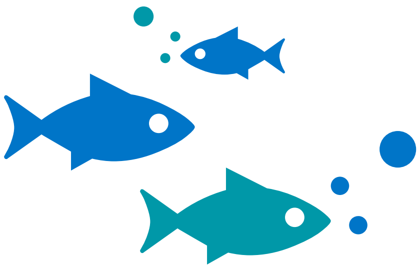
Tuna

Market Insight Factsheet

This factsheet intends to inform the United Kingdom (UK) seafood industry about the performance of tuna. Where possible it provides a summary of the UK value chain for tuna examining the detail behind its overall performance.

This document examines the detail behind the overall tuna performance including:



UK trade and supply (2017)

- Tuna imports to the UK
- Tuna exports from the UK
- Current stock overview

Tuna consumer sales

- Retail sales to consumers in the UK
- Tuna shopper profile GB
- Tuna trends in the GB commercial channel

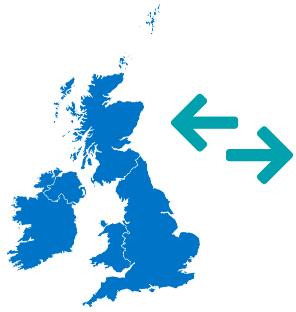
NB: The six species of tuna included in the analysis for this factsheet are; skipjack, yellowfin, bigeye, albacore, Bluefin and 'miscellaneous'.

UK trade and supply

2017

In 2017 UK imports of tuna were predominantly from the Seychelles. Most exports of tuna from the UK went to the Irish Republic.

Skipjack



The species mostly imported and exported is skipjack tuna with the majority of tuna being traded in the prepared/ preserved format.

Total tuna consumer sales

£403.2m

Over the 52 weeks ending 26th January 2019, UK shoppers purchased just over 58,900 tonnes of tuna equating to a retail value of £403.2m.

By volume, tuna was the 3rd bestselling fish across all seafood species. Older, more affluent couples are more likely to purchase tuna from the chilled sector.

Tuna is making a bigger impact in the lunch and 'on the go' occasions, thanks to a new dish on UK food service menus called Poke.

Tuna data

The following sections provide details of tuna trade and consumer purchases.

Tuna trade

Data includes total tuna imports and exports; comparing finalised HMRC data from 2017 to that of 2016 (HMRC, via BTS, accessed through Seafish Trade and Tariff Tool, 2017). Additionally a current stock overview of tuna is provided (Seafish Risk Assessment for Sourcing Seafood (RASS)).

Consumer sales

Data is included on consumer sales of tuna in the retail market (UK); including tuna shopper profiles (GB) (Nielsen ScanTrack and HomeScan data, 26/01/2019). Additionally, the foodservice information highlights current tuna trends in commercial channels (Global Data, 2018; NPD, 2018; Technomic, 2018).

Imports

Skipjack tuna **-3.0%**

Miscellaneous

Miscellaneous tuna **-22.1%**

Yellowfin tuna **-36.1%**

Albacore tuna **-24.7%**

Bluefin tuna **+209.9%**

Bigeye tuna **-69.1%**

Volume

In 2017 13.4% of the overall value and 16.1% volume of the total seafood imports to the UK were tuna, an increase of 0.9 and loss of 0.5 percentage points respectively.

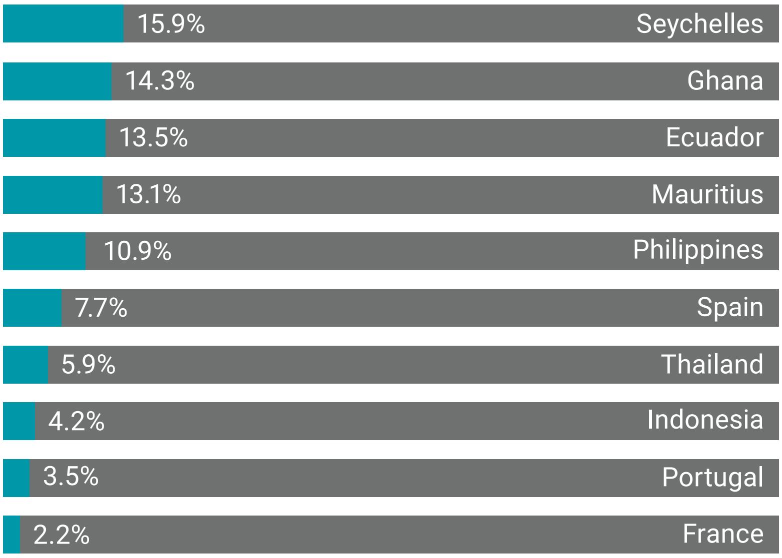
This equates to £426.4m in value (+11.1%) and 113,457 tonnes in volume (-5.9%). The average price per kg was up +18.1% in 2017 (£0.58) from £3.18 to £3.76.

In terms of volumes of tuna species imported to the UK, the majority (90.7%) was Skipjack tuna with the smallest share in import volume from Bigeye tuna (0.05%).

The main six tuna species (shown) each declined in volume when compared to 2016, this is with the exception of Bluefin tuna which experienced growth of +209.9%. The largest volume declines came from Bigeye (-69.1%) and Yellowfin (-36.1%) tuna.

97.5% of tuna imported is of a prepared/preserved format and was in decline by -5.3%, 1.7% is imported as frozen, also in decline of -29.0%. The smallest volume share imported is live/fresh tuna at 0.8% also experiencing declines of -17.4%.

Top 10 tuna import origins*



Import origin

Of the top 10 import countries, noteworthy growth for 2017 are Ecuador (+56%) and the Philippines (+20%). Growth was also experienced from Spain (+3%) with all others above experiencing volume declines.

* Top 10 ordered by volume, volume share stated.

Skipjack tuna **-18.4%**

Miscellaneous

Miscellaneous tuna **-8.4%**

Yellowfin tuna **-29.6%**

Bigeye tuna **-69.1%**

Albacore tuna **-72.1%**

Bluefin tuna **-47.7%**

Exports

Volume

In 2017 1.1% of the overall value and volume of seafood exports from the UK were tuna, a loss of 0.3 percentage points.

This equates to £20.2m in value (-11.0%) and 4841 tonnes in volume (-18.0). The average price per kg was up +8.5% in 2017 (£0.33) from £3.84 to £4.16.

In terms of volumes of tuna species exported from the UK, the majority (59.7%) was Skipjack tuna with the smallest share in export volume from Bluefin tuna (0.3%).

Exports of the six tuna species (shown) each declined compared to 2016. Largest volume declines came from Albacore (-72.1%) and Bigeye (-69.1%) tuna.

70.3% of tuna is exported in a prepared/preserved format and was in decline of -17.5%, 24.2% is exported as frozen also in decline (-26.2%). The smallest volume share exported is live/fresh tuna at 5.6%, however when compared with 2016, this volume increased by 37.3%.

Top 10 tuna export destinations*

69.9%	Irish Republic
11.9%	Denmark
3.5%	Spain
3.4%	Netherlands
2.6%	Poland
2.3%	France
1.7%	Germany
0.5%	Iceland
0.4%	Australia
0.4%	Italy

Export destinations

Of the top 10 export destinations noteworthy growth for 2017 are Spain (+144%) and Netherlands (+143%). Growth was also experienced to Australia (+1%) with all other countries above experiencing volume decline.

* Top 10 ordered by volume, volume share stated.

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.

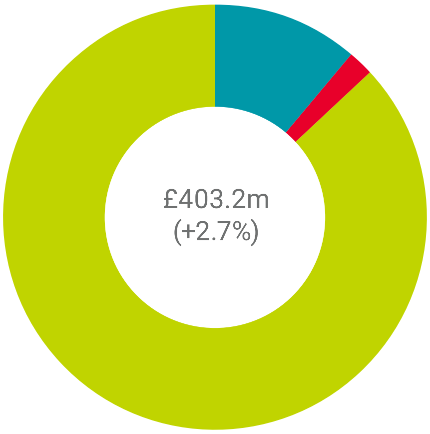
Currently Yellowfin tuna stocks are overfished in the Indian Ocean so the Indian Ocean Tuna Commission (the RFMO) has implemented a number of management measures aimed at rebuilding the stock. Stocks in the Atlantic are fully exploited. In contrast, stocks of Skipjack tuna in both the Indian and Atlantic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

Tuna in retail*

Tuna is a popular fish species within retail and most prominent sales are within the ambient sector.
In recent retail observations for February 2019, 11% of the new products observed contained tuna, all within the ambient sector.

* Retail ScanTrack data is based on UK consumers with retail HomeScan data based upon GB consumers.

Tuna retail sales by sector £m



Fresh £44,952,553
11% (-2.7%)

Frozen £8,450,657
2% (-3.9%)

Ambient £349,774,519
87% (+3.7%)

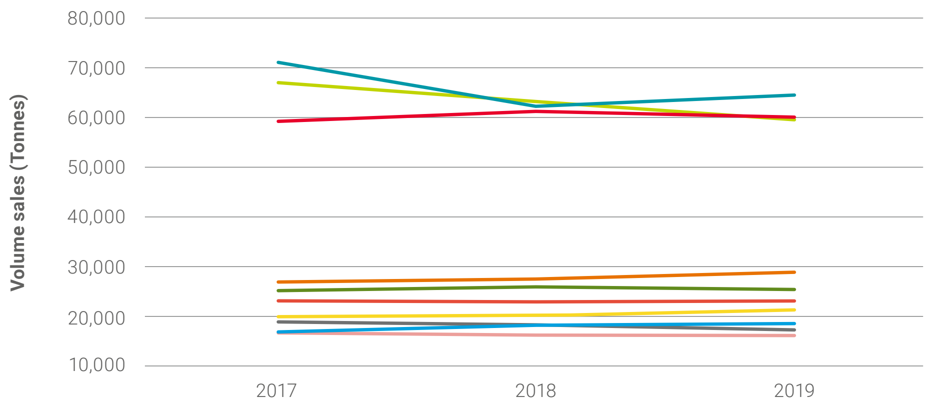
Volume

Over the 52 weeks ending 26th January 2019, UK shoppers purchased just over 58,900 tonnes of tuna equating to a retail value of £403.2m; a sales value increase of +2.7%.

By volume, tuna was the 3rd bestselling fish of all seafood species. However, out of the top ten selling species, tuna is reporting the least favourable volume growth (-7.4%) with units decreasing by -2.8% when compared to 2018. Additionally the £6.85 price per kg increased (+11.0%); price per unit also increased to £2.15 (+5.8%).

In retail the majority (87%) of tuna sales are from the ambient sector. As illustrated and compared to 2018, value sales of tuna only experienced growth in the ambient sector (+3.7%) with declines seen in both chilled (-2.7%) and frozen (-3.9%). In terms of volume all three sectors experienced declines; ambient (-7.5%), frozen (-9.8%) and chilled (-5.2%).

Volume of sales of the top 10 species in GB retail (Jan '18-Jan '19)

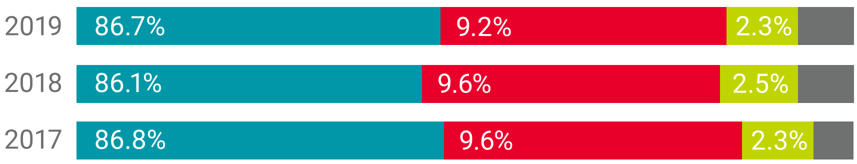


Salmon Cod Tuna Pollock Haddock Prawns (Warm Water)
Mixed Seafood Mackerel Other Prawns (Cold Water)

Format

By product format, "prepared" tuna has by far the largest share of value sales (86.7%), which has increased by 3.4% since 2018. Other segments which have grown in value sales are cakes and sushi with breaded, meals, natural, and sauce all experiencing declines.

Tuna retail sales by segment £m: top 3



Prepared £349.4m (+3.4%) Natural £37.0m (-2.1%) Meals £9.2m (-5.6%)

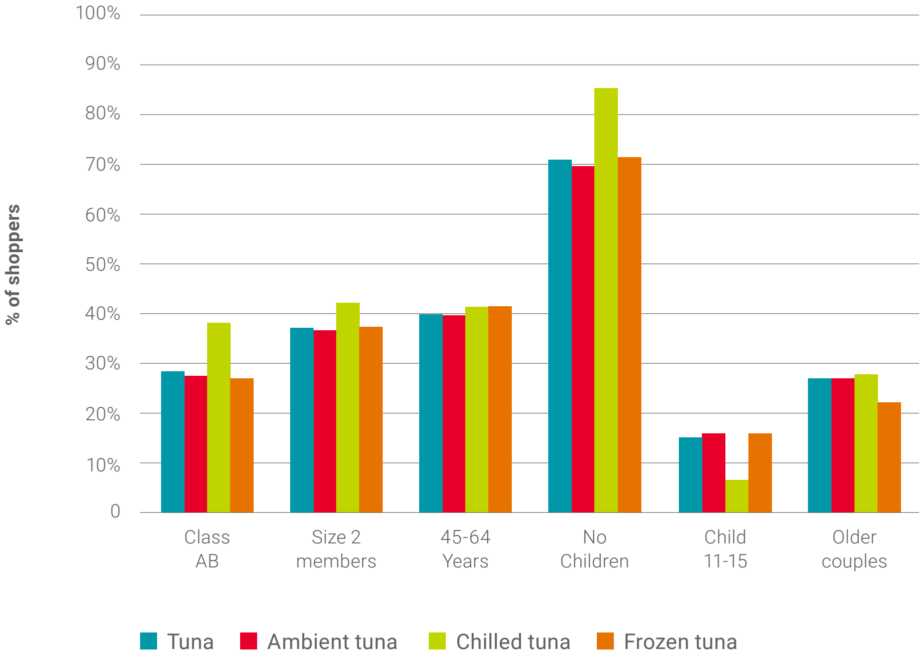
The tuna retail shopper (GB)

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.

The shopper who is buying chilled tuna is more likely to be from an affluent, 2 person household comprising an older couple aged between 45 and 64; mainly with no children. Where children are present, they are most likely in the age bracket of 11 to 15 years old

In households with children present, purchases from frozen and ambient are more common.

Tuna shopper profile



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 (NPD, 2018).

Of 'fish' purchases (892m servings), tuna accounts for about 17%. However tuna purchases are almost 50% of the 'non-fried fish' category (306m servings), making it the most popular species sold in this format (NPD, 2018).

Tuna sold as 'non fried fish' is mainly sold through the quick service restaurant channel (62%), followed by workplace/college/universities (15%), full service restaurants (9%) and travel and leisure (8%) (NPD, 2018).

Menu trends

Operators are offering more fish & seafood based meals designed for 'on-the-go' consumption; tuna is capitalizing on this occasion thanks to the introduction of poke (pronounced po-kay). Poke is an ideal lunch time option as it is a light and healthy dish (Global Data, 2018).

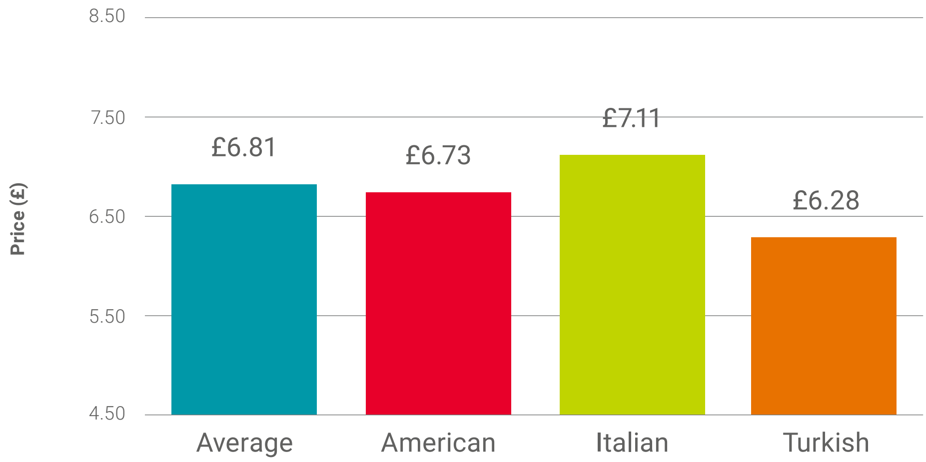
This menu trend originates in Hawaii and popularized in Southern California, it is a raw seafood salad known for its bright, tropical flavors and colourful appeal has grown to become an of-the-moment dish on menus at chain restaurants and emerging concepts the world over. (Techomic, 2018).

In the UK poke can be found on a number of menus in mainstream foodservice providers. (Techomic, 2018).

Menu item penetration rate for tuna is highest in American, Italian and Turkish restaurants, due to its widespread use as a pizza topping (Global Data, 2018).

Although average prices for tuna dishes do not vary markedly between the three profiled cuisine types, they are typically highest in Italian restaurants, where the fish is more likely to be served fresh, as a main meal fish course (Global Data, 2018).

Average price of tuna dishes



References

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- Nielsen (26.01.2019) ScanTrack Data.
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- Seafish (2018) Risk Assessment for Sourcing Seafood (RASS). www.seafish.org/rass/
- Technomic (2018) Seafood Trends.

Further Reading (Subscribers Only)

- Context Report

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