Market insight factsheet
Tuna 2019

This factsheet intends to provide the United Kingdom (UK) seafood industry with a summary of the performance of tuna in the retail, foodservice and trade sectors, including;

Tuna Trade and Supply
Data includes total tuna imports and exports; comparing finalised HMRC data from 2018 to that of 2017. Additionally a current stock overview of tuna is provided.

Consumer Sales
Data is included on consumer sales of tuna in the retail market (UK); including tuna shopper profiles (GB). Additionally, foodservice information highlights current tuna trends in commercial channels.

Summary

UK trade and supply (2018)

- **Mauritius** was the source of the majority of tuna imports by volume.
- **Irish Republic** was the destination of most exports of tuna from the UK by volume.
- **Skipjack** was the species of tuna mostly traded to and from the UK.

Total consumer sales

- **£415.3m** in value and **62,731** tonnes in volume of tuna were purchased by consumers in UK retail to 52 weeks ending 28.12.2019.
- Tuna was the **2nd** best-selling species in retail volume sales
- **New** dishes include Tuna Nicoise Salad, feeding into trending health concerns of the consumer.

NB

The six species of tuna included in the analysis of this factsheet are; skipjack, yellowfin, bigeye, albacore, bluefin and "miscellaneous". Unfortunately these species cannot be broken down in the consumer data and are recorded as 'total tuna'.

Tuna Imports

Performance

In 2018 tuna was the highest imported species into the UK, with 18% of the overall volume and 23% of the overall value share of the total seafood imports to the UK, an increase of 1.0 percentage points respectively. This equates to £433.3m in value (+1.7%) and 108,297 tonnes in volume (-4.5%). The average price per kg was up +6.5% in 2018 from £3.76 to £4.00.

Species

In terms of volumes of tuna species imported into the UK, the majority (92.7%) was skipjack tuna with the smallest share in import volume from bluefin tuna (0.1%). The main six tuna species (note minimal volume of albacore imported in 2018) each declined in volume when compared to 2017; with the exception of bigeye tuna which experienced growth of +141.3%. The largest volume declines came from albacore (-99.6%) and bluefin (-28.2%) tuna.

Format

In terms of product format, 97.7% of tuna import volumes were in a preserved/prepared format (-4.3%), with 1.7% of volume being frozen (-0.9%) and 0.5% being chilled (-33.3%).

Import origin top 10 (volume)

Rank	Origin	Volume (tonnes, % change)	Value (£, % change)
1	Mauritius	15,927 (+7.1%)	£58.9m (+13.3%)
2	Ecuador	15,817 (+3.1%)	£57.9m (+13.4%)
3	Seychelles	15,813 (-12.1%)	£64.5m (+9.0%)
4	Philippines	15,231 (+22.8%)	£55.8m (+38.9%)
5	Ghana	12,105 (-25.3%)	£50.9m (-15.3%)
6	Spain	6,628 (-23.5%)	£34,3m (-25.9%)
7	Indonesia	5,362 (+13.9%)	£18.4m (+15.0%)
8	Thailand	3,264 (-51.0%)	£14.1m (-51.1%)
9	Maldives	2,758 (+125.8%)	£10.7m (+127.9%)
10	Papua New Guinea	2,651 (+12.5%)	£8.1m (+22.2%)

Tuna Imports
HMRC, via BTS, 2019

Tuna Exports

Performance

In 2018, 1.9% of the overall value and 2.6% volume of seafood exports from the UK were tuna, a loss of 0.5 and 1.2 percentage points respectively. This equates to £25.6m in value (+27.8%) and 8,202 tonnes in volume (+70.6). The average price per kg was down -25% in 2018 from £4.17 to £3.12.

Species

In terms of volumes of tuna species exported from the UK, the majority (70.7%) was skipjack tuna with the smallest share in export volume from albacore tuna (0.01%). Exports of the six tuna species experienced various performance in 2018 with albacore (-93.9) and yellowfin (-5.0) in decline; bigeye (+33.9), bluefin (+142.1%), skipjack (+101.2%) and “miscellaneous” (+32.2%) experienced strong growth versus 2017.

Format

In terms of format 77.7% of tuna export volumes were in a preserved/prepared format (+88.5%), with 17.8% of volume being frozen (+25.3%) and 4.5% being chilled (+37.2%).

Export destination top 10 (volume)

Rank	Destination	Volume (tonnes, % change)	Value (£, % change)
1	Irish Republic	6,149 (+81.8%)	£16.1m (+31.0%)
2	Denmark	501 (-12.4%)	£3.5m (-1.5%)
3	Netherlands	278 (+70.6%)	£1.2m (+43.6%)
4	Lithuania	241 (*unavailable*)	£112k (*unavailable*)
5	Poland	228 (+81.0%)	£616k (+37.7%)
6	Spain	163 (+9.1%)	£451k (+1.0%)
7	Germany	150 (+86.3%)	£945k (+78.1%)
8	France	81 (-26.2%)	£660k (+10.1%)
9	Romania	69 (+408.7%)	£173k (+170.0%)
10	Cyprus	49 (+217.7%)	£184k (+110.9%)

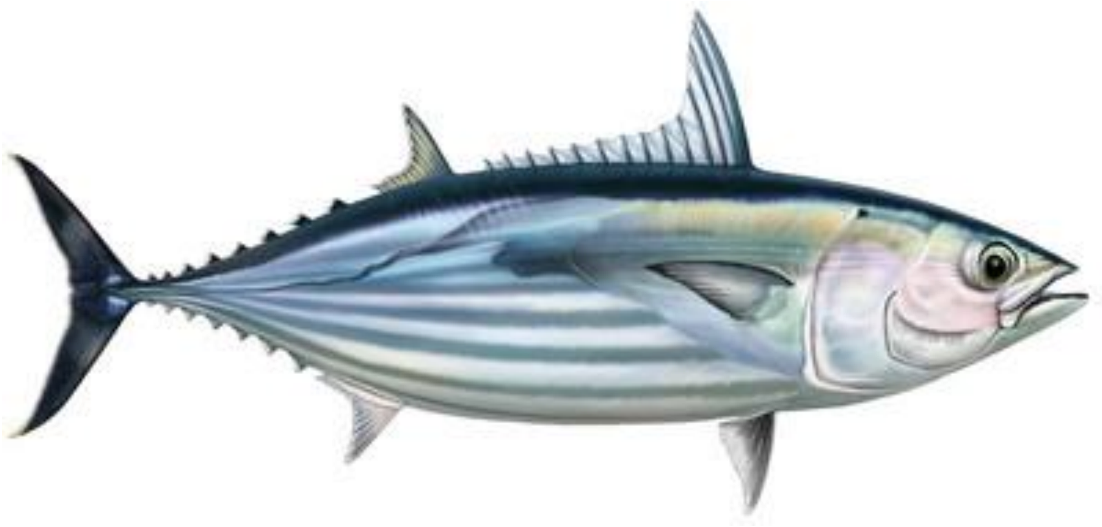
Tuna Exports
HMRC, via BTS, 2019

Current Stocks

Globally, the majority of tuna is caught by Japan and Taiwan. Other important fishing countries include; Indonesia, Philippines, Spain, Republic of Korea, Papua New Guinea, France, Ecuador, Mexico, Maldives, Islamic Republic of Iran, United States of America, Seychelles, Venezuela, Sri Lanka, Colombia, China, Vanuatu, Panama and Ghana.

The majority of tuna sold in the UK comes from yellowfin and skipjack tuna stocks, managed through the Regional Fisheries Management Organisations (RFMOs). However, there are ongoing concerns over illegal, unregulated and unreported (IUU) fishing for continued sustainability. For this reason the RFMOs keep lists of authorised vessels and also list of vessels suspected to be engaged in IUU fishing.

Currently Yellowfin tuna stocks are overfished in the Indian Ocean so the Indian Ocean Tuna Commission (the RFMO) has implemented a number of management measures aimed at rebuilding the stock. Stocks in the Atlantic are fully exploited. In contrast, stocks of skipjack tuna in both the Indian and Atlantic Ocean are assessed as underexploited.



Tuna Stocks
[Seafish, 2019, Risk Assessment for Sourcing Seafood]

Tuna in Retail

The third most purchased species by value; tuna is very popular within retail, with most sales within the ambient sector. In recent retail observations for December 2019, 12% of all the new products observed contained tuna, 80% of which were ambient format.

Volume

Over the 52 weeks ending 28th December 2019, of all the seafood sales in retail, tuna is worth 16% of the volume and 11% of the value. Putting this into perspective, the top 10 species in terms of value, where tuna is in 3rd place, are worth 86% of the total value and 85% of the total volume of sales in multiple retail.

UK shoppers purchased just over 62,731 tonnes of tuna equating to a value of £415.3m; a sales value increase of +1.6%. By volume, tuna was the 2nd bestselling fish of all seafood species. Popularity is highlighted in volume sales growth, with +4.1% more tuna being sold in retail when compared with 2019, with unit sales increasing by +3.8% to £2.20, however the £6.60 price per kg did see a decrease (-2.4%).

In retail the majority (93%) of tuna volume sales are in the ambient sector. Worth £363.9m, both value (+2.5%) and volume (+4.5%) experienced growth. In terms of value, declines were seen in chilled (-3.1%) and frozen (10.6%) whereas volume declines were in frozen tuna only (-17.6%)

Format

By product format, “prepared” tuna has by far the largest share of value sales (87%), which has increased by 2.5% since 2019; volume sales at a share of 93% also increased by +4.6%. Other segments which have grown in value sales are ‘meals’ with breaded, cakes, natural, sauce and sushi all experiencing declines.

The shopper (GB)

When comparing with the overall seafood shopper profile, the tuna shopper is quite distinct. They are less affluent, from larger households, are younger and tend to have children. This reflects the popularity of ambient format across these demographics.

Tuna in Retail
Nielsen Scantrack, 52 we 28/12/2019
The NPD Group, YE September 2019, Quarterly Crest

Tuna in Foodservice

When eating out, diners purchase tuna in a range of formats, from sandwich filling through to tuna steaks, however data on tuna purchases in foodservice is only available for the 'non-fried fish' variety. This would mainly include tuna steaks or portions. Although becoming less popular in foodservice, tuna is still an important species overall.

Of all 'fish' purchases (883m servings), tuna accounts for about 17%, however tuna purchases are almost 50% of the 'non-fried fish' category (299m servings), making it the most popular species sold in this format (NPD, 2019). Tuna sold as 'non fried fish' is mainly sold through the quick service restaurant channel (QSR) (67%), followed by workplace/college/universities (17%), full service restaurants (7%) and travel and leisure (6%).

Menu Trends

The number of UK outlets offering seafood on their menu declined slightly over the past year. Total seafood lost menu share across the main categories to supplementary meal parts such as add-ons and kids' menus. Seafood appetisers and ethnic dishes are trending well particularly sushi appetisers, the fastest growing dish on the UK menu.

The incidence of small plates continued to grow with the 4+ item sampler proving the most popular a possible opportunity for tuna offerings.

New tuna products introduced last year that included tuna was the Tuna Nicoise Salad at QSR outlet Subway. Products feeding into the health trend were proving ever more popular, with consumers citing demand for lighter and healthier meals as being a key reason when choosing a foodservice destination, this increased by +22% from 2016.

Tuna in Foodservice
Technomic, July 2019, Seafood Trends Across U.K. Restaurants
The NPD Group, YE September 2019, Seafood Data Sheet
The NPD Group, YE September 2019, Quarterly Crest
Seafish, 2019, Seafood in Foodservice

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- Seafish, 2019, Risk Assessment for Sourcing Seafood (RASS)
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- The NPD Group, YE September 2019, Seafood Data Sheet, Q3 Report.
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