



Consumer preferences for sustainable European fish

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SUCCESS-Project
Focus Group Workshop on: Competitiveness and sustainable sourcing in Europe for fish and seafood

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Background and aim

Background

- Strong competition on European fish markets
- Imports with increasing market shares
- Consumer preferences for European and sustainable production in other food markets
- Opportunity for differentiation in the European fish market?

Aim

- Analysis of consumer awareness, preferences and willingness to pay for sustainable European fish
- Identification of consumers' preferences for fish products from Europe with emphasis on geographical origin, ecological and social sustainability



What we already know

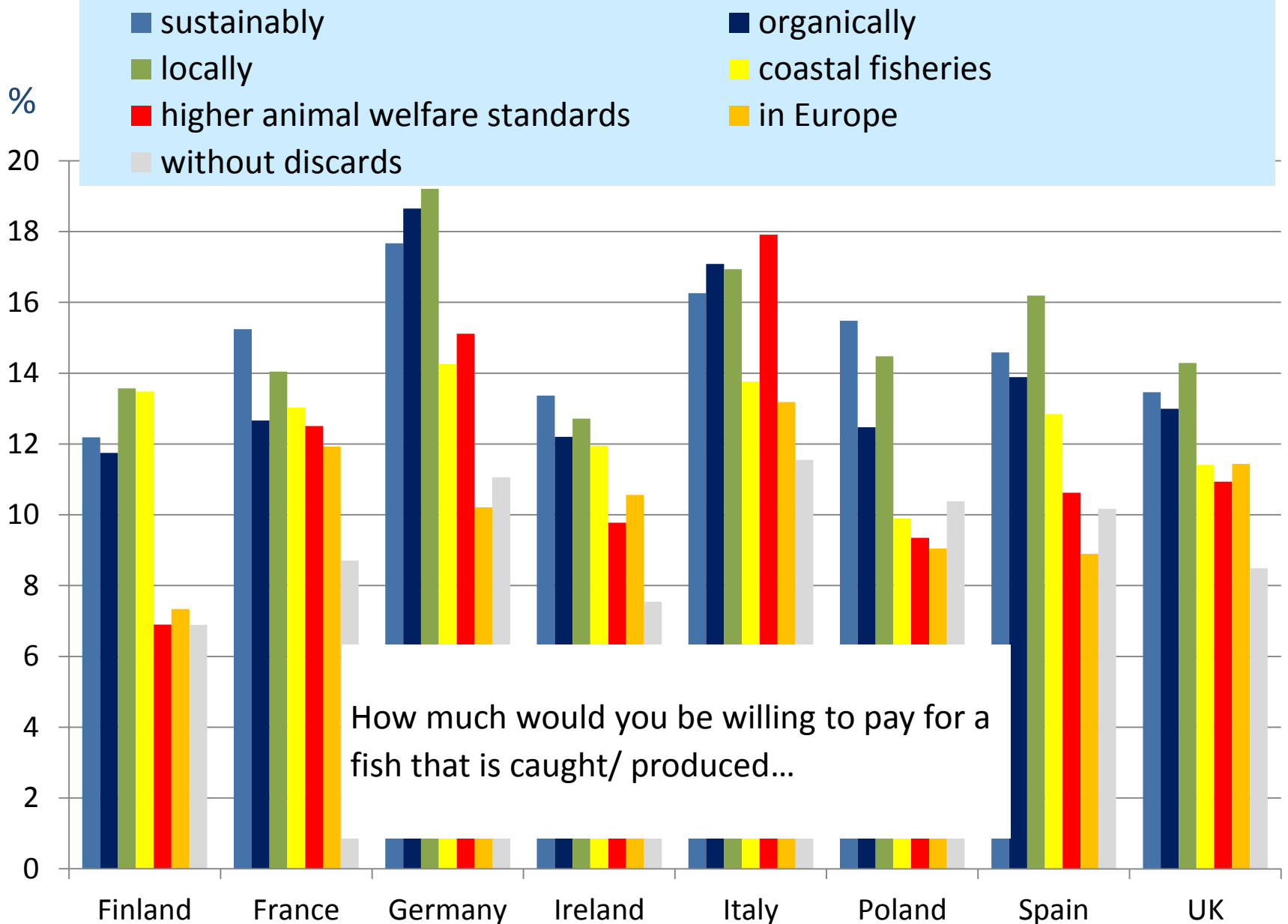
- Sustainability issues in fish purchase of minor relevance
- Consumers' knowledge of sustainable fishing and aquaculture (and labelling) is low
- Uncertainty about credibility of labels
- Limited interest in additional information
- Some preferences for origin of fish from aquaculture in Germany
- Challenges for fisheries sector with respect to communication of sustainable production



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**
- **18 to 70 years of age**
- **65% women, 35% men**
- **Fish consumers, responsible for fish purchases**

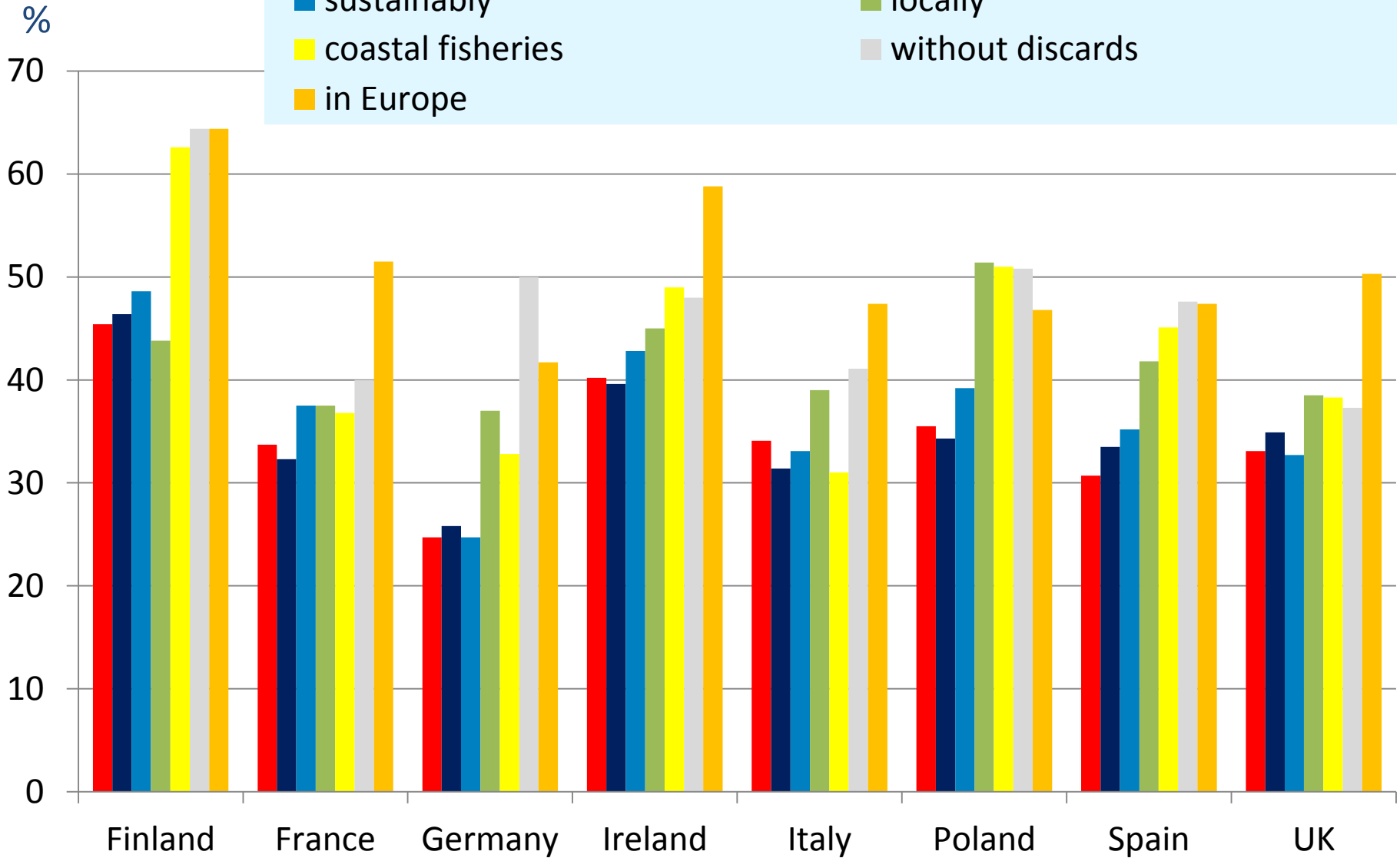
Additional WTP for ...



Share of participants without additional WTP

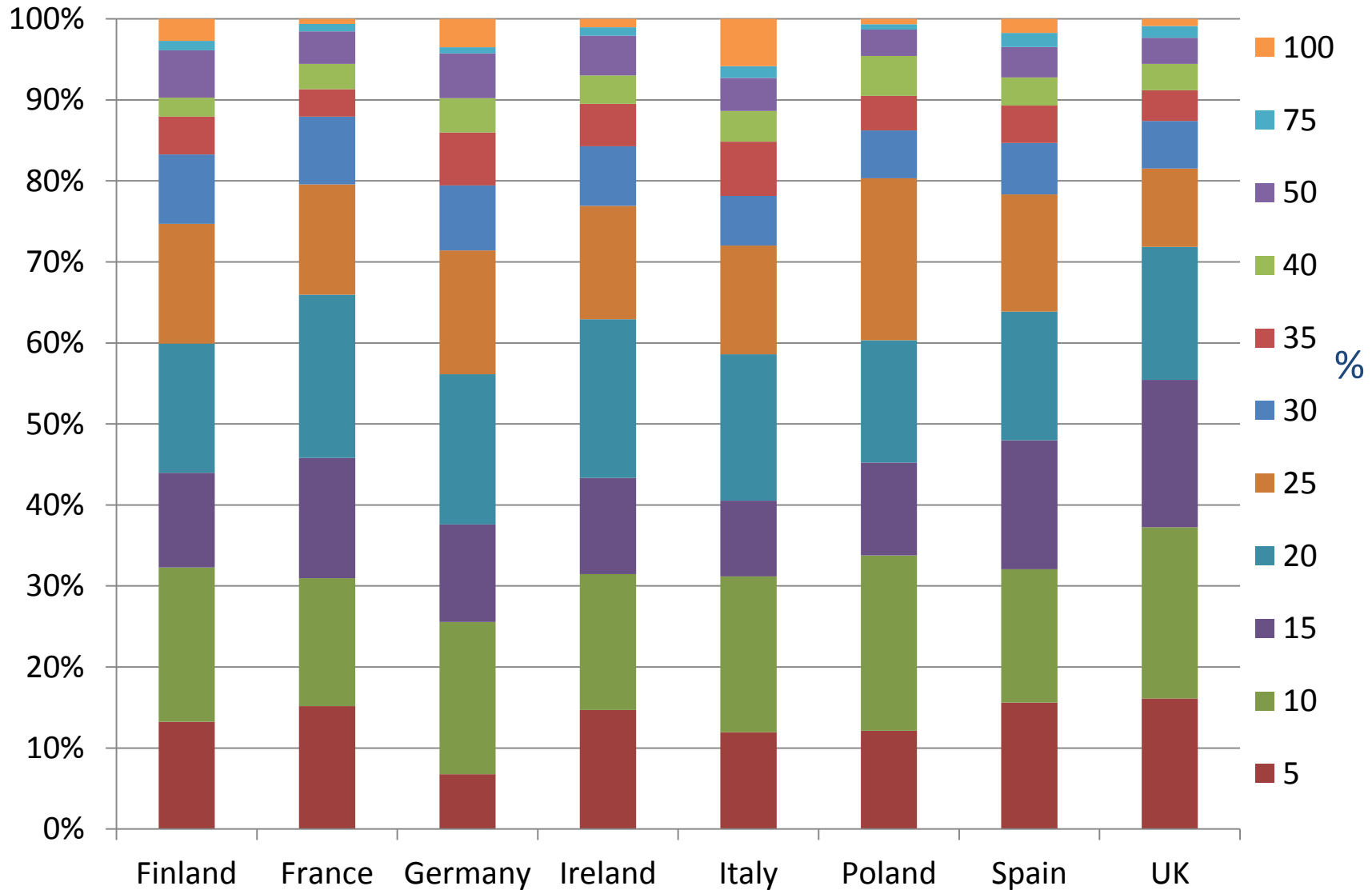


- higher animal welfare standards
- organically
- sustainably
- locally
- coastal fisheries
- without discards
- in Europe





Distribution of additional WTP (Sustainable production)





Summary

- **Local (and domestic) production are more relevant than European production in most study countries**
- **Attributes with highest WTP differ between countries**
- **Highest additional WTP for sustainable (15%), organic (14%) and local (14%) production (on average)**
- **Lowest additional WTP for European production (10%) and production without discards (9%) (on average)**
- **Share of consumers without additional WTP between 35% (animal welfare) and 51% (produced in Europe)**
- **Out of those who have an additional willingness to pay, about 50% are willing to pay at least 20% more**



What to do next

- Better understand consumers' behaviour
- Identification of key impact factors on WTP
- Identification of different consumer segments

- Communication strategies for sustainable European production
- Identification of innovative seafood products in cooperation with case studies (qualitative and quantitative)
- Effectiveness of central information websites for seafood and fish (e.g. seafish.org)

Thanks!

Dr. Katrin Zander

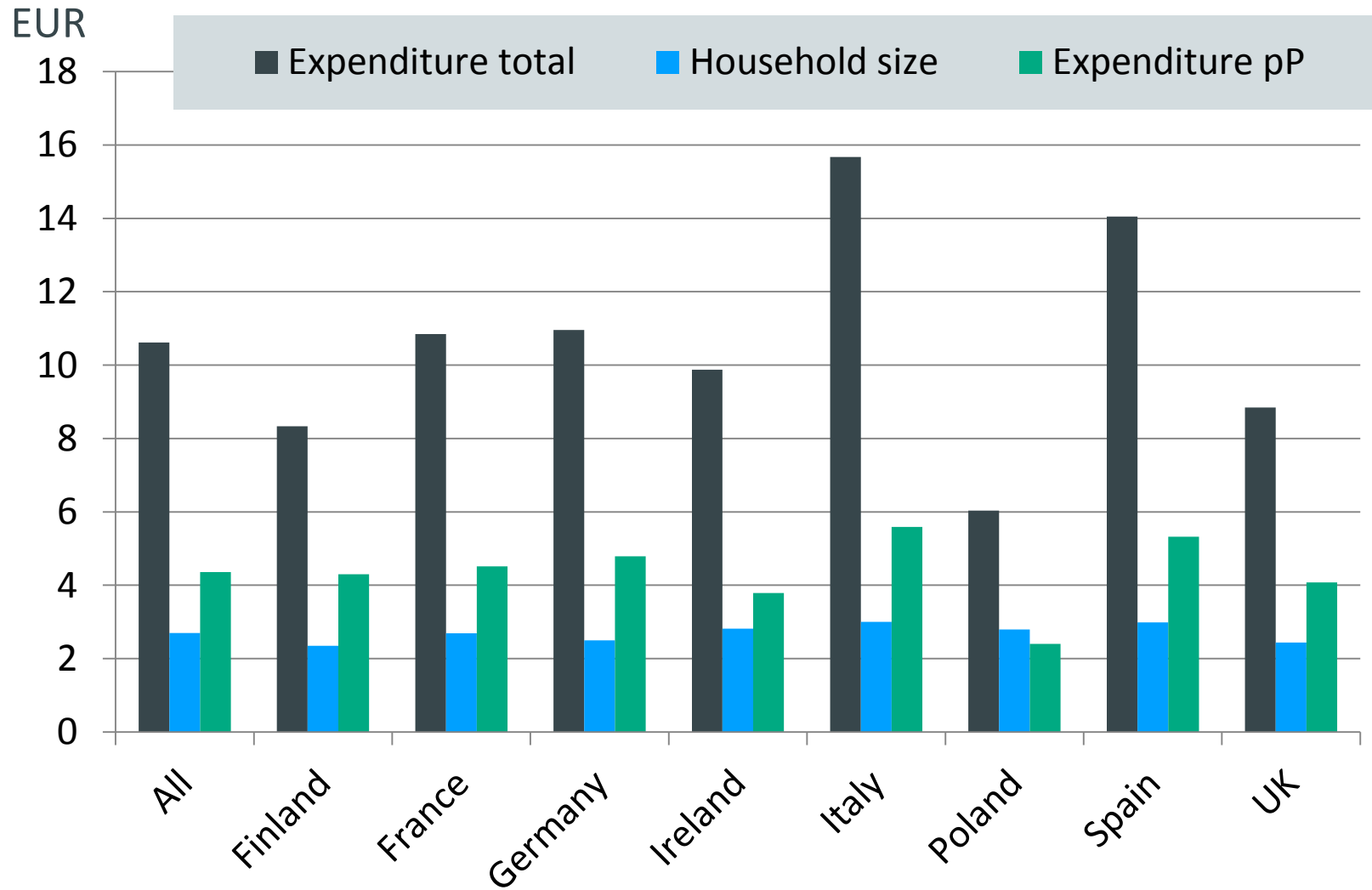
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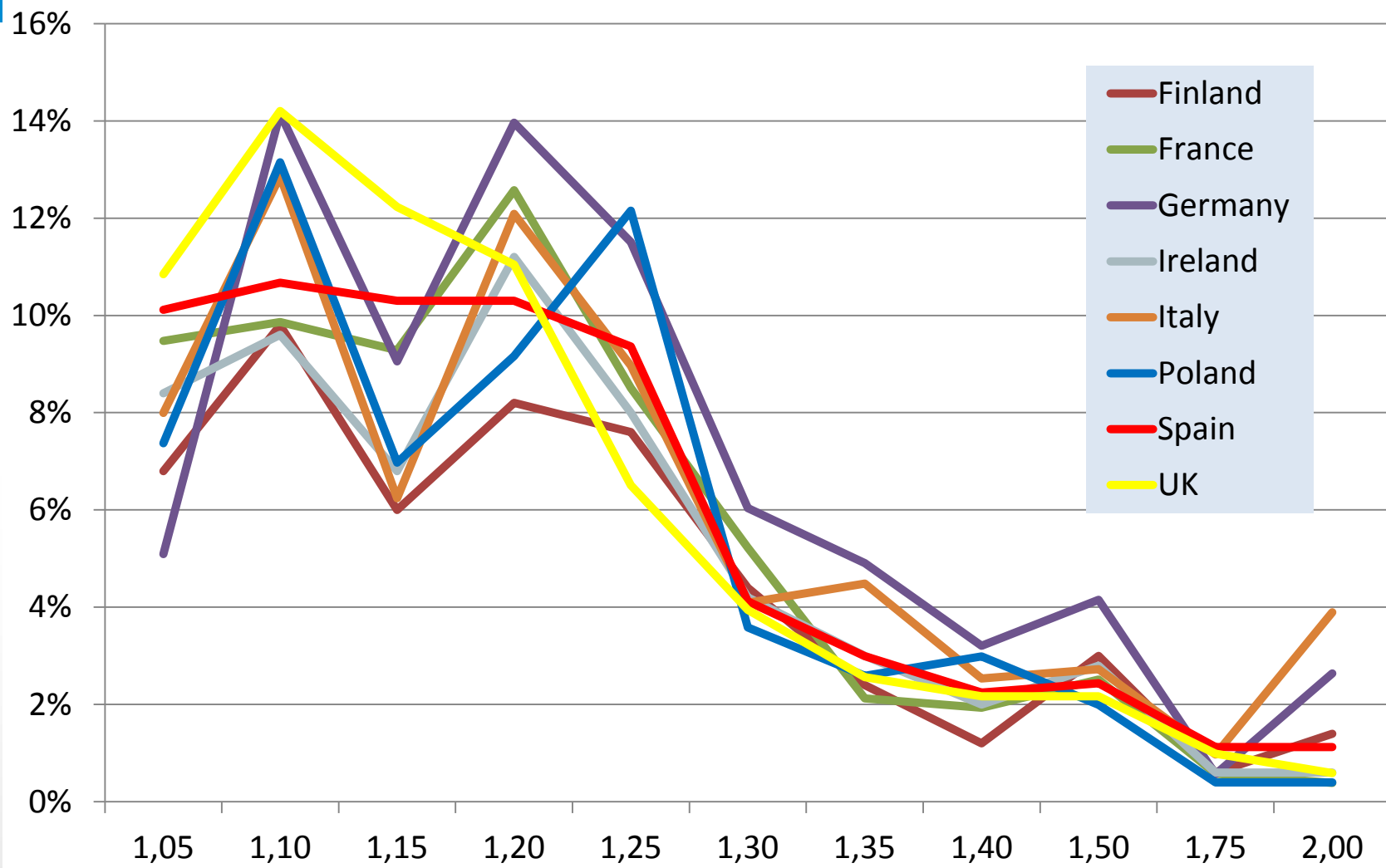




Expenditures for fish for an everyday occasion



Distribution of additional WTP (Sustainable production)





Consumers' preferences for origin of fish (% of participants)

...production	All	Finland	France	Germany	Irleand	Italy	Poland	Spain	UK
European...	55.2	53.4	60.3	53.6	48.4	61.2	63.1	58.8	42.2
Domestic...	64.7	50.2	76.4	45.3	71.0	82.8	63.9	76.6	51.1
Local...	60.5	58.2	55.5	45.7	72.2	73.3	46.4	72.3	60.6
Number obs.	4103	500	517	530	500	513	502	534	507

Question: Is it important to you that the fish you buy originates from...



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