

Exporting frozen tuna to Europe

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, Portugal, the United Kingdom 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.

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1. Product description

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

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

When 'frozen tuna' is referred to in this survey, this concerns the [Harmonised System](#) codes in codes Chapter 0303, paragraph 4 (which are 0303-41/42/43/44/45/46) and HS code 030487. This means that whole round tuna is included (0303-41/46), and frozen tuna fillets, steaks and loins (030487).

Quality

Depending on quality, tuna is used for canning, sashimi or frozen sales. For tuna, there are 4-5 quality criteria that determine the quality and thus the price of the product. These categories are freshness, size and shape, colour, texture, and fat content.

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

Tips:

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

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

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 Europe.
- 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 Europe because the deep frozen cold chain (-60 degrees' chain) cannot be guaranteed yet in many cases.

Picture 1: Tuna steaks in plastic bag, 1.0 kilogram, Germany.



Picture 2: Tuna steaks in plastic bag, 1.0 kilogram, United Kingdom.



Labelling

There are specific labelling requirements for fish sold in the European Union (EU). In addition, under new rules that went into effect in December 2014 (Directive No. 1379/2013), labels must provide precise information on the harvesting, used fishing gear, and production of the products. This applies to all unprocessed seafood, as well as to some processed seafood, regardless of whether it is pre-packed. Also, the label must mention how the product is processed: Frozen, whole/loin/steak, skin on/skinless, with bone/boneless. All information must be

provided on the labelling or packaging of the fishery product. Or by means of a commercial document accompanying the goods.

Tip:

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

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

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

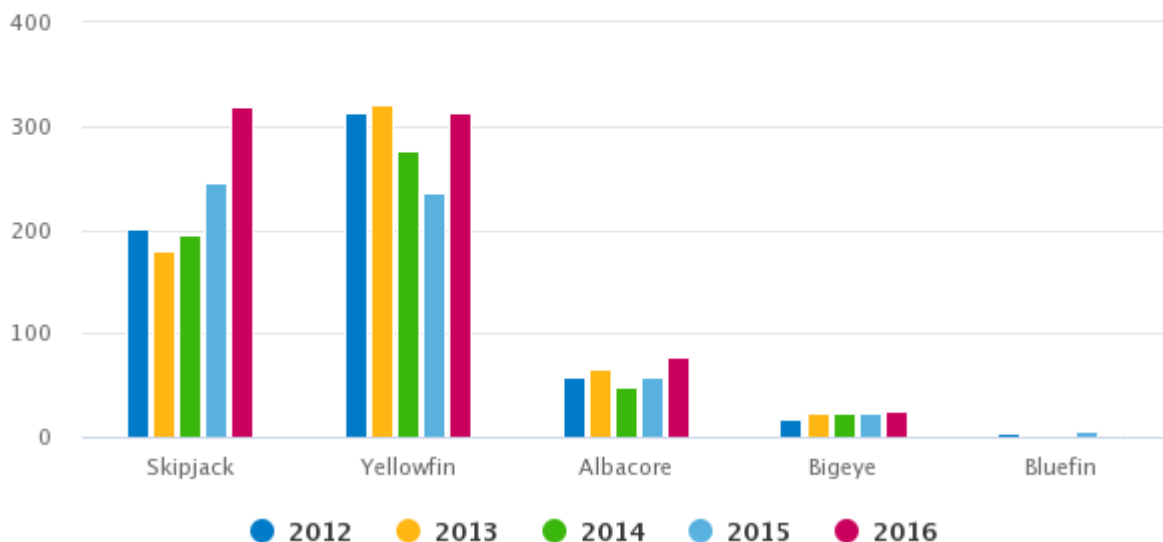
Imports

After years of relatively stable imports, European import value grew sharply in 2016. European countries imported €738 million of frozen tuna in 2016. Skipjack tuna was imported the most (€318 million), closely followed by yellowfin (€314 million). Yellowfin tuna imports thus recovered from two years of major decline and are back at the same level as in 2012. Skipjack (+12% per year), albacore (+8%) and bigeye (+10%) all realised strong growth in European imports in 2012–2016.

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 from time to time that catches were no longer profitable. For the coming years too, prices are expected to remain relatively low because of sufficient availability of raw material.

Figure 1: European import of frozen tuna by main species, 2012–2016

in € million



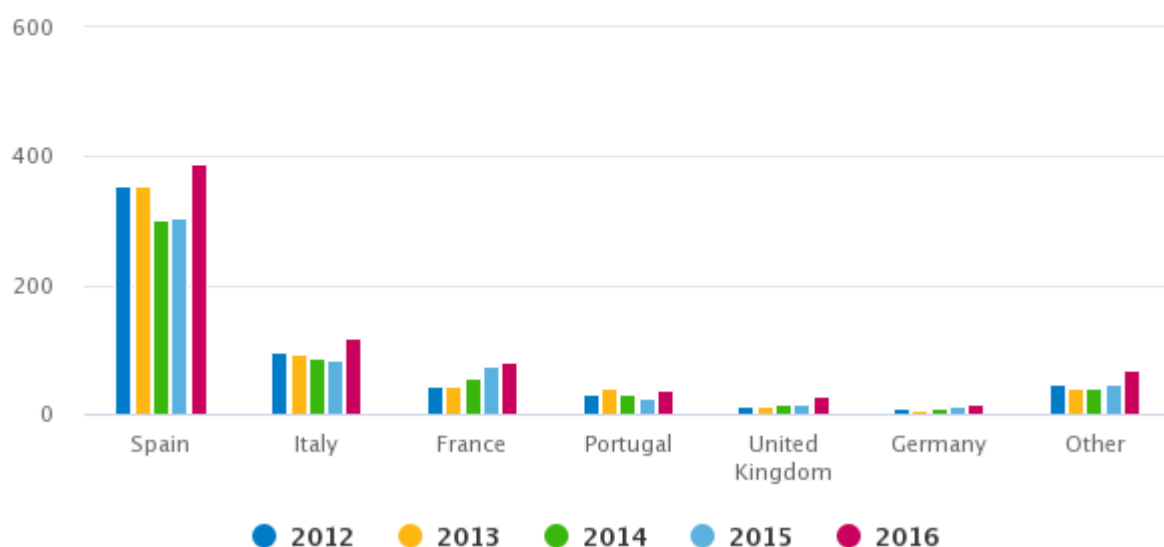
Source: Trademap 2017

Spain is the largest importer of frozen tuna, followed at a large distance by Italy and France. In 2016, Spain registered a total import value of €305 million, which represented 53% of total European imports. Italy imported €119 million (16%) and France €80 million (11%). Other significant European importing countries are Portugal (€37 million), the United Kingdom (€27 million) and Germany (€16 million).

Spain has been the main importer of yellowfin tuna whole round (around 102,000 tonnes and €203 million in 2016) for many years, followed by Italy (around 25,000 tonnes and €69 million in 2016).

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

in € million



Source: Trademap 2017

Leading suppliers

The list of leading suppliers of frozen tuna shows some variation over the years. In 2015, South Korea became the leading supplier of frozen tuna, followed by Spain and Vietnam. Together, they represented 30% of the total European import of frozen tuna in 2015. Other leading suppliers are France, Mexico and the Philippines. In 2016, South Korea was still leading (€90 million), followed by Spain, France, Vietnam and Mexico. Developing countries dominate the supply of frozen tuna to Europe (53%), followed by intra-European supply (24%) and the rest of the world (23%).

The largest importing countries of frozen tuna fillets, steaks and loins are Spain (around 9,700 tonnes in 2016) and France (around 7,000 tonnes in 2016). South Korea, Ecuador, Vietnam and Spain were the most important exporters of these products to Europe in 2016. The total European import value of frozen tuna fillets, steaks and loins was around €237 million in 2016. Most of the fillets, steaks and loins came from the yellowfin tuna.

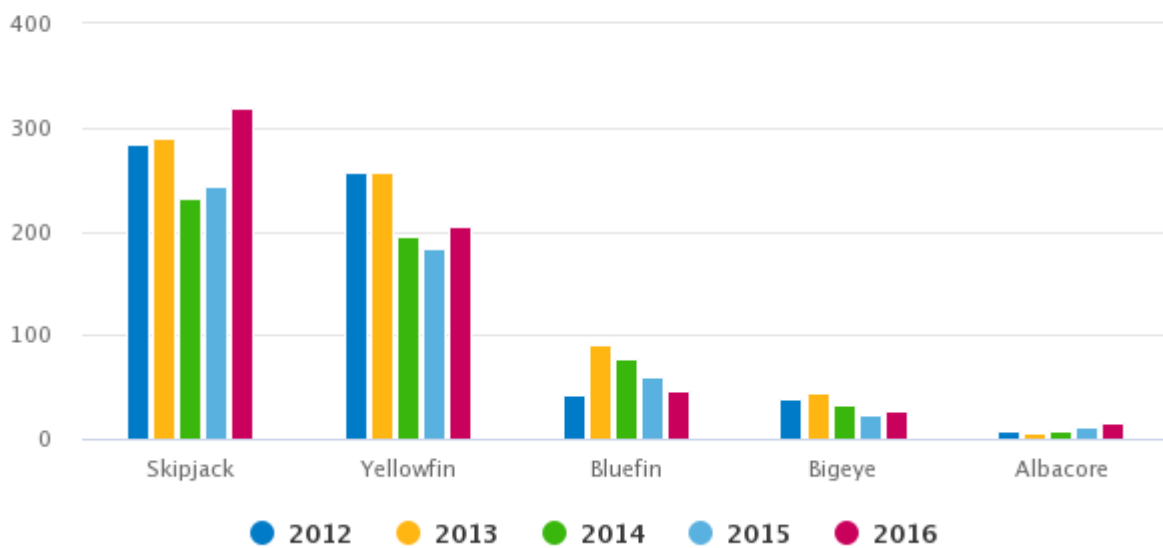
Exports

Total European exports of frozen tuna fluctuated quite a lot in 2012–2016. On average, exports slightly decreased (by 0.7% per year), mainly due to a large decline in 2014 and a smaller decline in 2015. In 2016 exports of frozen tuna from Europe showed strong recovery, with a 17% increase in exports compared to 2015.

Skipjack tuna was the most exported type in 2016 (€319 million). With a 31% annual increase, it performed best on growth as well, with over half of all frozen tuna exports comprising skipjack in 2016. Yellowfin exports reached €204 million, while the other species remained below €50 million in exports.

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

in € million



Source: Trademap 2017

Spain is the largest European exporter of frozen tuna (€313 million in 2016, 51% of total European exports). Other important exporters are France (€152 million), Malta (€59 million), Portugal (€30 million), the Netherlands (€22 million) and Belgium (€10 million). The Netherlands is an important re-export country in Europe, with more than 800 tonnes of frozen tuna loins and steaks exports in 2015 and more than 1,200 tonnes in 2016. Belgium's role as a re-exporter has been shrinking in recent years (from 1,600 in 2012 to 700 tonnes in 2016). Virtually all exported and re-exported tuna in Europe was yellowfin tuna.

Tips:

Go to the TARIC database for more details about European import duties, Chapter [0303](#) and [030487](#).

Take a look at national sector associations that provide a lot of information about active importers and exporters. Visit, for example, the website of [Conxemar](#) for Spanish wholesalers and importers, [Cluster Maritime](#) to find French prospects, or [Dutch Fish](#) to find Dutch importers of frozen tuna.

Relevant trade fairs for frozen tuna suppliers are [Seafood Expo](#) and [Conxemar](#). [The European Tuna Conference](#) may also be interesting for you.

Consider focusing on companies like [Amacore Seafood](#) and [Anova](#) in the Netherlands, who are important re-exporters of frozen tuna products in Europe.

Visit [the Atuna Portal](#) to know learn about the global trends and developments in the tuna industry.

Production

In 2014, almost 5.0 million tonnes, mainly skipjack tuna, was landed worldwide. Asia produced about 60% of the tuna in the world. Main species are skipjack tuna around 50%, followed by yellowfin tuna (20%) and bigeye tuna (5-10%).

In Europe, about 10% of the worldwide tuna is caught. The main species in Europe in 2014 were skipjack tuna

(around 50%), yellowfin tuna (about 30%), and bigeye tuna (10-15%).

Tip:

The statistics website of the Food and Agriculture Organization ([FAO](#)) of the United Nations (UN) provides detailed information about the tuna catches of the different European Union Member States.

Consumption

Yellowfin tuna is the most important tuna in terms of European consumption. In France and Spain, there is also a high preference for albacore tuna. Looking at consumption per capita in Europe, tuna only plays a small role, due to its' relatively high price. From the overall per-capita fish and seafood consumption in Europe of 22.6 kg in 2012, it is estimated that about 2.7kg is tuna in various forms. Canned tuna represents the lion share of that amount (2.0-2.2kg), followed by fresh tuna (0.4-0.5kg) and frozen tuna (0.05-0.15kg).

Tips:

The intelligence provided by the [European Market Observatory for Fisheries and Aquaculture Products](#) (EUMOFA) will help you to get a better view of the European fish market, and information about consumption of seafood in the different European countries.

See our study about the [European fresh tuna market](#) for more information on fresh tuna export opportunities to Europe.

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

This chapter explains the most important trend for frozen tuna: sustainability. For other trends, see our study [Trends on the European frozen tuna market](#).

Sustainability is the focus

As mentioned earlier, sustainability is becoming more important in Europe. Especially retailers in northern and western Europe are demanding sustainable seafood. An example of an organisation involved in sustainable fisheries certification is the Marine Stewardship Council (MSC). MSC strives to promote sustainable fishing and has its own certification program. Main components of sustainable fishing for tuna are:

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

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

As an alternative to MSC, you can invest in Friend of the Sea (FOS) certification (more popular in southern Europe) or a Fishery Improvement Project supervised by non-governmental organisations (NGOs) such as the

World Wildlife Fund (WWF) or Sustainable Fisheries Partnership (SFP). WWF, for example, invests more than USD10 million a year in tuna projects.

In 2018, 15 fisheries are FOS-certified and 3 are pending. These fishing companies are mainly active in catch areas 51 and 57 (Indian Ocean), areas 34 and 41 (Atlantic Ocean) and area 71 (Pacific Ocean). Their main fishing methods are hand line and purse seine, while the species involved are mostly yellowfin, bigeye and skipjack.

Tips:

Visit the [MSC website](#) or [FOS website](#) and contact NGO's like SFP and WWF to check how sustainable your tuna is.

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

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

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

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

Sustainability certification

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

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

Tips:

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

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

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

Common requirements

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

Tips:

ITC offers fact sheets on the several certification schemes, such as on [IFS](#) or [BRC](#).

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

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

Developing Country exporters of frozen tuna have two main options for entering the European market: 1) agent and 2) traders such as importers, wholesalers and distributors of frozen tuna.

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.

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), Vigo (Spain) 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 (more than 60 plants), followed by Italy (more than 10 plants, mostly bluefin tuna), France (5-8 plants), and Portugal (5-7 plants). Most of the tuna is put into jars and cans.

Retail markets in northern and western Europe only accept tuna of sustainable origin (such as 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.

6. What are the end market prices for frozen tuna?

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

Table 1: Examples of consumer prices for frozen tuna products in 2016/2018.

Product	Price (€/KG)	Country
2 pieces of frozen tuna loin in vacuumed packaging	8.25	Spain
Tuna loin	23.17 / 25.00	France
Sliced tuna in paper box	10.38	Spain
Tuna fillets in paper box	14.24	Spain
Tuna steaks without skin	44.99 / 40.49	Germany

Source: Globally Cool, 2018

The market prices for tuna vary a lot depending on supply and demand. In May 2016 for example, prices for whole yellowfin tuna of 3-10 kilograms (kg) averaged €1.75/kg Delivered At Terminal (DAT) Spain. And for whole yellowfin tuna of more than 10 kg averaged €1.78/kg DAT Spain. Prices for whole skipjack tuna (more than 3.5 kg) averaged €1.50/kg DAT Spain. Prices for yellowfin frozen loins averaged €4.35/kg DDP Spain and for skipjack frozen loins €3.50/kg Delivered Duty Paid (DDP) Spain.

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


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.

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