Securing the future of UK bluefin tuna

IPNLF
FOR ONE-BY-ONE FISHERS

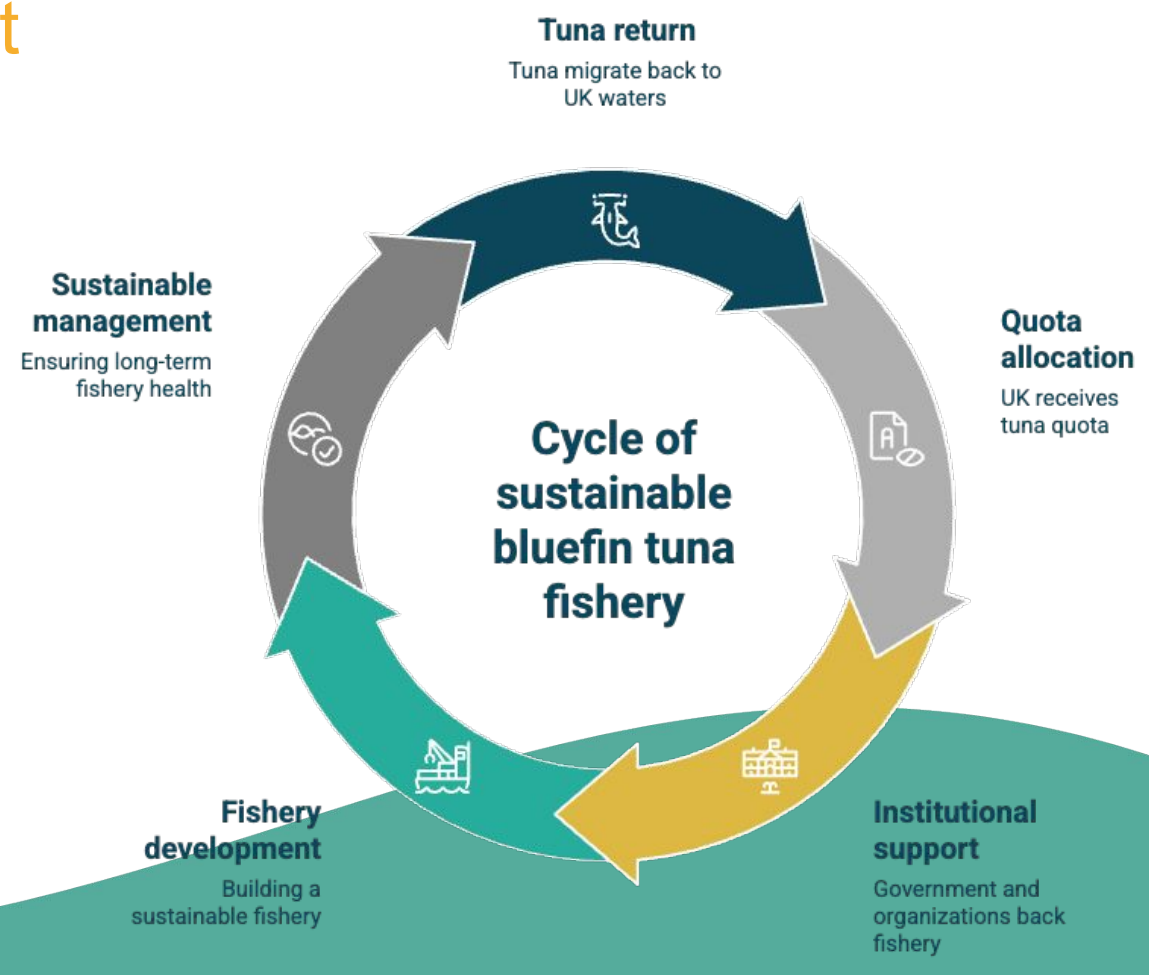
Esmée Fairbairn
FOUNDATION

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

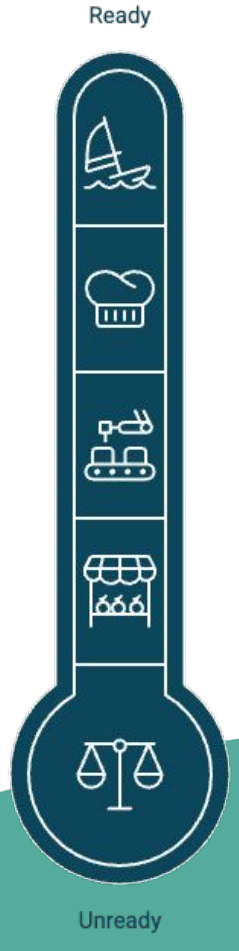
Bluefin tuna offers a rare alignment: a premium species, a sustainable gear type, and an underdeveloped domestic supply chain we can still shape

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

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



Skippers

Show innovation and readiness

Chefs

Ready to create new seafood dishes

Processors

Need stronger grading and handling

Merchants

Require improved traceability systems

Regulators

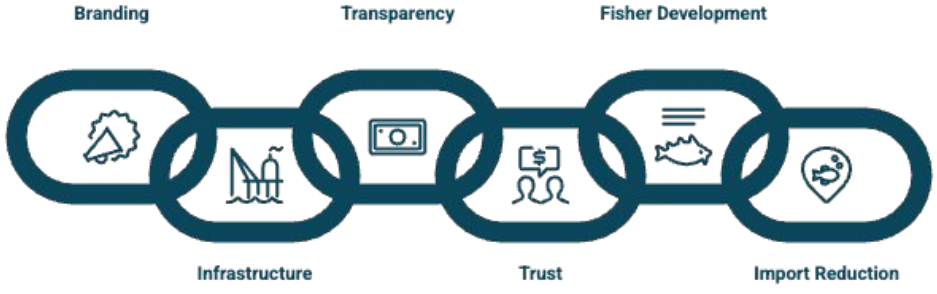
Need better infrastructure and training

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

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

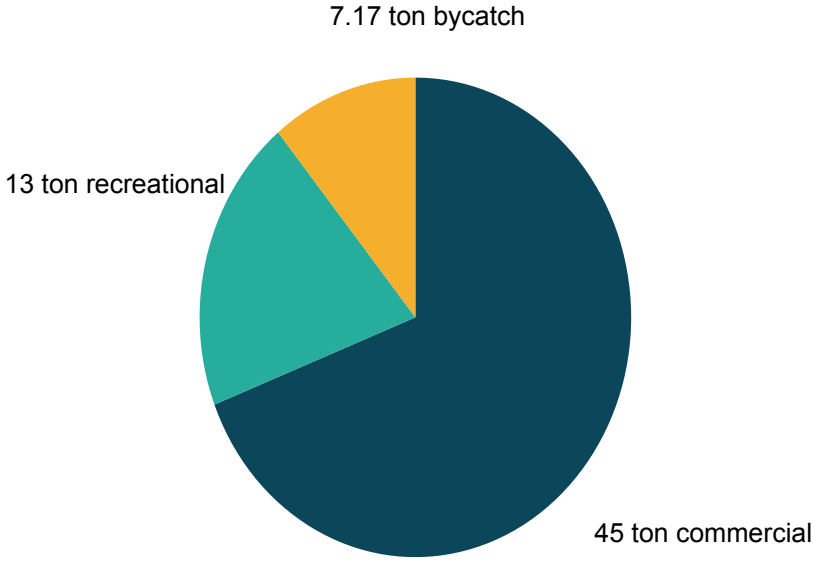
Voices from the value chain

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**

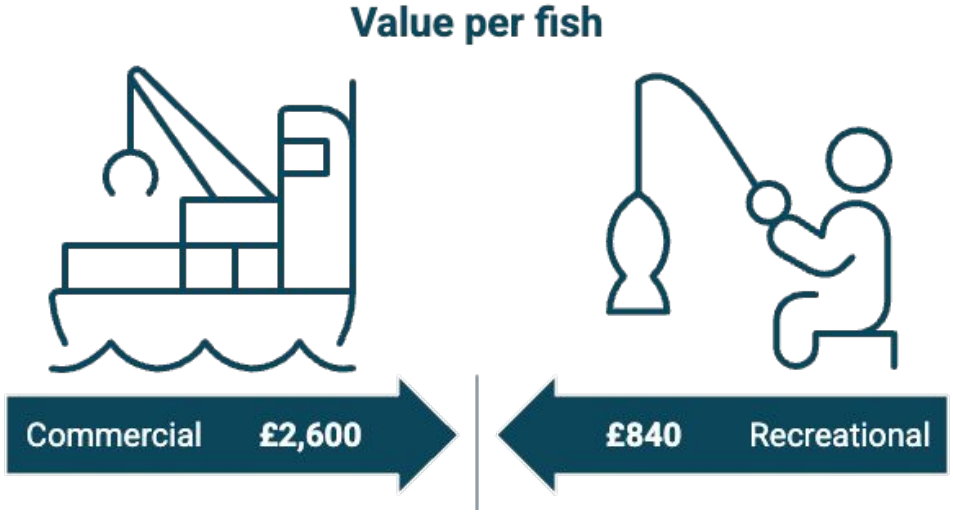
Quota allocation: carefully controlled, but uncertain

- 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

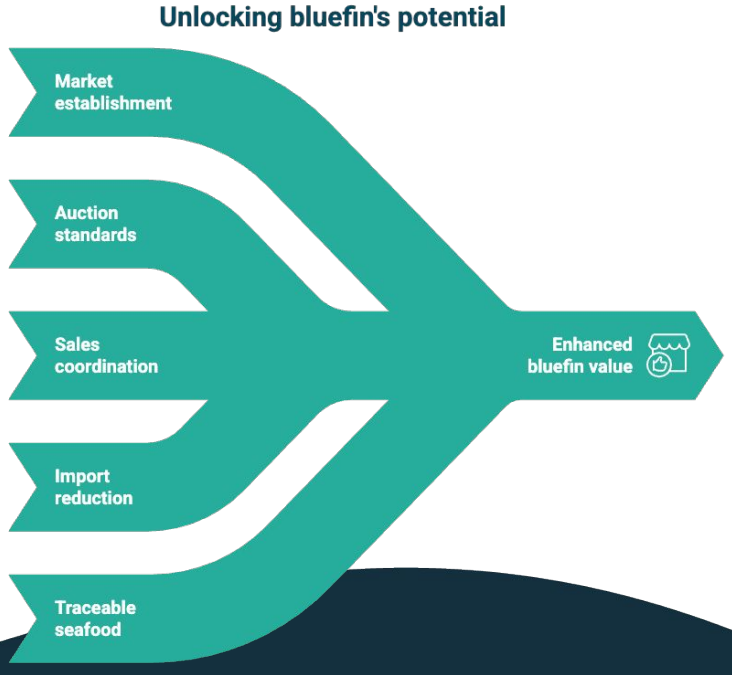


Domestic seafood demand: challenges and opportunities

- 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

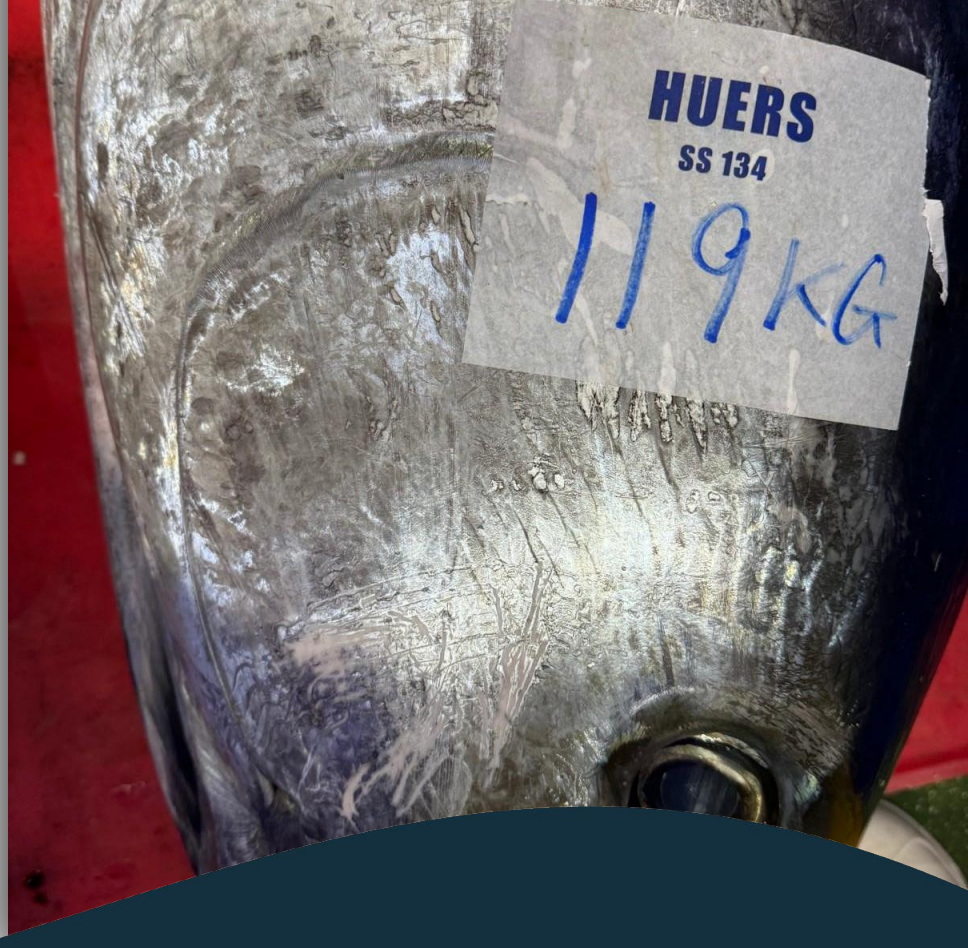
A fragmented chain that can’t capture bluefin’s value

- 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**



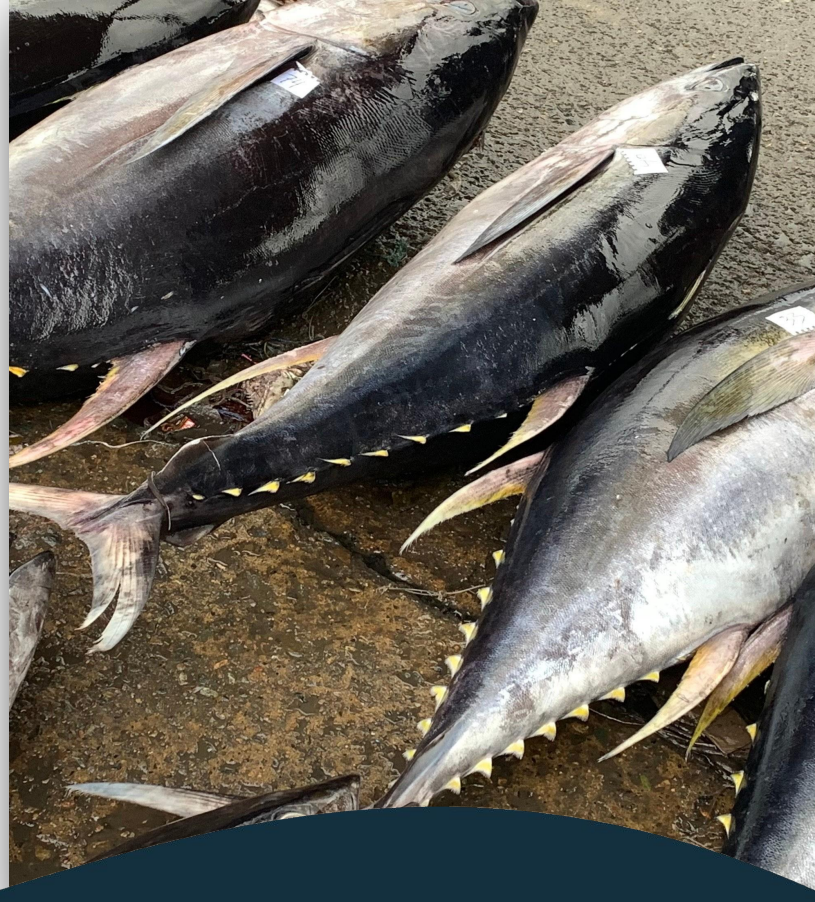
Unlocking local value from UK-caught bluefin tuna

- 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 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


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
Fisheries Project Manager
chris.giordano@ipnlf.org

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

Craig Turley
Fisheries Director
craig.turley@ipnlf.org

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.

www.ipnlf
.org

References

ABPmer & Risk & Policy Analysts. (2024). Impact Evaluation of Bluefin Tuna Quota Allocation - MF0740. Department for Environment, Food & Rural Affairs. https://sciencesearch.defra.gov.uk/ProjectDetails?ProjectId=21637

Angling Trust & UK Bluefin Tuna Association. (2023, March 6). Response to the UK's Eastern Atlantic and Mediterranean bluefin tuna fishing, farming, inspection and capacity management plan. https://anglingtrust.net/2023/03/06/bluefinresponse/

Carrano, C., Maguire, J.-J., Kerr, L., Walter, J., Lauretta, M., Rouyer, T., & Cadrin, S. X. (2022). 2022 ASAP Stock Assessment of the Eastern Atlantic and Mediterranean Bluefin Tuna. Collect. Vol. Sci. Pap. ICCAT, 79(3), 551–586.

Cornwall Wildlife Trust. (2024, April). Atlantic Bluefin Tuna – Cornwall Good Seafood Guide. Retrieved from https://www.cornwallgoodseafoodguide.org.uk/fish-guide/atlantic-bluefin-tuna.php

Department for Environment, Food & Rural Affairs. (2023, December 7). Summary of responses and government response: Establishing permitting regimes for the recreational fishing of eastern Atlantic bluefin tuna in UK waters. https://www.gov.uk/government/consultations/establishing-permitting-regimes-for-the-recreational-fishing-of-eastern-atlantic-bluefin-tuna-in-uk-waters Garrett, A., Watson, R., & Pegg-Darlison, S. (2024). Fish as Food 2024 update: A review of developments in UK seafood consumption, implications, and practical responses. Seafish. https://www.seafish.org/document/?id=4d589c4c-ca6d-408c-be0e-b1798542c1c1

Greenfield, P. (2024, February 9). 'It's a bucket-list fish': Bluefin tuna are back in British seas – and so are the fishing boats. The Guardian. https://www.theguardian.com/environment/2024/feb/09/fish-bluefin-tuna-british-seas-fishing-boats-quotas

Hawkes, L. A., & Witt, M. J. (2025, January). Written evidence on Atlantic Bluefin tuna in UK waters. University of Exeter. Submitted to UK Parliament Committee. Horton, T., Witt, M., & Righton, D. (2019). Thunnus UK: A baseline for Atlantic bluefin tuna off the United Kingdom. Presented at SWME19. University of Exeter & Cefas. https://www.thunnusuk.org

References

Horton, T. W., Binney, F. C. T., Birch, S., Block, B. A., Exeter, O. M., Garzon, F., … Hawkes, L. A. (2025). Annual migrations, vertical habitat use and fidelity of Atlantic bluefin tuna tracked from waters off the United Kingdom. Scientific Reports, 15, 293. https://doi.org/10.1038/s41598-024-80861-w

Horton, T. W., Block, B. A., Davies, R., Hawkes, L. A., Jones, D., Jones, H., Leeves, K., Ó Maoiléidigh, N., Righton, D., van der Kooij, J., Wall, D., & Witt, M. J. (2021). Evidence of increased occurrence of Atlantic bluefin tuna in territorial waters of the United Kingdom and Ireland. ICES Journal of Marine Science. https://doi.org/10.1093/icesjms/fsab039

Lappe-Osthege, T., Fenn, T., Fleet, D., Starr, M., Keech, M., Bannister Curran, L., Pollett, J., Ward, L., & Walmsley, S. (2024). Impact Evaluation of Bluefin Tuna Quota Allocation: Final Report. Risk & Policy Analysts Ltd (RPA) & ABPmer. Prepared for DEFRA. Retrieved from https://www.gov.uk/government/publications/bluefin-tuna-commercial-trial-fishery

Löfstedt, A., Scheliga, B., Aceves-Martins, M., & de Roos, B. (2025). Seafood supply mapping reveals production and consumption mismatches and large dietary nutrient losses through exports in the United Kingdom. Nature Food, 6, 244–252. https://doi.org/10.1038/s43016-024-01102-x

Marine Conservation Society. (2024). Atlantic bluefin tuna – Good Fish Guide. Retrieved April 2, 2025, from https://www.mcsuk.org/goodfishguide/species/atlantic-bluefin-tuna/

Marine Management Organisation. (2020). Domestic Seafood Supply Scheme (DSSS): How to apply for project funding. GOV.UK. https://www.gov.uk/guidance/domestic-seafood-supply-scheme-dsss-how-to-apply-for-project-funding

Marine Management Organisation. (2024, March 28). Bluefin (BFT) by-catch rules within the commercial fishery. GOV.UK. https://www.gov.uk/guidance/bluefin-bft-by-catch-rules-within-the-commercial-fishery

Marine Management Organisation. (2024). Application to fish Eastern Atlantic Bluefin Tuna (Thunnus thynnus) – 2025 commercial fishery. UK Government. https://www.gov.uk/government/publications/bluefin-tuna-fishery-commercial-application-guidance-2025

Marine Management Organisation. (2025, March 19). Bluefin Tuna Catch and Release Recreational Fishery: 2024. GOV.UK. https://www.gov.uk/government/statistics/bluefin-tuna-catch-and-release-recreational-fishery-crrf-2024

References

Marine Management Organisation. (2025, March 20). Bluefin tuna (BFT) commercial fishery within UK waters – Guidance. GOV.UK. https://www.gov.uk/guidance/bluefin-tuna-bft-commercial-fishery-within-uk-waters

Marine Stewardship Council. (2024). MSC Sustainable Tuna Yearbook: UK Analysis. https://www.msc.org/uk

Marine Stewardship Council. (2024). MSC UK Tuna Shopper Report 2023 (2nd ed.). https://www.msc.org/uk

Murphy, S. (2024, April). UK seafood supply chain overview: October–December 2023. Seafish. https://www.seafish.org/insight-and-research/current-and-future-trends/

Oceana UK. (2023). Mission Regeneration: A Roadmap to End Overfishing in UK Waters. https://europe.oceana.org/publications/mission-regeneration-roadmap-to-end-overfishing-in-uk-waters/

Seafish. (2022). The UK seafood supply base to 2030: Trends, risks and opportunities. Seafish Insight Series. https://www.seafish.org/document/?id=2b44fe25-e8b3-4b5c-bfe2-37a5e3ff4e6c

Seafish. (2024, November). Mid-Year UK Seafood Supply Chain Overview: January to June 2024. https://www.seafish.org/insight-and-research/current-and-future-trends/

Seafish & Department for Environment, Food & Rural Affairs (Defra). (2018). Seafood 2040: A Strategic Framework for England. Seafish. https://www.seafish.org/document/?id=4e0480be-1034-4c64-82b6-7c53bfb1571d

UK Parliament. (2024). The Sea Fisheries (Highly Migratory Species) (Amendment) Regulations 2024 (SI 2024/439). Retrieved from https://www.legislation.gov.uk/uksi/2024/439/contents/made