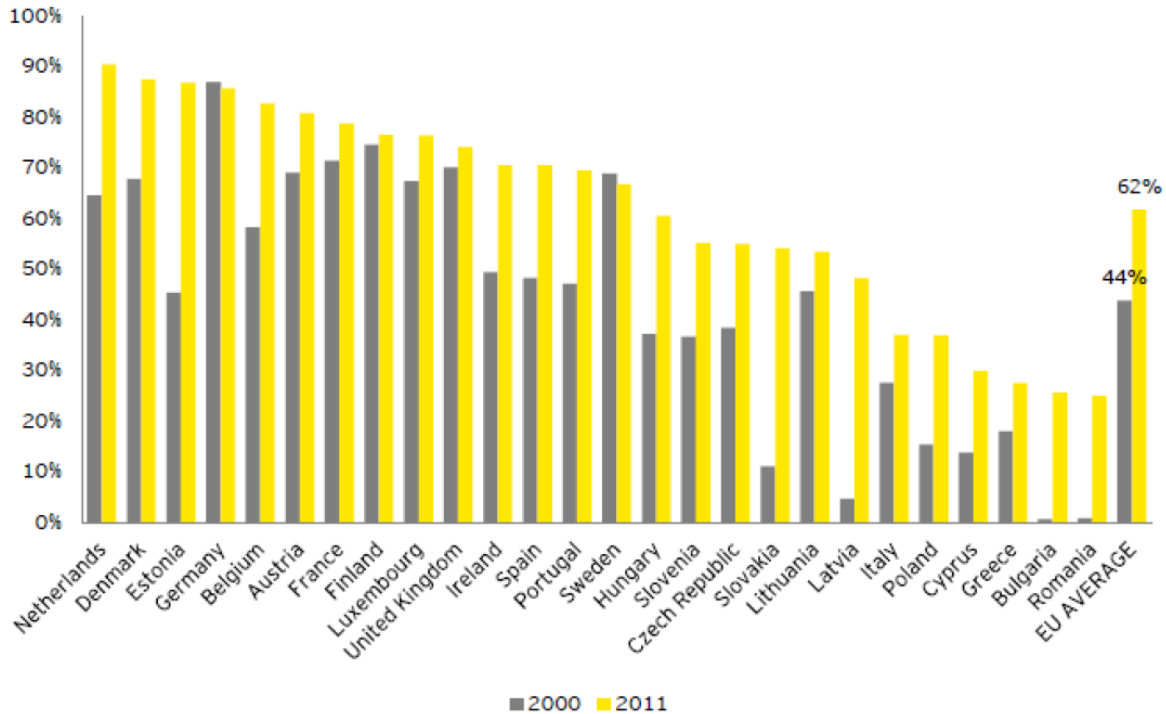
European Commission

EU Consumers habits regarding fishery and aquaculture products

The retailers' view

Maritime Affairs & Fisheries

Why are retailers important?

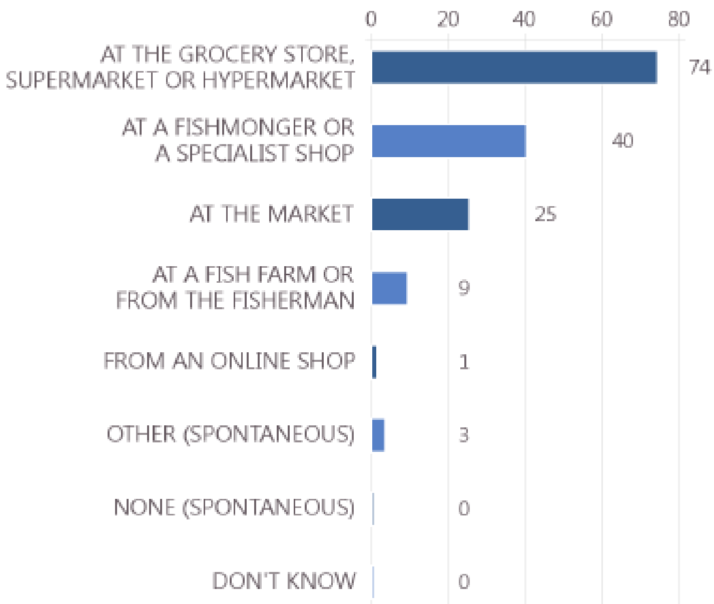


Source: Ernst & Young analysis based on Planet Retail in "The economic impact of modern retail on choice and innovation in the EU food sector" – European Commission – DG Competition

European Commission

And specifically for FAPs?

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

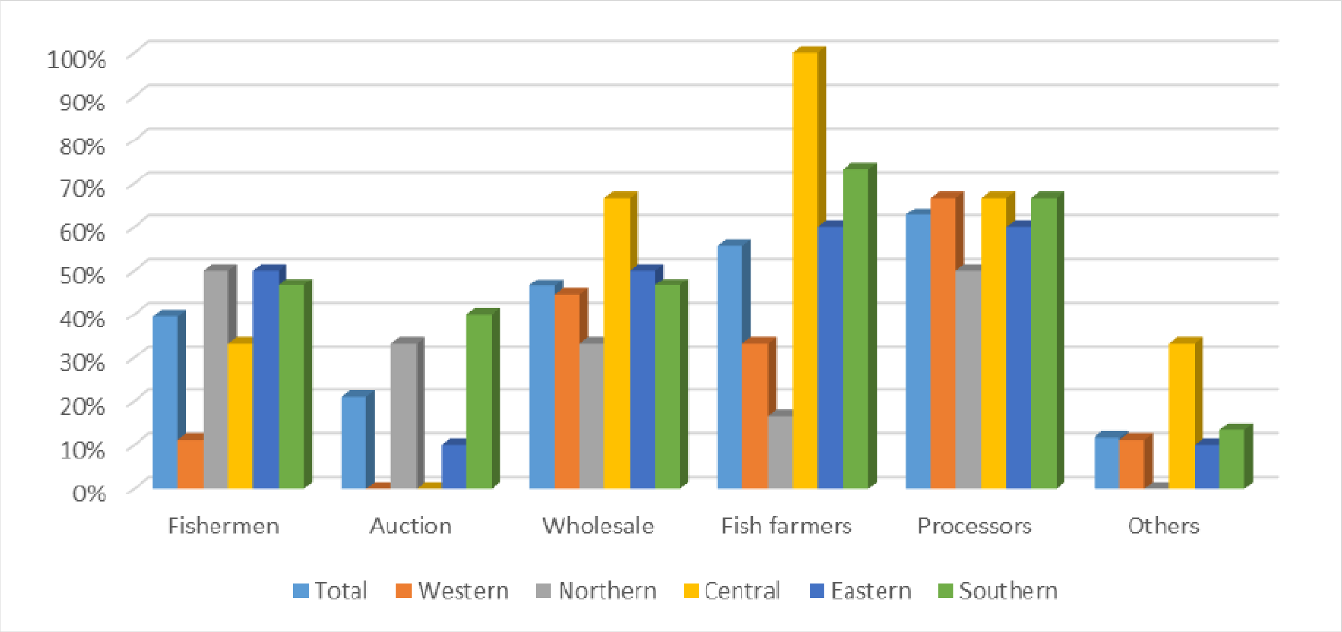


	At the grocery store, supermarket or hypermarket	At a fishmonger or a specialist shop
EU28	74	40
Age		
15-24	78	31
25-39	75	40
40-54	78	40
55 +	70	43

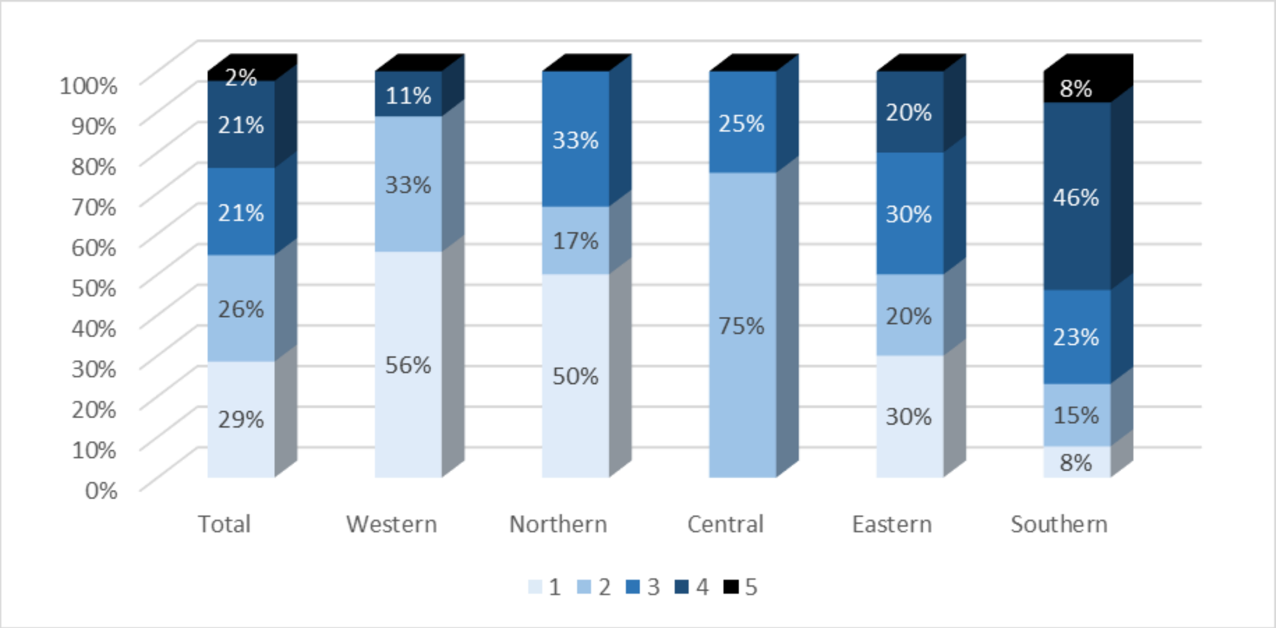
Base: respondents who buy fishery or aquaculture products (N=22,759)

European Commission

Suppliers

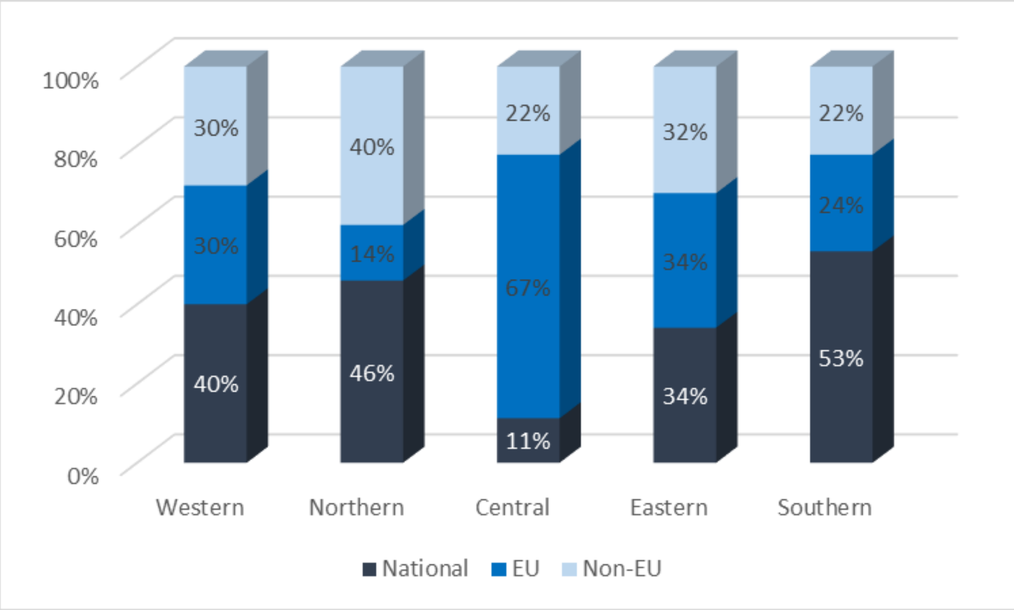


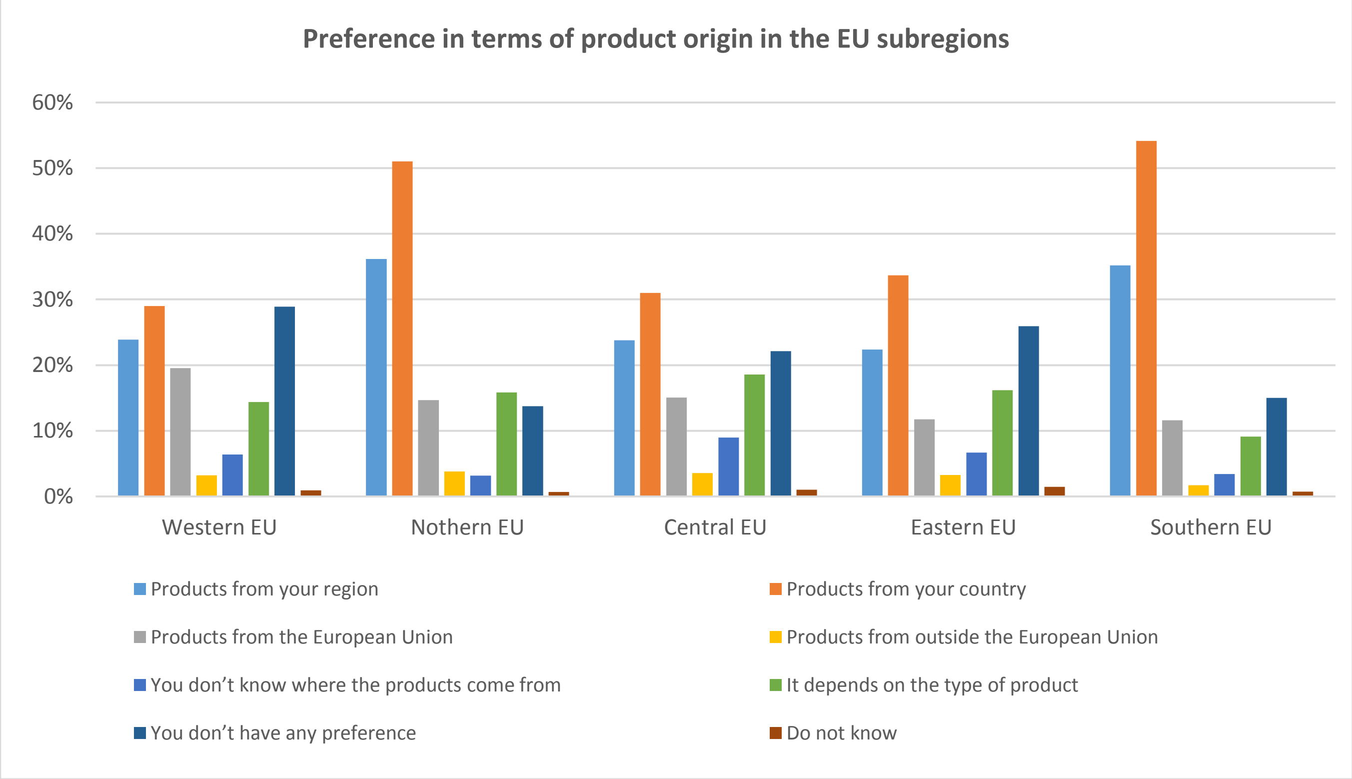
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Fishermen
Auction
Wholesale
Fish farmers
Processors
Others
Total
Western
Northern
Central
Eastern
Southern



100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
2%
21%
21%
26%
29%
11%
33%
56%
33%
17%
50%
25%
75%
20%
30%
20%
30%
8%
46%
23%
15%
8%
Total
Western
Northern
Central
Eastern
Southern
1
2
3
4
5

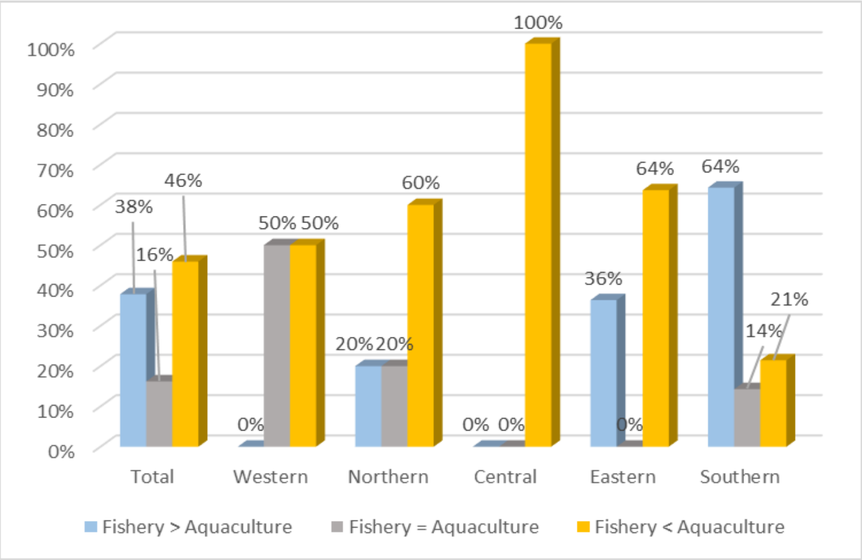
Origin of products on sale

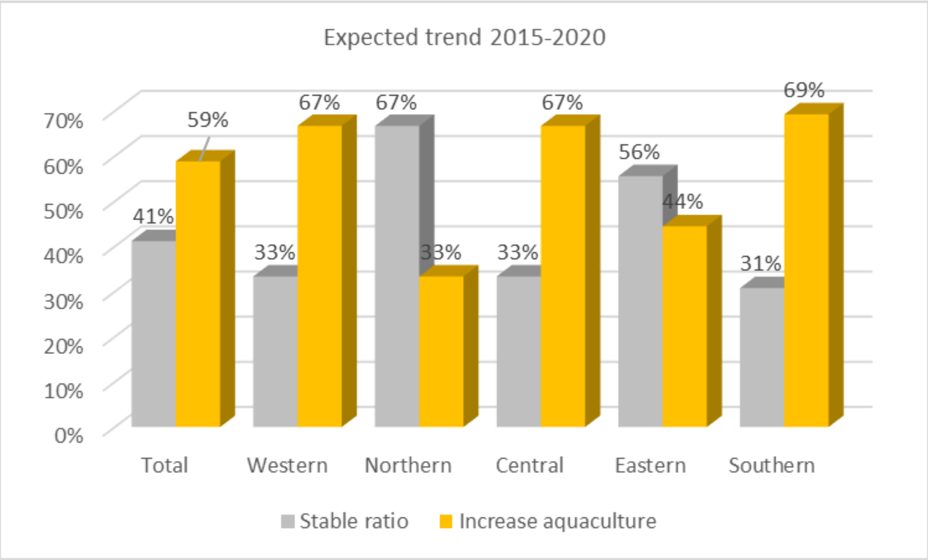


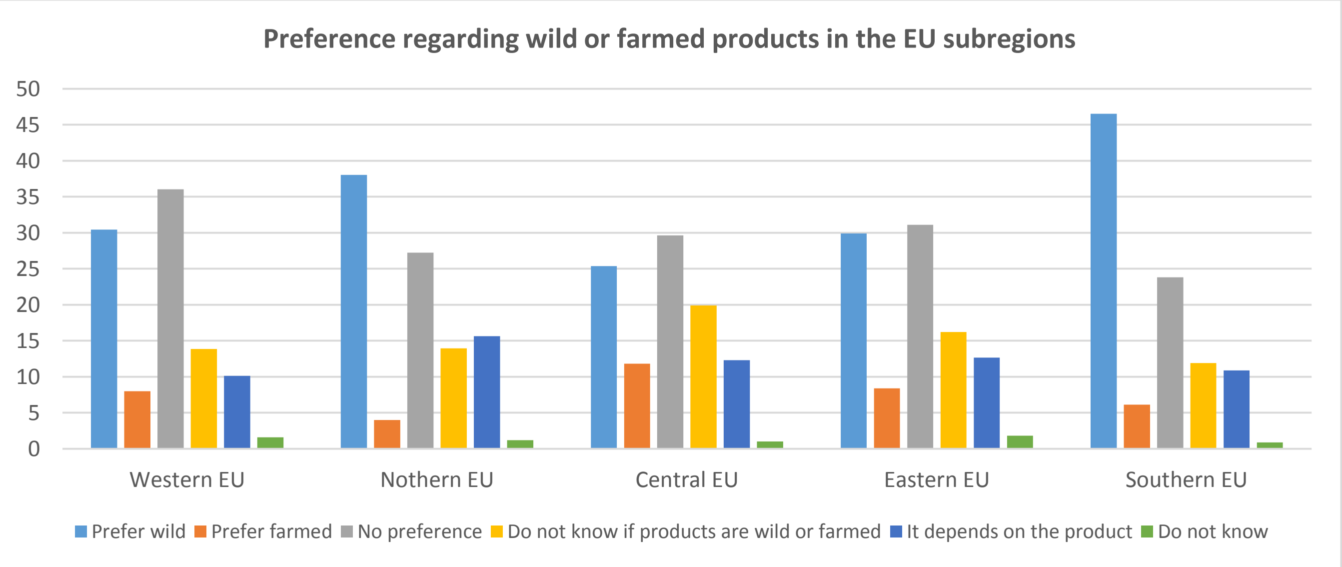


European Commission

Wild or farmed products?







European Commission

Product trends

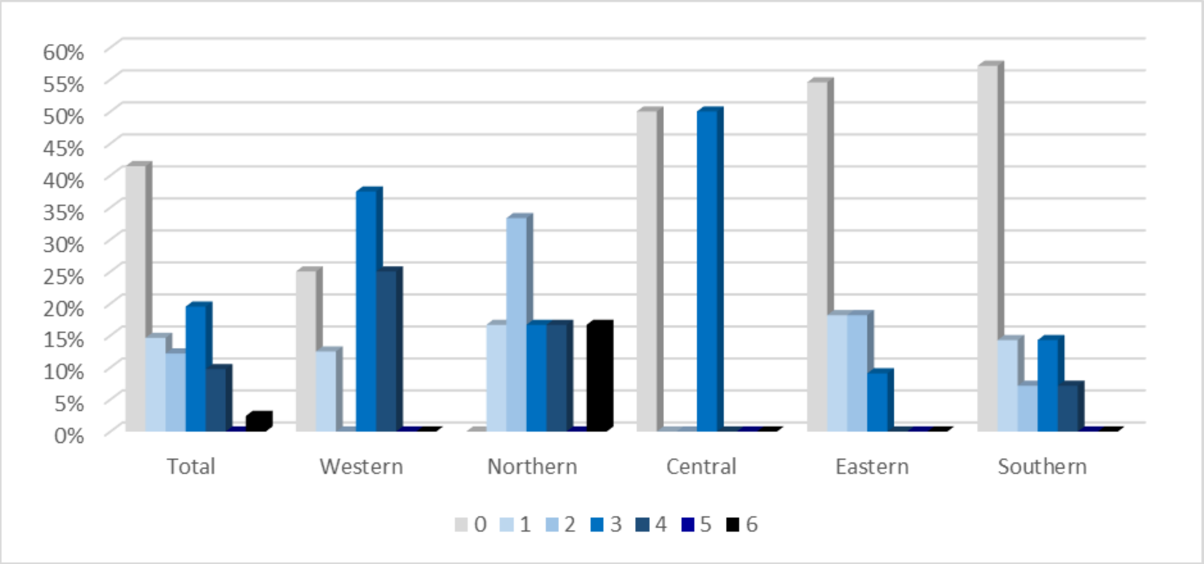
	Frozen products	Fresh products, including live	Tinned products	Products that are smoked, salted, dried or in brine	Breaded products and ready meals based on fishery and aquaculture products
EU28	69	67	61	50	41
Age					
15-24	72	58	57	49	50
25-39	72	67	61	52	47
40-54	73	67	63	53	45
55 +	64	68	60	49	32

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

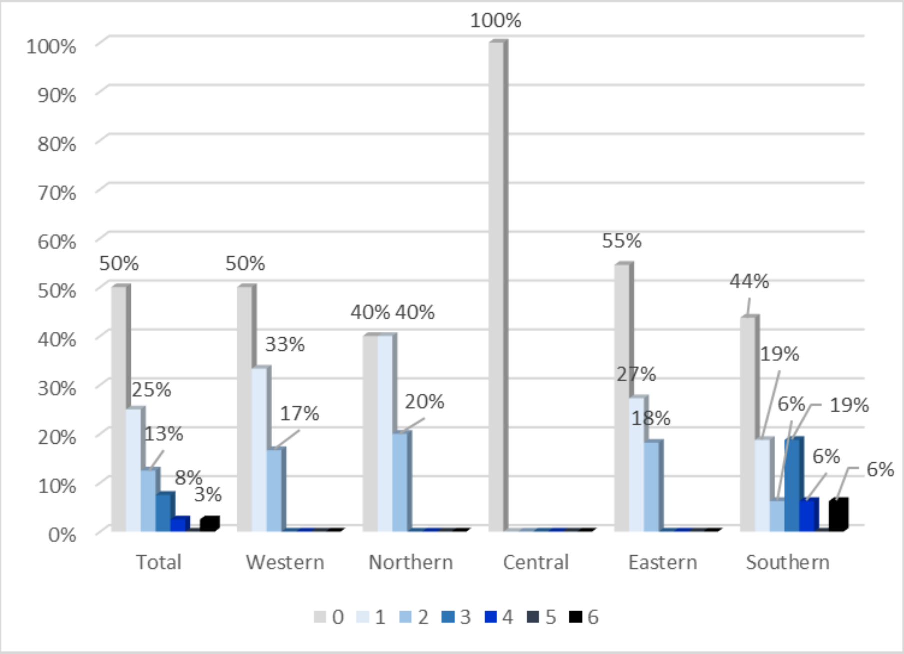


QC14 Which of the following do you think should be mentioned on the label for all fishery and aquaculture products? (MULTIPLE ANSWERS POSSIBLE)

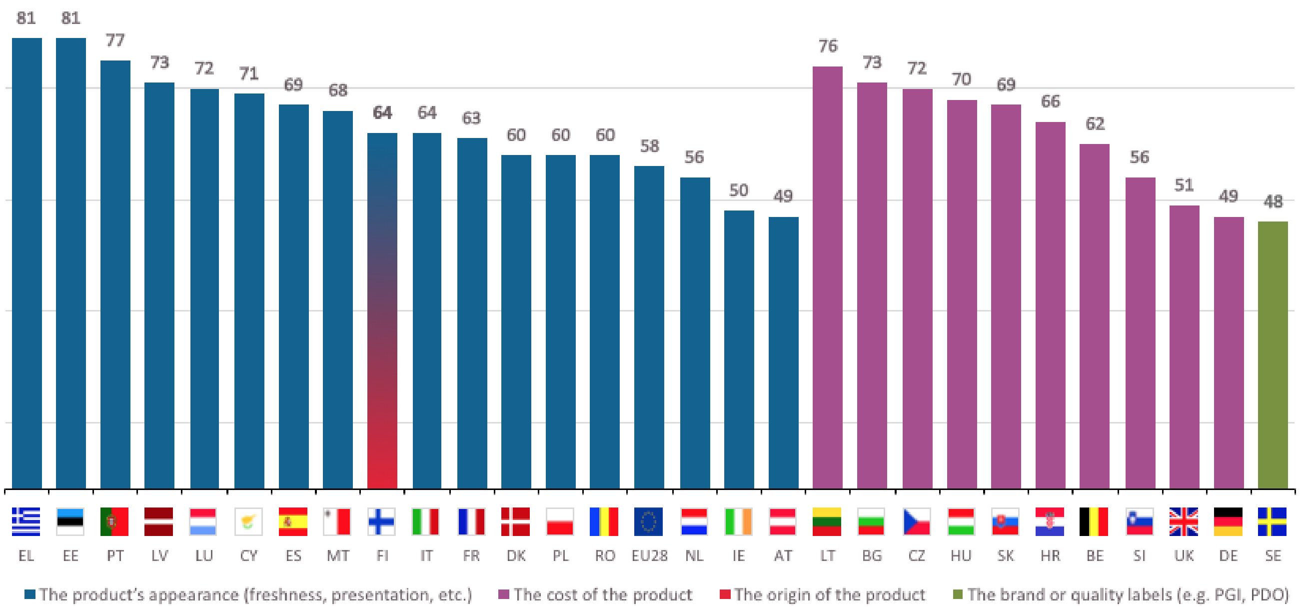
	Date of catch or production		Environmental information		The country of the ship that caught the product
EU28	76	EU28	39	EU28	31
FI	91	SE	71	EL	52
EL	89	NL	58	SE	52
CZ	86	DK	54	IE	43
DK	85	AT	50	IT	40
CY	85	LU	48	FR	35

European Commission

Quality labels



QC9 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)



European Commission

Factors impacting purchase

Availability
Regularity of supply at adequate volumes remains 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)

European Commission

Thank you for your attention!

http://www.eumofa.eu/eumofa-publications

European Commission