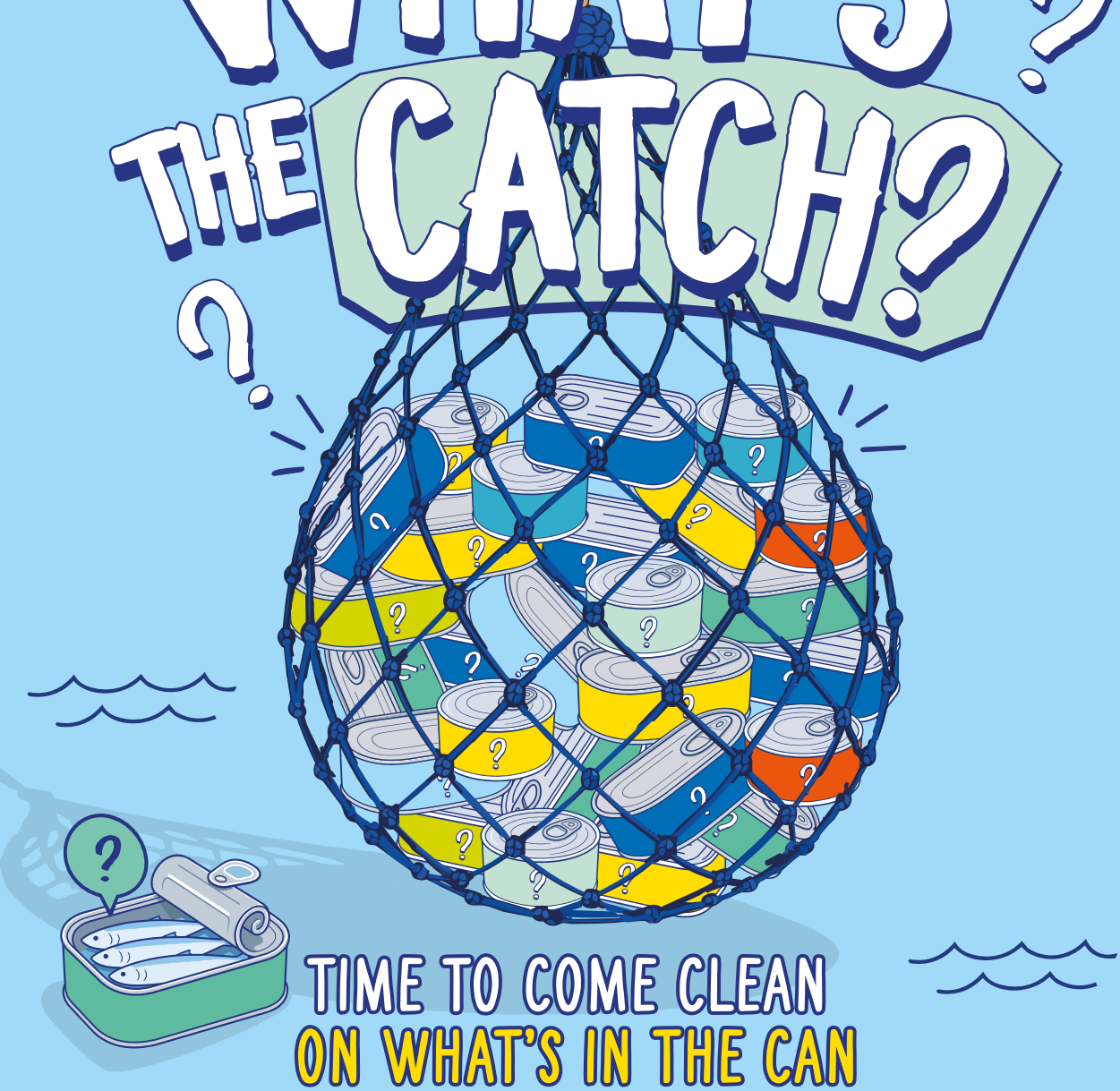
FISH TALES

WHAT'S THE CATCH?



TIME TO COME CLEAN ON WHAT'S IN THE CAN

A RESEARCH INTO TRANSPARENCY ABOUT THE ORIGIN OF PROCESSED SEAFOOD IN DUTCH AND BELGIAN SUPERMARKETS.

WHAT'S THE CATCH?

"SKIPJACK TUNA FROM BITUNG, INDONESIA, CAUGHT USING POLE AND LINE."

WHAT FISH ARE YOU EATING? WHERE WAS IT CAUGHT? AND HOW?

These are basic questions that consumers should be able to answer about the seafood they buy. For fresh and frozen seafood, that is whole or filleted, European legislation is clear: at the point of sale, consumers must be provided with key information including the species, catch area and fishing method. But for prepared and preserved seafood, this is not the case.

Buy a piece of fish from the fishmonger, you have the legal right to know where the seafood came from and how it was caught. Put that fish in a can, and suddenly you are left in the dark.

This difference matters. A lot. Every day, millions of processed seafood products are sold across the EU. Canned seafood and other processed seafoods represent 22% of all fishery and aquaculture products consumed in the EU[1].

The resulting transparency gap is particularly problematic: the products for which consumers receive the least information include those associated with some of the greatest risks of Illegal fishing and human rights violations[2]. In effect, the exemption weakens EU consumer-information rules[3] precisely where greater transparency is most needed. The counterargument from a part of the fishing industry for not including this information on the packaging? It's too expensive or not feasible.

At Fish Tales it has been our top priority to make sure that consumers know exactly what is in our cans from day one. That is also why we have consistently advocated for greater transparency across the canned seafood category. But transparency should not depend on which brand a consumer chooses. Basic information should be available to everyone. The real question is not whether transparency is possible, but whether the EU and the industry are willing to make it happen.

We decided to put the supermarket shelves to the test. We requested Future of Food Institute to investigate what information is provided to consumers on processed fish products sold in Dutch and Belgian supermarkets. It shows exactly where we stand today, and where the EU legislation and the seafood industry **have to do better.** Because we strongly believe you have the right to know what's in your can.

Our timing is just right; by the end of 2026, the European Commission will decide if they are going to revise the current regulations. Such revisions offer a huge opportunity to make it possible for consumers to get the information they need.

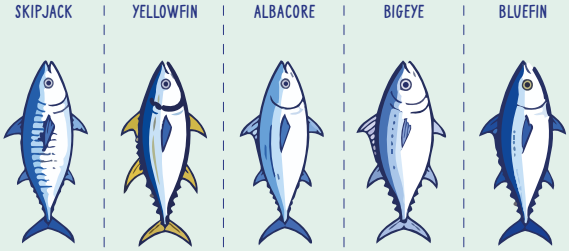
THE IMPORTANCE OF INFORMATION

Seafood supply chains are highly complex and globalized: fish and seafood products often cross multiple national borders at different stages of processing before reaching the final consumer[4]. This complexity reflects the highly international nature of the sector, with aquatic food products ranking among the most traded food commodities globally[5]. It is easy to lose track in these complex supply chains, especially for consumers wishing to make informed and sustainable choices.

Information about the exact species of seafood, the capture method and region are three pieces of information that together form the starting point for consumers to get to know more.

KNOWING THE SPECIES

Helps identify exactly what fish a product contains and is an essential piece of information for assessing the status of the relevant fish stock. **Take tuna: there are five different species primarily eaten worldwide.**

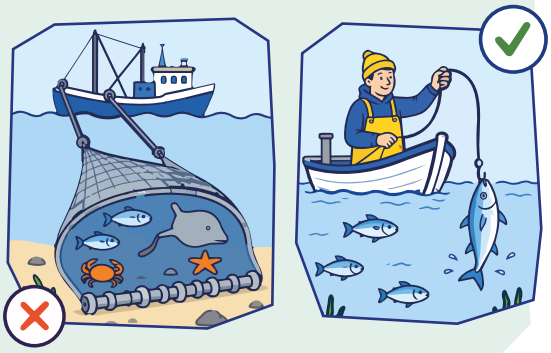


KNOWING THE CATCH LOCATION

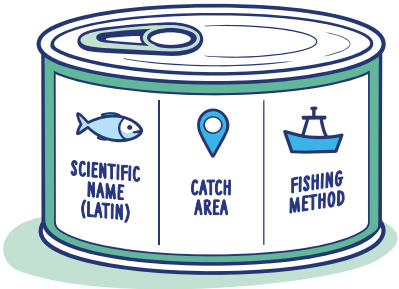
Helps establish which fishery and stock the seafood came from. For example, a species of tuna may be overfished in one region, and not in the other.

KNOWING THE FISHING METHOD

Provides important information about how the fish was caught and the potential environmental impacts associated with that method, including risks such as bycatch or damage to the seabed. For tuna, pole and line fishing is the method with the absolute least bycatch. Whereas catching tuna using purse seines with FAD's (Fish Aggregating Device) has much higher bycatch rates, including endangered and threatened species.



Without this basic information, consumers cannot properly check or compare products. Many seafood guides (for example VISwijzer in the Netherlands) require that information in order to make an informed purchase. A consumer may want to choose seafood from a local ocean or caught with a lower-impact fishing method. And it is not only about whether that information is available, but also how it is presented.



A standalone FAO code, for example, means very little to the average consumer. We don't expect consumers to be seafood experts. But without basic information, there is no way to check what's behind a product. Transparency makes informed choices and accountability possible.

Clear rules regarding consumer information packaging also creates a level playing field within the seafood industry; your local fish monger selling whole fresh fish is currently required to provide detailed information for each and every product, while some multi-million dollar companies selling prepared and preserved seafood are exempt. If all brands are required to provide the same information, they could no longer simply leave out information that might be less attractive. And if all brands are required to provide the same information, any unfair competition would be curtailed.

TRANSPARANCY VERSUS TRACEABILITY

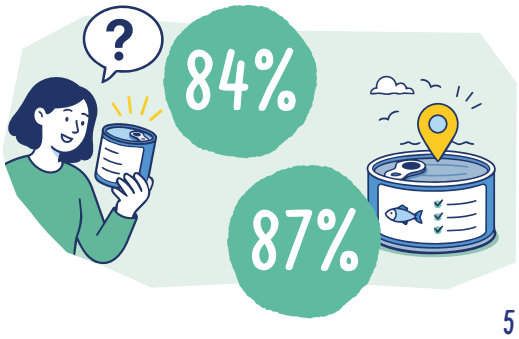
There is also an important distinction between **traceability** and **transparency**. Traceability means being able to trace the information from a seafood product throughout the entire supply chain: from boat to plate. Transparency is about how much of that information is actually visible and accessible to the consumer. This research focuses on the latter: what information about the origin of seafood can consumers actually find on the packaging? In this research, ware not investigating whether companies themselves can trace their seafood, but what the consumer is allowed to see.

CONSUMERS WANT MORE TRANSPARENCY

Research shows that European consumers want to know more about the seafood they eat. European consumer research by Oceana[6] found:

That 84% of the respondents want more information about the background of processed seafood products.

87% consider more information about the origin of species used in processed seafood important.



CLOSING THE GAP

The European Commission has recognised that EU seafood labelling rules leave a gap for processed products[7], and that there are calls for more information to be required[8]. A future update of these rules could close this transparency gap. By the end of this year, the European Commission is expected to decide whether to revise the EU Common Market Organisation (CMO).

A revision would offer an important opportunity to close the current information gap between whole and filleted seafood and prepared and preserved seafood. It could mean that basic information (species, catch area and fishing method) consumers already receive for fresh and frozen fish that is sold whole or filleted would also have to be provided for processed seafood (e.g. prepared meals and preserved seafood).

But whether the regulation will be revised, and what a revision would ultimately include, is still to be decided, and important high-level decisions from the European Commission this year might greatly influence the outcome.

The current political context and upcoming announcements from the Commission is making the question of what is happening on supermarket shelves today particularly relevant. This research shows what happens when providing this information is largely left to companies themselves without clear regulations.

METHODOLOGY

Future of Food Institute systematically mapped the information available to consumers across canned seafood sold in Dutch and Belgian supermarkets, using a representative research approach in August 2026.

They investigated what information is available about the species, catch location and fishing method directly on pack, and to what extent that information is actually accessible and understandable to consumers.

A total of 101 unique products per country were assessed, 202 products of 34 brands in total. In the Netherlands, the following supermarkets were included: Albert Heijn, Jumbo, Plus, LIDL, Aldi and Ekoplaza; in Belgium, these were Colruyt, Carrefour, Delhaize, Bio-Planet, Aldi and LIDL. The selection was based on the aim to capture as broad a range of eligible products and brands as possible, including budget, mid-range, mid-high, and premium brands, in different types of supermarkets - from budget to eco-focused.

The final products were selected to collectively reflect the Dutch and Belgian processed seafood markets, based on products offered. For brands with more than

10 products, Future of Food Institute made a representative selection covering all the different species they sell, plus a maximum of three variants of the same product in different flavour or preparation (for example, tuna in olive oil, water, or sunflower oil). Fish Tales products were assessed according to the same criteria as all other products included in the research.

FOR EVERY PRODUCT SAMPLED, THE EXACT INFORMATION GIVEN ON THE PACKAGE WAS RECORDED AND CATEGORIZED AS FOLLOWS:

SUFFICIENTLY TRANSPARENT

3/3

Information on the species name in latin, the name of capture area (FAO code is optional) and fishing method are given directly on the package, in the local language and are therefore assumed to be understandable to the consumer.

PARTIALLY TRANSPARENT

PARTLY COMPLETE

Information is given, but one (out of three) aspects is missing, not given fully, or assumed to not be understandable for the consumer (e.g. catch method presented in French, in a Dutch supermarket).

NOT TRANSPARENT

ONLY 1 OF 3

Information is completely lacking or minimal, only one (out of three) aspects is given. Consumers cannot find enough information on the package to be able to make informed choices.

WHAT COUNTS AS FULLY TRANSPARENT?

The criteria for the "Sufficiently transparent" category were based on the CMO requirements for whole and filleted fish, focusing on three key pieces of information: the scientific name of the species, catch area and fishing method.

1.

SCIENTIFIC NAME

LATIN NAME

Scientific name of the fish in Latin

2.

FISHING METHOD

WRITTEN OUT FULL

This must be written out in full, following the capture method categories as defined by the EU regulation. A code or abbreviati-on such as SP is not sufficient.

3.

CATCH AREA

OCEAN NAME IN CLEAR LANGUAGE

The name of the ocean where the seafood was caught must be stated in understandable writing, for example Pacific Ocean. This may be accompanied by the FAO code (a code that identifies a specific fishing area defined by the Food and Agriculture Organization). An unclear abbreviation such as ATL OC is not considered sufficient. This, or only an FAO code counts as somewhat transparent.

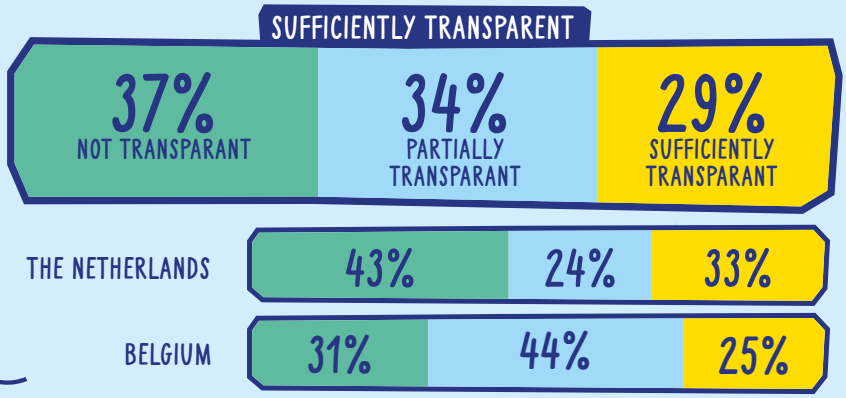
RESULTS

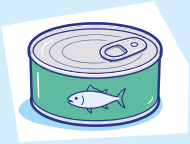
Our analysis of the canned seafood category in Dutch and Belgian supermarkets shows a substantial transparency gap in the canned seafood sold in Dutch and Belgian supermarkets. Only 29% (NL 33%, BE 25%) of the products assessed provide all three complete pieces of information we consider essential for sufficient transparency: the scientific species name, the catch area (name) and the fishing method, written in a clear, findable format in the local language.

This means that 71% of the products assessed are not sufficiently transparent. Within this group, 34% is partially transparent, they provide some information, but it is incomplete or the information is presented in a way that is not sufficiently clear or understandable to consumers. This counts for a quarter of products in NL (24%), and just under half of the products in Belgium (44%).

37% of the total products is not transparent. In the Netherlands, roughly 4 out of 10, 43%, fall into the not transparent category. This is only 3 out of 10 in Belgium (31%). A product is classified as not transparent when information is provided on only one of the three aspects, while the other two are missing entirely.

The result is that for most canned seafood products on supermarket shelves, consumers are still not given the complete set of basic information needed to understand what fish they are buying, where it came from and how it was caught.





NOT TRANSPARENT

NO PUBLIC INFORMATION ABOUT SOURCING, FISHERIES OR PRACTICES

PARTIALLY TRANSPARENT

LIMITED PUBLIC INFORMATION AVAILABLE

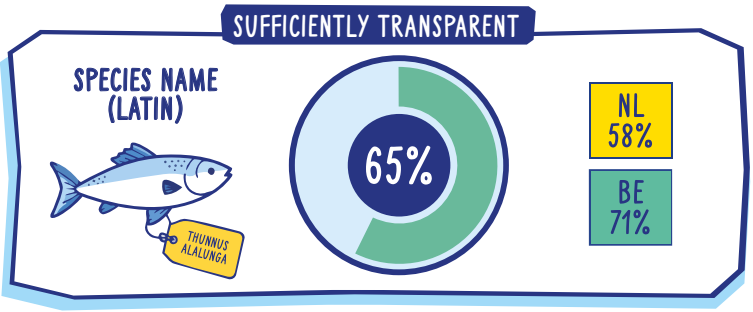
SUFFICIENTLY TRANSPARENT

CLEAR, DETAILED PUBLIC INFORMATION ABOUT SOURCING AND PRACTICES

INDICATING THE RIGHT SPECIES NAME

Over half (65%) of the canned seafood products assessed, provide the scientific, Latin name of the species. For The Netherlands, this is 58%, for Belgium 71%.

Unlike catch area, which can change between production batches, the species is the most defining characteristic of a seafood product and typically constant. Yet, the scientific species name is absent from a substantial proportion of the products assessed.

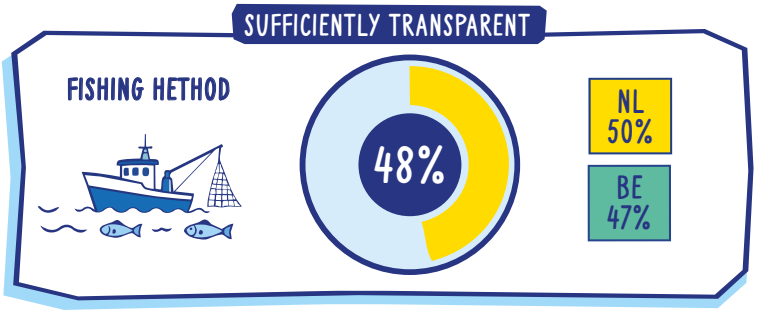


FISHING METHOD: BIGGEST INFORMATION GAP

Of the three pieces of information assessed, fishing method is provided only about half of the time. Only 48% (50% NL, 47% BE) of the products assessed state how the seafood was caught.

This is a significant gap. Fishing method is an important starting point for understanding the type of fishery behind a product and its potential environmental impacts, such as the risk of bycatch or damage to the seabed. Our research did not investigate why fishing method information is so often absent. We therefore cannot conclude whether this is caused by operational complexity, changing sources of supply, packaging decisions or simply the absence of a legal requirement to provide the information. One explanation could be that it is easier to source more broadly, buying from one area one time and from another area the next.

What our results do show is that, of the three basic pieces of information assessed, how seafood was caught remains the information consumers are least likely to find on the can.



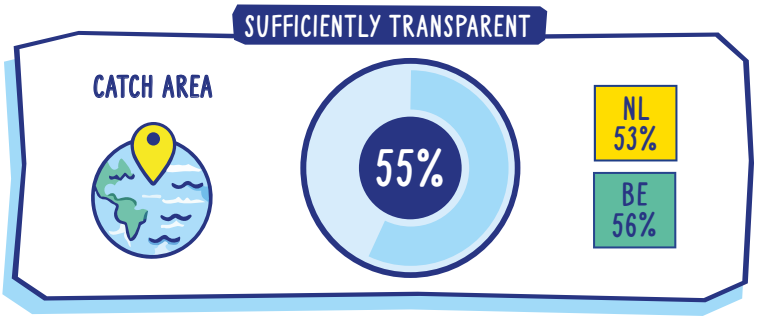
STATING THE CATCH AREA CLEARLY AND UNDERSTANDABLY

The picture is different for catch area. **When we apply the standard used in this research based on the way catch-area information is required to be communicated for seafood covered by the CMO Regulation, 55% (53% NL and 56% BE) of the products assessed provide catch-area information fully and in a way we consider understandable to consumers.**

The non-mandatory FAO number of the catch area is shown on 59% of products (51% NL and 67% BE). This suggests that many producers are already willing and able to communicate information about where their seafood was caught, despite that this is currently not mandatory.

But, in many cases, catch-area information is presented only through an FAO code or through abbreviations such as "PAC. OC." rather than writing out the name of the ocean or fishing area. While such information may be meaningful within the seafood industry, it requires consumers to interpret codes or abbreviations before they can understand where their seafood came from.

In some cases, multiple possible catch areas were listed on the label, while the actual catch area was only indicated by an FAO code printed elsewhere, for example on the lid. With no clear reference to this code on the label, consumers are unlikely to understand which catch area applies to their product.

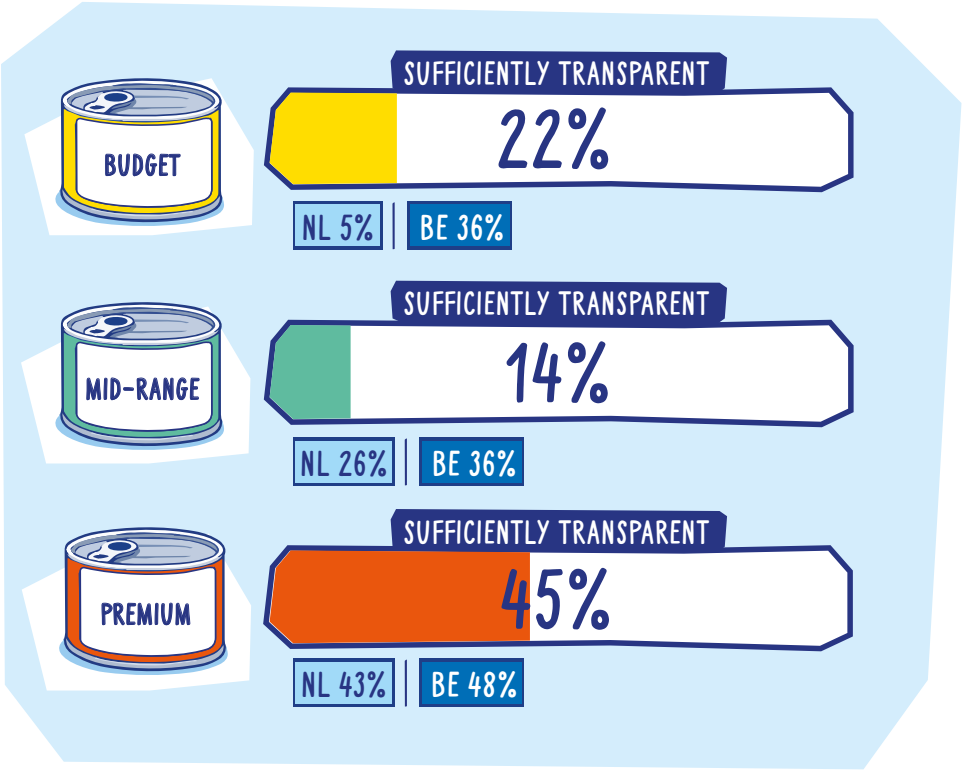


DIFFERENCE BETWEEN TYPES OF BRANDS

Close to half of premium products (48%) are sufficiently transparent (NL & BE the same), whereas only 20% of mid-range products are sufficiently transparent (41% NL, 5% BE).

In the budget category, over a quarter (29%) is sufficiently transparent (10% NL, 36% BE). Out of the smaller category of mid-high-range, none of the tested products were found to be fully transparent. Overall, manufacturer brands are less likely to be sufficiently transparent than private-label products (26% vs 35%). On top of that, private-label products are much more likely to be partially transparent (51% versus 26% of manufacturer brands).

Private-label products also disclose key information more often: 89% state the species name, compared with 53% of manufacturer brands, while 63% state the fishing method, compared with 41% of manufacturer brands. Manufacturer brands' products in the Netherlands are less often found to be sufficiently transparent than private label products (24% vs 65%). In Belgium it's the opposite, private label products are less often found to be sufficiently ransparent (19% vs 29%).



DIFFERENCES BETWEEN TYPES OF FISH

Salmon products assessed were overall the most often sufficiently transparent type of fish (59%, 56% NL, 63% BE). Followed by sardines (36%, 46% NL, 27% BE), anchovies, mainly because of a strong score on species name (31%, 50% NL, 13% BE), and tuna (26%, 33% NL, 21% BE).

One possible explanation for these differences is the complexity and geographical spread of the fisheries involved. Wild salmon is sourced from a relatively limited number of well-regulated fisheries, primarily in the US and Canada, while anchovies and sardines in the products assessed also came from a relatively limited number of sourcing regions. Tuna, on the other hand, is caught across many different parts of the world, giving producers much greater flexibility to source from different fisheries and catch areas. This may make it more challenging to provide one consistent catch area on the packaging.

MSC CERTIFICATION

Another way for consumers to identify sustainably caught seafood on the packaging is through an MSC certification. Six in ten products were MSC certified (62% overall; 72% in the Netherlands and 52% in Belgium). MSC-certified products are twice as likely to be sufficiently transparent as products without MSC certification (37% vs 17%). In Belgium the difference is the biggest: of the products that are not MSC certified, only 10% is sufficiently transparent (38% for certified products). In the Netherlands 36% of MSC certified products are sufficiently transparent and 29% of the products that are not certified.

FINDING AND INTERPRETING THE INFORMATION AS A CONSUMER

We found examples where packaging lists several possible ocean areas, while information identifying the catch area for the specific production batch is included elsewhere in the lot code or next to the best before date. In some cases, the packaging itself does refer consumers to this code for more precise catch-area information.

This suggests that, at least for these products, more specific catch-area information exists at batch level and can be communicated without creating different packaging for every sourcing location.

At the same time, it raises a broader question about what meaningful consumer transparency looks like. Information being technically present somewhere on a package does not necessarily mean that it is easy for a consumer to find or understand.

Other packaging may include information on the catch method in a non-local language, making the information technically present, but not clearly accessible to consumers.

Likewise for some products, consumers are referred to a QR-code or external website application to check the origin of the seafood. We recognize this effort to disclose elaborate information to consumers. However, this way of providing information is not conforming to the mentioned EU regulation for whole or filleted fish, and therefore recorded in this research as not transparent.

CONCLUSION

CURRENT LACK OF REGULATION SUPPORTS AN INCONSISTENT SHELF

These findings reveal an important pattern. Some companies already provide consumers with detailed information on species, catch area and fishing method, while others provide only part of that information or none of it in an accessible form. Others yet do not identify the correct fish on the label. Three products with a sardine label were found to contain types of herring (identified by the Latin name).

The fact that 29% (NL and BE) of the products assessed already meet all three of our transparency criteria shows that providing this level of information on canned seafood packaging is possible. Similarly, the presence of at least some form of catch-area information on products (55% catch area name and 59% FAO number, NL 53% and 51%, BE 56% and 67%) indicates that communicating origin information is already common practice across a substantial part of the category.

But voluntary disclosure also produces inconsistency. One product may tell consumers the species, fishing method and precise catch area, while the product next to it may provide substantially less information. Consumers therefore cannot currently expect the same basic level of transparency from every processed seafood product they buy.

This is where our findings become particularly relevant to the discussion around EU consumer-information legislation. **The question is no longer only whether processed seafood producers can provide this information. Our results show that some already do. The question is whether basic transparency should continue to depend on voluntary choices by individual companies, or whether every consumer should be entitled to the same basic information.**

If processed seafood were subject to clear and consistent consumer-information requirements, the next challenge would not simply be getting more information onto packaging. It would be ensuring that information is presented in a standardized, readable and understandable way. Consumers have the right to know where their food comes from, even when it comes in a can - not just when it's a fresh fillet.

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