

The European market potential for canned fish

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The COVID-19 pandemic has caused a positive trend in the European consumption of canned fish as more people turn to home cooking and retail purchases. As retail became the main outlet for fish and seafood, the demand for canned fish increased, especially during the period of lockdown. This reinforced the trend that European consumers want simple, ready-to-eat and convenient seafood. Quality, sustainability and traceability are also becoming more important for many European consumers. This Fact Sheet focuses on tuna, mackerel, anchovy and sardines, specifically.

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1. Product description

Canned fishes are processed and preserved in a sealed airtight container such as a tin or aluminium can. Water, oil or sauce is usually added to the fish and the can is sterilised. Canned fish typically has a shelf life from 1 to 5 years. In this report, we are focusing on several canned fish species that are relevant to Least Developed Countries in trade relations with Europe. The following are the species and their corresponding [Harmonised System](#) (HS) codes analysed in this study, including a description of the products covered.

Canned tuna

Tuna loins are pre-cooked, frozen and put in a metal can. Sauce, broth, brine, oil or salt is added. It is then sealed and heated to prevent spoilage. Canned tuna is available in a wide variety of shapes, sizes and packaging styles, such as solid or fillets, chunks, flakes and shredded tuna.

- HS 16041421 — Prepared and preserved skipjack, whole or in pieces (excl. minced);
- HS 16041428 — Prepared or preserved skipjack, whole or in pieces (excl. minced, fillets known as 'loins' and such products in vegetable oil);
- HS 16041431 — Prepared or preserved yellowfin tuna 'thunnus albacares', whole or in pieces, in vegetable oil (excl. minced);
- HS 16041438 — Prepared or preserved yellowfin tuna 'thunnus albacares', whole or in pieces (excl. minced, fillets known as 'loins' and such products in vegetable oil);
- HS 16041441 — Prepared or preserved tuna, whole or in pieces, in vegetable oil (excl. minced, skipjack and yellowfin tuna 'thunnus albacares');
- HS 16041448 — Prepared or preserved tuna, whole or in pieces (excl. minced, fillets known as 'loins' and such products in vegetable oil, skipjack and yellowfin tuna 'thunnus albacares');
- HS 16041490 — Prepared or preserved bonito 'sarda spp.', whole or in pieces (excl. minced).

Canned sardines

Sardines are canned in different ways, cooked by deep frying, steam cooking or smoked. At the cannery, the

fish are washed and the heads usually removed. They are packed in different kinds of oil, water, tomato, chilli or other sauces.

- HS 16041311 — Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines);
- HS 16041319 — Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil);
- HS 16041390 — Prepared or preserved sardinella, brisling or sprats, whole or in pieces (excl. minced).

Canned mackerel

Mackerel is gutted, viscera, tail, head and fins removed. They are packed like sardines, but the fish bones are much bigger. The contents are then sealed in a can and processed by heat.

- HS 16041519 — Mackerel of the species *Scomber Scombrus* and *Scomber japonicus*, prepared or preserved, whole or in pieces (excl. minced mackerel and fillets of mackerel);
- HS 16041511 — Fillets of mackerel of the species *Scomber Scombrus* and *Scomber japonicus*, prepared or preserved;
- HS 16041590 — Prepared or preserved mackerel of species *Scomber Australasicus*, whole or in pieces (excl. minced).

Canned anchovies

Anchovies are small, silvery fish measuring approximately 4 inches in length. Before packing, anchovies are beheaded, washed, skinned and filleted. Preserved anchovies can be readily found whole or filleted, salt-cured or canned in oil, sometimes with capers or olives.

- HS 160416 — Prepared or preserved anchovies, whole or in pieces (excl. minced).

This report will refer to the different canned fish by species, regardless of the particular HS code, unless otherwise specified. For example, the report will refer to canned tuna in general when talking about canned yellowfin and canned skipjack, unless specifically indicated.

2. What makes Europe an interesting market for canned fish?

Amid the COVID-19 pandemic, Europeans turned to canned fish

Canned fish sales have boomed during the lockdown period in Europe, particularly in fish-loving Southern European nations such as Spain, France and Italy. The sale of canned products, particularly canned tuna, and other packaged products which can be stored at home appealed to many Europeans as consumers were subjected to home quarantines, regulatory measures restricting ease of movement and other impacts of government lockdown.

In a [report](#) by Undercurrent News, cumulative imports of canned tuna, the most important canned fish in Europe, went up by 12% from January to May 2020 compared to the same period in 2019. This demand first shot up in late January when people started panic-buying canned tuna to store in their homes as the lockdown was imposed. In mid-February to April, demand from retailers continued strongly to replenish empty shelves during the panic-buying. However, this demand softened from May onwards.

If we take a look at Italy as an example, in the last 2 weeks of February and the first week of March (height of lockdown), canned tuna sales rose 38.6% compared to the same period in 2019, while the sale of tuna in olive oil increased 29.2% according to IRI, a market-research agency. This jump in canned tuna sales during the period clearly shows the familiarity of canned fish in the lives of Europeans, as they turn to canned seafood as their first choice of food to keep in storage during the most crucial times. The challenge for exporters is how to keep this interest going and the sales up as the lockdown eases.

European consumers love fish

Even without the lockdown or a pandemic, Europeans have a huge appetite for fish. According to the most

recent data from the Food and Agriculture Organization of the United Nations (FAO), the world's average annual consumption of fish increased by 8% from 2005 to 2015, from 18.8 kg to 20.2 kg per capita. In this period, Asia's consumption grew the most at 12%, followed by Europe (9%), Africa (9%) and Latin America and the Caribbean (5%).

A [2019 study](#) of the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) shows that, in 2017, apparent consumption of fish and seafood in the EU amounted to 12.45 million tonnes. Per capita consumption decreased from 24.87 kg to 24.35 kg. Despite this drop, some fish species have shown a growth in consumption.

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.

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 canned tuna exporters to enter the European market.

Europe's average annual sardine consumption grew from 0.53 to 0.58 kg per capita between 2015 and 2017. European average annual per capita consumption of mackerel increased from 0.58 kg in 2016 to 0.65 kg in 2017.

Household consumption of processed fish and seafood, such as canned fish, totalled 727,000 tonnes in 2018, the highest level since 2014. In terms of product category, shelf-stable products are the most consumed by Europeans, followed by frozen and chilled products.

Because of its high consumption, Europe still sources canned fish from other countries to meet production needs and domestic demand. Europe's self-sufficiency for fish and aquatic products was at 43.4% in 2017, which means that imports fulfilled a higher share of Europe's demand than domestic catches and production.

For tuna, Europe's 2017 self-sufficiency rate was even lower: 28%. This was lower than the 2014 rate of 34%. Still, the 28% rate represents a marginal improvement to 10 years ago, when it was 23%. Unlike tuna, Europe is very well capable of meeting its needs for mackerel with a 121% self-sufficiency rate. Sardines, on the other hand, have a 75% self-sufficiency rate.

Tip:

- Learn more about the European market for frozen and prepared tuna loin as an input for the canning industry, reading the CBI product fact sheet on Europe's most consumed marine species.

Europe has a high demand for raw material for processing

At the height of the pandemic in the first quarter of 2020, many processing operations halted or decreased in capacity around the world. In Italy and Spain, the 2 European countries that have been hit hardest, production kept going. The [ANFACO-CECOPESCA](#), the Spanish seafood canners' association, said they will continue to meet the demand. As an exporter, there is an opportunity for you to sell not only your canned tuna, but also the raw material used by the canning industry, as the demand increases and processing operations continue.

Tips:

- To get acquainted with the major fish canning companies in Spain, visit Galicia, where almost 60 fish

canning companies are based. Contact [ANFACO-CECOPESCA](#), a Spanish tuna processing organisation which represents the majority of these canners.

- If you do not speak Spanish, hiring a Spanish-speaking interpreter will be beneficial to ensure effective communication and negotiation with Spanish companies.

The European canned seafood processing sector is mostly concentrated in Southern Europe, where Spain, Italy, France and Portugal are key players. Spain leads the production of canned food in Europe. The leading product is canned tuna, which comprises two-thirds of the produced volume. Notably, Spain produces almost 70% of the canned tuna processed in Europe, with major companies, such as [Jealsa](#), [Frinsa](#) and [Grupo Calvo](#). Canned tuna comprises 83% of the canned food Spain exports. In addition to the Spanish domestic market, Spain's canning companies concentrate 90% of their exports in other European countries, including Italy, France and Portugal, which are also major canning countries.

Spain also leads the production of canned anchovies with 60% of the total European production. Italy, Greece and France follow. Spain also exports large cans of salted anchovies to Morocco and Algeria, where they are reprocessed and re-exported to the European market.

European domestic production of canned mackerel declined in 2019. Poland has been the main producer since 2018 when it took the top position from France, which was the largest canned mackerel processor in the previous years. Portugal, Spain and Bulgaria also feature among the 5 leading producers of canned mackerel in Europe.

Production of canned sardines is mostly concentrated in Latvia, Spain, Poland, Portugal and France. Canned sardine production shrank 18% in the period between 2015 and 2019, partly due to decreased quotas causing reduced sardine catches, but recovered slightly in 2017.

Before entering the European market, exporters must acknowledge that Europe produces its own canned fish at steady production levels. As Figure 1 shows, overall production of canned tuna increased in 2019, while production of canned sardines, canned mackerel and canned anchovies slightly decreased in 2019, compared to the previous year. However, Europe's domestic production could not yet meet EU demand. Imports of canned fish from other countries therefore remain very important and provide business opportunities for you to enter this market.

Huge business opportunity for non-European suppliers

In 2019, Europe imported a total of 775,167 tonnes of canned fish. Of the total volume imported 465,182 tonnes (60%) came from non-European countries. As an exporter, this means that the canned fish segment is relying on third-country producers to meet demand. This presents a very clear opportunity to enter the market. Canned tuna had the most demand among canned fish in 2019, followed by sardines, mackerel and anchovies.

As Figure 2 shows, non-European suppliers deliver 66.5% of the imported volume of canned tuna, with the remainder coming from suppliers within Europe. These non-EU suppliers come from Ecuador, Seychelles, the Philippines, Mauritius and Ghana. The top European countries importing canned fish from non-EU suppliers are the United Kingdom, Germany, France, Italy and the Netherlands. A 75% share of the canned tuna imported into Europe consists of skipjack tuna, while the remainder are yellowfin and other tuna species, such as albacore.

In 2019, a 59% majority of canned sardines imported into Europe were produced by non-EU suppliers. An overwhelming 91% of all canned sardines from non-European countries come from Morocco, while Thailand, the Philippines, Tunisia and China supply the remainder. Most of the non-EU sardines go to France, the UK, Germany, the Netherlands and Spain.

Non-EU countries supply 78% of the canned anchovies imported into Europe, with Morocco taking 59% of the total market share among non-EU suppliers. Peru, Albania, Tunisia and Turkey also deliver large volumes of canned anchovies to Europe. The top markets in Europe for canned anchovies, in decreasing order of import volumes, are Italy, Spain, France, Germany and Portugal.

European suppliers, however, provide 84% of the canned mackerel to EU producers. The remainder comes from Morocco, China, Cape Verde, Ecuador and Peru. These supplies, in decreasing order of import volumes, go to Italy, Spain, Portugal, the UK and Germany.

3. Which European countries offer most opportunities for canned fish?

United Kingdom: strong but uncertain as Brexit looms

The UK was the top EU importing country of canned tuna from non-European suppliers from 2015 to 2019, according to data from Eurostat and Trademap. In 2019, the UK imported a total of 79,006 tonnes from non-European suppliers (mainly Mauritius, Seychelles and Ecuador), equivalent to 77% of the country's total imports of canned tuna. This was a decline of almost 10% compared to 2018, when it imported over 90,000 tonnes from non-European countries. This decline was mostly driven by the UK importing more canned tuna products from Spain, from 6,522 tonnes in 2018 to 11,392 tonnes in 2019. Whether the trade flow will change once the UK enters into a full transition as it leaves Europe remains to be seen.

Since 2016, UK imports of canned tuna have declined 9%, especially from Ghana and Seychelles. [Thai Union](#) owns the major canneries in both countries, which exclusively export to the European market, particularly the UK, predominantly supplying [John West](#) and several retailers' private labels. The downward trend is caused by the performance of canned tuna in retail, as sales of canned products have declined over the last few years, with the latest figures showing a volume drop of approximately 10%.

Nonetheless, leading brands such as [John West](#) and [Princes](#) have recognised the growing demand for innovative and new products among British consumers, leading to increased canned fish products with experimental flavours and ingredients.

The UK is also the third-largest European importing country for canned mackerel, after Spain and Italy. British imports grew from just 363 tonnes in 2018 to 2,071 tonnes in 2019.

Brexit is likely to affect the trade relations of dominant canned tuna suppliers. If and when the country leaves the EU, the UK will have to negotiate new trade deals with its suppliers or risk a 24% tariff on canned fish products from any exporting nation.

The Philippines and the UK are working on a post-Brexit trade deal. Seychelles recently signed a deal with the UK to protect its supply to John West ahead of Brexit. Mauritius already has zero duties in the EU and the UK. Ecuador, 1 of the main suppliers of canned fish to Europe, recently signed a new trade agreement with the UK to ensure zero tariffs in case of Brexit.

Tips:

- [Know the status of trade agreements between your country and European countries](#), particularly the UK and what happens in case of Brexit. Protect your business by looking at alternative markets to sell your product in case trade deals fall and tariffs are imposed.
- Monitor the latest products of [John West](#) and [Princes](#) to check what kind of innovative products these companies are developing to increase consumer interest in canned fish and to understand potential changes in consumption patterns. Stay ahead of your competitors and prepare to meet your European

customers' demand in case they ask you for these specifications.

Germany: sustainable, healthy canned fish in demand

Germany is neither a tuna fishing nor processing nation. However, the country is an important market for canned tuna, especially for non-European suppliers. Germany has a few local processing companies producing value-added products, therefore relying heavily on foreign suppliers to meet demand. Most of the canned tuna products sold to Germany are under private labels, meaning these importers will work with their source companies to produce a product under the company's specifications and sold under the company's brand name.

Germany is the third-largest European market for canned tuna from non-European suppliers (after the UK and the Netherlands). In 2018, Germany imported a total of 54,940 tonnes of canned tuna from non-EU suppliers. In 2017, this was even more: over 60,000 tonnes.

German customers mostly demand canned tuna from fisheries that do not use fish aggregation devices (FADs), a requirement that Ecuador, a major tuna loin supplier to Europe, has previously struggled with. FADs are floating devices placed to attract various fish species, generating bycatch. Under pressure for sustainability, Ecuadorian producers launched a [new FAD management plan](#).

Yet, only [1 in 10 tuna cans sold in Germany is certified](#) by the Marine Stewardship Council (MSC) and tuna products on the German market caught by pole and line have the highest coverage of MSC certification at 68%.

Germany is also consistently in the top importers of canned sardines, canned mackerel and canned anchovies from non-European suppliers. The country ranks fourth, after the UK, France and the Netherlands, when it comes to imports of canned sardines, with 6,361 tonnes imported in 2019. Imports of canned anchovies from non-European suppliers slightly declined in 2019 from 787 tonnes to 752 tonnes.

Germany's fish market overall has shown promising growth over the years as the lifestyle of Germans changes and the consumption of red meat decreases. According to Statista, seafood consumption has gone up in Germany in the past decades, from 11.2 kg per capita in 1980 to 13.7 kg per capita in 2018.

Tips:

- In order to penetrate the German market, contact German retailers such as Lidl, Aldi, Rewe or Edeka.
- Read the recent study released by the MSC Germany to better understand MSC's presence in the German tuna market. This can be an untapped market gap in Germany that you should look into.

Italy: appetite for anchovies

The Italian canned tuna market is mostly dominated by imports from Spain, which account for 33% of the market. After Spain, Italy imports most of its canned tuna from Ecuador. In 2019, 16,782 tonnes came from this country. Ecuador is followed by Cote d'Ivoire, Solomon Islands and Indonesia.

According to World Tuna Market, produced by the Food and Agriculture Organization of the United Nations (FAO), the largest brands in the Italian market are:

- [Rio Mare](#) — 34% of the market;
- [Nostramo](#) — 12%;
- [Star \(Mareaperto\)](#) — 9%;
- [Palmera](#) and its luxury line [Alco](#) — 7%;

- [Mareblu](#) and [Maruzzella](#) — 6% each.

Italy is also the top European importing destination for canned anchovies from non-EU countries and the second-top importer of canned mackerel, after Spain. Italian imports of canned mackerel have generally diminished over the years, but imports of canned anchovies have been steadily rising and reached 8,013 tonnes in 2019. In 2018, this was 7,613 tonnes. Plus, anchovies are considered a common delicacy in Italy. This scenario provides an opportunity for you to enter the growing Italian market for canned anchovies.

France: imports from Africa dominate

The French canned fish industry is mostly concentrated by major players, such as [Saupiquet](#) and [Petit Navire](#). Thai Union's Seychelles plant is the main supplier to the company's French brand, Petit Navire. Currently, this brand has a 32% volume share of the French canned seafood market and is also the leader in the country's canned tuna market with a 35.4% share in market value.

France is the fourth-largest European importer of canned tuna from non-EU suppliers. The French market has traditionally been dominated by imports from African countries. Canned tuna imports into France come mostly from non-European suppliers in Seychelles, Cote d'Ivoire, Ecuador and Ghana, even though Spain provides a third of France's total canned tuna products.

France is the leading importer of canned sardines in Europe, importing a total of 9,955 tonnes in 2019. Imports from non-European countries experienced rapid growth between 2016 and 2017, but have slowed down since 2018. Morocco is the main supplier.

Spain: a huge market of consumers and re-exporters

Spain leads the production of canned fish in Europe, but it is also a very important market for non-European suppliers of canned fish. In fact, Spain is consistently among the top 5 importing European countries for the canned fish sector. Spain was the largest importer of canned mackerel from non-EU exporters in 2019 and the second biggest importer of canned anchovies after Italy.

Spain imported a total of 4,535 tonnes of canned mackerel in 2019, a slight increase compared to the 4,440 tonnes imported in 2018. Spanish imports of canned anchovies from non-European countries also grew 5% from 2015 to 2019. Some of these volumes are re-exported to the European market after being relabelled, except when they are first imported customer-ready as a final product.

If you are interested in doing business with Spanish buyers, bear in mind that Spain is a major processing country exporting mostly within Europe. By engaging with the Spanish market, your product can also access the rest of Europe. Several Spanish companies, however, focus their marketing efforts in international markets, performing just 30% to 40% of their sales domestically. Companies such as [Calvo](#), [IG Montes](#), [Garavilla](#) and [Group Consortium](#) can provide you with the potential for global reach, if they can be engaged.

International markets are also a growing opportunity to engage with small-scale producers, such as [Conservas Fredo](#) and [Palacio de Oriente](#). Exporters with established global connections outside Europe should communicate with these Spanish producers, which are keen on expanding their businesses internationally.

The Netherlands: an important transit route and importer

Like Germany, the Netherlands is a non-producing nation, but is a major transit route in Europe. In Europe's canned tuna sector, the Netherlands rose from being the fifth-largest importer from non-European suppliers to being the second-largest importer with a total of 60,616 tonnes of canned tuna imported in 2019. This was an increase of 47% compared to 2018, as the Netherlands positions itself not only as a major trade hub in Europe, but also as a consumer of canned tuna products.

Tuna products are transported and moved through Dutch seaports and warehouses to Europe's supermarkets.

The Netherlands' major markets for canned tuna re-exports are Germany, France, Belgium and Italy. Dutch exports to these 4 markets have grown considerably since 2014. However, in 2019, the re-exports slowed down, in particular to its main trading partners within Europe, such as Germany and France. For you, this may mean that the Netherlands is also increasing its local consumption and could therefore offer an interesting opportunity, not only as a trading hub, but also as a market on its own.

Imports of canned sardines from non-European suppliers increased from 6,068 tonnes in 2018 to 7,855 tonnes in 2019. The main re-export markets for Dutch canned sardines include France, Germany, the UK and Belgium.

[John West](#), [Princes](#) and [Rio Mare](#) are the major brands in the Netherlands, while [Aldi](#) and [Lidl](#) sell under private labels.

The founder of Dutch pole-and-line tuna brand Fish Tales recently launched a campaign called [Stop Foute Tonijn](#). The campaign claims that 93% of the canned tuna that households purchase in the Netherlands is 'wrong tuna' (*foute tonijn* in Dutch), based on a study by IRI market research agency. According to the campaign, the 'right tuna' can be identified in the 3.11% of canned tuna carrying the MSC logo, which is caught using pole and line. Those that are not MSC certified and not caught by pole and line fall in the 'wrong tuna' category.

While Dutch consumers do [recognise the MSC label](#) as a seal of sustainability, the higher price of MSC-labelled products can be a barrier. Overall trends put sustainability concerns above price among European consumers, but in the Netherlands price is an important consideration. The challenge for the Dutch market for canned fish, particularly for canned tuna, is to make MSC-labelled cans more affordable. Exporters looking to enter the Dutch market should pay attention to this.

Tip:

- Attend the [European Tuna Conference](#) to stay up to date on the latest trends in the European tuna market.

Eastern Europe: small but steady

While Eastern Europe is not a huge market for canned fish, some countries have been consistently importing higher volumes from non-European countries over the years. Poland is the largest importer of canned tuna in Eastern Europe, usually sourcing from Ecuador and the Philippines. Meanwhile, the Czech Republic significantly increased its imports from non-European suppliers between 2015 and 2019, reaching almost 3,000 tonnes in 2019. It also marginally increased imports of canned sardines in the same period.

After the Czech Republic, Romania has consistently had demand for canned sardines, although volumes did get smaller from 2017 to 2018 and then increased slightly again in 2019 to 1,171 tonnes.

Expect household purchases of canned fish, particularly canned tuna and canned sardines, to grow in the short term because of affordability and convenience. Expect increases in canned fish imports in the medium and long terms as Eastern Europeans consume more seafood for health reasons.

Tips:

- To enter this market, gain access through trading nations such as the Netherlands or Germany, which do business throughout Europe by means of the major ports of Rotterdam and Hamburg.
- Check out Polish seafood canner [Wilbo](#), which produces 2 key brands: Neptun and Taaka Ryba. Both brands have extensive product portfolios covering a range of canned fish, including tuna. They may be

able to provide potential access to buyers in other Eastern European countries.

4. What trends offer opportunities on the European canned fish market?

Elevate your canned fish through creative food marketing

Tuna has become popular in many European homes amid the COVID-19 pandemic. It is familiar. It is delicious. It is easy to serve. Europe has seen the demand for canned tuna increase during the lockdown period, but it is important for exporters to keep that momentum going. Exporters must think of ways to keep their canned tuna products relevant to stay popular even after the pandemic. In order to keep that demand going, exporters must be able to convince their buyers that canned tuna is not just for the typical 'rainy day' to store on the shelf, when the need comes. People who rely on tuna in their pantry know that they can cook something delicious and easy using canned tuna.

Tips:

- Check out how the Seafood Nutrition Partnership markets seafood in order to appeal to young kids and their parents by creating appetising meals out of seafood.
- Get ideas on how to elevate sustainable canned fish products from the book '[The Tinned Fish Cookbook](#)' by Dutch founder of Fish Tales, Bart van Olphen.

Highlight the story behind the canned fish

Europeans are looking for sustainable products. As an exporter, it is crucial to offer sustainable products and highlight the stories behind them through marketing campaigns. You can choose to share stories about people, environmental stewardship and animal welfare, among others. Corporate Social Responsibility (CSR) efforts that highlight your values are also starting to become more in demand in Europe.

To appeal to European consumers, you must consider what kind of stories add value to your products. They can be about recipes that your own mother used to create with a simple can of tuna or a story of a fisherman who catches fish using artisanal methods in the Pacific. European consumers are interested in authentic, healthy and sustainable products. Good stories that highlight those values may give you a huge competitive advantage.

Social media such as Instagram, Facebook and LinkedIn can be powerful tools to engage consumers, especially millennials or those born between 1981 and 1996.

Dutch company [Fishtales](#)' story includes working closely with local communities, sourcing from MSC-certified fisheries and using responsible fishing methods such as pole and line to curb overfishing in the world's oceans and support sustainable fishing.

Italy's largest canned fish processor, Rio Mare, focuses storifying efforts on the health benefits of its products. The company has a [wellness section on their website](#), indicating nutritional benefits, calorie and nutritional values, health benefits and even doctors' opinion on their products. Traditional, more experimental and new recipes are also a staple feature in the company's online materials, encouraging the consumers to tag and hashtag their recipes on social media for better promotion or exposure.

Tip:

Study social media facts and trends to see how European companies adapt to them. Check the product websites of large canned fish companies such as [Rio Mare](#), [Princes](#) and [John West](#) for inspiration.

Europe wants more sustainable canned fish

European countries are among the largest markets for seafood products sourced from sustainable fisheries. The Marine Stewardship Council (MSC) certification is recognised in Europe as a trustworthy ecolabel. If your fishery is not yet MSC certified and does not have another certification system accepted by your customers, consider the possibility of starting a fishery improvement project (FIP), which many of your clients will accept as evidence that you are focused on sustainability and that your fishery may be on the way to MSC certification.

A recent consumer survey in various European countries showed that the MSC label is gaining in recognition and importance in most of Europe, though [Friend of the Sea](#) certification is more popular in Southern Europe. According to a study by the MSC GlobeScan, 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. A 47% share of European consumers recall seeing the MSC label, up from 43% in 2016. The prices of MSC-labelled products versus those which do not have the seal, however, can still affect purchase behaviour, as discussed in the case of the Netherlands in the previous section.

In 2018, 16 tuna fisheries were MSC certified, with 7 fisheries in assessment. MSC-certified 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 restructured their supply chains to allow them to commit to MSC-certified seafood.

The MSC certification for mackerel has been suspended. According to the MSC website, mackerel caught on or after 2 March 2019 cannot be sold as MSC-certified or bear the blue MSC label as all mackerel fisheries are currently suspended from the programme. The suspension affects all 4 certificates [for fisheries across 8 countries](#) and comes after [mackerel stocks in the northeast Atlantic dropped below a warning level](#), while catches remain far higher than advised by scientists, according to a report published by MSC.

There are currently 2 MSC-certified anchovy fisheries: the Cantabrian Sea purse seine anchovy fishery and the Argentine anchovy. For sardines, there are 3 MSC-certified fisheries: South Australia, Cornwall in the UK, and Gulf of California fisheries. 2 anchovy fisheries are under suspension: Bay of Biscay in Spain and South Brittany in France.

Aside from certifications and FIPs, another growing trend in the canned fish sustainability sector is the type of fishing method used to catch the fish. Unlike purse seine, which uses FADs or longlining, both of which yield a high percentage of bycatch, the pole-and-line method is considered environmentally friendly because of its selective fishing technique.

Pole and line refers to an ancient, artisanal fishing method that supplies approximately 10% of the world's canned tuna today, mostly from the western and central Pacific and the Maldives in the Indian Ocean. Some of the European brands that distribute pole-and-line caught tuna are [Fishtales](#), [Fish4ever](#), [Frinsa](#) and [Jealsa](#).

Another method deemed to be more sustainable is the FAD-free purse seining or catching free schools of tuna. Currently, the Netherlands-based global tuna marketing company [Pacifical](#) has an agreement with 8 of the Parties to the Nauru Agreement (PNA) countries (Papua New Guinea, Solomon Islands, Kiribati, Tuvalu, Nauru,

Federated States of Micronesia, Palau, Marshall Islands) to promote FAD-free sustainable tuna.

Fishing methods for other species such as mackerel, anchovies and sardines usually involve purse seine and mid-water trawl nets. As consumer awareness of fishing methods impacts grows, companies have adapted to become increasingly more transparent about their fishing methods. For example, [Princes](#), [John West](#) and [Rio Mare](#) have dedicated website pages explaining their practices. It is important for these companies that the nets used in purse seine or trawling operations avoid the destruction of marine life in the ocean and decrease unnecessary bycatch.

Tips:

- See [this study by MSC GlobeScan](#) to learn more about European consumers.
- Attend trade fairs for frozen tuna suppliers, such as the [European Tuna Conference \(ETC\)](#), [Seafood Expo](#) and [Conxemar trade fairs](#). 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, where you can learn more about the Spanish and Southern European fish and seafood industries. Organised by Atuna, ETC offers updates on trends and practices in the tuna industry. Its 2018 edition focused on traceability and sustainability in the tuna supply chain.
- To verify which fisheries are MSC certified, simply [visit their website](#), which also explains the certification process in detail.
- Check the [Fishery Progress website](#) to verify the status of current FIPs, which have to update their information on the site every 6 months to allow for progress tracking.
- To apply for FOS certification or to verify if a fishery or fleet is certified, [visit this page](#). If you are new, their website also [offers a step-by-step procedure for](#) certification.

Make your products traceable

Traceability has become an integral part of quality and sustainability assurances. As an exporter, it is good to invest in methods to make your canned tuna product traceable. These traceability systems do not only provide reassurances to consumers. They also help retailers and manufacturers monitor defects and evaluate their products along the supply chain.

More companies and retailers, such as Rio Mare, feature an [online traceability system](#) where consumers can simply enter a code in order to find out the story behind each can, from the moment the fish is caught to processing, canning and sterilisation. European import regulations also require companies to provide proof that their products have been treated according to certain standards, which is made possible by the traceability of company supply chains.

Recently, blockchain technology in global fisheries are starting to change traceability and helping fight illegal, unreported and unregulated fishing. This innovation tracks the journey of the fish from 'bait to plate'. The blockchain platform gives environmental groups, retailers, consumers and certification bodies, globally, live access to verify how the fish was caught. It also allows live verification of the vessel, method, area and period, and processing details.

Tips:

- Make sure your processing is compliant with all EU regulations and parameters, particularly temperature, pressure, sealing and microbiology.
- All processing and transportation should conform to an internationally recognised standard, for instance, for pasteurisation and sterilisation.
- Check the [EU Rapid Alert System for Food and Feed](#) for reports of contamination or breaches in food

safety standards.

Expand your product ranges

It is important to monitor new products and trends in the European market if you want to deliver customised packages. Innovation is important — you have to always be up to date to stay in business. In Europe, canned fish with easy-open lids remain popular and are the most widely used packaging style. However, product ranges have been expanding to include pouches, easy-open cups and plastic cups, in addition to new and more interesting flavours, sauces and complimentary sides, particularly for preserved and processed tuna.

Consumers want no-drain products with no preparation needed, thus product lines such as warm meals infused with sauces and flavours becoming a popular hit among brands.

For example, John West has introduced its tuna Infusions and Steampots line with ready-to-eat meals. Flavours in tuna pouches are also been tried to match the changing European consumer taste with the inclusion of Asian, Moroccan and Indian style cuisines. Rio Mare has also introduced its Insalatissime, ready-to-eat product line, which includes pre-cooked tuna with pasta and vegetables.

Figure 3: Rio Mare's Mexican tuna salad and John West's smoked sardines and tuna basil salads on supermarket shelves in the Netherlands



Source: Seafood TIP

Mackerel has been mostly packaged in cans of brine, tomato or wine but also featuring different styles of cooking, such as grilled and smoked, including a variety of infused flavours and sauces from various cuisines. Easy-peel packaging for sardines, presented in a variety of oils, have been a popular choice among European retailers.

Anchovies are usually mass packaged in jars or tins, but some companies have been increasingly promoting their anchovy products in gourmet style packaging, particularly for Cantabrian anchovies from the waters of Northern Spain.

Tips:

- Consumers are key. Changes in product ranges as well as packaging are mostly due to changing consumer habits and demands. Keep yourself up to date with consumption trends by monitoring


retailers' websites and supermarkets' assortments. Be creative in exploring new options to improve the product.

- The wide range of new sauces incorporated to canned fish shows that European consumers are open to trying new flavours. Non-EU suppliers should also try to introduce their own recipe flavours to market.


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

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