EU Consumer Preferences: Opportunities for Aquaculture Products

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- Bacci joined the team in charge of the EU market in 2014.
- Bacci deals with the organization of the fishery and aquaculture sector, consumer issues and application of competition rules to the market for fishery and aquaculture products.

The EU Market in a snapshot (2016)

- A market of 500 million consumers, worth EUR 55 billion
- Per-capita household expenditure: EUR 107 (+1% over 2015)
- Per-capita consumption: 25,1 kg (-2% over 2015)

→ Biggest world market for fishery and aquaculture products, but more money is spent on less fish

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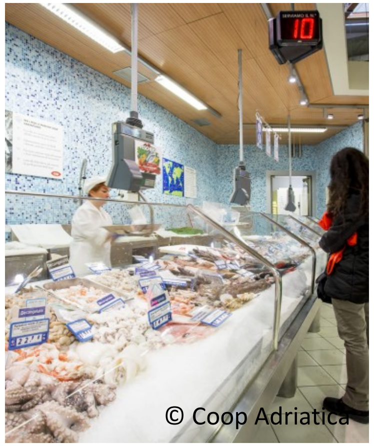
Getting to know the EU consumer

- The EU market is complex and habits and preferences vary from one EU country to the other
- Habits and preferences vary even more across age and socio-demographic groups



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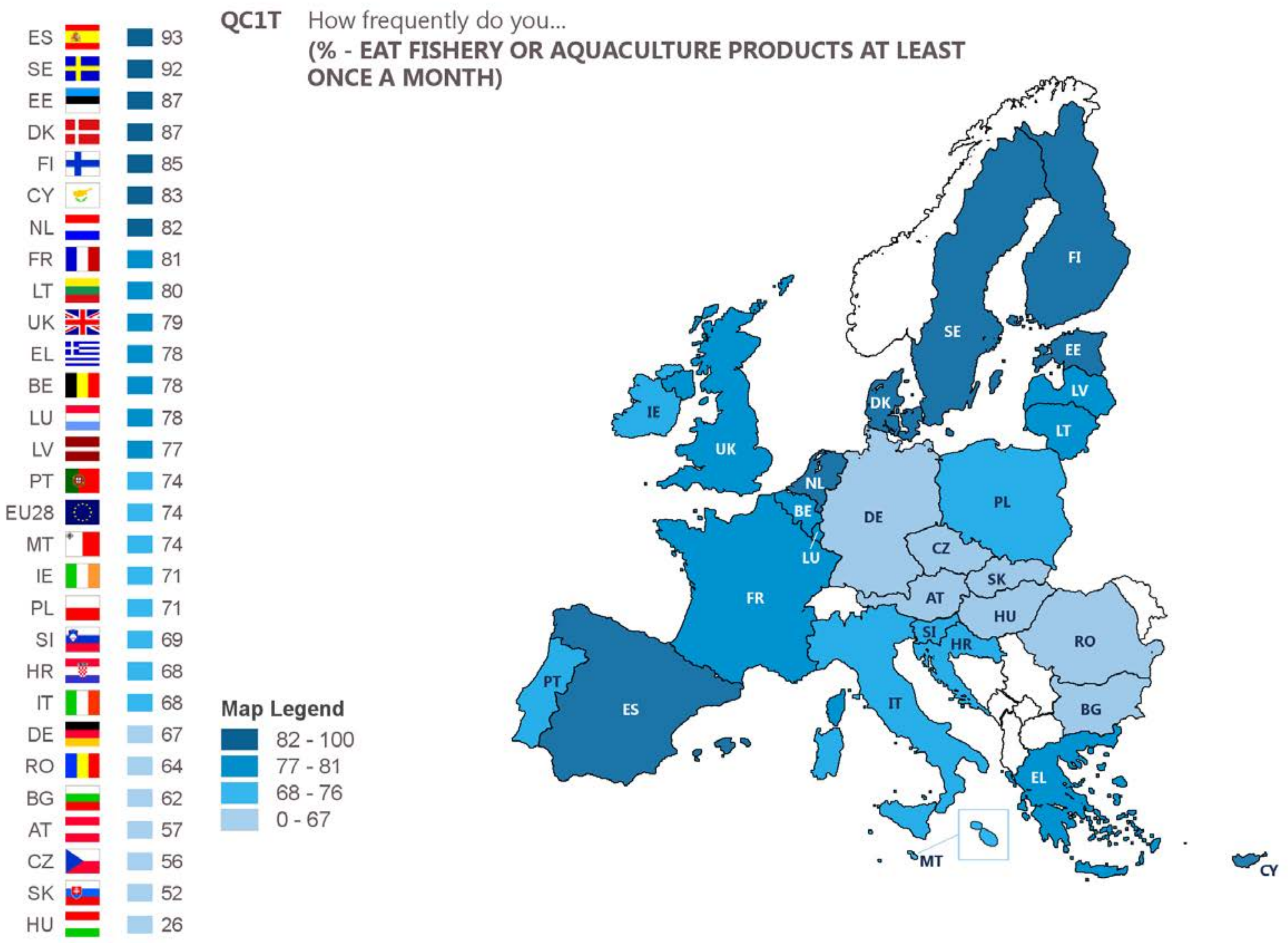
How we approached the issue

- **Survey conducted face-to-face at respondents' home**
- **Fieldwork: June 4th to 13th 2016**
- **Population: Population 15+**
- **Coverage: 28 EU Member States**
- **Number of interviews: 27,818**

Consumers in land-locked countries eat fish and seafood less frequently than those in countries with coastlines



Consumers who prefer wild product tend to eat and buy fish and seafood more frequently

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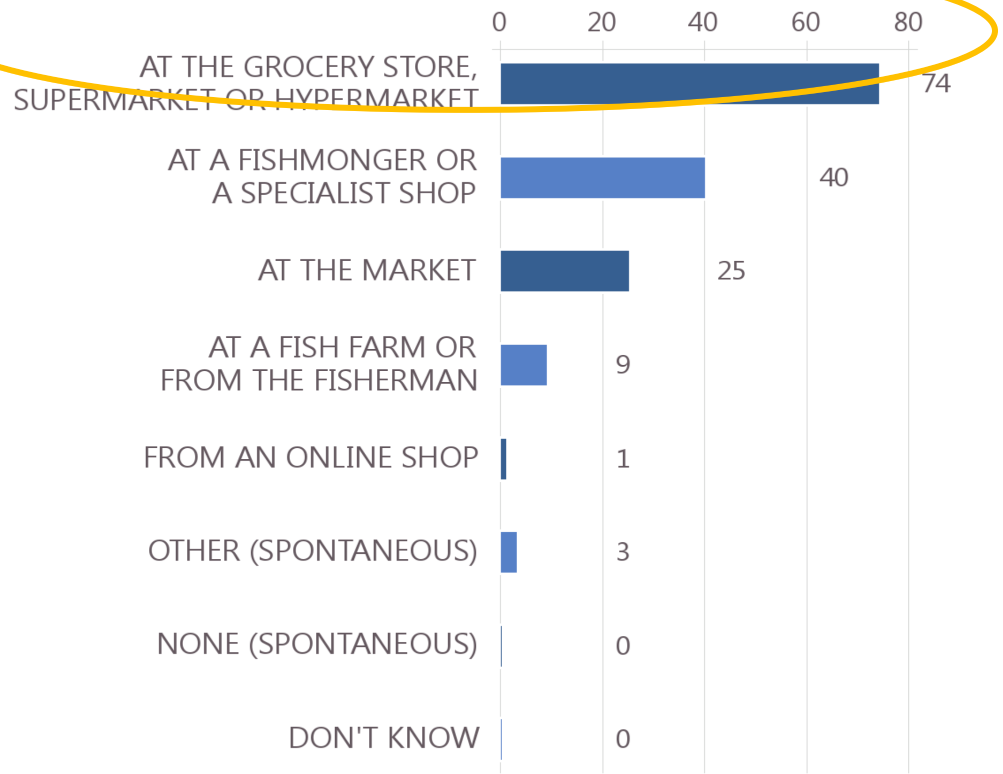
Where do people buy? Mostly at supermarkets (74%)

QC3 Where do you buy your fishery or aquaculture products?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Supermarkets need stable supply and see the role of farmed fish and seafood growing in the next decade

	At the grocery store, supermarket or hypermarket	At a fishmonger or a specialist shop
EU28	74	40
Age		
15-24	78	31
25-39	75	40
40-54	78	40
55 +	70	43

Base: respondents who buy fishery or aquaculture products (N=22,759)

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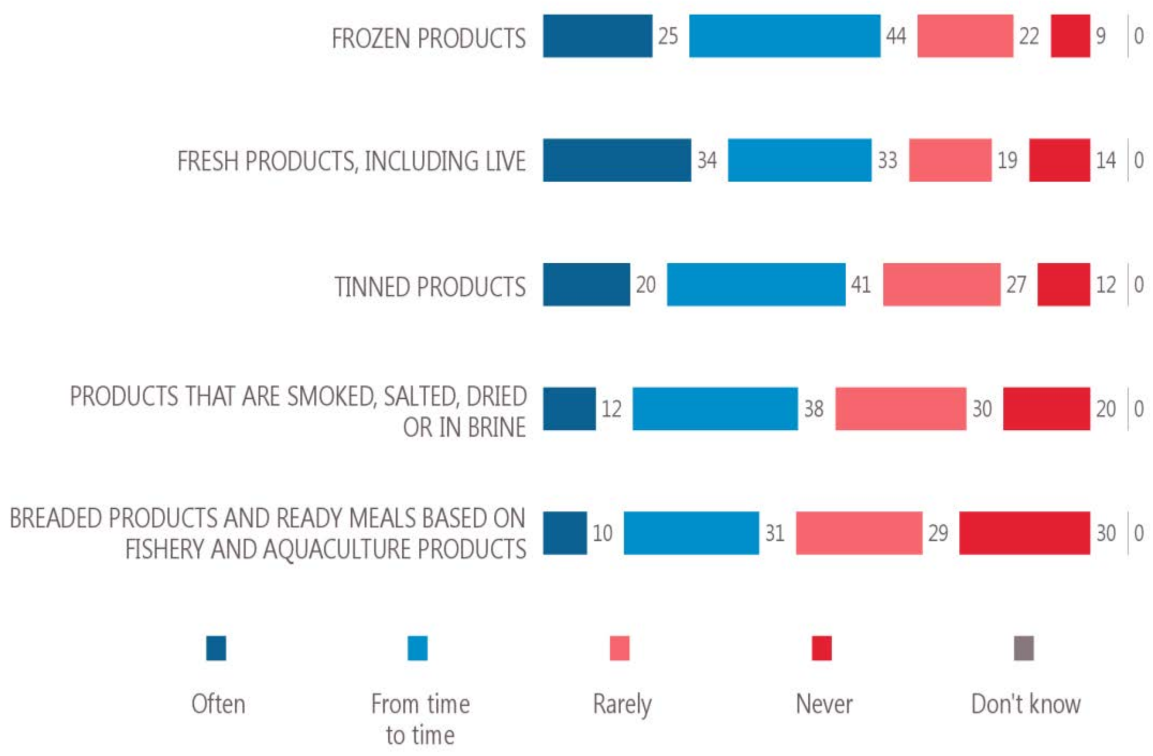
What do people mostly buy?

QC4a How frequently would you say you buy each of the following types of fishery and aquaculture products?
(% - EU)



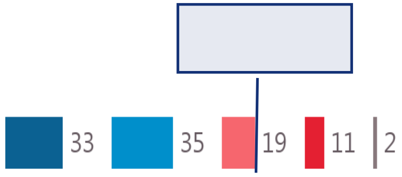
Base: respondents who buy fishery or aquaculture products (N=22,759)

Trend: fresh and convenience / ready-to-eat products – consumers who prefer wild products buy from the fresh counter more often

	Frozen products	Fresh products, including live	Tinned products	Products that are smoked, salted, dried or in brine	Breaded products and ready meals based on fishery and aquaculture products
EU28	69	67	61	50	41
Age					
15-24	72	58	57	49	50
25-39	72	67	61	52	47
40-54	73	67	63	53	45
55+	64	68	60	49	32

Would you buy more if...?

YOU WOULD BUY OR EAT MORE FISHERY AND AQUACULTURE PRODUCTS IF THE PRICE WAS NOT SO HIGH

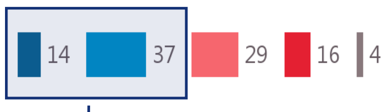


TOP		Total 'Agree'
EU28		68
BG		86
LT		84
PT		83
HR		82
IT		82

BOTTOM		Total 'Agree'
EU28		68
AT		54
LU		51
SE		51
NL		49
DE		42

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

YOU WOULD BUY OR EAT MORE FISHERY AND AQUACULTURE PRODUCTS IF THE CHOICE AND THE POINTS OF SALE WERE MORE DIVERSIFIED



TOP		Total 'Agree'
EU28		51
MT		68
RO		68
CY		67
BG		67
LT		66
IE		66

BOTTOM		Total 'Agree'
EU28		51
FI		45
BE		44
LU		44
AT		41
DE		29
NL		29

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

QC2 Which of the following are the main reasons why you never eat any fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE)
(%)

	You do not like the taste, the smell or the appearance of these products	You are not used to these products	You are vegetarian or vegan	They are too expensive	Because of health concerns (for example allergies or contamination by metals)
EU28	55	16	14	13	12
BG	61	29	4	17	11
CZ	62	29	12	21	11
DE	57	11	15	8	10
IE	71	7	13	10	6
IT	50	14	19	12	15
HU	63	26	4	31	4
AT	54	14	23	13	19
PL	59	20	9	16	5
PT	29	22	4	16	18
RO	43	25	2	21	12
SI	53	35	12	11	9
SK	70	24	9	20	5
UK	46	5	21	3	14

1st MOST FREQUENTLY MENTIONED ITEM

2nd MOST FREQUENTLY MENTIONED ITEM

3rd MOST FREQUENTLY MENTIONED ITEM

Dislike for taste, smell, appearance is why people don't eat fish and seafood – the challenge is even bigger for farmed products

Results for 15 countries have been excluded from the analysis due to low base sizes

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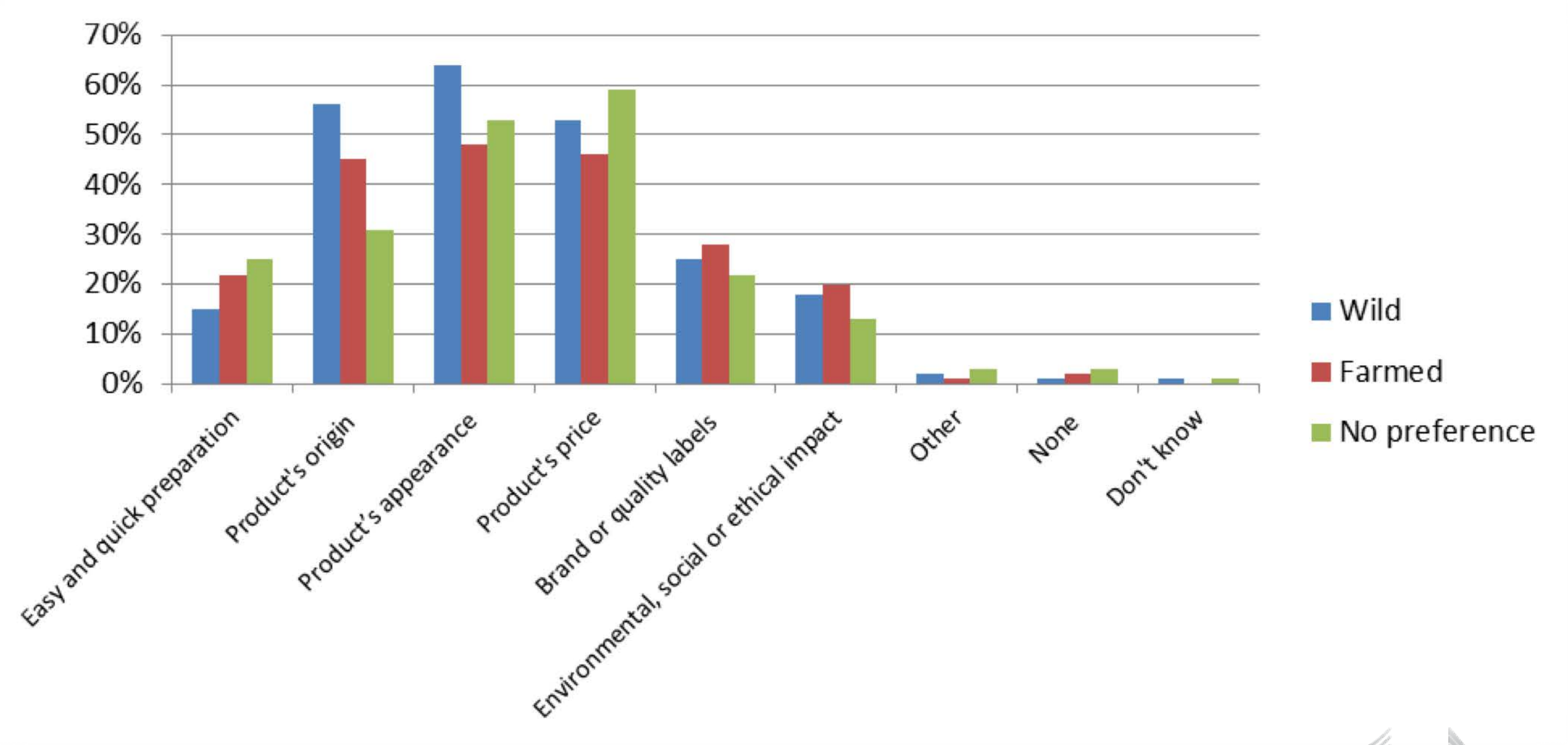
Appearance and cost drive purchases

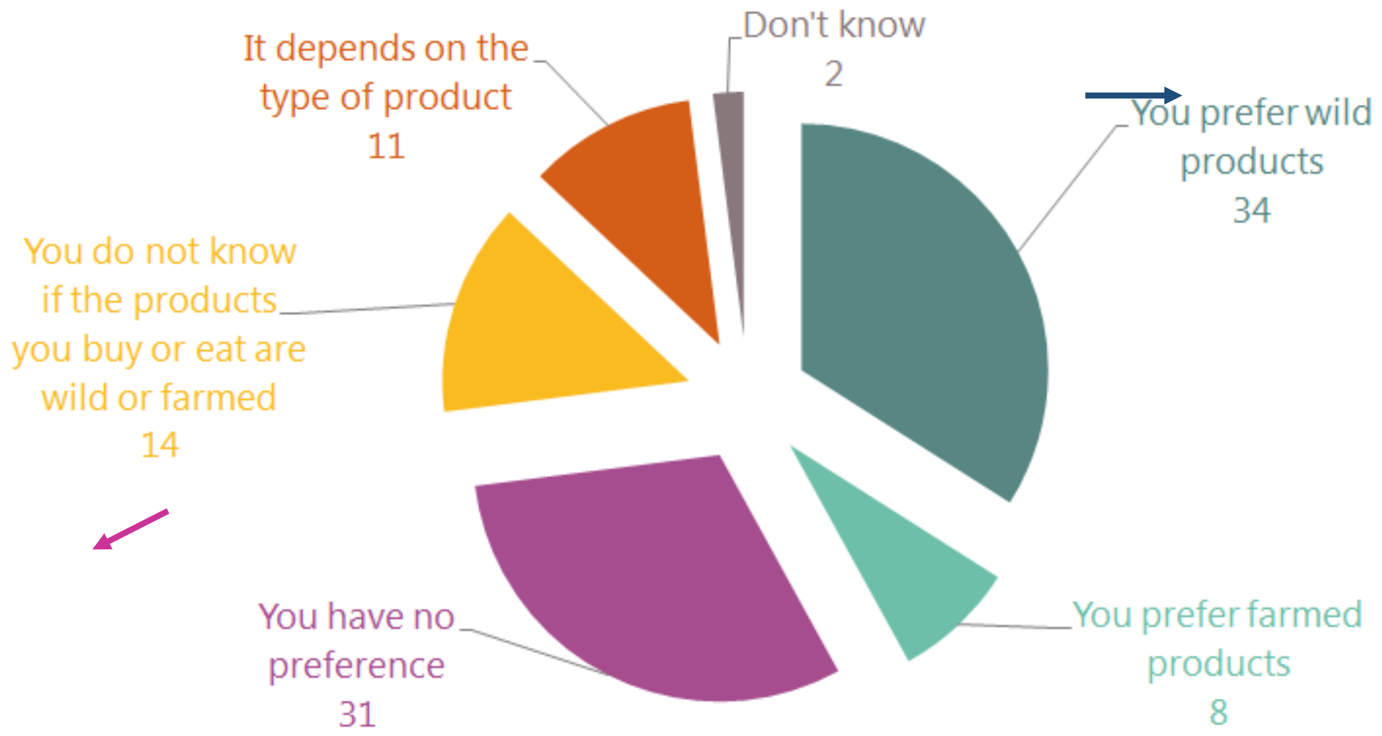
QC9 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)



Base: respondents who buy fishery or aquaculture products (N=22,759)

Wild or farmed?

QC5 Fishery and aquaculture products can be wild or farmed. Would you say that...
(% - EU)



39%
aged 55+

56%
prefer sea products

49%
prefer products from own region

35%
aged 15-24

59%
no preference for sea/freshwater products

36%
no preference on product's origin

QC7 Do you have any preference in terms of product origin? (MULTIPLE ANSWERS POSSIBLE)
(%)

	Products from your region	Products from your country	Products from the EU	Products from outside the EU
EU28	29	37	14	3
BE	23	31	29	6
BG	25	28	10	1
CZ	19	25	9	2
DK	26	43	18	3
DE	30	30	23	5
EE	27	38	13	2
IE	36	46	14	3
EL	53	76	12	1
ES	33	45	6	1
FR	41	46	14	2
HR	37	57	7	2
IT	35	43	12	3
CY	25	61	14	1
LV	29	35	10	2
LT	14	23	10	2
LU	20	26	42	4
HU	16	26	9	4
MT	27	57	26	1
NL	14	20	15	2
AT	24	31	17	4
PL	18	31	11	5
PT	19	53	10	2
RO	21	47	17	8
SI	43	50	24	1
SK	14	20	14	6
FI	40	63	11	5
SE	42	47	15	3
UK	19	23	7	1

Highest percentage per country

Highest percentage per item

Local and EU is largely preferred

→Information largely used by retailers (PDO, PGI, local supply chains or traceability)

Base: respondents who buy fishery or aquaculture products (N=22,759)

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Interest in voluntary information

QC14 Which of the following do you think should be mentioned on the label for all fishery and aquaculture products? (MULTIPLE ANSWERS POSSIBLE)

	Date of catch or production		Environmental information		The country of the ship that caught the product
EU28	76	EU28	39	EU28	31
FI	91	SE	71	EL	52
EL	89	NL	58	SE	52
CZ	86	DK	54	IE	43
DK	85	AT	50	IT	40
CY	85	LU	48	FR	35

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

	Date of catch or production	Environmental information	Ethical information
EU28	76	39	23
Age			
15-24	71	44	27
25-39	77	43	24
40-54	78	42	26
55 +	76	33	19
Education (End of)			
15-	73	29	16
16-19	77	36	21
20+	79	47	29
Still studying	71	48	28

Eco-labels: large development over the last decade but no price premium

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Summary: Prospects for Farmed Products

- General preference for wild products but buying is led by price and quality, not production method
- Stability in supply is key for retailers, where most fish is bought.
- Farmed products are likely to increase their presence in the EU market
- Products can get added value through some voluntary information, but remember that there are strict rules on clarity, unambiguity and verifiability of information, which should not mislead the consumer

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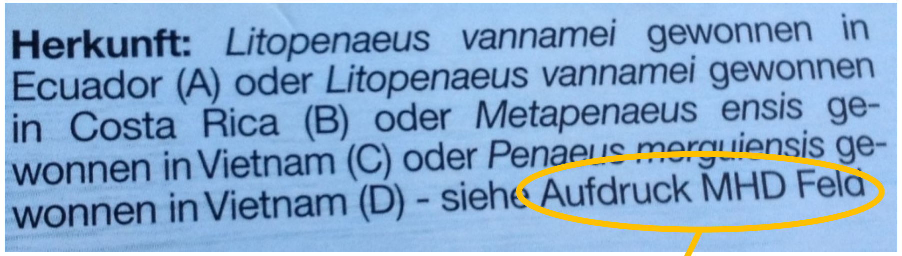
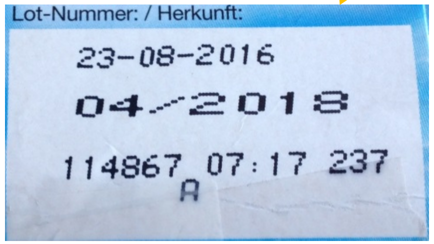
To sum up – what not to do


Herkunft: *Litopenaeus vannamei* gewonnen in Ecuador (A) oder *Litopenaeus vannamei* gewonnen in Costa Rica (B) oder *Metapenaeus ensis* gewonnen in Vietnam (C) oder *Penaeus merguiensis* gewonnen in Vietnam (D) - siehe Aufdruck MHD Feld



Thank you for your attention!

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