



Securing the future of UK bluefin tuna



IPNLF

FOR ONE-BY-ONE FISHERS

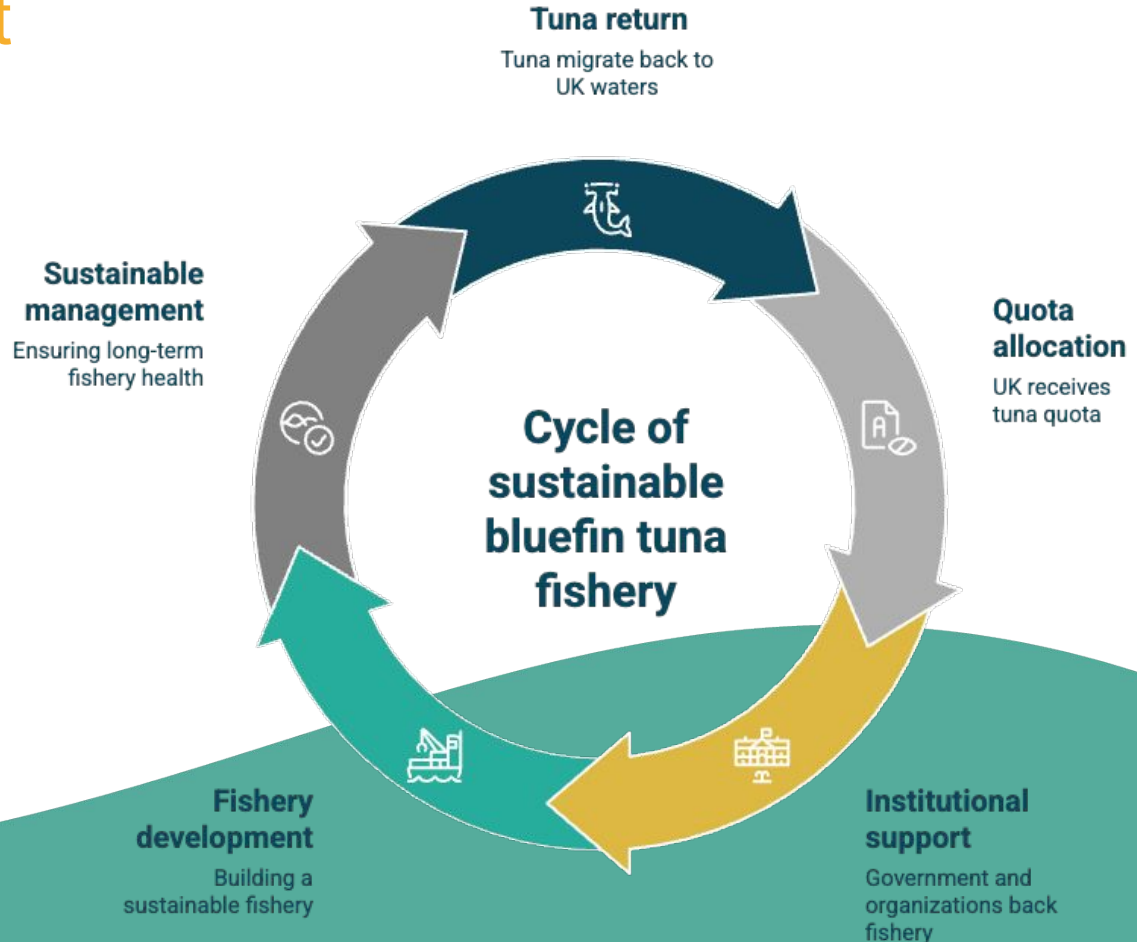
A fisherman with a beard and a dark cap is shown from the side, reeling in a fishing rod. He is wearing a dark long-sleeved shirt and blue gloves. The fishing rod is bent, indicating a catch. The background is a vast blue ocean under a clear sky. A dark green rectangular box with white text is overlaid on the image.

A window of opportunity

The return of a giant

Atlantic bluefin tuna are back in UK waters after decades of absence and with them, the chance to build a world-class, low-impact fishery from scratch

For the first time in 60+ years, the UK has quota, institutional backing, and a clean slate — no legacy industrial fishery, no entrenched supply chain



Why now: A strategic moment for UK seafood

The UK is not short of fish — but it is short of value, traceability, and domestic market alignment

Bluefin tuna offers a rare alignment: a premium species, a sustainable gear type, and an underdeveloped domestic supply chain we can still shape

This is a chance to build a high-value, low-carbon seafood system that works for fishers, food security, and funders alike.

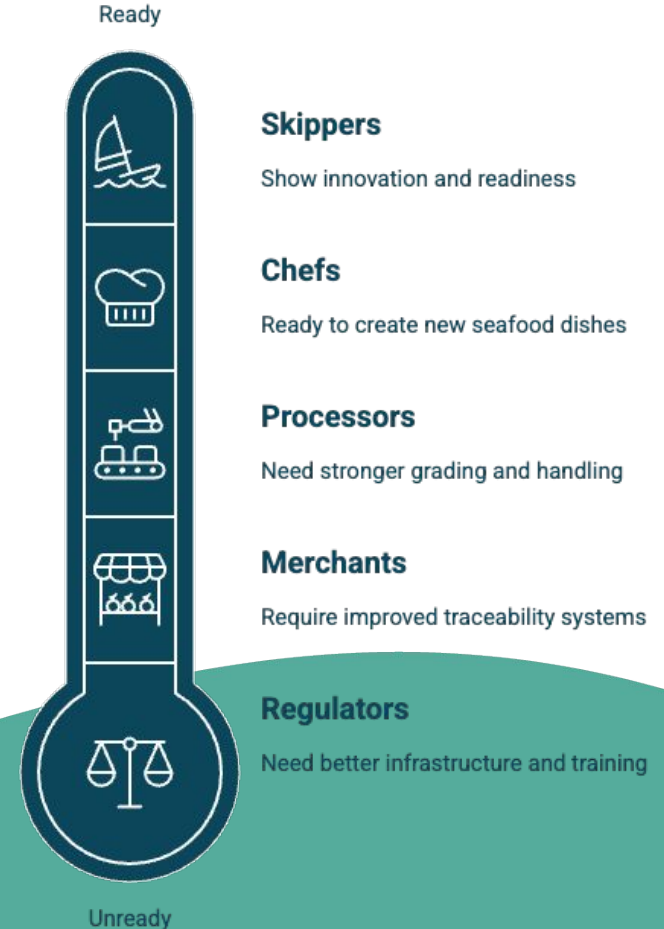
UK leverages bluefin tuna for seafood system transformation



Insights from the field

20 interviews: fishers, processors, chefs, merchants, regulators

- Skippers show innovation and readiness - but lack clarity, continuity, and confidence
- Auctions undervalue product due to weak grading and handling standards
- Infrastructure, traceability, and training gaps are limiting quality and pricing
- Demand exists, but mid-chain systems are not ready to deliver

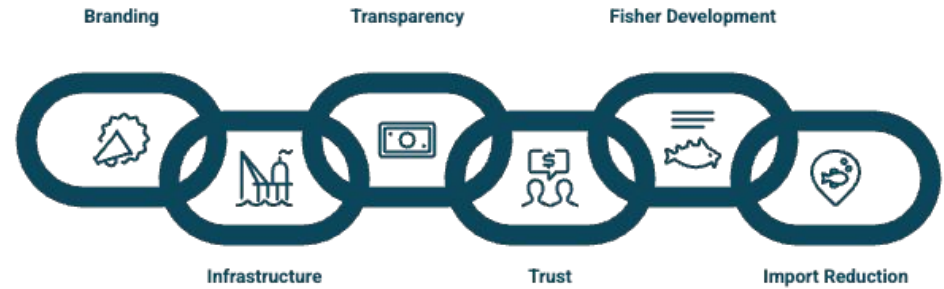


A new model for low-impact, high-value UK fisheries


Bluefin tuna offers the UK an unmatched opportunity: to develop a premium, low-volume fishery that retains value locally, builds supply chain trust, and reduces reliance on imports

This is a testbed for the infrastructure, transparency, and branding that can lift other UK fisheries too

Resilient fisheries need more than quota. They need vision, traceability, and investment in the full chain



The UK bluefin fishery: the history

- A low-impact, highly regulated fishery — but without long-term certainty
 - Commercial landings began with 2.4t landed bycatch; trials began in 2023 with 19.1t landed
 - Trials concentrated in the South West, aligning with seasonal returns (Oct–Nov)
 - Initial landings exposed traceability and enforcement gaps
 - Regulatory evolution from 2022–2024 helped embed controls, data reporting, and legal sale mechanisms
 - Foundation laid for a legally traceable, small-scale fishery
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The UK bluefin fishery: 2025


- 2025: 15 vessels authorised, each with 3t quota = 45t total allocation
 - Fishery restricted to rod-and-reel gear, trips <24hrs, and ICCAT eBCD reporting
 - Landings only at designated ports; traders must be registered and approved
 - Licences are non-transferable, valid for one year only, and do not confer track record
 - Built-in limitations preserve low-impact character — but limit business planning
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Voices from the value chain

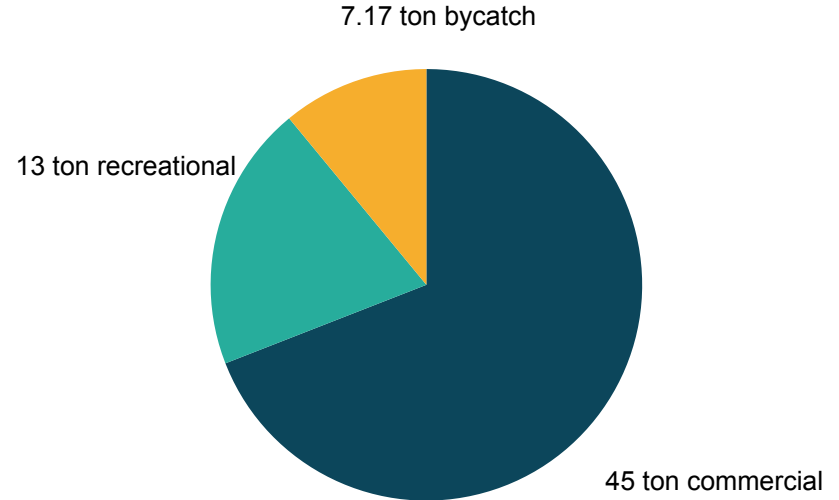


The stock is recovering, but needs caution

- Eastern Atlantic stock has shown strong recovery over the past decade
 - Current fishing mortality is below precautionary thresholds (F0.1)
 - IUCN reclassified bluefin from “Endangered” to “Least Concern” in 2021
 - UK waters host mostly spawning-age fish but data gaps remain about ecosystem impact
 - **Long-term projections are positive if moderate pressure is maintained**
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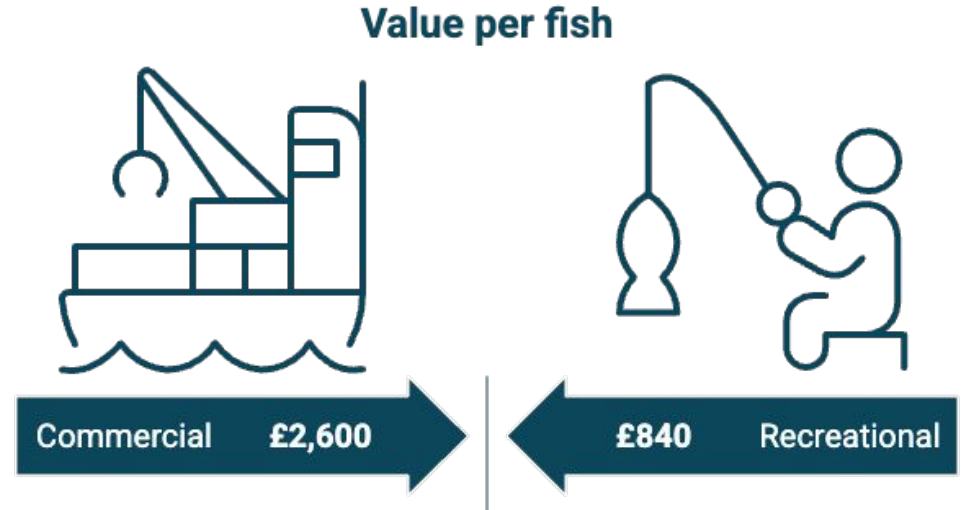
Quota allocation: carefully controlled, but uncertain

- UK's ICCAT quota: 66.15t in 2025
- 45t allocated to the commercial rod-and-reel fishery
- Remaining quota supports tagging, bycatch, and recreational fisheries
- Licences are awarded annually, with no track record or carry-over
- Lack of continuity prevents long-term investment



Two sectors, one fishery: aligning value and access

- Commercial fishery is small and traceable, but lacks continuity
- Recreational fishery shows high economic impact and low mortality
- No clear framework yet to balance sectoral equity or optimise returns
- Conflicting messages risk undermining trust and long-term sustainability



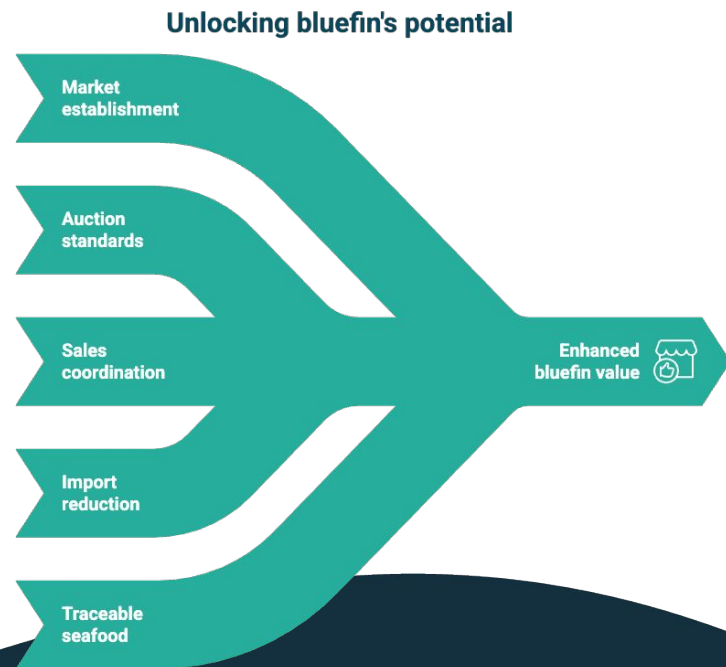
Domestic seafood demand: challenges and opportunities

- UK seafood consumption is well below health and sustainability targets
- Market dominated by 5 species, which are mostly imported
- Demand for sustainable, high-quality fish but poor labelling and access
- Shift towards convenience and premium formats could benefit UK bluefin
- Traceability, branding, and format innovation are key enablers



A fragmented chain that can't capture bluefin's value

- No established market for UK bluefin: weak traceability and brand identity
- Auctions undervalue fish due to lack of grading and handling standards
- Fragmented sales routes: no sourcing coordination across ports, fishmongers, or chefs
- 87% of UK tuna is imported canned skipjack with reputational risks
- **Value-for-money, traceable British seafood is outperforming in retail and foodservice**



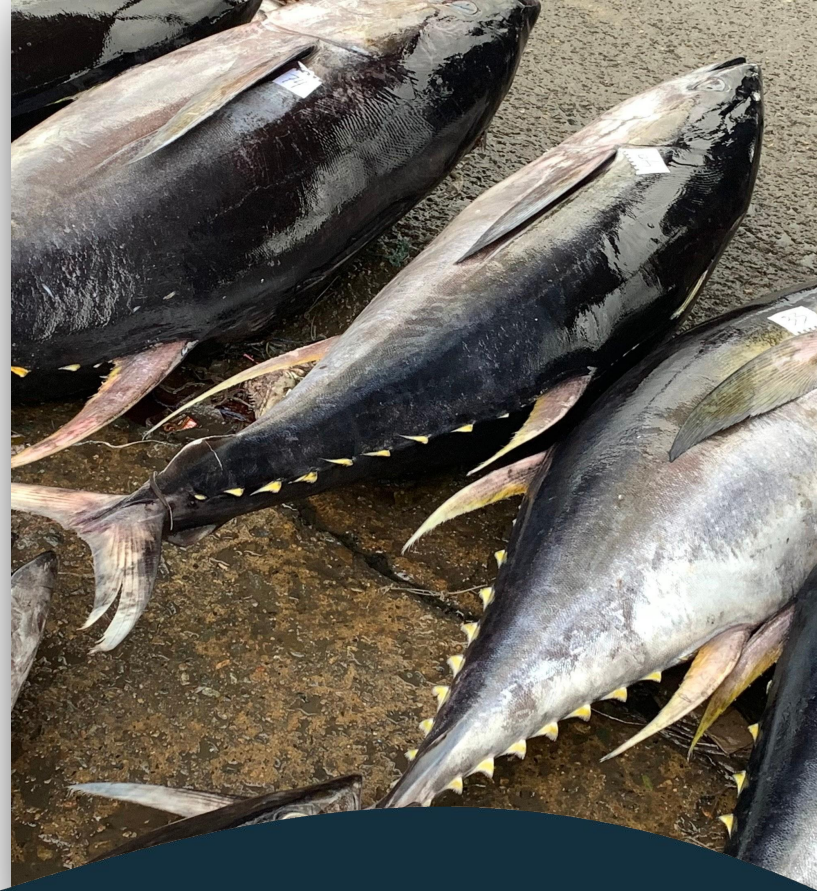
Unlocking local value from UK-caught bluefin tuna

- Retail markups possible with traceability and quality control
- Local chefs and fishers co-creating “hook-to-plate” value chains
- Trials show +42% revenue per vessel over previous years
- **Retail potential: £450k–£1m from trial landings**



Gaps in knowledge and infrastructure

- No standard for grading, handling, or chilling
- Limited access to traceable, branded auction or online platforms
- Missed opportunities in restaurants and retail due to inconsistent quality
- Season starts late, shortening the window for hospitality engagement
- Mid-chain investment lacking: chillers, logistics, training



A low-carbon opportunity we can't miss

- UK bluefin is rod-and-reel only, with short, nearshore trips
- No chumming, no baitfish, and all landings are domestic
- Likely to have a lower footprint than imported or farmed tuna — but assessment needed
- Bluefin infrastructure could embed low-carbon design from the outset
- Seafood supports net-zero diets - especially oily fish like bluefin



A fisherman with tattoos and a blue cap is smiling while holding a large, silvery fish on a boat. He is wearing a black long-sleeved shirt with a yellow logo and blue overalls. The boat deck is cluttered with equipment, including a white buoy, a red fuel tank, and a white bag with the name 'MADDEN' and the number '1102' written on it. The background shows the ocean and parts of the boat's structure.

A model for the future

What success looks like

- Traceable, UK-caught bluefin sold across foodservice, retail, and directly to consumers
- Local branding and auction upgrades drive value retention in coastal economies
- Short, low-carbon supply chains replace imports with UK premium protein
- Infrastructure investments benefit other domestic species
- Strong participatory governance supports fair access, quality control, and long-term trust



Shared traceability with quality as a catalyst


- Upgrade port auction systems to support grading, chilling, traceability
- Pilot digital traceability linked to ICCAT eBCD and UK consumer labels
- Quality-based sales build trust with buyers and price stability for fishers
- Shared systems can benefit other species once proven with bluefin
- Specific ask: Support data needs assessment and traceability study in 2025



Building the UK bluefin brand

- Align product with national identity: high-quality, traceable, local
- Develop bluefin brand tied to regions, chefs, and seasonal stories
- Build trust and price through storytelling, not just certification
- Fish already consumed domestically, now it needs visibility
- Supports foodservice, direct-to-consumer, and retail ready-to-eat market segments



A photograph taken from the perspective of someone on a boat, looking out over the ocean. Two fishing rods with black and gold accents are visible in the foreground, extending from the top corners towards the center. The water is a deep blue with white foam from the boat's wake. In the distance, a coastal town with buildings and a hillside is visible under a clear blue sky. A dark teal rectangular box is overlaid in the center of the image, containing the text "Actions for 2025" in white.

Actions for 2025

What needs testing during the 2025 season

- Port-based **quality control**: handling protocols and training in grading
- Cold chain **integrity testing** with onboard and auction-based temp. monitoring
- **Digital traceability** from vessel to buyer
- Investigate potential for **value-added processing** (e.g., aged tuna, pre-sliced sashimi packs) and artisanal seafood hub
- **Branding trials** with chefs, merchants, and fishmongers
- **Carbon footprint** baseline assessment for UK-caught bluefin
- Facilitate **peer learning exchanges** between fishmongers and seafood businesses within IPNLF's network

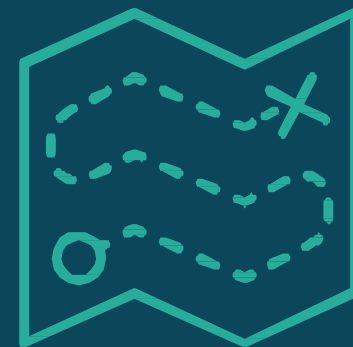
Light-lift, high gain start

- Timeline: July 2025 – March 2026
- Cost-efficient pilots using shared infrastructure and existing vessels
- 2-3 ports selected for traceability, SOPs, and brand activation
- Multi-stakeholder design: fishers, buyers, processors, regulators
- Evidence-driven approach: measurable outputs for 2026 scale-up



The 2025 roadmap: from pilot to proof of concept

Phase	Timeline	Key activities	Lead stakeholders
Pilot implementation	Jul–Oct 2025	Launch port pilots with traceability, quality monitoring, and branding trials	Project team, fishers, processors, chefs, auctioneers
Data capture & feedback	Oct–Dec 2025	Collect pricing, handling, and traceability data; conduct feedback workshops with ports and buyers	Researchers, fishers, traders, chefs
Analysis & synthesis	Jan–Feb 2026	Assess pilot outcomes and value-add potential, identify bottlenecks	Project team, IPNLF, evaluation consultants
Strategic scaling	Mar 2026	Develop 2026 national implementation plan; align recommendations with funders, DEFRA, MMO, and supply chain actors	Funders, regulators, local authorities, co-ops



The time is now

Quota is available and growing — but systems aren't in place

Fishers are engaged and ready — but lack continuity and infrastructure

Carbon, traceability, and resilience goals align, but require proof of concept

We have the design and stakeholder input — now we need to test it

If not tested in 2025, we risk losing momentum and market trust





Annex

Team



Christopher Giordano

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As Fisheries Project Manager, Christopher oversees our SoCool Small-Scale Fisheries Carbon Footprint project in Indonesia and, as an expert in cold-chains, he conducts post-harvest loss and quality assessments in many of our partner supply chains.

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Craig Turley

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As Fisheries Director, Craig is responsible for leading IPNLF's fisheries team. He has been working at IPNLF since 2020 as its Fisheries Improvement Consultant, has extensive experience implementing feet-on-the-ground projects and enjoys working closely with coastal fishing communities to help manage and drive community-based fisheries programmes.

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