EU consumers' preferences

Challenges and opportunities for farmed freshwater products
The EU Market in a snapshot (2017)

• A market of 500 million consumers, worth almost EUR 57 billion
• Per-capita household expenditure: EUR 110 (+1.9% over 2016)
• Per-capita consumption: 24.3 kg (+3% in 2016 over 2015)
How we approached the issue

- Survey conducted face-to-face at respondents’ home
- Fieldwork: 23 June – 6 July 2018
- Population: Population 15+
- Coverage: 28 EU Member States
- Number of interviews: 27,734
Consumers in land-locked countries eat fish and seafood less frequently than those in countries with coastlines.

Consumers who prefer sea product tend to eat and buy fish and seafood more frequently, while wild/farmed preference is not relevant.

Base: All respondents (N=27,734)
Where do people buy? Mostly at supermarkets (77%)
QB10 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)

**Wild/farmed**

- Easy and quick preparation
- Product origin
- Product appearance
- Price
- Brand / quality label
- Environmental, social or ethical impact

**Sea/freshwater**

- Easy and quick preparation
- Product origin
- Product appearance
- Price
- Brand / quality label
- Environmental, social or ethical impact

Base: respondents who buy fishery or aquaculture products (N=21,865)
Do you have any preference in terms of product origin? (MULTIPLE ANSWERS POSSIBLE) (%)

<table>
<thead>
<tr>
<th></th>
<th>Products from your region</th>
<th>Products from your country</th>
<th>Products from the European Union</th>
<th>Products from outside the European Union</th>
<th>You don't know where the products come from</th>
<th>It depends on the type of product</th>
<th>You don't have any preference</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU28</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Base: respondents who buy fishery or aquaculture products (N=21,865)</td>
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<td></td>
</tr>
</tbody>
</table>

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

QB15 Which of the following do you think should be mentioned on the label for all fishery and aquaculture products? (READ OUT - MULTIPLE ANSWERS POSSIBLE)

<table>
<thead>
<tr>
<th>Date of catch or production</th>
<th>Environmental information</th>
<th>The country where the ship that caught the product is registered</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU28</td>
<td>76%</td>
<td>EU28 39%</td>
</tr>
<tr>
<td>EL</td>
<td>90%</td>
<td>SE 68%</td>
</tr>
<tr>
<td>CY</td>
<td>88%</td>
<td>NL 57%</td>
</tr>
<tr>
<td>FI</td>
<td>88%</td>
<td>MT 48%</td>
</tr>
<tr>
<td>PT</td>
<td>87%</td>
<td>AT 48%</td>
</tr>
</tbody>
</table>

Base: respondents who buy or eat fishery or aquaculture products (N=23,968)

Eco-labels: large development over the last decade but no price premium
Wild or farmed?

QB6  Fishery and aquaculture products can be wild or farmed. Would you say that...

(% - EU)

39% aged 55+

54% prefer sea products

48% prefer products from own region

38% aged 15-24

59% no preference for sea/freshwater products

36% no preference on product's origin
From the sea or freshwater?

QB7  Fishery and aquaculture products can come from the sea or from freshwater sources. Would you say that...

(% - EU)

- It depends on the type of product: 10 (-1)
- You do not know if the products you buy or eat are from the sea or freshwater sources: 6 (-1)
- You have no preference: 33 (-2)
- Don't know: 1 (=)
- You prefer products from the sea: 42 (+3)
- You prefer freshwater products: 8 (+1)

(June-July 2018 - June 2016)

46% aged 55+
64% prefer sea products
51% prefer products from own region

43% aged 15-24
62% no preference for wild/farmed products
35% no preference on product's origin
Dislike for taste, smell, appearance is why people don't eat fish and seafood – the challenge is even bigger for farmed products

**QB2** Which of the following are the main reasons why you never or almost never eat fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE)

<table>
<thead>
<tr>
<th>Reason</th>
<th>EU28</th>
<th>BG</th>
<th>CZ</th>
<th>DE</th>
<th>IE</th>
<th>HU</th>
<th>AT</th>
<th>RO</th>
<th>SI</th>
<th>SK</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>You do not like the taste, the smell or the appearance of these products</td>
<td>49%</td>
<td>56%</td>
<td>59%</td>
<td>50%</td>
<td>64%</td>
<td>63%</td>
<td>44%</td>
<td>40%</td>
<td>62%</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>They are too expensive</td>
<td>16%</td>
<td>25%</td>
<td>32%</td>
<td>11%</td>
<td>12%</td>
<td>33%</td>
<td>21%</td>
<td>15%</td>
<td>14%</td>
<td>31%</td>
<td>1%</td>
</tr>
<tr>
<td>Because of health concerns (for example allergies or contamination by metals)</td>
<td>12%</td>
<td>15%</td>
<td>11%</td>
<td>8%</td>
<td>8%</td>
<td>3%</td>
<td>18%</td>
<td>8%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>You are not used to these products</td>
<td>16%</td>
<td>21%</td>
<td>29%</td>
<td>10%</td>
<td>14%</td>
<td>24%</td>
<td>12%</td>
<td>28%</td>
<td>29%</td>
<td>24%</td>
<td>7%</td>
</tr>
<tr>
<td>You are vegetarian or vegan</td>
<td>16%</td>
<td>7%</td>
<td>6%</td>
<td>17%</td>
<td>11%</td>
<td>3%</td>
<td>18%</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Results for 18 countries have been excluded from the analysis due to low base sizes
Possible solutions!
To sum up:

- 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.
- Voluntary allegations can help to add value, but there are strict rules on clarity, unambiguity and verifiability of information, which should not mislead the consumer.

→ Critical size needed, which can be achieved through producer organisations.
Thank you for your attention!