

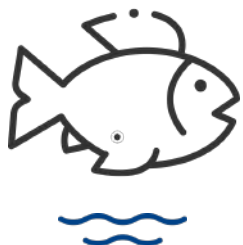
# The value chain of the freezer tuna sector and its economic impact - Spain



**BERMEO** *Tuna*  
WORLD CAPITAL



# 1- BACKGROUND



The human diet depends largely on fish: it is not only a source of **protein**, but also a source of

## **EMPLOYMENT AND ECONOMIC ACTIVITY**



**Freezer tuna vessels** were created as a result of a risky decision in the mid-twentieth century. Today they constitute an active and dynamic industry with great investment capacity.

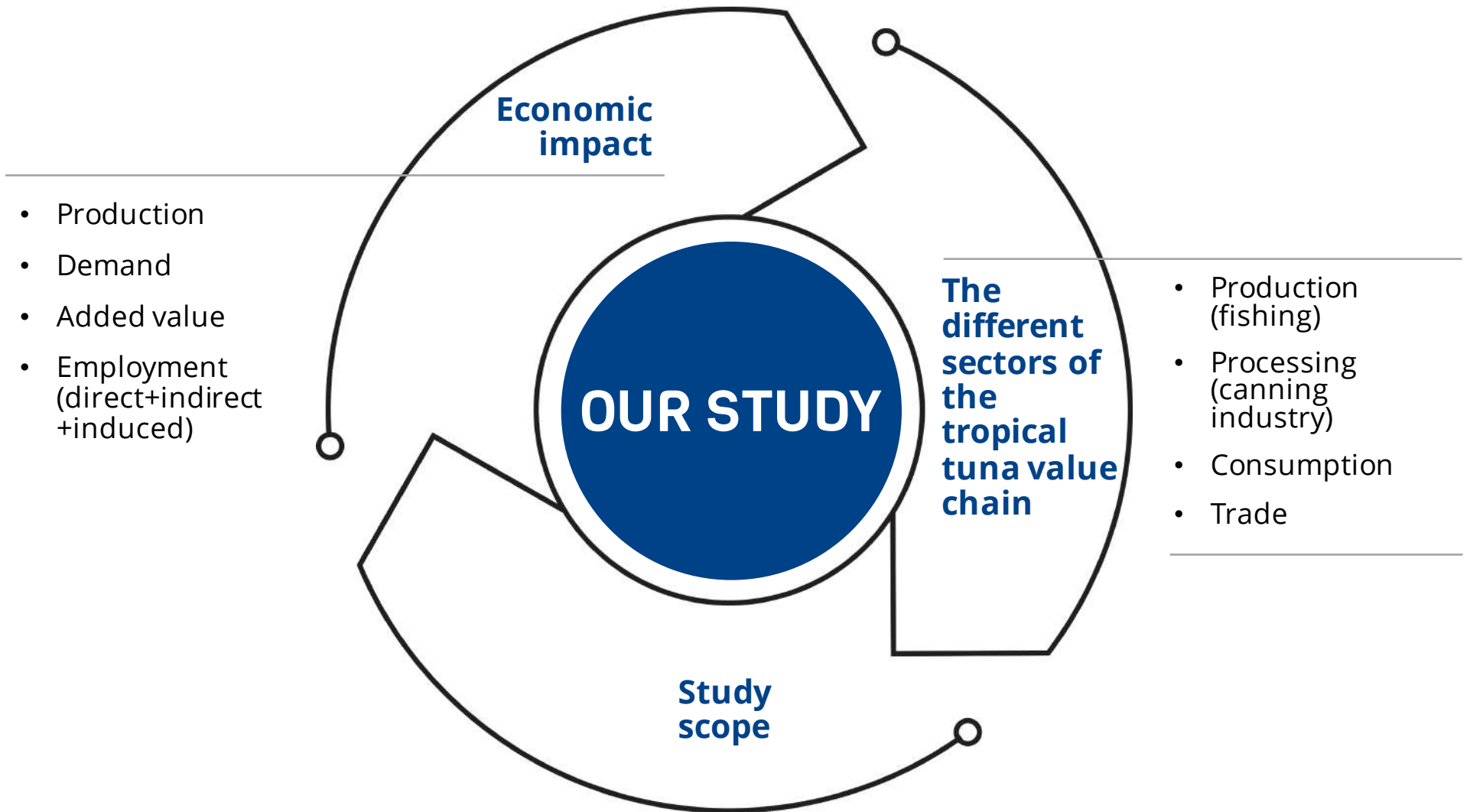


**Tropical tuna fishing is an economic activity that impacts at different levels:**

- Local
- Regional
- National
- International

***Bermeo Tuna World Capital*, with the collaboration of AZTI, has conducted the first global study on the economic impact of the value chain from the tuna sector at the state level.**

Impact analysis: **Local** (municipal – regional) and **at the state level**



**Average for 2015, 2016 and 2017:** public sources and official data

**3 TROPICAL TUNA SPECIES** are the most fished by the fleet and frozen on board

- Bigeye and Yellowfin → Light Tuna
- Skipjack → Tuna



## **2- ECONOMIC DATA SPAIN**



## 1- STATEWIDE PRODUCTION

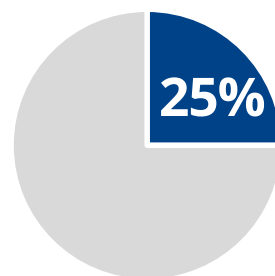


### AN INDUSTRY OPERATING in the Atlantic, Indian and Pacific Oceans

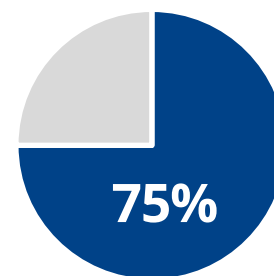
**13 main companies** (8 of them with integrated production: fishing + processing)

They manage **70 ships** and generate **4,103 jobs**, both directly and indirectly.

**Total economic impact\***  
**1,967 M€\*\***



extractive  
(484 M€)



Processing  
(1,482 M€)

\* Global contribution to the economy in Spain

\*\* +751 M€ come from NOT integrated companies



## PRODUCTION



### 13 main companies in Spain

8 with integrated production (fishing + processing)

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### Spanish fleet



**70**  
Fishing  
vessels

**31**  
Support  
ships

**8**  
Cargo  
vessels



## 2- PROCESSING



**SPAIN**



**2<sup>nd</sup> world producer of  
canned tuna**

**+60 canning  
companies generating**



**12,012 jobs and 2,233 M€**  
of economic and social impact

**Total production**



**225.000 T = 1,241 M€**  
(49% Skipjack- 45% Yellowfin)

**Production**



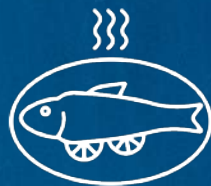
Consumption



**Export**

Processing companies are highly  
focused on the EU market





## 3- CONSUMPTION



We consume an average of **2.3 kg of tuna per person** per year,  
with an average expenditure of **17 €**



**TUNA IS MAINLY CANNED,**  
under the designations of **Tuna** (Skipjack) and **Light Tuna** (Yellowfin and Bigeye)



The **EU** is the **world's second largest consumer** of canned tuna (loss-leader product)



Tuna represents more than **50%** of the  
consumption of **canned fish** in Spain



## 4- TRADE



Tuna is the most traded seafood in the world

### Export

- Spain exports 85,000 T = 380 M€ (63% Skipjack– 37% Yellowfin)
- **95% goes to the EU** (Italy and France)

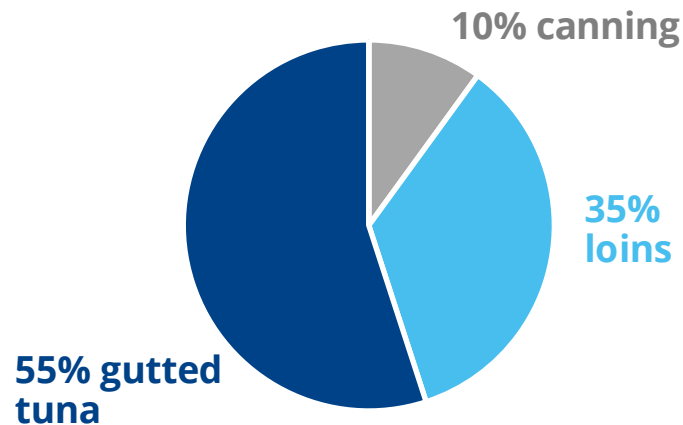
### Import

Imports:

**276.000 T**



**767 M€**



Main source  
Ecuador and  
El Salvador

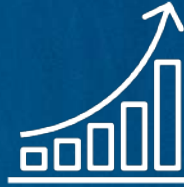


## SUMMARY FISHING AND PROCESSING

### The Spanish tuna freezer sector in the world

Supports **47.025** > **9.701** Jobs stay in Spain  
Jobs worldwide 1,885 fishing + 7.816 processing

Generating an economic impact over **3.425** M€ > **1.967** M€ Stay in Spain  
485 M€ fishing + 1.482 M€ processing



## IMPACT SUMMARY



At a worldwide level, the Spanish freezer tuna sector is providing:



**Economic  
Impact:**

**3,85€**  
for each euro  
produced



**Social  
Impact:**

**38 jobs**  
per million euros  
produced



**Impact from the use of  
natural capital:**

**71 jobs**  
for every 1,000 T fished



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[www.bermeotunaworldcapital.org](http://www.bermeotunaworldcapital.org)

