

Exporting fresh tuna to Europe

Fresh tuna is a high-value product in the European market. Most of the fresh tuna imported is Yellowfin and Albacore tuna. The top three markets are Spain, France and Italy. Growth markets are Portugal, Belgium, United Kingdom and Italy, due to the growing popularity of Sushi in several parts of Europe.

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1. Product description

In taxonomy, tuna is part of the mackerel family (Scombridae) and the perch-like order (Perciformes). This cruiser with a torpedo-like body can migrate efficiently through the (deep) ocean. Most of the time, tuna schools move in same-sized groups. There are several types of tuna varieties, this survey will include the following species:

- Yellowfin, also known as 'ahi' is a tuna with yellow fins. Yellowfin can be found in cans or as fresh and frozen in steaks form, loins, fillets or whole,
- Albacore, pale flesh tuna which can be mainly found in cans, but also as fresh or frozen,
- Bluefin, the biggest tuna species which is mostly used in sushi,
- Bigeye, also known as 'ahi' is a big tuna which is sold as tuna steaks and sushi,
- Skipjack, most common and relatively small tuna specie mostly sold as canned tuna.

When 'fresh tuna' is referred to in this survey, this concerns all the [Harmonised System](#) codes in Chapter 0302, paragraph 3. This means it only concerns fresh whole round tuna, and not tuna fillets and other tuna meat.

Quality

For tuna, there are 4-5 quality criteria that determine the quality and thus the price of the product. These categories are freshness, size and shape, colour, texture, and fat content.

It is good to know what specific product your buyer prefers and for which end-user the product is intended. Because each client has its own requirements.

Tips:

Discuss with your buyers what specifications they want. By sending tuna with the preferred specifications, you can strengthen your relationship.

For more information about grading of tuna, you can buy the [Tuna grading and evaluation book](#).

Transport, processing and packaging

Fresh tuna is transported in crates, chilled in ice on zero degrees Celsius. Packaging requirements for processed tuna differ widely between customers and market segments. It is therefore crucial for you to conduct

discussions with your customers about their preferred packaging requirements. Some general characteristics for tuna are:

- Sold mostly as loins and steaks. Steaks are mostly processed and pre-packed in Europe itself according to retailer specifications.
- Retail packaging: Mostly in trays with a plastic filter. Portions vary between 100 and 500 grams.
- Wholesale packaging is mostly delivered in 2-5 kg loins vacuum-packed or whole (headed and gutted).

Labelling

There are specific labelling requirements for fish sold in the European Union. In addition, under new rules that went into effect in December 2014 (Directive No. 1379/2013), labels must provide precise information on the harvesting, used fishing gear, and production of the products. This applies to all unprocessed seafood, as well as to some processed seafood, regardless of whether it is pre-packed. The information must be provided on the labelling or packaging of the fishery product. Or by means of a commercial document accompanying the goods.

Tip:

See our study [EU Buyer requirements for Fish and Seafood](#) for more information about labeling requirements.

2. Which European markets offer opportunities for exporters of fresh tuna?

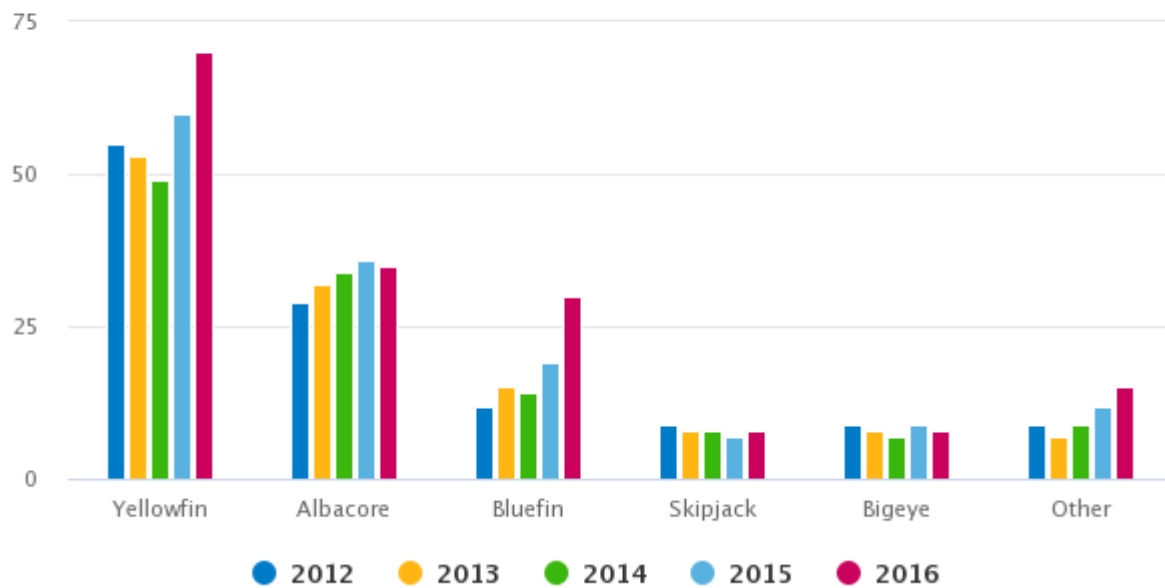
The lion share of tuna consumed in Europe is imported from countries outside Europe. There is only local supply of bluefin tuna in Southern Europe, but a large share of that bluefin tuna is exported to countries outside Europe, especially Japan.

Imports

European imports of fresh tuna increased by 5.2% per year on average in 2012–2016. In 2016, European countries imported a total of €142 million of fresh tuna. Yellowfin tuna was imported the most (€70 million), followed by albacore (€35 million) and bluefin tuna (€30 million). The three species with the largest imports all registered significant average annual growth rates in 2012–2016.

Figure 1: European import of fresh tuna by main origin

2012-2016



Source: Trademap 2017

France took over the leading importer position within Europe from Spain in 2016. From 2012 to 2015, Spain was the main importer. The difference in import value between the two leading importers remains small (€36 million versus €35 million). Italian imports grew sharply in 2016. At €33 million, the country's imports were almost as large as traditional import leaders France and Spain.

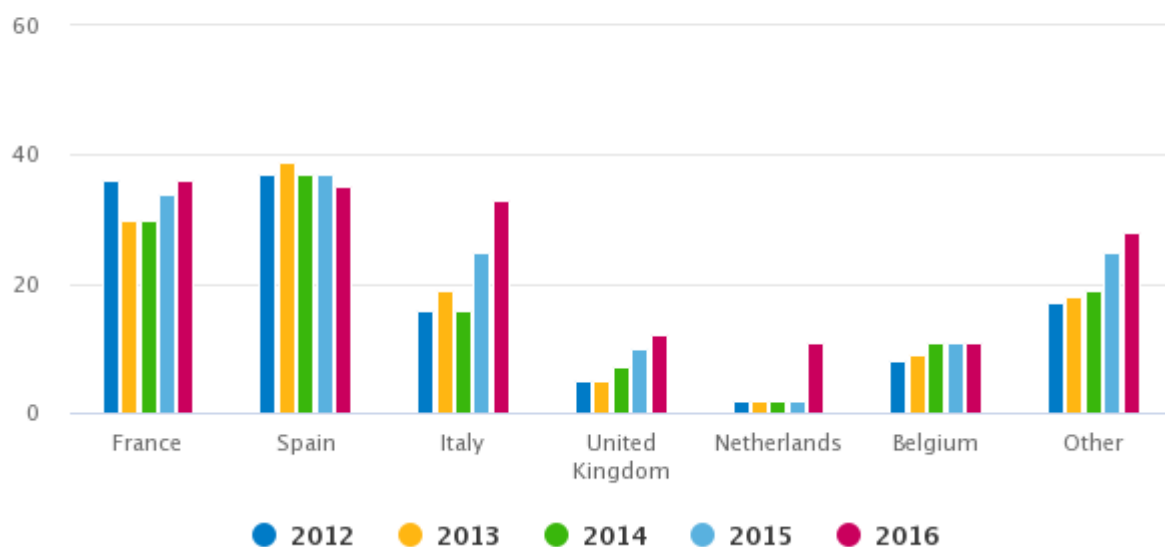
United Kingdom, the Netherlands and Belgium complete the top six. All three countries imported around €10 million of fresh tuna in 2016. The Netherlands making the list of European importers with the largest imports of fresh tuna is remarkable. Imports to the Dutch market were five times larger than in 2015.

Besides the strong growth performance in the Netherlands, average annual import growth in 2012-2016 is very positive for Italy (20%) and United Kingdom (23%). France recovered in 2015 and 2016 from a serious decline in imports in 2013. Because of the growth of 6.6% in 2016, France claimed the leading importer position.

France has been the main importer of Yellowfin tuna (€21 million in 2016) for many years, whereas Spain is the main importer of the other tuna species (€30 million). French Yellowfin tuna imports were hit during 2013 and 2014 by a worldwide scarcity of Yellowfin tuna until mid-2013 (declines of 12% and 15% in 2013 and 2014 respectively), but in 2015 imports recovered to a large extent (+17%), while keeping level in 2016. Spain is less dependent on Yellowfin tuna, so Spanish imports were less affected by the Yellowfin scarcity.

Figure 2: Leading European importing countries of fresh tuna 2012–2016

in € million



Source: Trademap 2017

An interesting note is the fact that world import prices for tuna were considerably lower in 2014 than previously, because of abundant supply versus stable demand. The lower prices did not affect consumption of tuna. Tuna processors (canneries) were buying larger quantities of raw material, and as such absorbed the extra supply. Compared to mid-2015, when there were lower supplies and inventories reported, prices have again shown an upward trend.

Leading suppliers

Spain, France, Italy, Ireland and the Maldives are the leading suppliers of fresh tuna. Together, they represented 76% of total European imports of fresh tuna in 2016. Other important suppliers are Greece, United Kingdom, Portugal and the Netherlands. Intra-European imports dominate the supply of fresh tuna to Europe (80%), followed by developing countries (18%) and the rest of the world (2%). Imports from developing countries were dominated by Maldives (€12 million), followed at great distance by Suriname and Sri Lanka (both €2 million). Spain and France are the only two countries in Europe that own purse seiners.

The Maldives has been the most important extra-European Union supplier of Yellowfin tuna since 2011, and is also the leading non-European supplier of fresh tuna to Europe (7% share in European imports). The Yellowfin fishery, mainly handline, benefits from the Generalised System of Preferences (GSP) preferences for this country.

Sri Lanka used to be the second largest non-European supplier (6.4% share in 2014). However, the market share dropped to 0.4% in 2015 as the European Union banned all imports of fishery products from Sri Lanka, including tuna. Due to non-compliance with Illegal, Unreported, and Unregistered fishing (IUU) regulations, this country lost access to the European Union. This shows the importance of the requirement that a legal and registered vessel has caught the tuna, proven by catch certificates. The European Union wants to protect endangered consumer species and it will implement stricter policies against IUU fisheries in the future.

Tips:

The TARIC database shows more details about import duties in Europe, also for Chapter [0302](#).

Take a look at national sector associations that provide a lot of information about active importers and exporters. Visit, for example, the website of [Dutch Fish](#).

You can find more information about the fish and seafood sector by visiting relevant websites and reading their publications such as [Seafish](#) (focused on the seafood industry of United Kingdom), [Infofish](#) which is a project of Food and Agriculture Organization (FAO) of the United Nations (UN) focused on the fishery industry of Asia-Pacific and [Globefish](#) (Global).

Relevant trade fairs for fresh tuna suppliers are [Conxemar](#) (Vigo, Spain) and [Seafood Expo](#) (Brussels, Belgium). [The European Tuna Conference](#) in Brussels, Belgium (in the same period as the Seafood Expo) may also be interesting for you.

Ensure that your fish is not from IUU fisheries. It is very important to hand over the right catch certificates with your products.

Visit the [EU Fisheries Portal](#) for more information about Europe's fight against IUU.

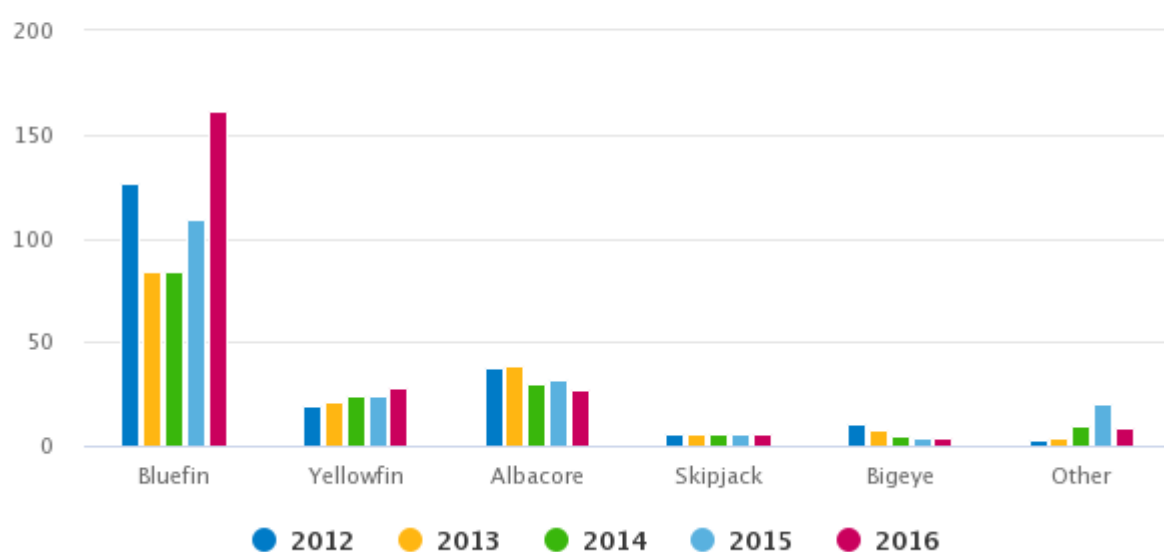
Exports

Total European exports of fresh tuna amounted to €236 million in 2016. The exports grew by 3.7% on average yearly in 2012–2016, primarily in 2015 and 2016. Exports increased by respectively 24% and 20% in these two consecutive years. Virtually all European tuna exports originate in Southern Europe, since that region hosts several tuna fisheries and aquaculture production facilities.

In 2016, bluefin tuna dominated exports (€161 million, 68% share of total export of fresh tuna). Albacore and yellowfin completed the exports top three, with respectively €28 million and €27 million exported value.

Figure 3: European export of fresh tuna, by species, 2012–2016

in € million



Source: Trademap 2017

Spain was the largest European exporter of fresh tuna until 2015 (€87 million, 45% of total European exports in 2015, declining to €66 million in 2016), but lost that position to Malta in 2016 (€72 million in that year). Other important exporters are Croatia (€27 million in 2016), France (€23 million), Italy (€11 million), Portugal (€8

million) and Ireland (€6 million). Japan is the foremost destination (€130 million in 2016), as this country receives the lion's share of bluefin tuna exported by Europe. Spain is the second export destination (€27 million), followed at some distance by Italy and France (€16 million and €12 million respectively), and the United States (€11 million).

In recent years, almost all farmed bluefin tuna has been exported to Japan. Exports to the United States are also growing (from €7.2 million in 2012 to €11 million in 2016). The high value of bluefin tuna exports is the result of the (Mediterranean) bluefin tuna farming in Southern Europe. These farms can supply high volumes of valuable products. Moreover, these farms are less criticised for sustainability issues than Asian bluefin since this form of farming has minimal impact on the global stocks of bluefin tuna. However, to make one kg of bluefin tuna, around 15.8 kg of fish feed is needed. Bluefin tuna farming is expanding worldwide.

Tip:

The [statistics website of the FAO](#) provides detailed information about the tuna catches of the different European Union Member States.

Production

Local production of tuna in Europe is limited. It is limited to bluefin tuna production in Southern Europe, originating from both tuna fisheries and aquaculture production facilities. Between 3,000-3,500 tons of tuna are farmed every year, while a volume of 420-480 thousand tons is caught. Less than 1% of this tuna 'production volume' is sold as fresh.

In Northern Europe, Ireland is an important producer of fresh albacore tuna (between 2.0-2.5 thousand tons per year).

Consumption

Yellowfin tuna is the most important tuna for all European countries. In Spain, Italy and France, there is also high demand for albacore tuna. Yellowfin tuna is mostly consumed as steaks, which are sold both fresh and frozen. The price differences between fresh and frozen are considerable, mainly because of the use of prime material for fresh tuna. More information is below ("What are the end market prices...").

Bluefin, Yellowfin and bigeye fresh tuna are mainly used as sashimi tuna (ingredient for sushi), and are estimated to represent 50% of fresh tuna consumption in Europe in 2016, which is roughly more than 11 thousand tons. This share is much higher in Northern and Western Europe, and lower in Southern European countries. Mostly in Northern and Western Europe this market has grown a lot in recent years, because there is a growing popularity for Japanese food and Sushi restaurants.

Tips:

Spain and France are the largest markets for fresh tuna, followed by Italy. Exporters should focus on these markets.

The priority tuna for the European market is yellowfin tuna, while for the focus countries also albacore tuna sales have good opportunities.

3. What trends offer opportunities on the European market for fresh tuna?

This chapter explains the most important trends for fresh tuna: sustainability and super frozen tuna. For trends related to frozen tuna, see our study [Trends on the European frozen tuna market](#).

Sustainability is the focus

Sustainability is becoming increasingly important in Europe, as consumers become more critical about where their food comes from and how it is produced or caught. As a result, especially retailers in Northern and Western Europe are demanding sustainable seafood.

An example of an organisation involved with sustainable fisheries is the Marine Stewardship Council (MSC). MSC strives to promote sustainable fishing and has its own certification program. Main components of sustainable fishing for tuna are:

- A healthy and robust stock,
- Minimal impact to the ecosystem of the marine,
- Minimal impact to other animals (by-catch), such as turtles.

Since most tuna species are migratory, it has been a challenging operation to get them MSC certified, but several fisheries managed in recent years. In 2018, 16 tuna fisheries are MSC certified, with 7 fisheries in assessment. MSC certified fresh tuna is mainly caught in the Pacific Ocean (areas 61, 67, 71, 77 and 81). Albacore, yellowfin and skipjack are the most caught tuna species by MSC certified fishing companies.

As an alternative to MSC, you can invest in Friend of the Sea (FOS) certification (more popular in Southern Europe) or Sustainable Fisheries Partnership (SFP). In 2018, 15 fisheries are FOS certified and 3 are pending. These fishing companies are mainly active in catch areas 51 and 57 (Indian Ocean), areas 34 and 41 (Atlantic Ocean) and area 71 (Pacific Ocean). Their main fishing methods are hand line and purse seine, while the species involved are mostly yellowfin, bigeye and skipjack.

Tips:

Visit the [MSC website](#) or [FOS website](#) and contact non-governmental organisations (NGOs) like SFP and World Wildlife Fund (WWF) to check how sustainable your tuna is.

Fishery Improvement Projects supervised by NGOs such as the WWF are interesting sources to go through before applying for a MSC certification.

Try to arrange a meeting with your most important buyers and NGOs to discuss possibilities for starting a fishery improvement project (FIP). Visit the [WWF website](#) or [SFP website](#) to find examples of tuna FIPs.

Visit the websites of important northern European retailers, such as [Ahold Delhaize](#) and [Aldi](#), to learn more about the importance they attach to sustainability.

Super frozen (blast freezing) tuna

The demand for super frozen tuna in high-end markets in Europe is increasing. By freezing tuna to minus 60 degrees Celsius, directly after the catch, the quality of the fish can be maintained. The advantage of this technology is the possibility for storing the fish. In times of scarcity, you can sell your stored tuna. Note that deep-frozen is still a niche market in Europe, as the distribution chain still has some bottlenecks such as a lack of cold stores with such temperature capacities.

Tips:

Discuss with partners whether it would be beneficial to invest in super frozen processing equipment in order to meet growing European demand for this high value product.

Watch further developments in deep frozen carefully. Follow the news on seafood news portals such as [Undercurrent News](#).

Make a plan with your buyer to find niche markets to sell your fresh tuna to Europe.

4. What requirements should fresh tuna comply with to be allowed on the European market?

Before you want to sell to European buyers, you need to fully understand the European Union's legal requirements that apply to your fish and seafood products. Understanding is the first thing, after that follows the route towards compliance. See our study [EU Buyer requirements for Fish and Seafood](#) to better understand the legal requirements and also additional requirements that European buyers may ask from you. Sustainability certification may be interesting for you as it guarantees you a head start into the market. The most important and specific requirement for tuna is sustainability certification.

Sustainability certification

Eco-labelled seafood products (or: sustainably certified products) have quickly gained market share in several European markets in recent years.

Handline fisheries are considered sustainable in Europe. Sustainable fishing is growing in importance and since 2014 Generalized System of Preferences (GSP) is also influenced by sustainability of the supply chain in the production countries.. This means that sustainably caught tuna can enter the European market at a lower import duty than unsustainably caught tuna.

Tips:

For more information about the sustainability certification, see abovementioned trend 'Sustainability is the focus'.

Relevant sources that may be helpful for you in gaining access to the European market are: [EU Trade Helpdesk](#) to find information related to European requirements, tariffs, statistics and preferential arrangements and the [ITC Sustainability Standards Map](#) for standards related to sustainability.

Check the main aspects of the new [European Union's GSP](#) via the European Commission website.

Common requirements

For fresh tuna, additional requirements are mainly requirements with respect to food safety. The most commonly requested food safety certification schemes for seafood products are [International Food Standard \(IFS\)](#) and (or) [British Retail Consortium \(BRC\)](#), and sometimes also [GLOBALG.A.P.](#)

Tip:

See our [10 tips for doing business with European buyers of fish](#) and seafood and our [10 tips for finding buyers in the fish and seafood sector](#). These tips also offer more information on which topics are decisive for European buyers when searching for (new) suppliers.

5. Through what channels can you get fresh tuna on the European market?

Developing Country exporters of fresh tuna have several options for entering the European market. The companies that import fresh tuna are most likely to be recognized as importers or traders, processors, or wholesalers of fish and seafood products. In that respect, the channels are comparable to market channels for frozen tuna and fish.

In Europe, tuna is mostly imported by traders. These traders sell the tuna products to the wholesale trade, industry and/or the retail sector. As tuna is a specialty product that is traded in very small volumes and requires a lot of expertise, supermarkets and other retail sellers are not yet involved in direct sourcing.

Large fresh tuna importers have their own quality agents at origin to check the quality of the tuna products. These checks can be a final inspection at the end of the production chain or monitoring throughout the process.

Although the general trend in Europe is to shorten the supply chain, with retailers and food service companies buying directly from exporters, this is not expected to happen with fresh tuna in the short to medium term. For fresh tuna they will prefer to rely on specialized fish traders for their fresh tuna supply.

Because of the relatively short shelf life of the product, fresh tuna is transferred to Europe by air. Important destinations in Europe for air cargo are Copenhagen (Denmark), Amsterdam (the Netherlands), Frankfurt or Munich (Germany), Madrid (Spain), and Paris (France).

Tips:

It is an advantage to be transparent. Give your buyer the possibility to monitor the overall production process.

For small exporters of fresh tuna products to the European market, it is difficult to supply large and consistent volumes. It is therefore important to find clients with purchasing requirements that match the services you can deliver.

Although the fishery products are transported in refrigerated trucks and aircraft, extra cooling is desirable for tuna. It is good to put extra cold packs or ice in the fish boxes to guarantee the cold chain.

6. What are the end-market prices for fresh tuna?

Consumer prices of fresh tuna products in the different European countries give you an impression of the price level in Europe.

Table 1: xamples of consumer prices for fresh tuna products in 2018

Product	Price (€/KG)	Country
Tuna steak	10.90 - 23.60	Spain, Italy
Tuna steak in plastic container	29.99	Belgium
Tuna steak in vacuumed packaging	18.00	Spain
Tuna belly	7.99	Spain
Tuna tartare	32.90	Spain
2 pieces of tuna medallions on plastic tray	8.53	Spain

Source: Globally Cool, 2018

The price differences between fresh and frozen tuna are considerable, mainly because of the use of prime material for fresh tuna. For example, in 2016 the price for a two pack of tuna steaks (250 grams) in the Netherlands was around €3.85 for frozen tuna and €7.31 for fresh tuna. Processed tuna products are sold at even higher prices. For example, sliced smoked tuna in vacuumed packaging can be found in supermarkets in Spain, Italy and France for between €35-60/kg. This high price is a combination of prime material use and relatively high processing costs that are translated in a high retail price.


The margins in the value chain (also) vary a lot from low end to high end products. For low end products, margins can be as low as 5% for each company, with a retail margin as low as 10%. For high end products, these margins can be as high as 20-25% for fishermen and processors, and 100% for importers and retailers.


Price developments for tuna are difficult to forecast. Price developments for the several tuna species are the result of shifts in supply and demand, depending not only on species but also on catch area and method. They are not limited to fresh tuna alone, but prices are also influenced by other segments, such as demand for processed (canned) tuna.


There is a willingness to pay a premium for sustainable tuna, whereas conventional tuna products compete on price. In the Netherlands, for instance, a MSC certified tuna steak costs about €30/kg, whilst a non-certified tuna steak costs about €15/kg.

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