

# The European market potential for tuna loins

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Tuna loins are usually categorised into three types: (1) frozen pre-cooked tuna loins for canning, (2) frozen loins for processing into steak portions, and (3) tuna loins for the fresh market, such as for sushi and sashimi. This study only focuses on pre-cooked and frozen tuna loins used as a raw material in the European canning industry.

As the consumption of canned tuna grows, so does the demand for frozen and pre-cooked tuna loins. The leading European markets for these products are Spain, Italy, France and Portugal.

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## 1. Product description

There are several varieties of tuna but the majority of the European market is made up of four species: skipjack or stripe-bellied bonito, yellowfin or ahi tuna, albacore and bigeye. However, only two major species of tuna are used for tuna loins destined for the canning industry:

- Skipjack, which can be identified by the presence of longitudinal stripes on their bellies. Skipjack usually grow up to between 40 cm and 80 cm and weigh approximately 2.5 kg. They are usually caught through purse seining or pole-and-line methods. The small size of the tuna fish makes it a perfect material for loins.
- Yellowfin can be easily recognised by the sickle-shape and yellow colour of their anal and second dorsal fins. They grow up to between 40 cm and 150 cm and can weigh more than 189 kg.

Cooked loin products are cleaned according to customers' precise needs and specifications. Loins that will be exported are then vacuum packed and frozen before being transported to customers.

Pre-cooked frozen tuna loins are fillets commonly used as raw material, classified under the following [Harmonised System](#) (HS) codes:

- 16041426 for skipjack;
- 16041436 for yellowfin;
- 16041446 for other kinds of tuna loins, which are preserved and prepared whole or in pieces, excluding skipjack and yellowfin. This excludes products in vegetable oil or minced. This HS code may include bigeye or albacore loins.

## 2. What makes Europe an interesting market for tuna loins?

Tuna is an integral part of the diet of millions of Europeans. Furthermore, Europe's imports of tuna and tuna-like species are notably higher than its production and exports. In 2018, Europe imported a total of 1,365,545

tonnes of tuna and exported 311,723 tonnes. Production of tuna and tuna-like species, both wild and farmed, amounted to just 418,155 tonnes. This means that there are opportunities for exporters to Europe to enter this market as providers of pre-cooked, frozen tuna to the European canning industry.

## Tuna is the most consumed marine species in Europe

A 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 2.78 kg per capita, most of which is canned tuna, which corresponds to 11% of all fishery and aquaculture products consumed in Europe.

Europeans currently eat more tuna than Americans. Consumption of canned tuna in the US has shrunk over the last decade, falling from 3.5 kg per capita in 2000 to 2.1 kg per capita in 2017. Other main consumers of canned tuna are Australia and Japan, where consumption has moderately increased in the same period.

In Europe, there was a 95-gram increase in the annual per capita consumption of skipjack in 2016, one of the largest increases in the consumption of fishery and aquaculture products that year. On the other hand, EUMOFA also reported a 63-gram drop in the consumption of miscellaneous tuna, which includes yellowfin. The shrinking consumption of yellowfin has been partly caused by the delisting of yellowfin products in Central and Northern European markets due to questions of sustainability. Additionally, Spain and Italy prefer the lower-priced skipjack.

The high consumption of tuna forces Europe to import tuna from other countries to meet demand. Europe's 2016 self-sufficiency rate for tuna was 28%, which is slightly lower than the 2014 rate of 34% and marginally higher than the 23% of 2018. In 2016, skipjack tuna catches increased by 22,960 tonnes, which contributed to a slight recovery of the self-sufficiency rate for European tuna in general. Still, there are plenty of opportunities for non-EU tuna producers to enter the European market.

### Tip:

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

## Demand from domestic canning industry

More than 70% of the tuna caught in the world is canned or otherwise prepared or preserved. The main countries producing canned tuna are Thailand, Spain and the United States. The multinational groups [Bolton](#), [Bumble Bee](#), [Thai Union](#) and [StarKist](#) dominate the world's tuna industry.

Europe's tuna canning industry is concentrated in Southern Europe, particularly in Spain, Italy and France. Spain leads Europe's production of canned seafood with more than 343,000 tonnes of product weight produced, valued at €1.5 billion. The Iberian country also produces 70% of the canned tuna processed in Europe.

It is common practice in the European canning industry to perform all the processing up to tuna loin production as close as possible to the landing areas in developing countries, then export the semi-processed product — frozen pre-cooked tuna loins for canning — to canneries in developed countries.

[Eurostat](#) data total shows that European import volumes of frozen pre-cooked skipjack, yellowfin and other tuna loins grew 2.39% in 2018, growing 12.03% since 2015. Import prices per kilo also grew in 2018 to €5.16 from €5.03 in 2017, corresponding to a 21% rise since 2015.

Figure 1 shows that skipjack loins have the most demand in Europe, making up most of Europe's increasing import volumes. Yellowfin loin import volumes have been unsteady, showing a declining trend in 2018, while import volumes of other tuna loins remain steady.

Specifically for skipjack, overall import volumes jumped 8.41% in 2018, including intra-European imports, adding up to 30.91% growth since 2015. The top six European markets for skipjack loins are Spain, Italy, France, Portugal, the Netherlands and Greece.

Yellowfin loin imports decreased slightly since 2015, recording a -4.54% drop from 2017 to 2018. The top six destinations in Europe for yellowfin loins are also Spain, Italy, France, Portugal, the Netherlands and Greece. The shrinking volumes of yellowfin imports can be attributed to the decreasing consumption of yellowfin in Europe.

Imports of tuna loins that do not fall under skipjack or yellowfin loins HS codes, such as albacore or bigeye species, have inched 0.46% higher in 2018. In the 2015–2018 period, however, these imports declined by 10.15%. The top six EU importing countries in this category are Spain, Portugal, Italy, Belgium, France and the UK. Sales in this category may not be as huge as in skipjack or yellowfin, which major players Ecuador and China already dominate, but tapping into this niche market may be a good start for smaller suppliers.

Europe's catches make up just 10% of the world's tuna catches. According to Eurostat, European countries caught approximately 435 thousand tonnes of tuna in 2017, corresponding to 10% of all marine fish caught by European countries that year. The most common tuna species caught was skipjack tuna (121,358 tonnes), followed by yellowfin tuna (117,771 tonnes). Spain and France accounted for almost all of the tuna caught in Europe in 2017, with shares of 64% and 28% respectively.

Europe's total import volume of skipjack and yellowfin loins in 2018 amounted to 136,914 tonnes, of which 79,237 tonnes were skipjack and 57,677 tonnes yellowfin. Some fishing organisations, such as [Europêche](#), claim that European fishing fleets can meet the needs of European processors, however, producing tuna loins for the canning industry involves more than the fleet's fishing capacity. The labour costs for processing raw material in Europe, which includes gutting and cleaning the fish, are usually higher than elsewhere. In addition, if canners choose to process tuna, they would also incur some production losses. Production yields for skipjack and yellowfin tuna are normally between 50% and 55%, most losses happening in deboning and cleaning. Plus, yields may also change during packing.

Considering the losses and expenses during processing, it is understandable why canners in Europe still prefer importing from non-EU sources, creating more opportunity for outside suppliers selling tuna loins at cheaper prices.

### Tip:

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

## Huge business opportunity for non-EU suppliers

European countries imported a total of US\$2.9 billion of prepared and preserved tuna from outside the EU in 2018. This includes two major products: finished product in the form of canned tuna and raw materials (pre-cooked loins) for Europe's canning industry. Major buyers of tuna loins include Spain, Italy, France and Portugal. The next section offers a breakdown of the European tuna loin market in more detail.

European imports of tuna loins from the African, Caribbean and Pacific Group of States (ACP) and the eight Least

Developed Countries (LDC) are duty-free. In addition, since 1990, in an effort to help tackle drug production and trafficking, canned tuna and tuna loins from Central American and Andean countries are subject to zero tariffs when entering the European market, adding to trade efforts towards alleviating poverty, promoting good governance and helping vulnerable nations achieve additional revenue.

More than 90% of all tuna loin imports into Europe come from non-EU suppliers, which presents huge opportunities for non-European exporters to enter the market. In addition, there has been a steady increase of 30.91% in tuna loin export volume to Europe since 2015. Import volumes of non-EU skipjack tuna loins, the most used in canning, have increased by 10.91% between 2017 and 2018, and 31.58% since 2015.

Ecuadorian suppliers still lead skipjack tuna loin exports to Europe, but their market control is now challenged by China, whose volumes have grown 68% from 2017 to 2018. Figure 2 shows how Ecuador's share of the market has been affected by Chinese exports. Ecuador's share has shrunk almost -32% in the same period.

The shift in the market can be attributed to China's ability to supply tuna loins at the cheapest prices since 2015. For instance, Ecuador sold frozen skipjack tuna loins at €4.78 per kg in 2018, while China kept the price at €4.53 per kg, allowing Chinese tuna to gain market share.

Prices in general grew last year, including tuna loin prices from Papua New Guinea, Indonesia and Philippines. Yet, suppliers from these countries improved their market presence among exports to Europe significantly, by 77.62%, 30.32% and 62.34% respectively.

Figure 2 shows that trading from China usually peaks in the beginning of the year as the quota of duty-free loins are filled. Most deliveries under the Autonomous Tariff Quota (ATQ), which is usually filled in January, come from China at considerably low labour costs and prices. The ATQ enables EU processors to import raw material from non-EU countries duty-free for further processing. Volumes of pre-cooked loins outside the quota are automatically subject to 24% import tax when entering the EU.

Export volumes from Ecuador, the Philippines and Papua New Guinea to Europe are usually high in the first quarter of the year, when canneries fill their tuna loin storages, but remain steady throughout the year. Volumes of skipjack tuna loins start to pick up again in July and August as canneries finish the first batch of processing. These countries maintain steady delivery volumes because they benefit from duty-free trade with European buyers throughout the year.

The yellowfin tuna loin industry has a slightly different group of active countries than those active in skipjack. As Figure 3 shows, Ecuador still leads in yellowfin exports to Europe at 17,447,900 kg in 2018. Suppliers from other countries include Mauritius, Papua New Guinea, Solomon Islands and Philippines.

Unlike skipjack, yellowfin is considered overfished, so there are catch limits and other measures which affect its trade, in addition to weather conditions.

As Figure 3 shows, yellowfin loin import volumes only start to pick up in late January, possibly due to the end of the two-month fishing ban in the Eastern Pacific Ocean, where Ecuadorian vessels fish. In these fisheries, half of the purse seiners stop fishing between 29 July and 8 October and the other half from 9 November to 19 January. These windows help explain why yellowfin loin supply is higher in certain periods, such as late January, early July and late October.

In the Indian Ocean, where yellowfin stocks are severely overfished, producers from Mauritius are struggling to maintain their supplies to Europe. Meanwhile, stocks in the Western Pacific Ocean are healthier, which helps explain the steady supply from countries such as Papua New Guinea, Solomon Islands and Philippines.

Recovery measures for yellowfin stocks and consistent price increases from non-EU suppliers help explain the

downward trend of imported yellowfin loins. The average price of yellowfin increased by 14% between 2015 and 2018.

Supply of other tuna loins, which is dominated by non-EU exporters, has remained steady in the last three years. Exports volumes drops in Portugal in 2018 (-73.69%) were compensated by increased imports from Spain (+13.13%) and Italy (+293.20%).

Half of the total imports from outside Europe were consistently provided by Ecuador in the 2015–2018 period, followed by Mauritius, El Salvador, China and Cape Verde.

## Understanding EU tariffs necessary to enter the market

As the European canning industry relies on imported tuna loins so heavily, the industry's own development is highly dependent on EU tariffs, which affect raw materials' availability and prices. The cost of raw materials is a key factor for entering the competitive tuna loin market and the reason why European canners advocate for additional quotas for duty-free loins.

Over the years, duty-free quotas of tuna loins have increased, showing European canners' growing demand for tuna loins. In 2015, the ATQ was set at 22,000 tonnes and gradually increased over the years. The current quota for 2019-2020 is 30,000 tonnes as per Council Regulation (EU) 2018/1977.

These measures are designed to enable the European fish processing industry to import raw materials from non-EU countries for further processing at reduced rates or duty-free. The volumes are calculated according to utilisation rate, the need for a level playing field between EU and non-EU producers, value added for each product and existing trade preferences.

For suppliers looking to enter the European market, until the quota is filled, exporting tuna loins into Europe tax-free is essentially a matter of finding a buyer for your product to qualify for tax-free status. However, getting into the business may be tricky, as many trading partnerships are already established.

Interested parties must also consider that 11 out of the 15 main trading partners already export at zero tariffs via unilateral arrangements, such as the Generalised Scheme of Preferences (GSP+), free trade agreements and economic partnership agreements. For example, all shipments from Ecuador and Papua New Guinea to Europe are duty-free any time of the year, as long as they meet rules of origin. If your country is not one of the main trading partners of Europe, it is important for you to make your sales under the ATQ to be competitive.

### Tips:

- Check price movements in the tuna loin industry. Get a subscription at [Atuna.com](https://atuna.com) for the latest price updates.
- Learn the status of the ATQ allocation, since it is rapidly exhausted in the beginning of the year.
- Visit [this website](#) to learn all about the ATQ and the policies behind it.
- Contact buyers in the last quarter of the year, since timing is important. Remember that Spanish and Italian buyers fill their cold storages with loins at the beginning of the year because of the ATQ.

## 3. Which European markets offer opportunities for exporters of tuna loins?

The top destinations for tuna loins are located in Southern Europe, where tuna-processing facilities are located,

but non-EU suppliers should also consider buyers in Northern and Eastern Europe. These regions may not process much tuna loins into canned tuna but their imports are also growing. Some countries, like the Netherlands, import products for re-export within Europe. In others, like those in the east, tuna imports are growing as consumers seek healthy protein options.

## Spain

Spain is Europe's leading tuna-processing country with major companies, such as [Jealsa](#), [Frinsa](#) and [Grupo Calvo](#). Canned tuna comprises 83% of the canned food exported by Spain. Besides producing for the Spanish domestic market, Spain's canning companies export within Europe to Italy, France, Portugal and other countries. Spanish tuna exports to countries outside Europe are limited and at higher prices than those to nearby destinations.

Across all species for tuna loins, Spanish processors are the top importers in Europe from non-EU suppliers. In 2018, Spain imported 51,751,700 kg of skipjack loins and 95% of this volume was sourced from outside Europe. Some of these volumes are re-exported to other European countries, such as Portugal, Italy and France. Volumes sent to Portugal and Italy were slightly lower in 2018 than in previous years.

Spain's imports from non-European countries have increased since last year for skipjack and other tuna loins but have slightly dropped (3.61%) for yellowfin imports.

### 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 most of these canners.
- *¿Hablas español?* If you don't speak Spanish, make sure to hire a Spanish-speaking mediator to effectively negotiate and deal with Spanish companies.

## Italy

The second largest canned tuna producing country in Europe is Italy, which also comes second to Spain when it comes to importing tuna loins. The country's largest processor, [Bolton Food Group](#), owns major European brands [Saupiquet](#), [Isabel](#) and [Rio Mare](#), the leading tuna brand in Europe, which holds more than a third of the Italian market.

Italy imported a total of 11,767,700 kg of skipjack tuna loins in 2018, accounting for 14.8% of Europe's overall imports. A 98% share of this volume comes from outside Europe, which is 39.56% more than in 2015.

Import volumes of yellowfin loin coming from non-European countries dipped slightly at -1.08% in 2018, but have otherwise remained steady since 2014. However, Italy's imports of other tuna loins from outside the EU showed promising volumes last year, skyrocketing from 25 thousand kg in 2017 to 98,300 kg in 2018.

Italian processor Bolton believes Italy's improved domestic production of canned tuna favoured the climb in pre-cooked tuna loin imports. Expansion of the Italian tuna business is well underway as deals between Bolton and the US-based processor and trader Tri Marine move forward. The combined turnover of Tri Marine and Bolton was more than €2.5 billion, according to European Union officials in a review of Bolton's investment in Tri Marine in 2013.

The announced takeover of all of Tri Marine's tuna business is expected to give further integration to Bolton's supply chain as well expansion of private label business, a specialty of Bolton's and its joint ventures with

Taiwan's Fong Chun Formosa Fishery Company (FCF) and Japan's Itochu. Becoming a preferred supplier to Bolton and its partner, you gain access to a large market. Read the [CBI study about trends in the fish and seafood market](#) to learn more about mergers and acquisitions affecting the seafood trade.

## France

The canned tuna business in France is mostly dominated by [Petit Navire](#), owned by Thai Union, [Saupiquet](#), owned by Bolton, and the tuna fishing and processing company [Sapmer](#).

Having imported 5,595,600 kg in 2018, France is the third largest market in Europe for external suppliers of skipjack tuna loins. Despite dropping slightly since last year, imports from non-European suppliers by French processors grew 16.04% between 2015 and 2018.

As imports from countries outside Europe grow, French canners also bought fewer skipjack loins from European countries in 2018, reducing volumes by almost half -45.53%.

In yellowfin loins, French processors have been drastically reducing imports: almost 90% since 2015, mostly from European suppliers (-95.11%). Issues over sustainability and overfishing, particularly in the Indian Ocean, have influenced the drop in yellowfin imports. French canners and processors, like Sapmer and Saupiquet, have also pledged commitment to high-value and sustainable tuna.

## Portugal

Portuguese import volumes are miniscule compared to major processing countries, such as Spain, Italy and France, but Portugal has great potential for suppliers seeking to enter the European market.

The average annual consumption of fish and seafood in Portugal increased 3% from 2015 to 2016, reaching 57 kg per capita, the highest in the EU. That is more than twice the EU's average annual consumption of 24.3 kg per capita. Portugal has many canned fish processing plants producing under brands mostly for export, including [Santa Catarina](#), [A Poveira](#) and [Ramirez](#).

The fourth largest European importer of skipjack loins from outside the EU, Portugal increased its import volumes by 49.73% in 2018, corresponding to an additional 1,390,200 kg in imported product in comparison with 2017.

Imports of yellowfin and other tuna loins trend in the opposite direction, dropping -40.53% and -73.69% respectively between 2017 and 2018.

## Netherlands

The Netherlands is a small country without any tuna-processing facility, but its imports of skipjack tuna loins have increased dramatically since 2015, adding 1,876,100 kg in volume since 2015. These imports come mostly from non-European countries, which account for 80% of the total import volume. Tuna products are transported and moved through their seaports and warehouses and on to other destinations in Europe.

The Netherlands' major markets for re-export of skipjack loins are France, Italy, United Kingdom and Spain. However, these volumes dropped between 2017 and 2018, particularly in France, going from 4,628 tonnes in 2017 to 2,631 tonnes in 2018.

## Germany

German buyers are steadily importing more tuna loins for re-export to other European countries. Germany's main markets for prepared and preserved tuna are Austria, Belgium, Netherlands, Poland and France, all of which increased their imports between 2017 and 2018.

With Germany upping its exports within Europe, the country might be the next potential market for non-EU suppliers. Skipjack loin imports from non-European suppliers have more than tripled in 2018, as well as yellowfin loin imports, which increased by 91,100 kg from 2017 to 2018.

Germany's tuna market has shown promising growth over the years as the lifestyle of Germans change 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.

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](#), which appears to be paying off.

## Belgium

Belgium is not a major player in skipjack loin imports. It is, however, the third top importing European country for yellowfin loins, which amounted to 1,292,800 kg in 2018. Of these purchases, a 97% share came from suppliers within Europe, mostly from Italy, France and Spain. The remaining 3% came from non-European suppliers, which may seem small but shows the first few Belgian imports from non-EU suppliers since 2015.

In the last two years, Belgian re-exports to other European countries have rapidly grown, adding 370,674 kg to Luxembourg, another 334,858 kg to Slovenia and 22,625 kg to the Netherlands.

## United Kingdom

The UK is not a significant importer of skipjack and yellowfin loins, but has imported other tuna loins under HS code 16041446 from other EU countries. British imports, which come mostly from Germany, account for just 0.14% of Europe's overall imports of other tuna loins.

The impact of the United Kingdom's projected exit from the European Union remains uncertain for European canners and non-European suppliers. Many questions remain open on the future of UK's imports of canned tuna and from where they will be sourced. It is therefore wise to check the existing and possible future customs regulations before entering a deal with buyers in the United Kingdom.

## Eastern Europe: A promising market

Latvia's skipjack loin imports in 2018 reached 48,800 kg, Bulgaria's 43,200 kg and Lithuania's 10,200 kg, all of which include imports from non-EU suppliers. Poland and Hungary, which imported 14,700 kg and 11,400 kg respectively, sourced their skipjack loins exclusively from within Europe.

Eastern European buyers source yellowfin loins mostly from other European countries. Imports from EU countries into Bulgaria increased by 25.37% in 2018 to 16,800 kg, compared to 2017, while imports into Poland and Romania dropped significantly by -52.11% and -90.83% to 3,400 kg and 1,000 kg respectively in the same period.

Bulgaria's imports of other tuna loin products from non-EU countries also grew by 59.52% in 2018 compared to 2017, reaching 6,700 kgs tuna loins. Bulgarian fish importers seek to expand local availability of medium and high-value fish products in particular. Fish and seafood consumption in Bulgarian households remains relatively small at 5 to 10 kg per capita annually, but the local restaurant industry has been driving increased demand for seafood.

Eastern Europe's imports of tuna loins are expected to grow in the coming years, largely influenced by increased consumption and promotion of seafood as part of a modern and healthy lifestyle. In the medium and long terms, tuna imports are expected to increase as the purchasing power of consumers improve. In the short term, however, consumer purchases will likely be concentrated in low-value products, such as canned tuna.



## Tips:

- To reach Eastern European markets, such as Poland, Bulgaria and Hungary, which source from other countries in Europe, consider trading with Germany or the Netherlands, which in turn do business through deliveries made from stocks in the major ports of Hamburg and Rotterdam.
- Check out Bulgarian buyers in the frozen and canned tuna sector like [Diavena Ltd.](#) and [Ra Ste Co.](#)
- If you are capable of or interested in exporting tuna as a final canned product, read the CBI Product Fact Sheet for Canned Fish to learn what opportunities exist for exporting canned tuna to countries that have few tuna-processing facilities but are increasing their tuna consumption, like many in Eastern Europe.

## Internal movement of tuna loins within Europe

Within Europe, the internal movement of tuna loins dropped 11% from 9,629 tonnes in 2017 to only 8,553 tonnes in 2018. Spain led the exports of frozen pre-cooked tuna loins to other member states in 2018, supplying 2,457 tonnes or -18% from 2017.

Although the UK has no tuna loin processing plants, it was the second largest transporter of tuna loins to the rest of Europe, moving 1,888 tonnes. Italy came close after a massive 128% increase, supplying 1,421 tonnes, more than double the volume transferred in 2017.

Looking into Europe's internal import market can also be interesting for non-EU suppliers. Trading with Spain, the UK and Italy, which are dominant players, can be useful if you want to enter the market using help from the inside.

## 4. What trends offer opportunities in the European tuna loin market?

### Further rise of the ATQ

In 2018, the ATQ allowed Europe to import up to 30,000 tonnes of raw materials at zero percent tariffs from non-European suppliers. The ATQ is expected to be set higher next year as the canning sector requests an additional 6,000 tonnes for the 2019-2020 period. The ATQ has gradually risen from 22,000 tonnes since 2015.

Canning association [ANFACO-CECOPESCA](#) (Asociación Nacional de Fabricantes de Conservas de Pescados) emphasises that EU production of canned tuna only covers 48% of European consumption and demands a further rise in the quota for tuna loins to increase canned tuna production in Spain.

Opposition from the Spanish fishing fleet and other organisations claims that raising the ATQ further would be an unfair advantage against the European fleet, [which can meet the entire demand from canners](#), according to The National Association of Tuna Freezer Vessel Shipowners (ANABAC). The Association of National Organizations of Fishing Enterprises in the European Union, *Europêche*, also criticises the ATQ saying it serves only to get better prices from non-EU producers and "put pressure on European producers' prices and employment."

## Tips:

- Keep yourself updated on developments about the ATQ. Subscribe to [Undercurrent News](#) or [Atuna](#) for latest news on ATQ updates.
- If the ATQ is raised further next year, contact buyers ahead of the imposition of the quota to take advantage of the additional opportunity to enter the European tuna loin market.

## Chinese tuna loins gaining foothold in Europe

As the US-China trade war continues, Chinese loin processors continue to find new markets for their tuna loins, and have successfully managed to gain access to the European market. While Ecuador is still in the top position as the biggest exporting country, in the last decade, the Chinese took over a substantial share of the supply to European canners.

China's skipjack loin exports grew by 68% in the 2017–2018 period, more than doubling (121.46%) since 2015. This trend is likely to continue in the short and medium terms, as Chinese prices remain low.

However, other third nations like Indonesia (+30.32%), Philippines (+62.34%), Solomon Islands (+25%) were also considerably increasing their export volumes to Europe since 2017. This shows a positive outlook for non-EU suppliers to enter the market, which seems to be growing for tuna from more non-EU sources.

In the long term, European buyers are expected to continue to outsource processing operations of tuna, up to loining, to low-cost countries, which have different policies for industrial management and which are located close to fishing grounds (such as Ecuador, Philippines, Papua New Guinea).

## European buyers require sustainability seals

European retailers and consumers, particularly from Northern and Western Europe, are increasingly more concerned with the sustainability of seafood products. 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. A 47% share of European consumers recall seeing the MSC label, up from 43% in 2016.

MSC, the most recognised and accepted certification for sustainable wild-caught seafood, 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 seven 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 Atuna's [European Tuna Conference](#) for updates on trends and practices in tuna industry. The 2018 edition focused on traceability and sustainability in the tuna supply chain.
- Attend the [Seafood Expo](#) and [Conxemar trade fairs to meet frozen tuna buyers and suppliers](#) 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, held usually 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.

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. Eleven are run by industry such as [TUNACONS](#), [TransMarina C.A.](#) and the [Organisation of Associated Producers of Large Freezer Tuna Vessels \(OPAGAC\)](#). TUNACONS is a joint effort of tuna companies in Ecuador to promote FIP to support purse seine fisheries to achieve MSC certification.

As an alternative to MSC, you can also look into the [Friend of the Sea \(FOS\)](#) certification, which is more popular in Southern Europe. In 2018, 15 fisheries were FOS-certified and three 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 six months.
- To apply for an FOS certification or to verify if a fishery or fleet is certified, visit [the FOS page](#). If you are new, their website also offers a step-by-step certification procedure.

## Europe enforces stricter regulations against fraud and illegal, unreported and unregulated (IUU) fishing

As one of the world's largest import market for fisheries products, Europe is very active in combatting IUU fishing activities. Europe's regulation against IUU fishing entered in 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, then 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 has been caught legally, make sure that your product has the right CATCH certificate.
- Keep yourself updated with the developments against IUU fishing in Europe. In May 2019, the Commission has launched [CATCH](#), an IT system that aims to digitalise the currently paper-based European catch certification scheme as laid down by the Regulation (EC) No 1005/2008.
- The infographic below shows a simplified version of how the European Commission addresses IUU fishing. If you want a more detailed explanation of the European Commission's policies, consult the [European Commission's page dedicated to IUU fishing](#).


Thailand, a major tuna-processing country, has recently had a yellow card status lifted after four years. Thailand was the seventh largest exporter of skipjack loins to Europe in 2018. Vietnam, which also exports some volume of tuna loins to Europe, is still awaiting results of an assessment to remove its yellow card warning. To have the yellow card removed, Vietnam must fulfil Europe's requirements, including:


- revising its legal framework to ensure compliance with international and regional rules applicable to the conservation and management of fisheries resources;
- effective implementation and enforcement of the amendments;
- increasing the traceability of its products;
- sanctioning sales of IUU products;
- strengthening the implementation of international rules and management measures.

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

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