

Trends and Developments In The Marketing of Tuna in Europe

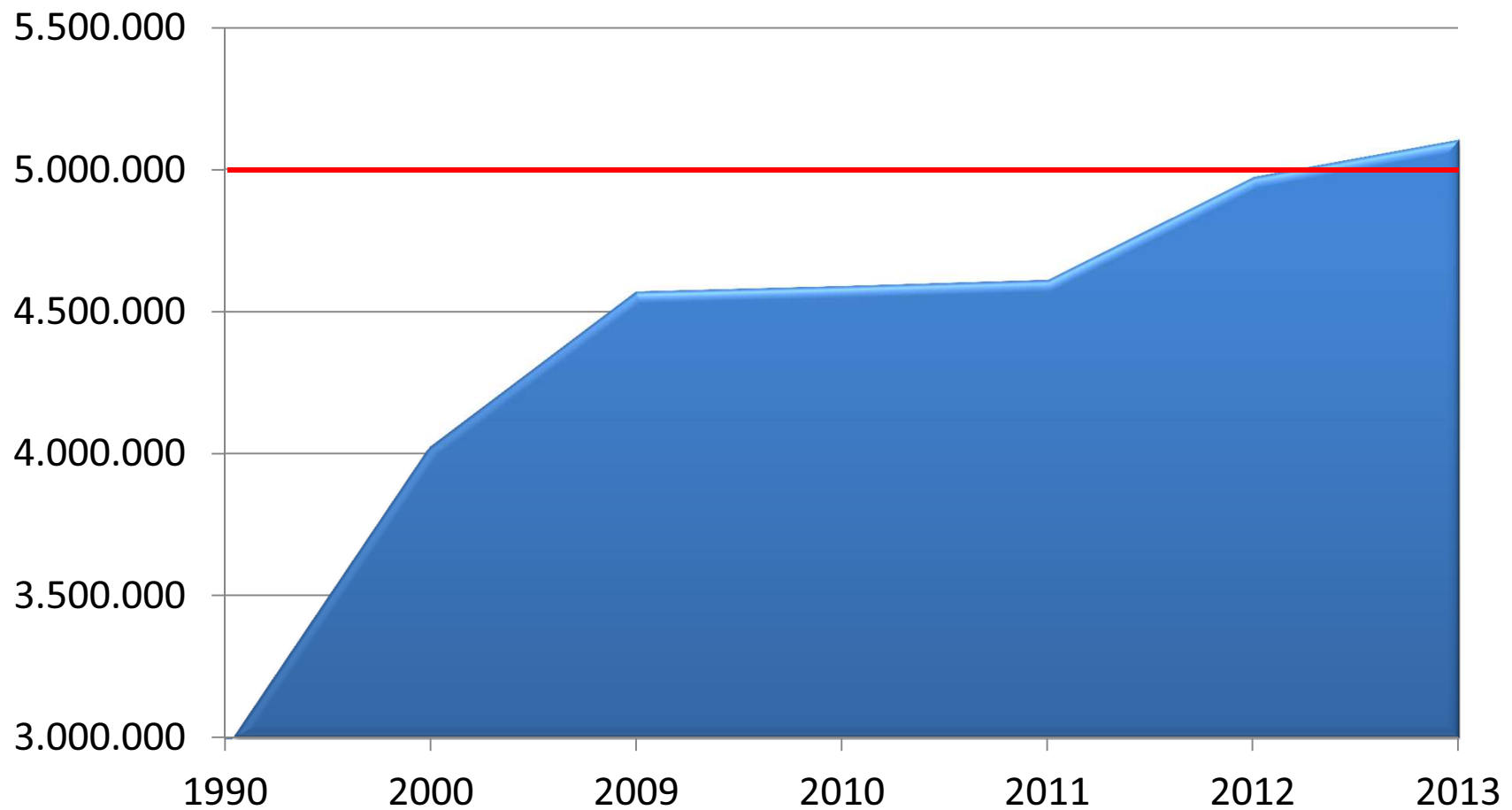
Henk Brus CEO

sustunable

II Foro Regional de Sostenibilidad del Atún



We reached the limit !

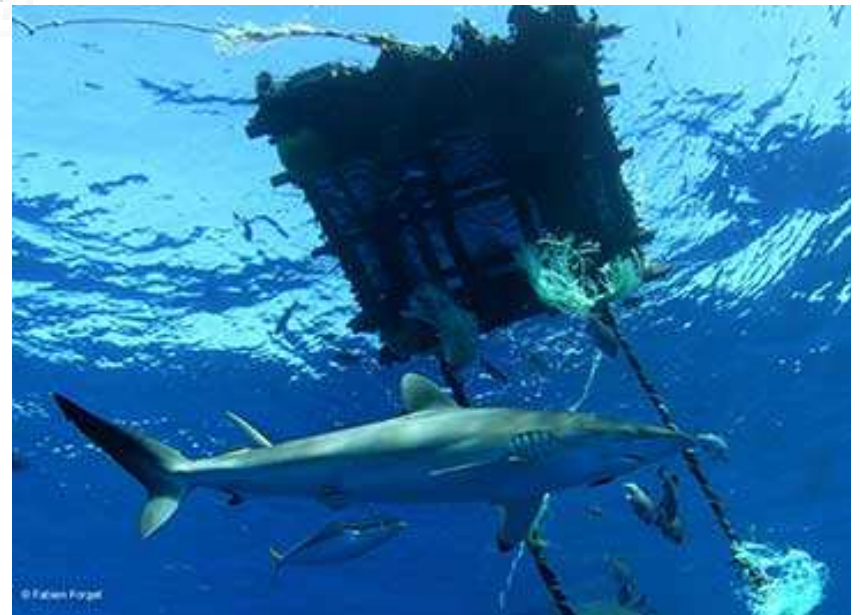


Source : 2013 **FAO data** – SKJ-YF-BE-ALB-BF

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Satellite Connected Solar
Powered Sonar Buoys



Estimated number of drifting FADs deployed per year by the tropical tuna purse seine fleet

| RFMO | FADs deployed per year |
|--------------|------------------------|
| IOTC | 7,600 |
| WCPFC | 28,300 |
| IATTC | 17,000 |
| ICCAT | 9,000 |
| TOTAL | 61,900 |

Source : Estimated by PEW 2012

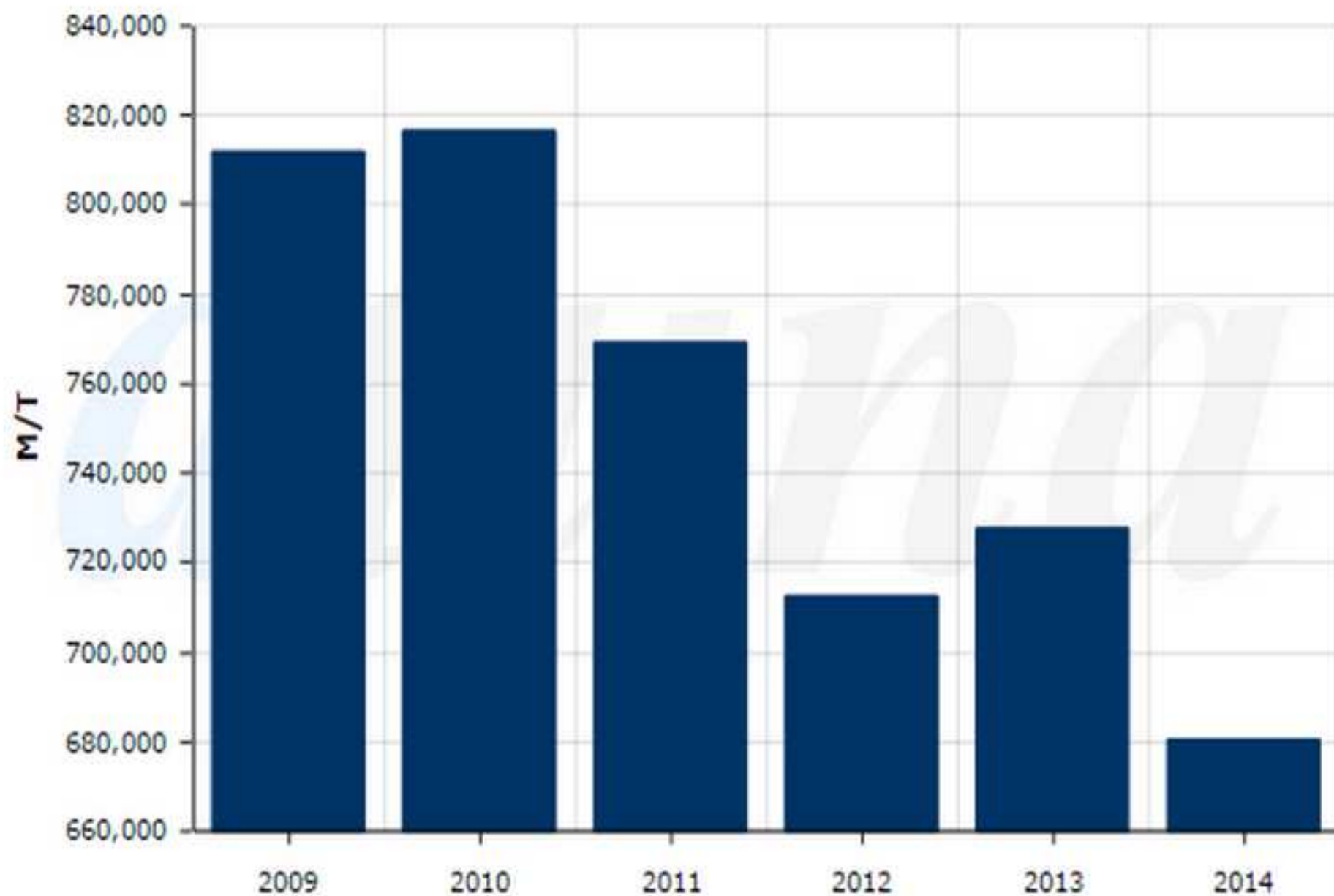
Butchering the “Chicken of the Sea” with the golden eggs ?

Tuna Purse Seiners > 400 M/T

| RMFO | 2008 | growth | 2015 |
|-------|------|--------|------|
| WCPFC | 236 | +41% | 335 |
| IATTC | 163 | 0% | 163 |
| IOTC | 50 | +22% | 61 |
| ICATT | 50 | 0% | 0 |
| Total | 499 | +22% | 609 |

Excluding EFFICIENCY CREEP !! +5% EACH YEAR ?

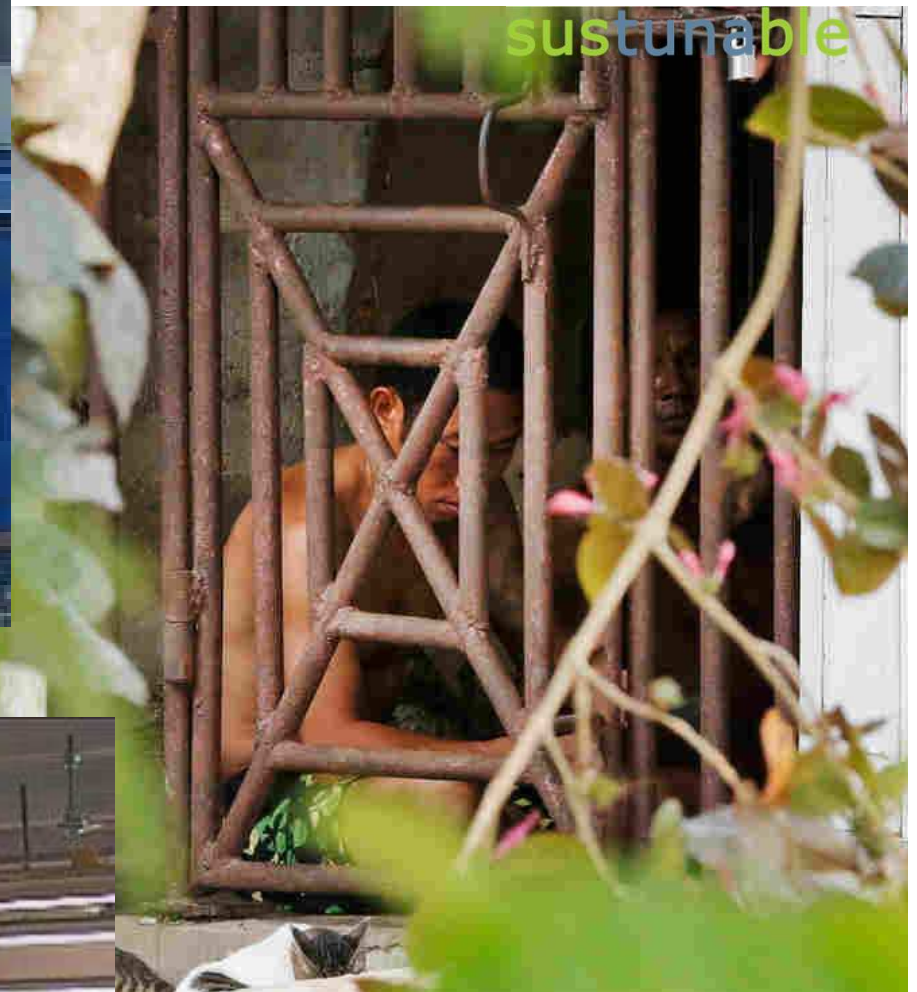
Thailand's Declining Demand For Raw Material





About Usd 3 BILLION lost in value within 2 years





- IUU Fishing
- Child Labor
- Forced Labor + Slavery

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Self-certified Free school Tuna



Dominant Influence Brussels on global sourcing, tuna fishing and processing



DISCOVER THE STORY BEHIND YOUR CAN

Enter the information on
your can, to discover
where your fish came from.

ENTER YOUR
CAN CODE



? FISH TYPE

Select Fish



? COUNTRY

Select a fish first



? BARCODE

Enter your barcode

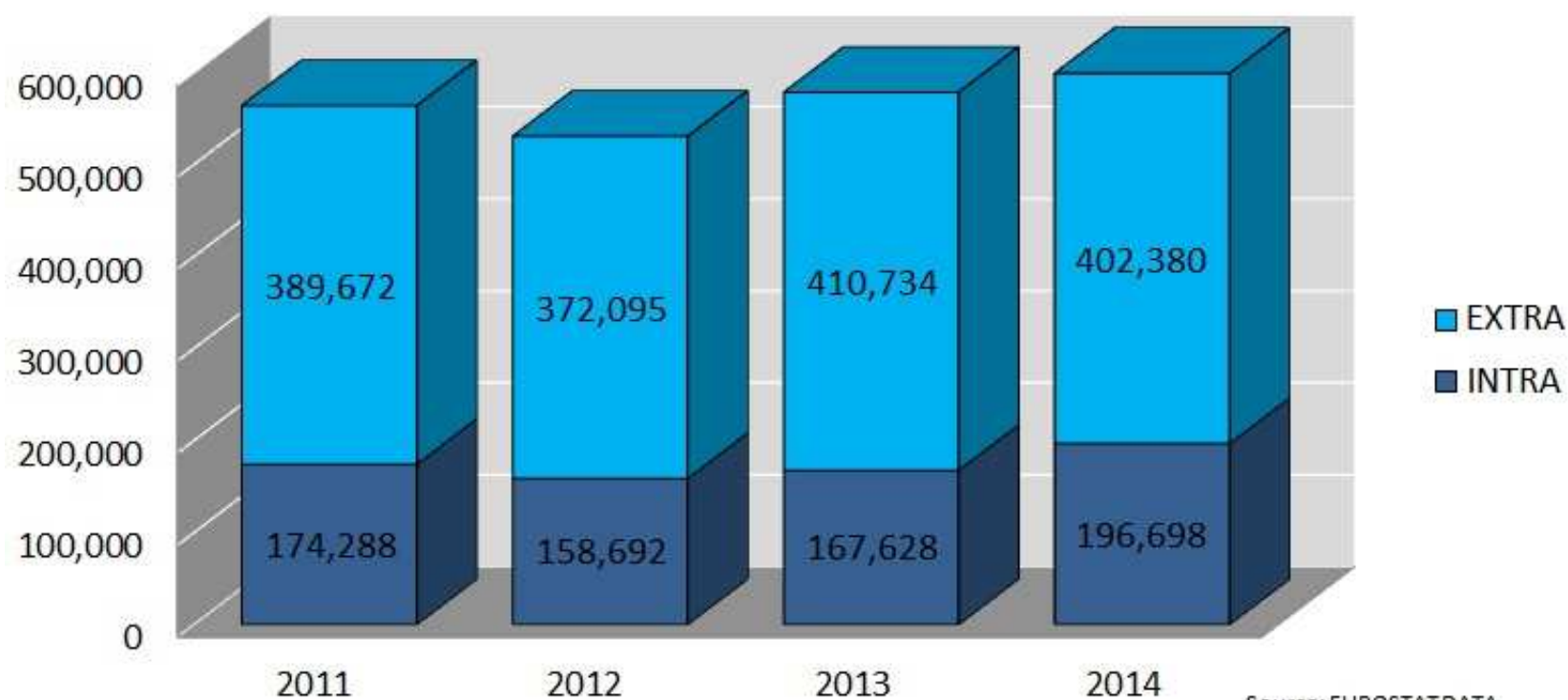
? CAN CODE

Enter your can code

SUBMIT

EU - Import Trend Of Canned Tuna

In M/T



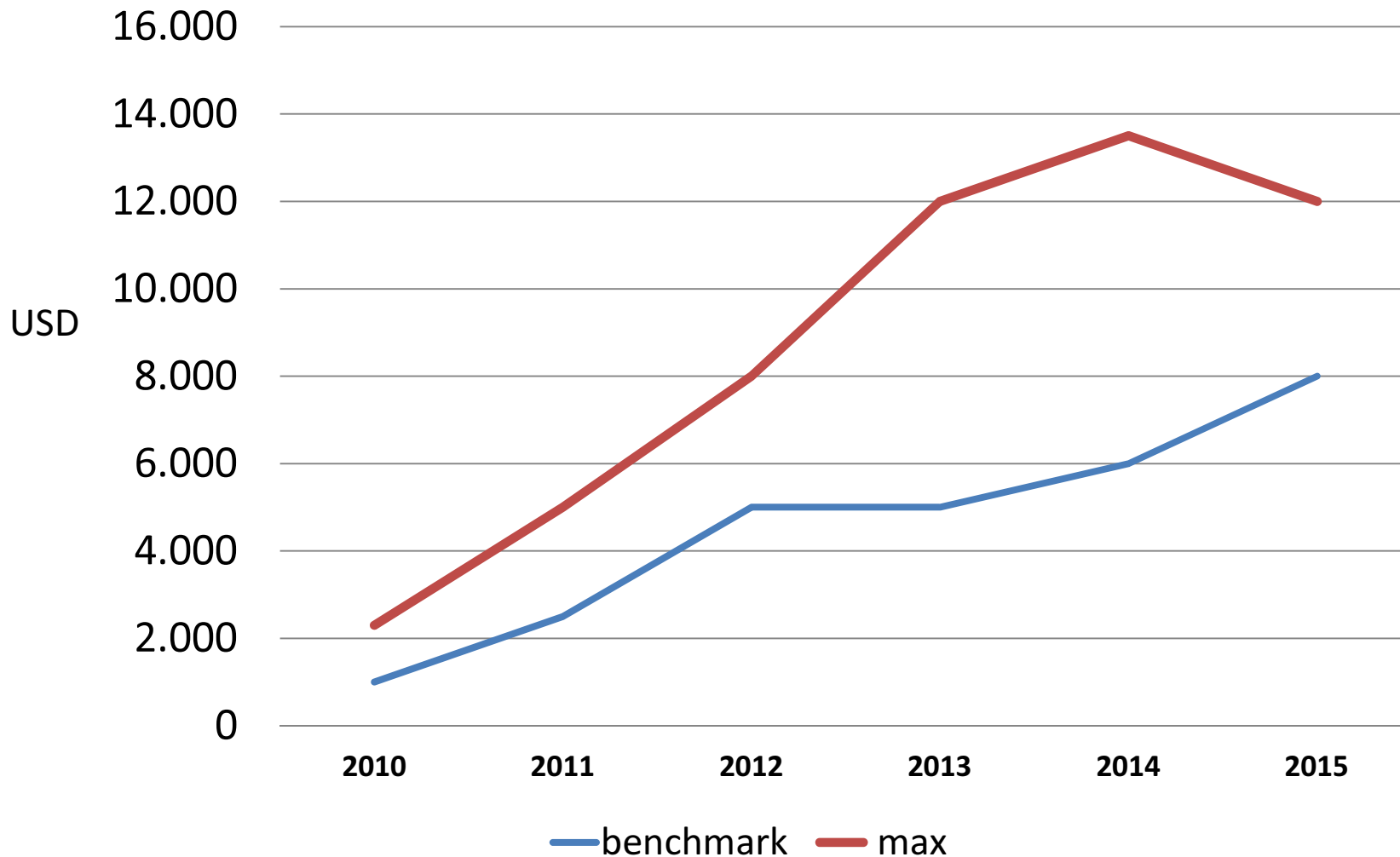
PHILIPPINES 0% duty

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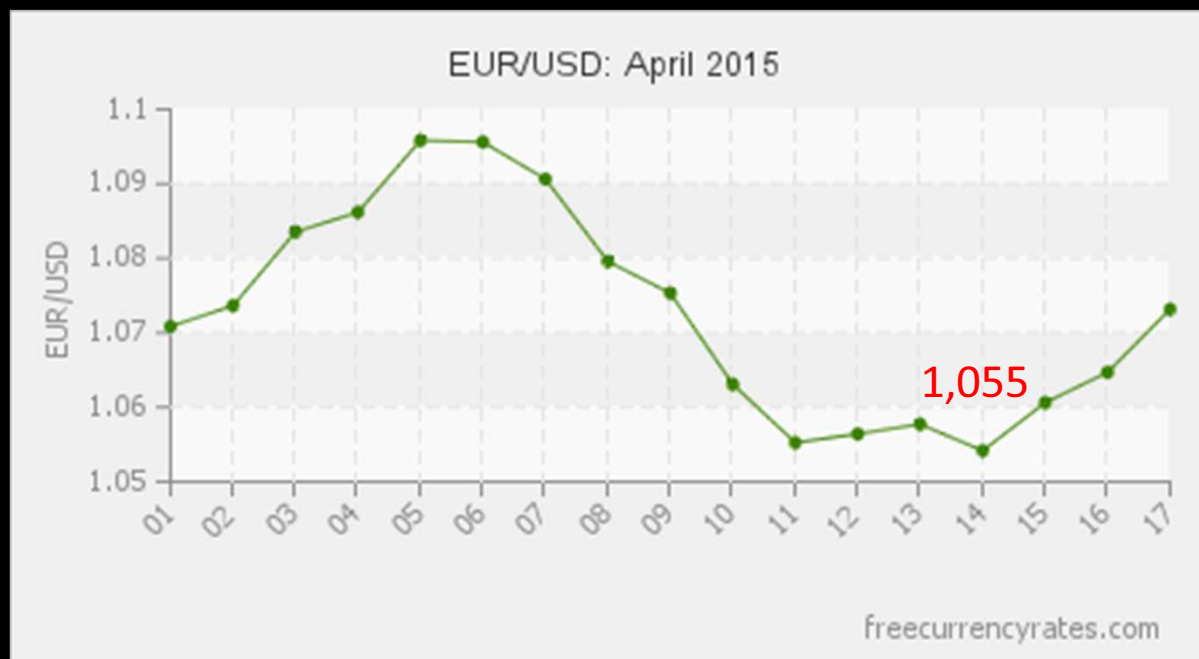
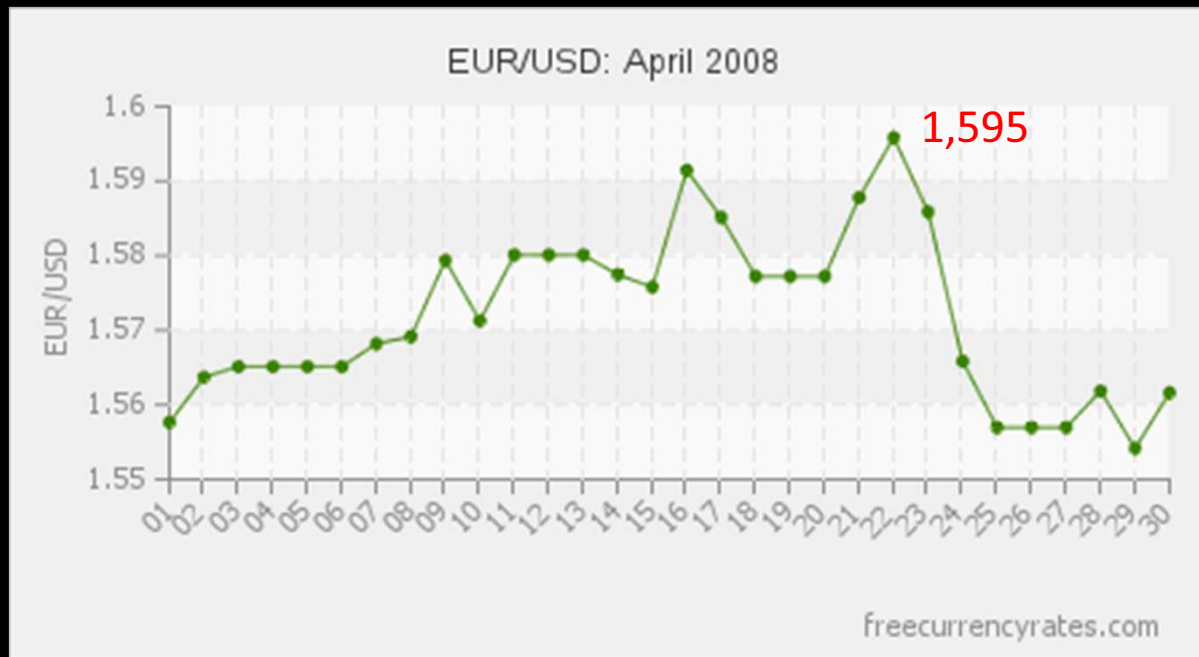


PNA – The Emirates of Tuna

price for 1 day fishing tuna (VDS)



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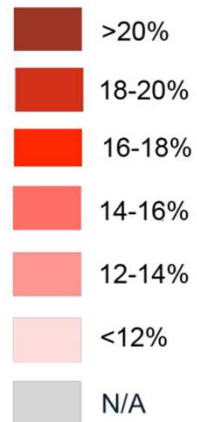




Greying Population of active consumers

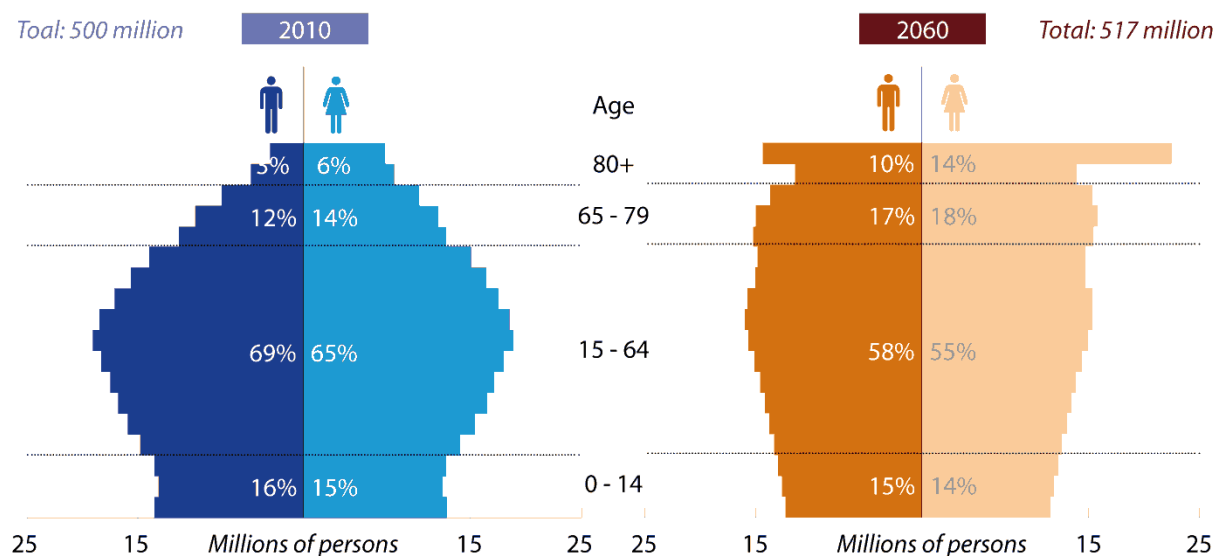


Percentage over
65 year old



2019 half Dutch population 50+

EU27 population by age and sex



In the WHO/European Region



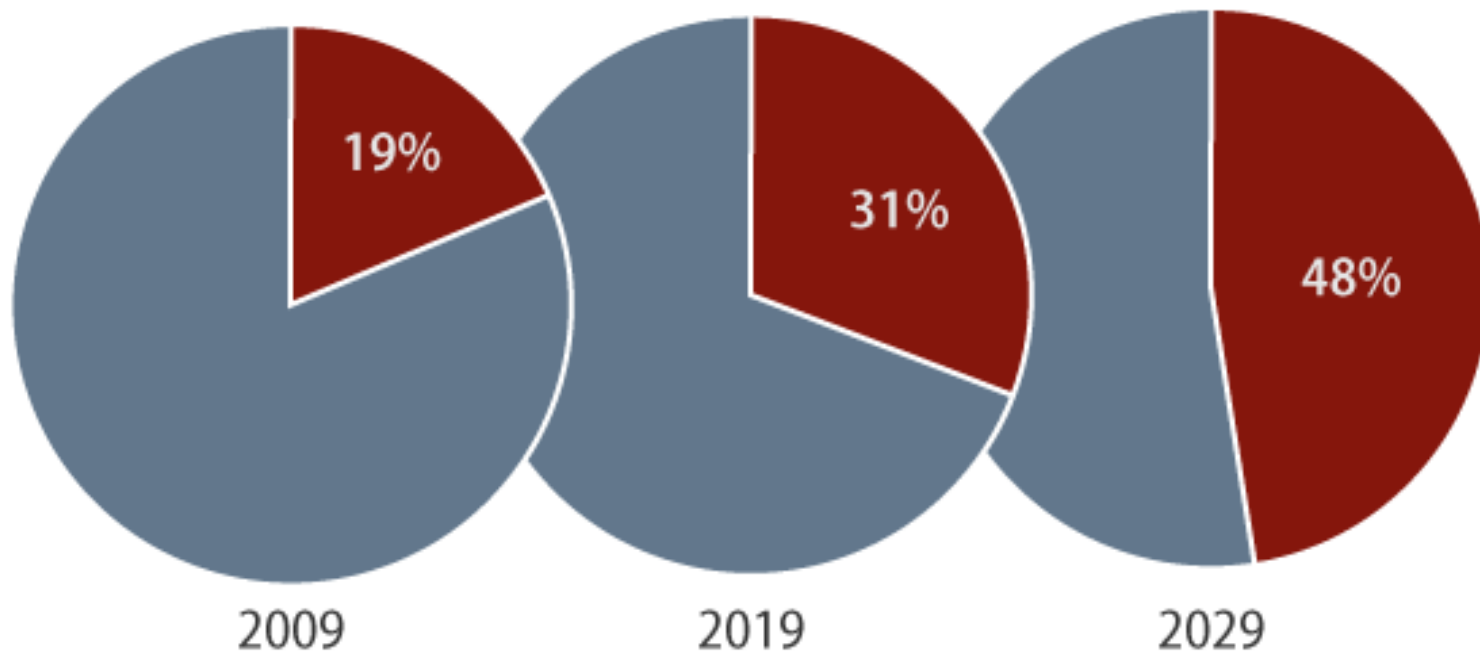
over 50%
of people are
overweight or **obese**



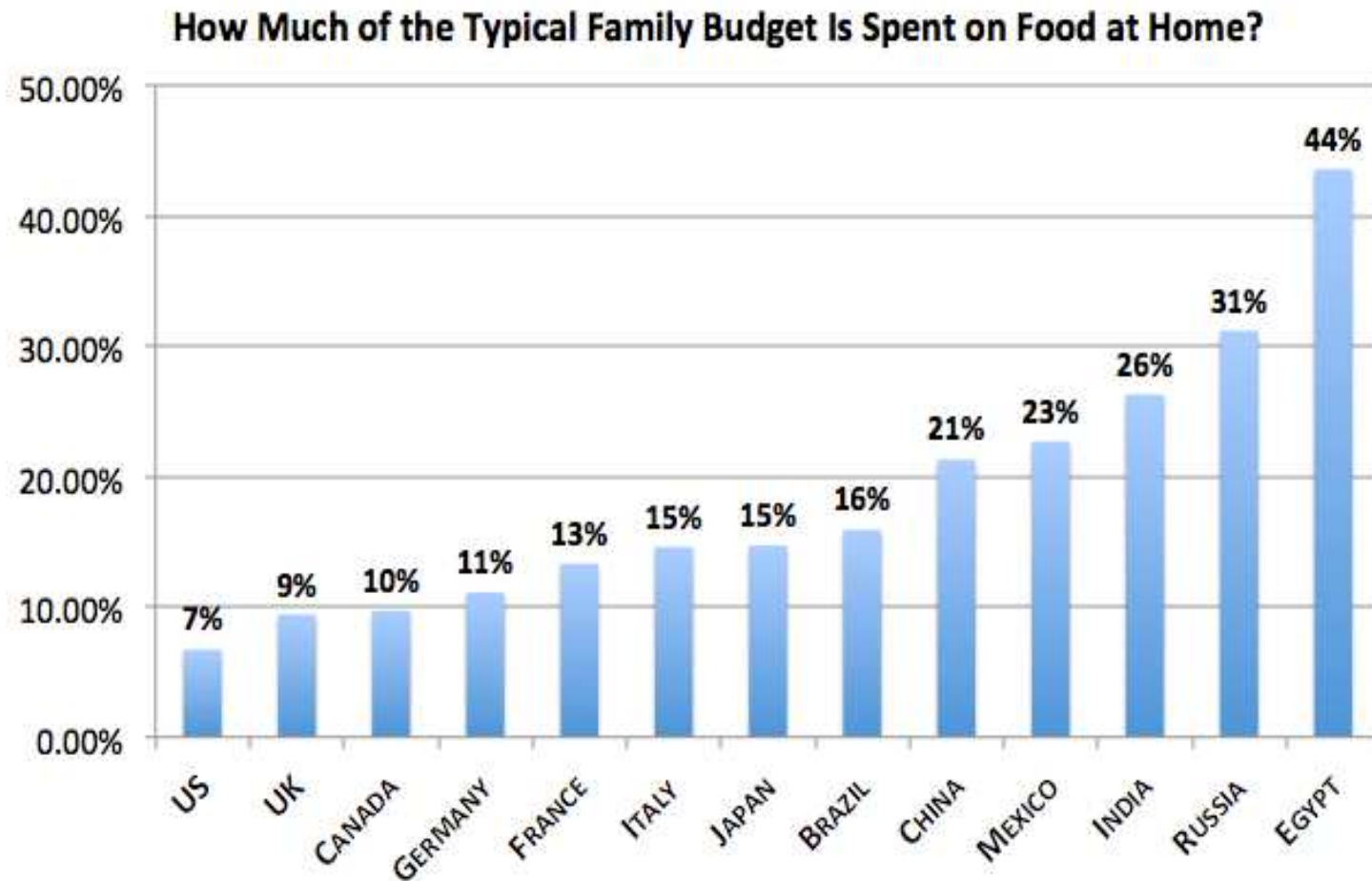
over 20%
of people are
obese

Health care spending never higher

Growth in health care spending eats up family income, 2009-2029

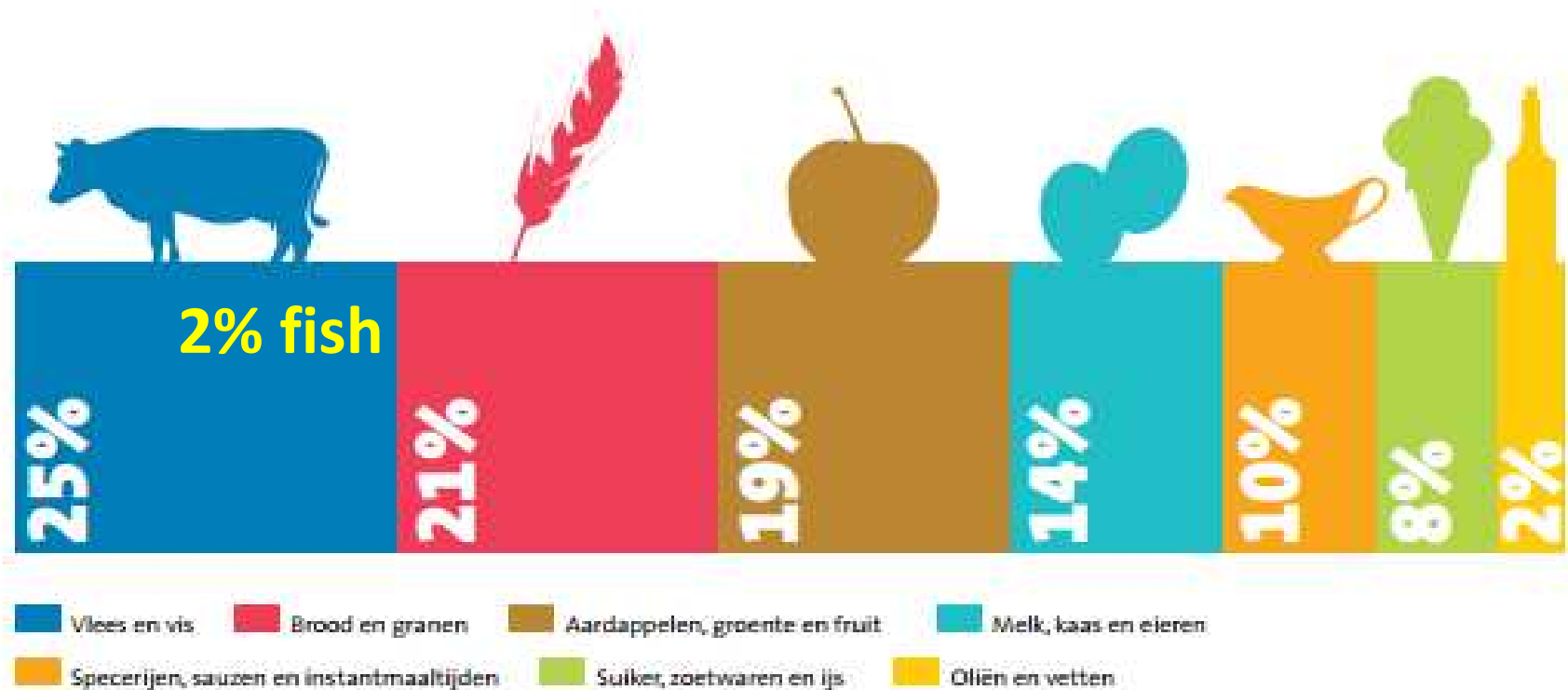


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Spending on Food was never lower
Netherlands 15% = food + beverage



Was 18% in year 2000

The Dutch spending on food



A can of tuna was never cheaper !!

- Average Dutch family of 2.2 person had a net spendable income of :
- Euro 20.000 in 1994 - a case of canned Usd 28,50 CFRDP (48x185g 140g dw skipjack brine)
- Income Euro 35.000 (+75%) in 2015 -
Today canned tuna Usd 34,00 CFRDP (+19%)



- **Mad Cow Beef**
- **Bird Flu Chicken**
- **Swine Flu Pork**
- **GMO Soybeans**
- **Gluten Bread**



- **What's for lunch today ?**

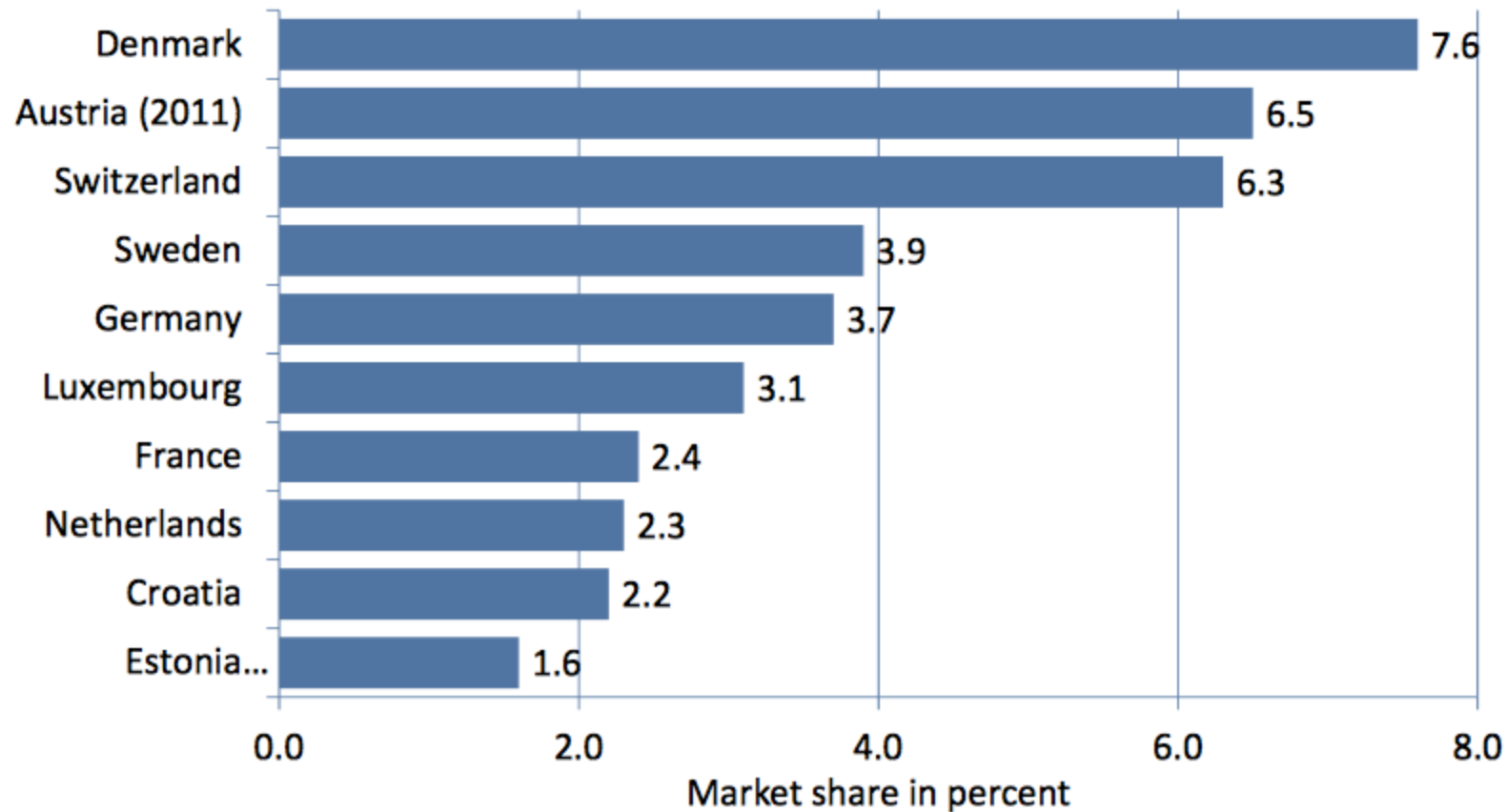


Allergies





Market share Organic food 2012



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Europe's Most Popular Seafood

| Main commercial species | Per capita (Kg) | % wild | % farmed |
|-------------------------|-----------------|--------|----------|
| Tuna (canned) | 2,14 | 100% | 0% |
| Cod | 1,96 | 98% | 2% |
| Salmon | 1,72 | 2% | 98% |
| Pollack | 1,64 | 100% | 0% |
| Herring | 1,18 | 100% | 0% |
| Mussel | 1,16 | 10% | 90% |
| Hake | 0,94 | 100% | 0% |
| Mackerel | 0,87 | 100% | 0% |
| Pangasius | 0,80 | 0% | 100% |
| Tropical shrimps | 0,75 | 46% | 54% |
| Sardine | 0,71 | 100% | 0% |
| Squid | 0,70 | 100% | 0% |
| Scallop | 0,58 | 87% | 13% |

Top three trends for 2015-2016

- More Health Focus
- Rising Consumer Confidence - GBP growth expected in most EU markets in 2015 0,5% to 3%
- Discount expansion – value expected to double in next 4-5 years
- Aldi in UK grew 21 % YoY
- Lidl in UK + 14%
- 55% of all UK consumers now visiting food discounters – was 38% in 2010

Aldi- Netherlands



Duurzaam en voordelig.



Lekkerbekjes**

Noord-Atlantische kabeljauw in krokant jasje. 3 stuks, per stuk verpakt.

300 g
2.89
€ 9.66/kg



Kibbeling**

Inclusief zasje met kruiden.

500 g
2.89
€ 5.78/kg

Vissticks**

15 stuks.



450 g
1.59
€ 3.53/kg

* Uit onze koeling ** Uit onze diepvries

3 | **ALDI** Gegarandeerd verse producten van hoge kwaliteit bij u in de buurt, altijd voor een ALDI-prijs.



Alaska koolvisfilet**

400 g
1.59
€ 3.98/kg

Verse maatjesharing*

2 stuks.
Met ui.



150 g
1.65
€ 12.00/kg



Visfilet**

Bordelaise, Broccoli of Italiano.

400 g
1.49
€ 3.73/kg



Gerookte makreel*

Hele makreel, gerookt en gezouten.

100 g
0.73
€ 7.29/kg

DAGELIJKS
in ons assortiment

Vis past in een gezond menu

De Gezondheidsraad adviseert: eet twee keer per week vis. En kies daarbij eenmaal voor een vette vissoort, bijvoorbeeld makreel, zalm of haring. Die is rijk aan omega 3. Vis zit vol met waardevolle voedingsstoffen. Zoals vitamines, mineralen en eiwitten van hoge kwaliteit. Onmisbaar voor een goede gezondheid!

Wilde zalm*

Mild gerookte Sockeye zalm.



150 g
4.99
€ 32.27/kg

Wilde zalmfilet**

Stevig van structuur met een zuivere en karakteristieke zalm smaak. Graatloos, zonder huid. 4 tot 6 filets.



500 g
3.95
€ 7.90/kg

Gegarandeerd verse producten van hoge kwaliteit bij u in de buurt, altijd voor een ALDI-prijs. **ALDI** 3

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- ✓ Organic – Wild
- ✓ SuperFood -Omega 3
- ✓ Low Fat
- ✓ High in Protein
- ✓ Allergy Free
- ✓ GMO Free
- ✓ No Antibiotics
- ✓ Disease Free
- ✓ No land Use
- ✓ Low water Use
- ✓ Low Fossil Fuel Use
- ✓ ATTRACTIVE Price

SUSTAINABLE ?
Social Responsible ?

If we do not take voluntary action ..

- Fishing and processing nations will eventually be forced by resource owning governments such as PNA , and by large market nations such as the EU, and USA to be catching and processing legally, sustainable and under good social circumstances .

What else can we expect ?

- European tuna canning industry will become again increasingly important in serving this market, as a highly robotized assembly industry mostly based on pre-cooked frozen loins, located close to the major markets, and capable of packing in innovative packaging with better marketing features.
- Retailers and consumers want to have sustainable seafood that can be easily identified as such through a recognized logo and is fully traceable, with a transparent supply and production process.
- MSC = Globally dominant - in Tuna only in Europe
- Friend of the Sea (EII) = only found in Italian tuna market

Eco labels found on canned tuna products during 24 store checks

- MSC – in all 5 countries 
- Naturland – Wild Fisch - Germany 
- Pro Planet – Rewe - Germany 
- Responsible Quality – Bolton- All countries 
- Various dolphin safe logo's - all countries
- FAD free logo – Germany 
- EIU Dolphin safe logo – all 5 countries 
- NO Friend of Sea in any of the 24 supermarkets in 5 countries 

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- With prices of tuna coming from a high level and consumers accustomed to paying higher canned tuna prices for the last 2-3 years there has never in time been a better opportunity :
- to offer consumers much more attractive price
- calculate a premium in such lower price
- To cover cost required for a sustainable and socially responsible catch.