of sushi or sashimi packages.

Globalisation and immigration are also factors that affect the European consumer's palate, as more people learn about other cuisines. The proliferation of Asian restaurants has also sparked interest in fresh tuna and how it can be consumed in a number of ways, apart from the traditional grilled tuna steaks found in Southern European countries.

Figure 4: Raw tuna served in a restaurant in the Netherlands



Tip:

See what kinds of sushi and sashimi are trendy among Europeans. For example, when you talk to your buyers, consider offering them various ways to incorporate fresh tuna in their menu, whether in poke bowls or in sushi forms.

Europeans love fresh and sustainable tuna

According to a Marine Stewardship Council (MSC) GlobeScan study, [sustainably sourced and environmentally friendly seafood products are ranked just above price as a purchase motivator](#), a consideration that is unique in the European market. Awareness is strong in Europe, particularly in Switzerland, Austria and Germany. [In a 2018 study about MSC labels](#), a 47% share of European consumers recalled seeing the MSC label, up from 43% in 2016.

Getting an MSC seal is the best way to ensure that your product is sustainable and is thus an opportunity to sell more, especially since MSC seals/ecolabels are becoming a crucial market entry requirement in Europe.

If your fishery is not yet MSC certified, consider the possibility of starting a fishery improvement project (FIP). A FIP is a major step for tuna businesses to achieve the sustainability practices required to meet certification standards. FIPs are supervised by non-governmental organisations (NGOs) such as the World Wildlife Fund (WWF) and the Sustainable Fisheries Partnership (SFP). WWF, for example, invests more than US\$10 million a year in tuna projects. Currently, there are 141 FIPs in progress, of which 37 include tuna.

Tuna FIPs are supported by various entities and stakeholders, but are mostly implemented with the help of NGOs and industry groups. As an alternative to MSC, you can also look into the [Friend of the Sea](#) certification, which is more popular in Southern Europe. In 2018, 15 fisheries were Friend of the Sea certified and 3 were pending. Their required fishing methods include hand line and purse seine for mostly yellowfin, bigeye and skipjack.

Tips:

Check the [Fishery Progress](#) website to verify the status of current FIPs. It is important to note that FIPs have to update their information on the site every 6 months.

To apply for a Friend of the Sea certification or to verify if a fishery or fleet is certified, visit [the Friend of the Sea page](#). If you are new, the website also offers a step-by-step certification procedure.

An example of why sustainability is a truly important factor in fishing for tuna is Maldives. In 2016, Maldives' MSC certification for yellowfin tuna was suspended, which also affected its tuna trade with Europe. However, a recent [report](#) stated that Maldives' yellowfin catch was reduced by almost 8,000 tonnes in 2019 compared to 2015, in order to allow the yellowfin stocks to rebound in the Indian Ocean. Maldivian fishermen, processors and the government joined forces in 2019 for 3 national campaigns dedicated to reducing yellowfin tuna catch, with a strong focus on reducing the amount of juveniles acquired, the report stated.

Europeans care about responsible fishing

Exporters looking into dealing with European buyers must be aware of Europe's strict regulations on illegal fishing. European buyers care about your products being fished responsibly and legally. If you are confident about the way your product is fished, this is something you can use to your advantage in terms of marketing your products towards European buyers. For example, you can highlight stories about responsible fishing and efforts against illegal, unreported and unregulated fishing (IUU). This could convince your buyer to make you their preferred supplier.

Here are the things you need to know. As 1 of the world's largest import markets for fisheries products, Europe is very active in combating IUU fishing activities. Europe's regulation against IUU fishing entered into force in 2010 and applies to all landings and transshipments of fishing vessels in European ports and all trade of marine fishery products to and from Europe. Non-EU countries which have difficulties fulfilling their obligations in fighting IUU fishing and fail to cooperate with EU's policies will be issued a yellow card warning. This is part of a pre-identification process in which a formal dialogue is carried out between the European Union and the third country to solve problems. If these exchanges go well, the third country may be issued a green card and the warning lifted. If not, a red card all-out ban of all fisheries products from that country entering Europe will be imposed.

Tips:

Know your country's status. Check this [link](#) for a full overview of all past and ongoing procedures against IUU fishing.

Partner with fisheries that commit to battling IUU fishing. To prove that your fish have been caught legally, make sure that your product has the right CATCH certificate.

Stay updated on the developments against IUU fishing in Europe. In May 2019, the Commission launched [CATCH](#), an IT system that aims to digitalise the currently paper-based European catch certification scheme as laid down by Regulation (EC) No 1005/2008.

Traceability becomes more important

European buyers are becoming more demanding of traceable products. If you can offer traceable products, it will allow your buyers to be more confident about your product and to build trust with their customers. This can help you sell more fresh tuna.

A traceability system allows the buyer and/or consumer to track the origin of the product. In the case of fresh tuna, traceability means knowing in which part of the ocean the fish was caught, which fleet/country was responsible for catching the fish and the succeeding steps until the fish is served in restaurants or found in supermarkets. In Maldives, for example, they use a QR code scanner and blockchain technology to monitor the supply chain of their skipjack or yellowfin tuna.


Through the use of QR tags and scanning devices, information is collected about the tuna's journey at various points along the supply chain. Tracking will start as soon as the tuna is caught, and data will also be collected during its landing and processing.

This study has been carried out on behalf of CBI by [Seafood TIP](#).

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