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Tuna 2024

This Market Insight factsheet intends to provide the United Kingdom (UK) seafood industry a summary of tuna in the retail, foodservice and trade sectors.

01/03/2024 Suzi Pegg-Darlison (15-minute read)

Contents

Factsheet overview

This Market Insight factsheet intends to provide the United Kingdom (UK) seafood industry a summary of tuna in the retail, foodservice and trade sectors.

Consumer preferences are constantly changing with several factors playing a role in purchasing decisions. Understanding this and having insights into the seafood market and its role in the retail, foodservice and trade sectors, can help to run a successful seafood business.

Top takeaways

Tuna remains a popular species in the UK purchased by consumers in and out of home. It's the most imported species by volume, the 2nd most popular seafood species by volume sales in retail and is 11% of all seafood servings in foodservice.

UK trade and supply

The most imported species by volume, 15.2% of all seafood imports are tuna. In terms of volume, most imports were from Ecuador. Volume of imports of tuna has experienced a year-on-year decline in 2023. There is very little export of tuna relative to the volume imported and consumed in the UK.

UK retail

16% of the total seafood volume sales in retail are to tuna, 60,829 tonnes sold. It is the second most purchased species in terms of volume worth £418m. Tuna is seeing year-on-year price driven value growth (+2.1%) with volume sales in decline (-4.7%).

GB foodservice

11% of all the seafood servings out of home are to tuna. Overall, it was a weak year to December 2023 for tuna with servings down 2.3% on the previous year end. Tuna most usually purchased in Quick Service Restaurants.

UK trade and supply

The following sections provide details of total tuna landings, imports, and exports; comparing provisional HMRC data from 2023 to finalised data of 2022.

Landings

Value of total UK landings by UK vessels value in 2023 was £805.5 million, an increase of +9.1% compared to 2022. A very small proportion (0.03%) of this came from tuna but this proportion has been growing in recent years.

In total, 27 tonnes of tuna were landed into the UK, by UK vessels. This was an 884.8% increase on 2022 volumes. Tuna landings value to UK ports by UK vessels in 2023 was £264,700, an increase of +2120.0% compared to 2022.

Imports

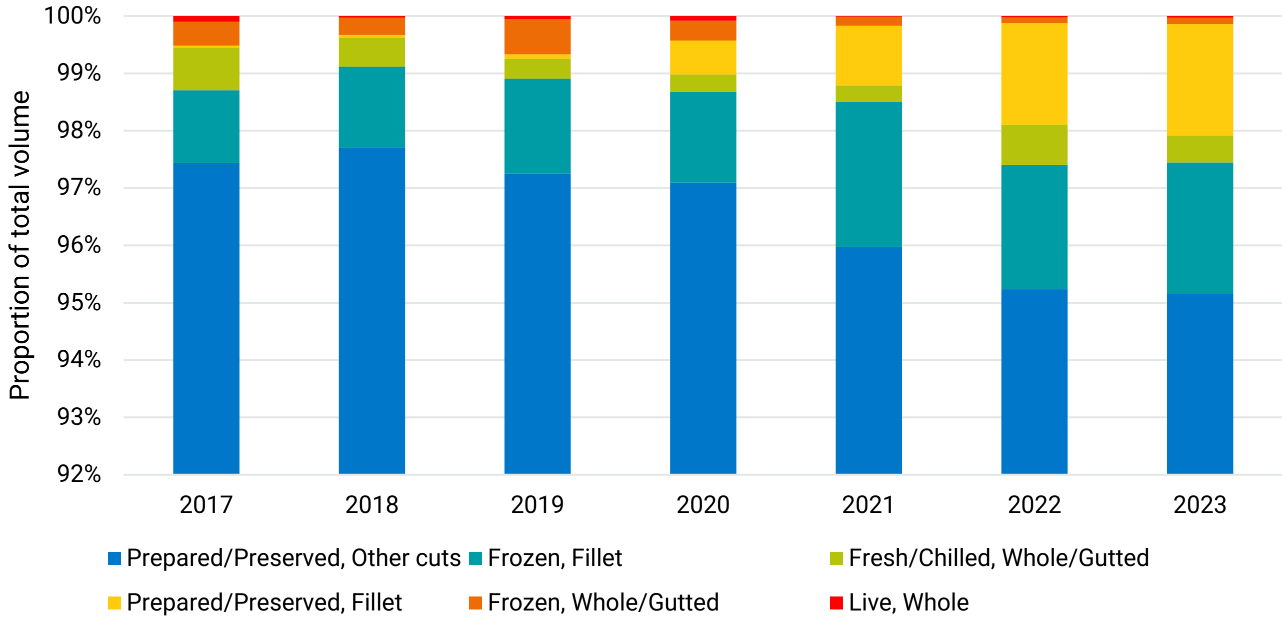
Most tuna available in the UK for domestic consumption is imported from other countries.

In 2023, 12.0% of the overall value of total seafood imports to the UK were from tuna, up from 11.1% in 2022. By volume, Tuna was the top imported species, making up 15.2% of total seafood import to the UK, this was down from 16.4% in 2022.

The total value of tuna imported to the UK in 2023 was £414.2 million, an increase of £11.3 million (+2.8%) compared to 2022. This growth was price led as the volume imported decreased by 13,180 tonnes (-12.4%) to 92,855 tonnes. The average price of imported tuna increased by £0.66/kg (+17.4%) between 2022 and 2023, experiencing higher price inflation than the average imported seafood product which reached +0.2%.

By volume, over 95% of all tuna is imported as prepared/preserved, other cuts, likely all canned tuna products. A higher proportion of tuna fillets were imported compared to 5 years ago. Chart 1 below shows the share of tuna by the format in which it was imported into the UK.

Chart 1. UK tuna import volume by format in 2017 to 2023.



Over a quarter of all tuna imports were from Ecuador, with 71% from the top five countries of consignment as listed below in table 1. This shows more details of the top five exporting countries by import volume of tuna.

Table 1. Imports to the UK of tuna by exporting country (Top five)

Rank	Exporting Country	Volume (tonnes)		Growth (year on year)		Share of Total Tuna Import
		2022	2023	Percentage	Actual (tonnes)	
1	Ecuador	22,524	23,940	+6.3%	+1,416	26%
2	Mauritius	14,881	14,565	-2.1%	-316	16%
3	Ghana	9.845	9,219	-6.4%	-626	10%
4	Seychelles	12,442	8,596	-30.9%	-3,846	10%
5	Philippines	6,202	8,576	+38.3%	+2,374	9%
	Grand Total	**106,035**	**92,855**	**-12.4%**	**-13,180**	

Tuna was the most imported species of seafood imported to the UK, with salmon following closely behind. In 2023, both tuna and salmon experienced volume declines, (-12.4%) and (-11.9%) respectively.

In 2023, the UK exported 1,104 tonnes of tuna products, representing 0.3% of total UK seafood exports. It is likely some of these exported products are re-exports of imported tuna, mostly destined for the Republic of Ireland.

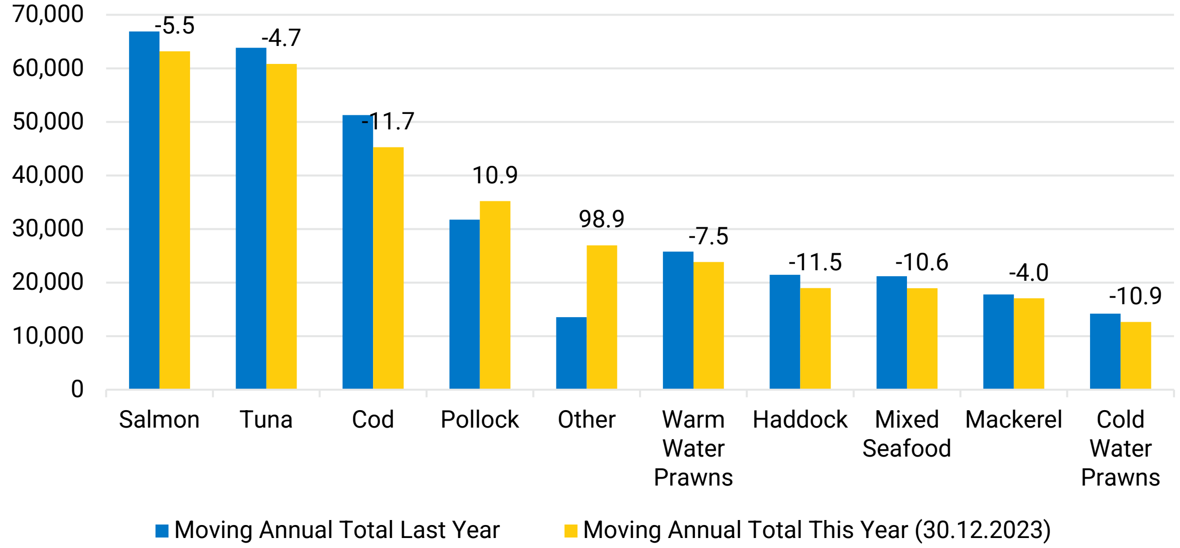
UK retail sector

Tuna is a popular species with UK consumers when purchasing seafood in the retail sector. This section provides details of consumer purchases of tuna in the retail market including shopper profiles.

Tuna sales in retail

By volume, tuna was the second bestselling fish of all seafood species sold in retail, with 16% of all seafood volume sales in retail being to tuna. UK shoppers purchased just over 60,829 tonnes of tuna equating to a retail value of £418.2m over the 52 weeks ending 30th December 2023. Retail sales are increasing in value by 2.1%, but this is price driven with volume sales in 4.7% decline and price per kg up 7.1%. Chart 2 below shows the top ten selling species in retail with year-on-year volume growth.

Chart 2. Volume sales (tonnes) of the Top 10 species in retail with volume percentage growth (%) to 52 week ending 30th December 2023.



Sales by sector

96% of all the volume sales of tuna are purchased from the ambient sector with just 5% being chilled and 1% being frozen tuna.

Volume sales of tuna experienced declines in all sectors compared to the same period in 2022; ambient (-4.1%), chilled (-8.7%) and frozen (-31.5%). Despite increases in price per kg chilled (-2.1%) and frozen (-23.7%) tuna experienced declines in value with ambient in 3.1% price driven growth.

Sales by segment

Tuna is sold in seven product formats in retail known as segments: prepared, meals, natural, sushi, sauce, cakes and breaded. There were no battered, fingers or dusted sales of tuna in the 52 weeks to 30th December 2023.

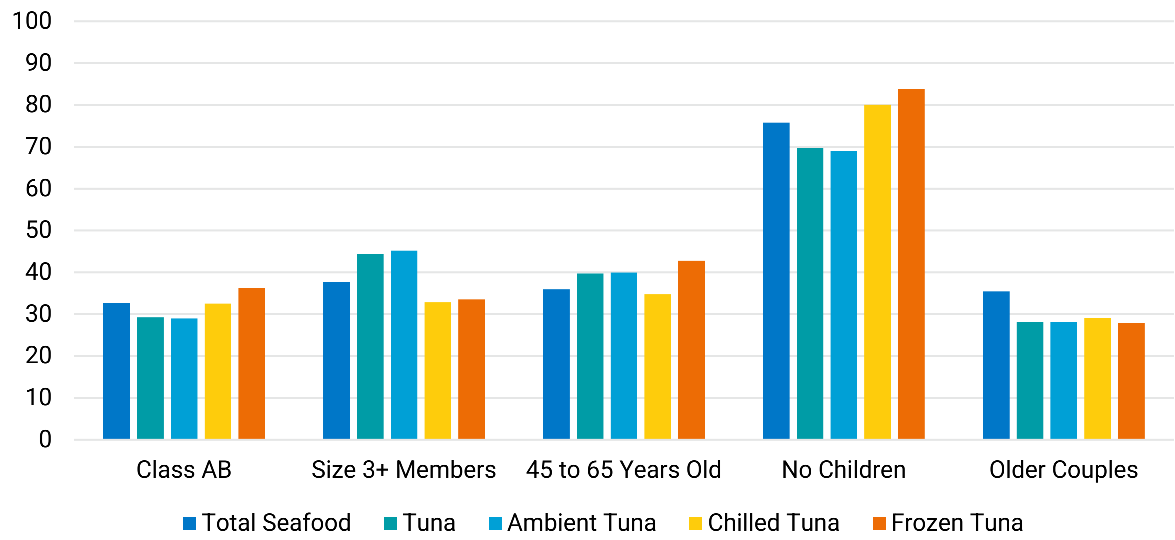
Of the seven segments prepared has the largest share of tuna volume sales at 93.9% and was in 4.1% year-on-year decline. The volume share of tuna for the other seafood segments were as follows, meals (3.4%), natural (1.7%), sushi (0.6%), sauce (0.3%), cakes (0.1%) and breaded (0.01%).

Sushi (+7.9%) and breaded (+34.4%) are the only segments experiencing volume growth all other segments are experiencing declines.

The tuna shopper (GB)

When comparing with the overall seafood shopper profile, the tuna shopper is quite distinct. They are less affluent, from bigger households and are younger. Chart 3 below shows the tuna shopper demographics by sector with clear differences between the ambient, chilled, and frozen tuna shopper by purchase volume.

Chart 3. Purchase volume share of trade for each demographic across total seafood, tuna and by ambient, chilled, and frozen tuna to 52 week ending 30th December 2023.



GB Foodservice

Tuna is a popular species with GB consumers when eating out of home. This section provides details of consumer purchases of tuna out of home including consumer demographics.

When eating out of home, diners purchase tuna in a range of formats from sandwich filling through to tuna steaks and are enjoyed across six different channels. Most commonly tuna will be sold in Quick Service Restaurants.

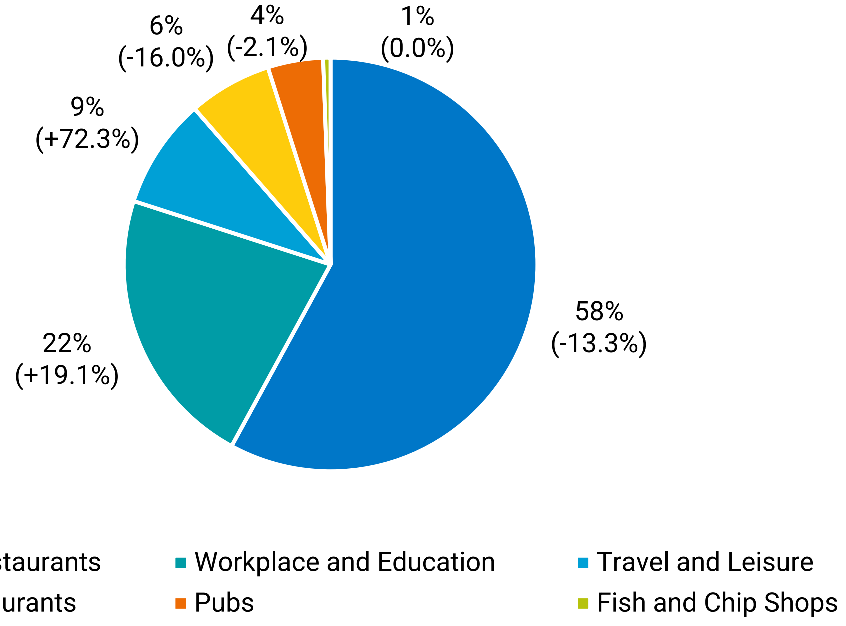
Total performance and channel performance

Of the total seafood servings out of home (988m servings), tuna account for 11% (105m servings), approximately 14,655 tonnes*. Overall, it was a weak year to December 2023 for tuna with servings down 2.3% on the previous year.

**Tonnes is an estimation calculated by the total number of servings sold multiplied by 140g, the recommended serving size of seafood.*

Over half of all tuna servings are sold through the Quick Service Restaurant channel (58%), this is followed by Workplace and Education (22%), Travel and Leisure (9%), Full Service Restaurants (7%), Pubs (4%) and Fish and Chip Shops (0.6%). Servings growth was seen in Workplace and Education and Travel and Leisure all other channels were in decline. Chart 4 below shows the share of tuna servings in each channel with year-on-year growth.

Chart 4. Servings share of tuna by GB foodservice channel with servings growth (%) to 12 months year end December 2023.



Consumer demographics and motivations

Tuna is on par with the total foodservice market in terms of affluence with over 68% of all tuna servings being to a more affluent consumer.

Compared to the total market, tuna over indexes with a younger and the oldest age categories 18 to 24 years of age and over 65’s, but over one fifth of all servings (22.4%) are to the 35 to 49 year old age group slightly under indexing with the total market (24.2%). However, in pubs over 54% of all servings are to those 65 and over.

Overall tuna appeals slightly more to female consumers especially in Pubs, however in Full-Service Restaurants over half of all tuna servings are to men. Tuna is consumed predominately on adult only occasions, especially at Quick Service Restaurants and Pubs.

Servings are usually occurring during lunch, especially at Pubs. Tuna consumption over indexes the market on Mondays, Fridays and Saturdays being most popular on Fridays. It has an opportunity to appeal to families with weekdays providing a good growth opportunity too.

Consumers turn to tuna for functional needs except at Pubs and Full Service Restaurants where its most likely consumed during social occasions. There is an opportunity to be seen as a treating food type.

Sources

Data sources: (%) values represent changes from the previous year unless otherwise stated.

Resources used in the production of this factsheet can be viewed below.

NielsenIQ (NIQ) retail data to 52 week ending 30th December 2023:
- ScanTrack – UK EPOS from key retailers (including composite data from discounters Aldi, Lidl and Northern Ireland) excludes seafood sandwiches.
- HomeScan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches.

Circana foodservice data:
- Panel based data to year ending December 2023.

HMRC trade data**:
- Import, exports HMRC data provided by BTS data to year ending December 2023. Published data is provisional for 18 months once published and subject to change during this time. Please see trade notes below.

MMO landings data**:
- UK sea fisheries annual statistics provided by the Marine Management Organisation to year ending December 2023. Please see trade notes below.

Additional data and insights used to produce this factsheet:
- Seafish, 2023, Seafood Segments in the Retail Market
- Seafish, 2023, Seafood Trends in Commercial Foodservice (2023 Update)
- Seafish, 2023, Latest Quarterly UK Seafood Trade Data

Are you interested in the data behind the insights? Individuals working for seafood businesses can register for the Market Insight Portal on Seafish.org and access the Retail, Foodservice, and Trade data and reports directly. Click here to register today.

**Trade data

Notes and limitations of the trade and landings data.

HMRC trade in goods statistics cover seafood products imported to and exported from UK ports and presented as 8-digit combined nomenclature commodity (CN8) codes. We process these statistics using the EUMOFA (EU Market Observatory for Fisheries and Aquaculture) methodology. This allows for analysis of the value and volume of main commercial species, species groups, preservation and presentation states traded with the UK by partner country. Published data is provisional for 18-months and subject to change over this time.

The species defined in trade statistics are defined based on CN8 commodity codes Some traded commodities may include products containing a variety of different species or groups of species, meaning that individual species can't be identified.

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