



# BENELUX MSC CANNED TUNA SNAPSHOT



BELGIUM, THE NETHERLANDS AND LUXEMBOURG

FEBRUARY 2021

The Benelux region has shown a significant increase in MSC-ecolabel awareness according to the latest Globescan survey. The PNA MSC certified fishery and our Pacifical partners have played a key role to guarantee the consistency of MSC certified tuna in these markets. Here we have a brief recap on how the markets are progressing:



THE SKIM.

## KEY TAKEAWAYS

- Belgium and The Netherlands (NL) scored high in MSC ecolabel awareness 2020 vs. 2018 compared to other countries globally.
- Netherlands 2nd and 3rd largest retailers (Jumbo and Superunie) introduced Private Label MSC Certified canned tuna.
- Aldi BE and Colruyt sources part of its canned tuna from PNA MSC certified fishery.
- The A-brands in NL have increased their share of MSC certified products, but high prices are still a challenge to increase demand.

AWARENESS OF THE MSC ECOLABEL

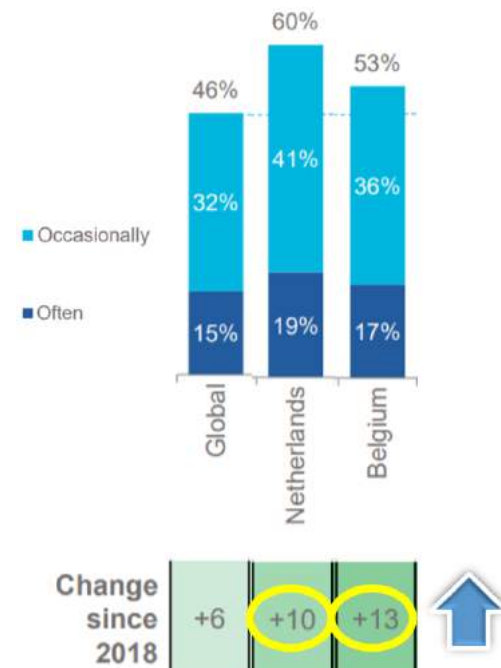


FIGURE 1 THE MSC GLOBAL AWARENESS FIGURES 2020

### MARKET OVERVIEW

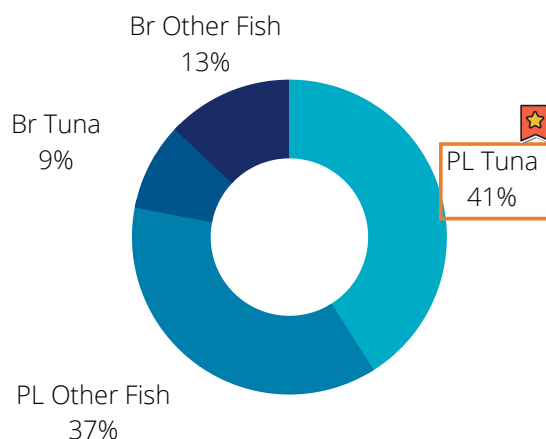


## BELGIUM

Population: 11.5 M (2019)

A market primarily **dominated by Private Label** and highly focused on Yellowfin tuna. The total Belgium canned fish retail market is valued at €140 million, canned tuna represents close to **50% of that share** (approx. €66 million and 6100 M/T final product).

BELGIUM CANNED TUNA VOLUME SHARE



Colruyt is Belgium's market-leading retailer and a **strong supporter of our PNA islands**. They have introduced **3 MSC Pacifical Skipjack and Yellowfin SKUs** under their private label and 2 MSC Albacore items. Colruyt sells 20 canned tuna items, at this moment the bulk of the canned tuna volume is still non-MSC. We will track if more MSC labeled items will be introduced in 2021.





Carrefour offers with >50 items the largest canned tuna assortment in Belgium; 13 products under private label, but only one of them (Albacore) is MSC.

All their tuna is caught **without the use of FADs**. A logo translating 'Responsible Fishery' is displayed on all PL references.

The Dutch brand "Fish Tales" and Belgium brand "Cocagne" do sell MSC tuna at premium price levels. In France, Carrefour launched a few **MSC-certified Yellowfin tuna** products during 2020, we are yet to see if the company will introduce in Belgium as well.



## DELHAIZE

Apart from 3 canned Tuna salads and 1 white tuna in glass jar, the Delhaize canned tuna PL does not use the MSC ecolabel. Delhaize chooses to showcase an own designed Pole and Line logo on the core PL assortment instead.

Next to Private Label, Delhaize sells other brands "Imperial" (Non-MSC), Rio Mare (few MSC items), and the UK brand John West (few MSC items).



Aldi BE sources part of its canned tuna from PNA MSC certified fishery. Aldi BE holds more than 10% market share and is the frontrunner in terms of **MSC canned tuna** assortment.

Back in 2019, Aldi switched **its entire PL assortment to MSC** maintaining the same competitive price level. Aldi has two MSC skipjack solid packs 200g/150g in brine and sunflower oil, as well as PNA-Pacific MSC Yellowfin solid pack in brine 195g/140g processed in Papua New Guinea.





LIDL Belgium runs **several MSC-certified in/out canned tuna promotions** throughout the year, however, their private label under the Nixe LIDL brand remains non-MS-C. The label says it is FAD-free. With the strong growing awareness of the MSC-ecolabel in Belgium, it would be interesting to follow their development.

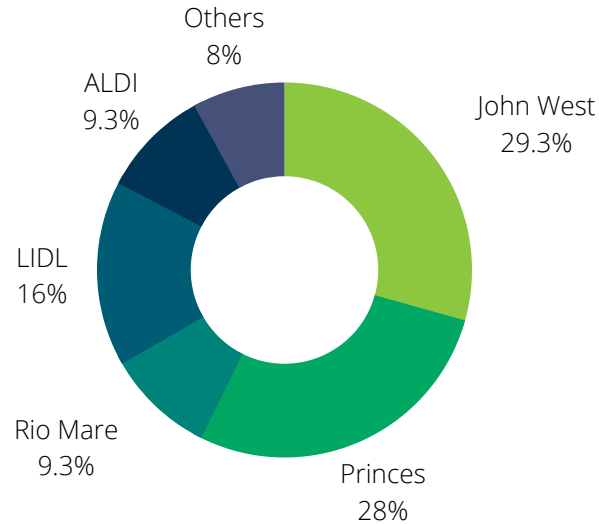


**MARKET OVERVIEW**  
**NETHERLANDS**  
Population: 17.3 M (2019)

A market that used to be known for hardly carrying any private label canned tuna, has now seen its 2nd and 3rd largest retailer (Jumbo and Superunie) **introduce Private Label MSC Certified canned tuna**.

The Dutch market for canned tuna is valued at around €75 Million lead by brands John West and Princes. It is primarily a skipjack market.

NL CANNED TUNA MARKET SHARE IN VALUE (Q1-2020)



Albert Heijn (AH) is the Dutch leading retailer with ~35% market share. AH does not have its own private label, however, it holds exclusivity for the premium positioned brand "Fish Tales". All Fish Tales **products are MSC certified**.

The brand **Princes has shown strong commitment towards sustainability**; 18 out of 21 Princes tuna SKU's are already MSC-certified at AH. The brand John West currently only sells 3 MSC items and Bolton (Rio Mare) has 2 MSC-certified products. The majority of the MSC tuna at AH is sourced from FAO 51 (Indian Ocean).

**JUMBO**

Jumbo holds more than 21% market share. It is the 2nd largest retailer in the Dutch market. In June 2020 **Jumbo has introduced a range of private label MSC certified** canned tuna. The entire canned tuna category is heading towards 100% MSC. This is in line with the trend of the consumer who is expecting more sustainable canned seafood for a competitive price level.



We are thrilled to see the Dutch shelves offering more sustainable tuna, although the premium prices for MSC (in some cases over 30% compared to non-MSC tuna) might be a discouraging factor for the better sales. All canned tuna for Jumbo PL is processed in Spain and sourced from FAO 71 and FAO 51.



\*MSC VS NON-MSC COMPARISON ON NETT WEIGHT - 30% PRICE GAP



Superunie (SU) is a Dutch purchasing organization for 13 retailers holding together more than 27% of the NL market. SU has recently launched a very extensive private label canned seafood assortment, including 9 SKUs of **MSC-certified** canned tuna.

SU sources its canned tuna **from the PNA MSC certified fishery**. 8 MSC tuna items are processed in Papua New Guinea and/or the Philippines.

These products wear the Pacific Geographical Indication in support of the origin of their fish and the future generations of people and tuna species in the PNA region.

The A-brands have also increased their share of MSC certified products. A great example is the **PNA Pacifical MSC-certified Tuna chunks in dressing from John West!**



In Q4-2020, LIDL Holland listed a **premium quality MSC certified Yellowfin tuna** solid pack in EV olive oil 160g/104g within their core 'Nixe' assortment. This remarkable sustainable launch follows the trend towards more and more **MSC-certified** canned tuna assortment in The Netherlands.

The tuna is sourced from FAO 71 (Western Central Pacific) and processed in Spain.

Lidl Holland has also very active in/out promotions on canned tuna (mainly salads) and this assortment is always MSC-certified.





Totally contrary to the Aldi Belgium tuna sustainability policy, not a single item of the fixed assortment is **MSC-certified** at Aldi Holland.



Nevertheless, most in/out promotional initiatives with canned tuna at Aldi do wear the **MSC-ecolabel**.

Tuna at Aldi NL is sourced from FAO 71 & 34 (Western Central Pacific and the Atlantic Ocean). Caught on Purse Seine with the use of FADs.

IN BRIEF

## LUXEMBOURG

Population: 613,894 (2019)

Due to COVID-19 restrictions, we were unable to perform a study on the Luxemburg market. However, a highlight on the desk study performed is the variety of ALDI listed references **100% MSC**. Auchan also has an MSC yellowfin reference, although not as competitive as ALDI LU in terms of price. We hope to be able to visit this beautiful country after restrictions are lifted so that we can share a more detailed snapshot.

Product Name	Price	Weight	Price per kg
ZAPI® Thon	1.19	200 g	5,95/kg
ZAPI® Thon à l'huile	1.19	200 g	5,95/kg
ZAPI® Thon albacore au naturel	1.65	140 g	11,79/kg
ZAPI® Salade au thon	1.79	280 g	6,39/kg



Have you thought of getting your brand on board with MSC Tuna as well? Let's catch up. Always great to connect to explore opportunities. If you are interested, please send us an email at [commercial@pacifical.com](mailto:commercial@pacifical.com)

Your Friends at Pacifical

WHY TRUST PACIFICAL ON YOUR MSC TUNA JOURNEY?

## CAN PACIFICAL HELP MY BRAND GET MSC TUNA AT AFFORDABLE LEVELS?

Pacifical's primary goal is to make PNA MSC-certified tuna **accessible to everyone**. We translate our team's in-depth market knowledge on sustainable tuna into valuable opportunities for our partners across the chain, from fishing companies, all the way to world retailers.

It is normal to feel intimidated with changing the status quo, switching your tuna brand from non-MSc towards MSc. But guess what? **It is not rocket science, as a matter of fact, it is SIMPLE.**

Get in touch with us to assess and determine the most effective supply chain and sourcing strategy of both Skipjack and Yellowfin MSc certified tuna.

We pride ourselves in having an ecosystem approach, for us all species matter! Our fishery is located in **the only ocean with ALL tuna species in a healthy state; The WCPO**, the largest and yet the most sustainable ocean.

## OUR FISHING METHOD IS PURSE SEINING

we strongly believe that true change for the entire ecosystem can only happen if the large scale fisheries are handled sustainably.

**Did you know 65% of all tuna catch comes from purse seiners?** In order to bring most of the world's tuna to a sustainable level, we need to make sure purse seiners operate sustainably. That's where our focus is.

**All our tuna is 100% traceable.** Many traceability systems are regularly based on captain statements or self-declaration (not independently verified), We believe the world deserves better transparency, that's why Pacifical's verification approach is based on a multilayer system of checks and balances, as well as independent onboard observers reporting to PNA.

## PNA: The World's Largest MSC Tuna Fishery



\*\*Total MSC Tuna Volume (SKJ+YF+ALB)= 1,652,490 MT  
 \*\*\*Total PNA Eligible Volume 735,523 MT

FIGURE 3 - BASED ON DATA FROM WWW.MSC.ORG

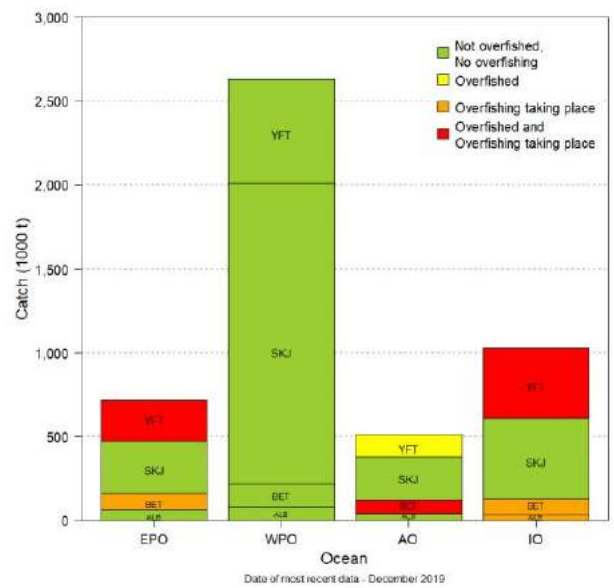


FIGURE 4 - WCPO STOCK STATUS SEPT 2020 REPORT - SPC

## PROPORTION OF TUNA CATCH CAUGHT BY GEAR TYPE

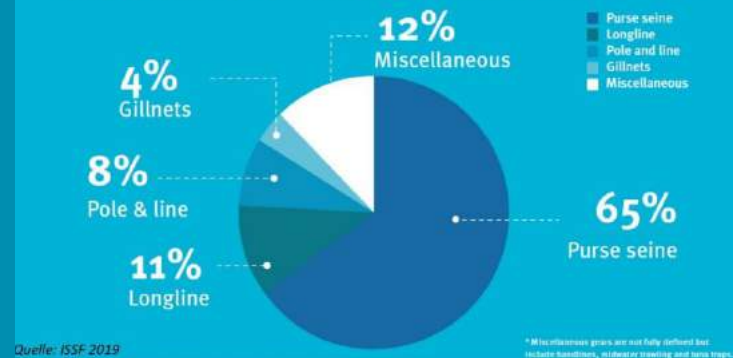


FIGURE 5 - SOURCE: 2020 MSC TUNA ANNUAL HANDBOOK

## Blockchain Lookup

To learn more about Pacifical's sustainability program and their unique blockchain traceability system [click here](#). Enter the tracking code that is printed on the lid of your tuna can below to find out where your tuna came from. For example

\*U73X2CBNN 3NMBN MSC/PNA\*

Search Product Here

U73X2CBNN 3NMBN MSC/PNA

