



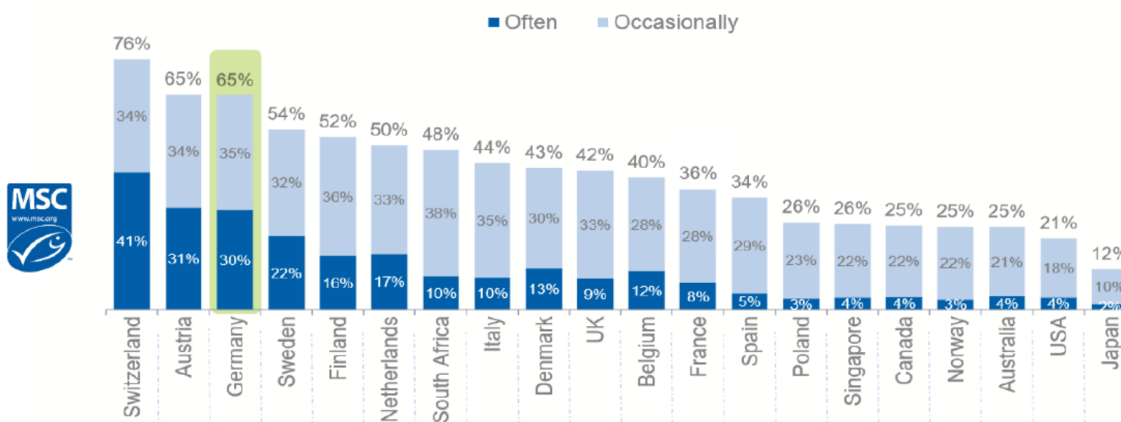
# GERMANY: MSC CANNED TUNA MARKET SNAPSHOT



## GERMANY | MAY 2020

German grocery stores have started to introduce MSC certified canned tuna products at a very competitive price entry level. Pacifical is playing a major role in supporting brands and retailers with consistent large volumes of MSC certified wild tuna, fully traceable from sea to shelf. The share of MSC-certified products in Germany continues to increase rapidly and the MSC eco-label consumer awareness remains high, ranking 3rd globally.

Awareness of the MSC label (seen often + seen occasionally), by country



#3

MSC MARKET  
with the highest  
consumer ecolabel  
awareness\*

130

MSC TUNA  
PRODUCTS\*

69%

GERMAN TUNA  
PRODUCTS COME  
FROM THE PACIFIC\*

## GENERAL OVERVIEW

For all German grocery stores, the majority of the revenue generated from the canned tuna category comes from two references with the following description:

- Skipjack Solid pack in brine Nw. 195g/ Dw. 150g
- Skipjack Solid pack in Sunflower oil Nw. 195g/ Dw. 140g

Sustainable MSC certified canned tuna products have been available on the German shelves for some time, but prices were high compared to every retailer's price entry assortment. The two products mentioned above have a general consumer price at about €1,19/ can in every German store. Compared to other European countries, this is a very competitive price considering the amount of tuna and the high quality specifications demanded by German retail.

Up until the end of 2019, the only available MSC canned tuna products in Germany were sold between € 1.99 and € 2.29. This was for a content of Nw 185g/ Dw 140g. This tuna was mostly caught with pole&line in the Indian Ocean (FAO51). Unfortunately, a price difference between 67% and 92% with non-MSC certified products which has proven to be an obstacle for the average consumer. \*

## HOW HAS ALL THIS CHANGED IN 2020?

\*Data taken from the MSC Thunfisch Bericht 2019

\*Data taken from the MSC Consumer Survey 2018

\*PNA are the 8 nations made up of Micronesia, Kiribati, Marshall Islands, Nauru, Palau, Papua New Guinea, Solomon Islands and Tuvalu.



# EDEKA

Up until last year, Germany's largest retailer, EDEKA (>19% share of national grocery sales), used to only offer MSC tuna under a premium private label reference priced at €2.29. The largest share of canned tuna volume remained with the non-MSC item priced at €1.19.

On March 2020 **EDEKA announced that all its canned tuna assortment is now 100% MSC- certified.** The key highlight was that EDEKA was able to maintain **price at €1.19.** They even added a third reference Skipjack tuna solid pack in olive oil Nw 185g/ Dw 130g at the same price level. Tuna chunks in Dressing with vegetables are also MSC certified!



## Netto

Marken-Discount

Netto Marken- Discount, one of the discounted formulas from EDEKA sources its sustainable tuna from **Pacifical, MSC tuna coming from PNA MSC certified fishery**, which is located in the Western Central Pacific Ocean (FAO 71&77). This is **the largest MSC certified tuna fishery** available by volume, therefore it is able to provide the consistency and the scale that such a unique move requires.

Veterinary codes reveal that all EDEKA private label canned tuna products are processed in Papua New Guinea or the Philippines. Except for the Tuna chunks in Dressing with Vegetables which is processed in Vietnam.

# REWE

Germany's second largest retailer REWE (> 14% share) also carries MSC tuna references, however **not yet in the price entry SKUs.** They recently re-introduced a 2 pack **PNA MSC certified tuna chunks** in olive oil 2x80g.







This decision follows METRO's commitment to have 80% of its twelve major fish and seafood species certified by the end of 2020 and its **voluntary commitment regarding tuna traceability** by signing the Tuna 2020 Traceability Declaration. Pacifical offers 100% traceability from sea to shelf.




REAL supermarkets - (2.7% share) was **the first German food retailer to offer MSC certified canned tuna under their private label entry-level brand** in June 2019. Shelf price of € 1.19 was kept, An unprecedented move in the German market.

Recently REAL has started sourcing their canned tuna from Pacifical. The picture was taken last year when the product was introduced with another MSC fishery.



KAUFLAND (>6% market share) has added **4 PNA MSC certified Tuna salads** to their assortment. Nevertheless Kaufland has **not incorporated MSC certified canned tuna** products in its price entry category.



**K-CLASSIC**  
**Thunfisch-Salat Italien 160g**  
 160g Dose  
 100 g = 0,94 €



**K-CLASSIC**  
**Thunfisch-Salat Mexican 160g**  
 160g Dose  
 100 g = 0,94 €





At Aldi (both Aldi Süd as Aldi Nord) we observed that **mainly MSC certified canned tuna is in and out assortment**. But fixed assortment is all non-MS.



At Lidl we see **mainly in & out promotions which are MSC certified**. These first steps are really important and **good signs** for further sustainability within the canned tuna category.



## THE A-BRANDS



There are two A-brands taking the lead on MSC in the German canned tuna market. For many years FOLLOWFISH only sells Pole & Line MSC canned tuna, and since 2017 the brand HAWESTA also launched a 100% MSC-certified tuna assortment in the German market including many tuna salads. **The MSC tuna used for Hawesta is from Pacifical**



We are pleased to share with you these developments in the German market.

**Have you thought of getting your brand on board with MSC Tuna as well?** If you have questions or would like to explore possibilities, we would be happy to arrange a call with you. **Please contact us at [commercial@pacifical.com](mailto:commercial@pacifical.com)** or give us a call to +31 162 746 011