EU Consumers habits regarding fishery and aquaculture products

The retailers' view
Why are retailers important?

Source: Ernst & Young analysis based on Planet Retail in “The economic impact of modern retail on choice and innovation in the EU food sector” – European Commission – DG Competition
And specifically for FAPs?

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

<table>
<thead>
<tr>
<th>Option</th>
<th>EU28 At the grocery store, supermarket or hypermarket</th>
<th>EU28 At a fishmonger or a specialist shop</th>
</tr>
</thead>
<tbody>
<tr>
<td>At the grocery store, supermarket or hypermarket</td>
<td>74</td>
<td>40</td>
</tr>
<tr>
<td>At a fishmonger or a specialist shop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At the market</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At a fish farm or from the fisherman</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From an online shop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (spontaneous)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None (spontaneous)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Base:** respondents who buy fishery or aquaculture products (N=22,759)
Origin of products on sale

Preference in terms of product origin in the EU subregions

- Products from your region
- Products from the European Union
- You don’t know where the products come from
- You don’t have any preference
- Products from your country
- Products from outside the European Union
- It depends on the type of product
- Do not know
Wild or farmed products?

Preference regarding wild or farmed products in the EU subregions

Expected trend 2015-2020
Product trends

Main trends: freshness and convenience (ready-to-eat for fishmongers)

- Strong increase in pre-packed fresh fish (lower in loose fish)
- Increase for convenience products and smoked fish

→ Similar trends expected for 2015-2020
**Eco-labels**

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

<table>
<thead>
<tr>
<th></th>
<th>Date of catch or production</th>
<th>Environmental information</th>
<th>The country of the ship that caught the product</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU28</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FI</td>
<td>76</td>
<td>39</td>
<td>31</td>
</tr>
<tr>
<td>EL</td>
<td>91</td>
<td>71</td>
<td>52</td>
</tr>
<tr>
<td>CZ</td>
<td>89</td>
<td>58</td>
<td>43</td>
</tr>
<tr>
<td>DK</td>
<td>86</td>
<td>54</td>
<td>43</td>
</tr>
<tr>
<td>CY</td>
<td>85</td>
<td>50</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>35</td>
</tr>
</tbody>
</table>
Quality labels

Q9. When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)
Factors impacting purchase

**Availability**
Regular supply at adequate volumes remains the largest weakness of fishery products.

**Price and price-quality ratio**
FAPs as expensive products → promotion on price plays an important role to attract new consumers.

**Presentation (fresh, frozen, processed) and retail method (loose, pre-packed)**
Each presentation or retail method constitutes a specific segment with specific market trends.

**Level of information**
Consumers lack knowledge of FAPs (species, cooking...) more information could increase consumption.

**Geographical origin of products**
Origin does not drive purchase. Local/national signs are a plus.

**Production method (fishery/aquaculture)**
Better image of fishery products than aquaculture ones, but this does not limit purchase.

**Range**
The challenge is not to propose a 'large range', but a 'good range', adapted to consumer needs.

**Specific labelling or branding (eco-label, quality scheme, retailer labelling...)**
Labelling/branding are not important sale drivers (mostly in Northern and Southern areas).
Thank you for your attention!

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