Consumers’ perception of aquaculture products
OECD
Paris 16 April 2010
Aquaculture products: consumers’ perception

- SEAFOODplus EU-FP6 integrated project 2004-2008
- CONSENSUS EU-FP6 coordination action 2006-2008
- DG MARE – Ernst&Young study 2007-2008
- Image et perception des produits d’origine aquatique, Ofimer 2004, FAM 2009
Positive attributes, accepted by all

• Availability, in terms of volume, day after day, all year through
• Healthy food
• Helps to preserve the marine resource (yet not always a stimulus for purchase)
• Cheaper than wild fish
Negative attributes, accepted by all

- Stessfull environment for the fish
- Use of colorants may be excessive
- Use of antibiotics
No consensus

- Quality, some say better taste than wild; others not
- Some say fresher than wild, other not
  - One study evidenced that the older the consumer, the more likely to prefer wild fish
Image of farmed fish
Note: center of the graph = most positive image score
Image of farmed fish

Convenience
Health
Safety
Sustainability
Sensory
Quality
Price
Animal Welfare

Belgium Norway Spain

1 2 3 4 5 6 7

Belgium Norway Spain

www.marketing-seafood.com
Perception of wild and farmed fish: HEALTH

- Poland
- Belgium
- Netherlands
- Denmark
- Spain

- Farmed fish healthy
- Wild fish healthy
Lack of knowledge

• Some still don’t know about the existence of farmed fish
• Little awareness of farmed fish production. Some compare with on-land production system (henns in battery cages)
Evaluation of whole cod fresh Sweden

Source Nofima (2010)
Evaluation of whole cod fresh
France

Source: Nofima (2010)
Main traits

• Farmed seafood is seafood: positive prejudice
• No strong specific à priori. No big difference on main attributes with wild seafood.
• Lack of information/ knowledges of aquaculture
• The less he/she knows the more rumours will find their way
Seafood consumption, kg/y/capita

Source: FAO Food Supply (2005)
Aquaculture: market share
(volume, 2007)

Source Paquotte, P. unpublished estimates (2010)
Aquaculture: market share
(volume, 2007)

EU 21%
Spain 22%
France 27%
Italy 24%
United Kingdom 19%
Germany 19%
Netherlands 14%
Portugal 9%
Poland 9%
Sweden 24%
Austria 19%
Belgium 24%
Finland 28%
Greece 19%
Ireland 21%
Denmark 16%
Lithuania 16%
Czech Republic 16%
Romania 16%
Latvia 13%
Hungary 10%
Estonia 10%
Slovenia 4%
Bulgaria 17%
Cyprus 16%
Slovakia 18%
Malta 26%
Consumption of aquaculture products

- Seafood: great market flexibility, open to new species (Alaska pollock, Nile perch, Pangasius...)
- Aquaculture species come top: salmon, shrimp, carp, pangasius
EU 27 Seafood market (2007)

- Farmed shellfish: 1,792,000 tonnes (13%)
- Farmed finfish: 1,489,000 tonnes (11%)
- Farmed shellfish: 1,344,000 tonnes (10%)
- Capture shellfish: 8,724,000 tonnes (66%)

The reality of consumption: France

• In France, the image is inferior to the one of wild fish
• Main species: salmon, shrimps, mussels, oysters, scallops, pangasius, seabass, seabream
The reality of consumption: in Spain

- Main species: shrimps, mussels, clam shells, salmon, pangasius, seabass, seabream, turbot

- Farmed finfish: 152,000 tonnes (10%)
- Farmed shellfish: 370,000 tonnes (43%)
The reality of consumption: The UK

- Main species: salmon, shrimp, seabass, pangasius, mussels

![Graph showing consumption of farmed finfish and shellfish in the UK.](image-url)
The less processed, the more protected…

- 2004, publication in «science» First Global Sampling Study Reveals Health Risks Associated with Consuming Farm Raised Salmon + echo in the media
- The consumption of whole salmon has dropped
- The one of portions and pre packed products has not be impacted.
Role of information

Interest in farmed / wild relative to other information

- Safety guarantee
- Quality mark
- Recipes
- Health benefits
- Method of preparation
- Colorants used
- Environmental friendly
- Fed with GMO
- Wild/farmed
- Country of origin
- Fish welfare
- Feed used during farming
- Batch ID
CONCLUSIONS

• The image of seafood is positive, especially in terms of health, and fairly consistent across OECD countries.

• The information conveyed to consumers is not comprehensive in terms of origin: legislation in incomplete (restaurants) and not applied thoroughly.

• There is some confusion among European consumers about what is farming and the exact origin (wild/farmed) of the fish/seafood.

• At the moment of purchase, their interest in this type of information is relatively low.