Fish made in Europe – are consumers interested in?

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Market opportunities for fish made in Europe?

- High share of imports in the European fish market
- Low competitiveness due to higher production costs
  - Higher labour costs
  - Higher environmental standards

- Consumer preferences for local and sustainable production in other food segments
  ➔ Preferences and higher willingness to pay for sustainable European fish?

- Is product differentiation in the European fish market promising?
Aim

Analysis of

- Consumer knowledge of sustainable fisheries
- Consumers’ preferences for European and sustainable fish
- Consumers’ willingness to pay for sustainable European seafood
What we have done

- Online survey in 8 European countries (Finland, France, Germany, Ireland, Italy, Poland, Spain, UK)
- 4100 interviews plus analysis of willingness to pay (contingent valuation)
- March 2016
- 65% women, 35% men
- Fish consumers
Aspects of sustainable fisheries

Protection of endangered species
No overfishing
Recovery of depleted stocks
Protection of juvenile fish
No bycatch
Protection of the sea ground
Good working conditions
Smallscale coastal fisheries
Vessels low energy consumption

Please indicate the three most decisive elements of sustainable fisheries from your point of view.
Aspects of sustainable aquaculture

Minimal use of hormones and drugs
Helping to protect endangered species
No pollution of the environment
Respect of fish welfare
Minimizing impacts on wild stocks
Production close to nature
No use of wild fish in fish feed
Use of renewable energies
Support of rural areas
Good working conditions
Low technical level

0% 5% 10% 15% 20% 25% 30% 35% 40%

Which are the three most decisive elements of sustainable fish farming from your point of view?
Consumers’ preferences for origin of seafood (% of participants)

Question: Is it important to you that the fish you buy originates from ... production?
Reasons for preferring European fish

- Shorter transport distances
- Higher food safety
- Support of the European economy
- Higher environmental standards
- Better regulation
- It generates jobs in Europe
- Healthier products
- Preservation of European traditions
- Higher trust
- Higher animal welfare standards
- Higher transparency

Why is European production important to you?
Reasons for preferring local fish

Why is local production important to you?

- Greater freshness of the fish
- It supports the local economy
- Shorter transport distances
- It generates local jobs
- Preservation of local traditions
- Healthier products
- Higher trust
- Higher food safety
- Higher transparency
- Better regulation
- Higher environmental standards
- Higher animal welfare standards

Why is local production important to you?
How much would you be willing to pay for a fish that is caught/produced...
Consumer segments based on their Willingness to Pay

![Chart showing consumer segments based on their Willingness to Pay in different European countries. The chart includes categories for High WTP, Medium WTP, and Low WTP. The countries listed are Ireland, Finland, Poland, Spain, France, Italy, UK, and Germany. The y-axis represents the countries, and the x-axis represents the percentage of consumers in each WTP category.]
Impact factors on WTP

Additional WTP is higher with

- Women
- Younger people
- Higher altruistic values
- Higher involvement in fish
- Higher subjective knowledge
- Higher perceived consumer effectiveness
- Positive attitude towards aquaculture
Conclusions

- Consumer preferences for sustainable fish from Europe exist
- More than half of the participants showed an additional willingness to pay for organically, sustainably, animal welfare, locally produced fish
- Different consumer segments with different WTP
- Target group for sustainably produced fish
  - Better educated and ethically motivated consumers
  - More involved and more knowledgeable with respect to fish
Conclusions

• Well targeted communication needed
• Promising arguments
  – In fisheries: Protection of fish species, diversity and stocks
  – In aquaculture: Protection of endangered species, high quality fish with minimal residues, fish welfare, naturalness
Thanks!

Contact

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Fish consumption

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<tr>
<th>Variable / Description</th>
<th>All</th>
<th>DE</th>
<th>FI</th>
<th>FR</th>
<th>IT</th>
<th>PL</th>
<th>UK</th>
<th>ES</th>
<th>IR</th>
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<td>Number of observations</td>
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<td>530</td>
<td>500</td>
<td>517</td>
<td>513</td>
<td>502</td>
<td>507</td>
<td>534</td>
<td>500</td>
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<tr>
<td><strong>Occasional fish consumers</strong></td>
<td>47</td>
<td>57</td>
<td>68</td>
<td>43</td>
<td>30</td>
<td>59</td>
<td>46</td>
<td>21</td>
<td>54</td>
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<tr>
<td>Less than once per month</td>
<td>9</td>
<td>8</td>
<td>13</td>
<td>9</td>
<td>4</td>
<td>10</td>
<td>10</td>
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<td>4</td>
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<tr>
<td>Two to three times per month</td>
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<td>38</td>
<td>25</td>
<td>22</td>
<td>35</td>
<td>27</td>
<td>14</td>
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<tr>
<td><strong>Regular fish consumers</strong></td>
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<td>57</td>
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<td>41</td>
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<tr>
<td>More than once per week</td>
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