CBI Product Factsheet:

Frozen Tuna in Europe
Introduction

The lion’s share of frozen whole tuna imported into Europe is used for canning, with the balance left for processing into loins or steaks. The most promising markets for frozen tuna in Europe are Spain and France, followed at a distance by Italy, UK, the Netherlands, Belgium and Germany. As there is growing concern about the sustainability of tuna fisheries, your tuna fishery’s level of sustainability will be the key to the success of your business.

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. The HS codes referred to in this product factsheet are given in table 1.

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>03034100</td>
<td>Albacore or long-finned tuna (Thunnus alalunga)</td>
</tr>
<tr>
<td>03034200</td>
<td>Yellowfin tuna (Thunnus albacares)</td>
</tr>
<tr>
<td>03034300</td>
<td>Skipjack or stripe-bellied bonito</td>
</tr>
<tr>
<td>03034400</td>
<td>Bigeye tuna (Thunnus obesus)</td>
</tr>
<tr>
<td>03034500</td>
<td>Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis)</td>
</tr>
<tr>
<td>03034600</td>
<td>Southern bluefin tuna (Thunnus maccouyi)</td>
</tr>
<tr>
<td>03048700</td>
<td>Frozen fillets tuna, skipjack and stripe-bellied bonito</td>
</tr>
</tbody>
</table>

Product specification

This section provides you with basic information about labelling and packaging specifications for fishery and aquaculture products in the EU. Important legislation is the recently renewed Common Organisation of the Market, which contains the rules of the organisation of the market for fishery and aquaculture products in the EU. Legislation about how to inform EU consumers about fishery and aquaculture products is also relevant to you. Below, you can find more specific information about the labelling, packaging, and processing of frozen tuna for the European market.

Labelling:

The contents of labelling must be provided in the language of the country your products are exported to. When fishery and aquaculture products are imported into the EU, the following information must be provided on the label or the package of the fishery product, or by means of a commercial document accompanying the goods:

- Name of the product: The commercial and scientific name of the species. Member States publish a list of the commercial and scientific names accepted in their territory for this purpose;
- Production method: In the case of tuna, it must be mentioned that it is caught at sea;
- Catch area (number and name): One of the areas mentioned here;
- Origin: There needs to be a reference to the country of origin;
- Presentation: It has to be stated how the product is processed: Frozen, whole/loin/steak, skin on/skinless, with bone/boneless;
- Net weight: The net weight must be stated on pre-packed products;
- Date of minimum durability: Consisting of day, month, and year in that order and preceded by the words "best before" or "best before end" or the "use by" date;
- EU seller: The name or business name and address of the manufacturer, packager or seller established in the EU;
- EU approval: The package must contain an EU approval number and a lot number;
- The packaging must also contain a batch number;
- Nutrition: Ingredients and nutrition must be mentioned.

Each EU member state has a competent authority that is responsible for the implementation of EU regulation with respect to labelling.

Packaging:

Packaging requirements differ widely between customers and market segments. It is crucial that you discuss your customers’ preferred packaging requirements with them. Some general characteristics are:

- Loins and steaks already processed and pre-packed in the exporting country. These products are sold the most in the EU;
Retail packaging: Mostly steaks, vacuum-packed in cartons or plastic bags. Portions vary between 250 and 1000 grams;
Wholesale packaging is mostly delivered in 2-5 kg loins, individually wrapped packed (IWP), and steaks in plastic bags of around 1000 grams;
Tuna for industry are most of the time delivered in 2-7 kg loins, individually wrapped packed or bulk, but also as whole tuna (headed and gutted). This tuna could be of lower quality, because it will be processed into cans and jars;
Sushi market: Saku blocks from deep frozen (-60 degrees) tuna already processed and pre-packed in the exporting country. Only small quantities are sold in the EU because the deep frozen cold chain (-60 degrees chain) cannot be guaranteed;

What is the demand for frozen tuna in Europe?

General information and figures in relation to fish production and trade developments in Europe are provided in CBI Trade Statistics. This section provides you with more detailed statistics in relation to the trade and consumption of frozen tuna in Europe.

Figure 2: Imports of raw frozen tuna whole round (W/R) in metric thousand tons

Source: Trademap

Figure 3: Imports of raw frozen tuna whole round (W/R) per species, 2014

Source: Trademap
Imports

Although Figure 2 shows quite some fluctuation in imports of raw frozen tuna whole round, with a peak in 2013, the overall tuna market in Europe is rather stable, with little or no growth expected in the short term and yellowfin tuna expected to remain the most important species.

The total import value for yellowfin tuna was €273 million in 2014, which is less than the €320 million in 2013. The total import value for skipjack tuna was €65 million, which is also lower than in 2013 (€68 million).

Due to worldwide scarcity, tuna import prices increased in 2012. In 2013, there was more tuna available, but prices were still high that year. Since 2014 prices declined and in the first half of 2015, prices have even dropped below 2010 levels. The prices were even reported to be so low that catches are no longer profitable. For the coming years too, prices are expected to remain relatively low because of sufficient availability of raw material.

The main market for frozen tuna whole round in Europe is clearly southern Europe (Italy and Spain). In these countries, most of the tuna is processed into cans and jars.

Spain has been the main importer of yellowfin tuna whole round (around 85,000 tons and €170 million in 2014) for many years, followed by Italy (around 24,000 tons and €66 million in 2014). Most notably, the import quantities for yellowfin tuna whole round in Spain decreased by 7% between 2011 and 2014, as yellowfin tuna is a relatively expensive raw material.

The list of leading Developing Country suppliers of tuna W/R shows some variation over the years. The countries that have been in the top ten almost every year since 2012 are (in the order of largest suppliers in 2014 and with the export volume in 1,000 tons between brackets): Panama (20), Mexico (18), Cape Verde and Philippines (13), Guatemala and Seychelles (12), South Korea (11), Vietnam (10) and Senegal (8).

The import of frozen tuna fillets, steaks and loins was dominated by Spain (around 6,000 tons in 2014) and France (around 5,000 tons in 2014). Vietnam, Korea, Mauritius, Ecuador, Mexico and Indonesia were the most important exporters of these products into Europe in 2014. The total EU import value of frozen tuna fillets, steaks and loins was around €127 million in 2014. Most of the fillets, steaks and loins came from the yellowfin tuna.

The value and volumes of the frozen tuna products, such as fillets, steaks and loins, were probably higher in Europe than the mentioned €127 million above. A new product code in 2012 and the interpretation of this product-code definition had resulted in an inaccurate use of the code.
Exports
Virtually all European tuna exports come from Spain and France, as these countries have large tuna processing facilities. Spain exported more than 13,000 tons of tuna in 2014, and France about 10,000 tons.

The Netherlands is an important re-export country in Europe, with almost 1,800 tons of frozen tuna loins and steaks exports in 2014. Belgium’s role as a re-exporter has been shrinking in recent years (from 1,200 in 2012 to 500 tons in 2014).

Virtually all (re-)exported tuna in Europe was yellowfin tuna.

Tips:
- Consider focusing on companies like Amacore Seafood and Anova in the Netherlands, who are important re-exporters of frozen tuna products in Europe.
- 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 to find Dutch importers of frozen tuna.

Production
In 2013, almost 5.7 million tons, mainly skipjack tuna, was landed worldwide. Asia produced 59% of the tuna in the world. Main species are skipjack tuna (49%), followed by yellowfin tuna (20%) and bigeye tuna (7%). Depending on quality, the tuna are used for canning, sashimi or frozen sales.

In Europe, 9% (around 488,000 tons) of the worldwide tuna is caught. The main species in Europe were skipjack tuna (49%), yellowfin tuna (31%), and bigeye tuna (12%).

Tip:
- The statistics website of the FAO provides detailed information about the tuna catches of the different EU Member States.

Consumption
Yellowfin tuna is the most important tuna for all European countries. In France and Spain, there is also a high preference for albacore tuna.

According to a report from EUMOFA about the European fish market, overall consumption of tuna in Europe was 2.68 kg/capita in 2011. Most of the tuna eaten in Europe is canned tuna (2.14 kg/capita of total consumption). Less than 100 g/capita is consumed in the form of frozen tuna products like steaks. Detailed consumption data for the different European countries is not readily available.

Tip:
- The EUMOFA website helps you to get a better view of the European fish market, and information about consumption of seafood in the different European countries.

What trends offer opportunities on the European market for frozen tuna?
CBI Trends provides you with trends in the European frozen tuna market.

What requirements should frozen tuna comply with to be allowed on the European market?
Requirements can be divided into: (1) musts, which are legal requirements you must meet in order to enter the market, 2) non-legal requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market; and (3) additional requirements for specific segments.

You can find a general overview of the EU buyer requirements for fish and seafood on the Market Intelligence Platform of CBI including many tips for how to get more details or how to meet these requirements. A summary of the requirements follows below, including some specific details for frozen tuna.
What legal requirements must my product comply with?

These are the legal requirements for the import of frozen tuna into the EU:

- **Approved country and establishment**: Your country must be on the list of EU-approved countries in order for you to export fish to the EU market.
- **Catch certificate to combat illegal fishing**: To combat illegal fishing, (wild caught) fish imported or transhipped in the EU must be accompanied by a catch certificate.
- **Traceability rules**: It means that the label has to offer precise information on its harvesting and production. It applies to all unprocessed and some processed seafood, whether it is pre-packed or not.
- **Health certificate**: The fishery products you export to the EU must be accompanied by a health certificate.
- **Hygiene above all**: There is a list of requirements that fishery products must meet, but to sum up many of these are related to hygiene. The implementation of HACCP is one of the measures you need to take, but the general hygiene of your establishment must also be good and is of key importance to potential buyers.
- **Contaminants – restricted and tested**: Contaminants that may end up in the food product as a result of various stages in the process or environmental contamination, are restricted by EU legislation. Fish destined for the EU market is generally tested before shipped, sometimes in the buyer’s own lab, sometimes in recognized (independent) labs, in order to prevent costly border rejections.
- **Microbiological contamination**: just like contaminants, microbiological contamination has restrictions and is therefore examined in the fish destined for the EU market.

**Tip:**

- For a full list of requirements, including the ones mentioned above but also specific labelling requirements for fish, please consult the [EU Export Helpdesk](#) where you can select your specific product code under chapter 03.

What additional requirements do buyers often have?

For frozen tuna, additional requirements are mainly requirements with respect to food safety. The most commonly requested food safety certification schemes for seafood products are IFS and (or) BRC, and sometimes also GLOBAL GAP.

**Tips:**

- The International Trade Center (ITC) offers fact sheets on the several certification schemes, e.g. on [IFS](#) or [BRC](#).
- Sustainable tuna is becoming more important in Europe. Visit the [MSC website](#) or contact NGOs like [SFP](#) and [WWF](#) to check how sustainable your tuna is.
- Handline fisheries are considered sustainable in Europe. Sustainable fishing is growing in importance and since 2014 GSP preferences are also influenced by sustainability of the supply chain in the production countries. Check the main aspects of the new EU GSP via the [EU website](#).

What are the requirements for niche markets?

In the EU, sustainability certification is still seen as a niche market requirement, although sustainability certification has become a buyer requirement for several large retail and food service companies in some European countries (e.g. Germany). For wild-caught fishery products, MSC is the major certification scheme. It is difficult to become MSC certified for tuna on account of the migratory nature of the fish.

What do the trade channels and interesting market segments look like in Europe for frozen tuna?

For more general information about market segments and channels, take a look at [Market Channels and Segments for seafood products in Europe](#), which is available at the CBI market information platform. This document is available at the CBI market intelligence platform. This section provides some detailed information about the various marketing channels through which frozen tuna is marketed in Europe.
Large frozen 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.

Nearly all frozen tuna enter Europe by ship, although small volumes are also imported by airfreight. Important ports in Europe are Rotterdam (the Netherlands), Antwerp (Belgium), Hamburg or Bremen (Germany), and Marseille (France).

Frozen tuna whole round is meant for canning and a small fraction for the production of loins or steaks. Most of the processing is done in southern Europe. Spain has the most processing plants (68 plants), followed by Italy (11 plants, mostly bluefin tuna), France (7 plants), and Portugal (6 plants). Most of the tuna is put into jars and cans.

In Europe, tuna loins and steaks are 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, only a few retailers and wholesalers buy their tuna products directly from tuna exporters.

Retail markets in Northern Europe only accept tuna of sustainable origin (e.g. MSC, FOS or tuna from FIP projects). You need to invest in sustainability in order to reach this market.

**Tips:**
- It is an advantage to be transparent. Give your buyer the possibility to monitor the overall production process.
- To guarantee the cold chain, send 2 data loggers along with your sold products to the importer. These loggers will check the temperature of the products throughout the chain.
- Visit the websites of big northern Europe retailers such as Albert Heijn and Aldi to learn more about the importance they attach to sustainability.

**What are the end market prices for frozen tuna?**

Consumer prices of tuna products in the different European countries are presented below. Although the data are from 2012-2013 and prices in 2015 are lower because of the lower raw material prices, they give you an impression of the price level in Europe.

**Table 2: Consumer prices for frozen tuna products in 2012-2013**

<table>
<thead>
<tr>
<th>Product</th>
<th>Price €/kg</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen YF tuna steaks skin on / bone in plastic bag</td>
<td>8.55</td>
<td>Germany</td>
</tr>
<tr>
<td>Frozen product</td>
<td>Price</td>
<td>Country</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------</td>
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</tr>
<tr>
<td>Frozen YF tuna steaks with tomato flavour plastic bag</td>
<td>19.95</td>
<td>Italy</td>
</tr>
<tr>
<td>Frozen YF tuna steaks skin less / bone less plastic bag</td>
<td>13.36</td>
<td>Germany</td>
</tr>
<tr>
<td>Frozen Albacore tuna steaks skin less / boneless carton</td>
<td>18.17</td>
<td>France</td>
</tr>
<tr>
<td>Frozen YF tuna steaks skinless / boneless carton</td>
<td>12.60</td>
<td>Netherlands</td>
</tr>
<tr>
<td>Frozen YF tuna steaks skinless / boneless carton</td>
<td>15.40</td>
<td>Netherlands</td>
</tr>
<tr>
<td>Frozen YF tuna steaks skinless / boneless carton</td>
<td>20.20</td>
<td>France</td>
</tr>
<tr>
<td>Frozen YF tuna steaks skinless / boneless carton</td>
<td>21.95</td>
<td>UK</td>
</tr>
<tr>
<td>Frozen Skipjack tuna steaks skinless / boneless carton</td>
<td>19.00</td>
<td>UK</td>
</tr>
</tbody>
</table>

Source: Innova database

The market prices for tuna vary a lot depending on supply and demand. In April 2015, prices on the European market for whole yellowfin tuna of 3-10kg averaged €1.40/kg DAT Spain and for whole yellowfin tuna of more than 10kg averaged 1.75/kg DAT Spain. Prices for whole skipjack tuna averaged €1.15/kg DAT Spain. Prices for yellowfin frozen loins averaged €4.50/kg DDP Spain and for skipjack frozen loins €3.65/kg DDP Spain.

There are 4-5 quality categories that determine the price of the product. These categories are freshness, size and shape, colour, texture, and fat content.

**Tips:**
- There is a willingness to pay a premium for high-quality tuna with a sustainable story, whereas the majority of the market is currently price-driven.
- Sustainably produced tuna (proven) is a promising product for (new) market players who want to export to Europe.

**Useful sources**
- Atuna - [http://www.atuna.com](http://www.atuna.com)
- Conxemar - [http://www.conxemar.com](http://www.conxemar.com)
- Seafood Expo Global - [http://www.seafoodexpo.com](http://www.seafoodexpo.com)