



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?



Analysis of

- **Consumer knowledge of sustainable fisheries**
- **Consumers' preferences for European and sustainable fish**
- **Consumers' willingness to pay for sustainable European seafood**

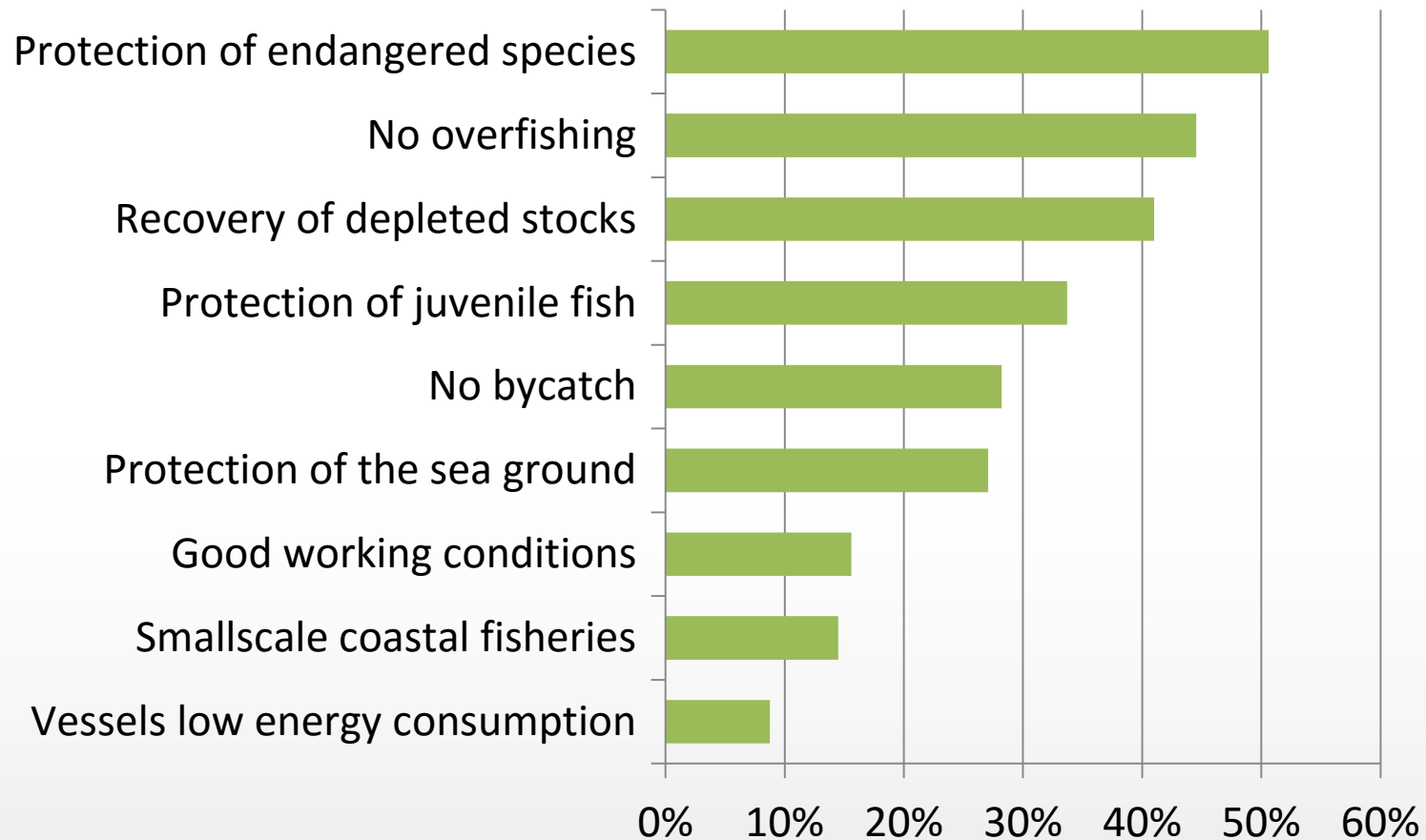


What we have done

- **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**



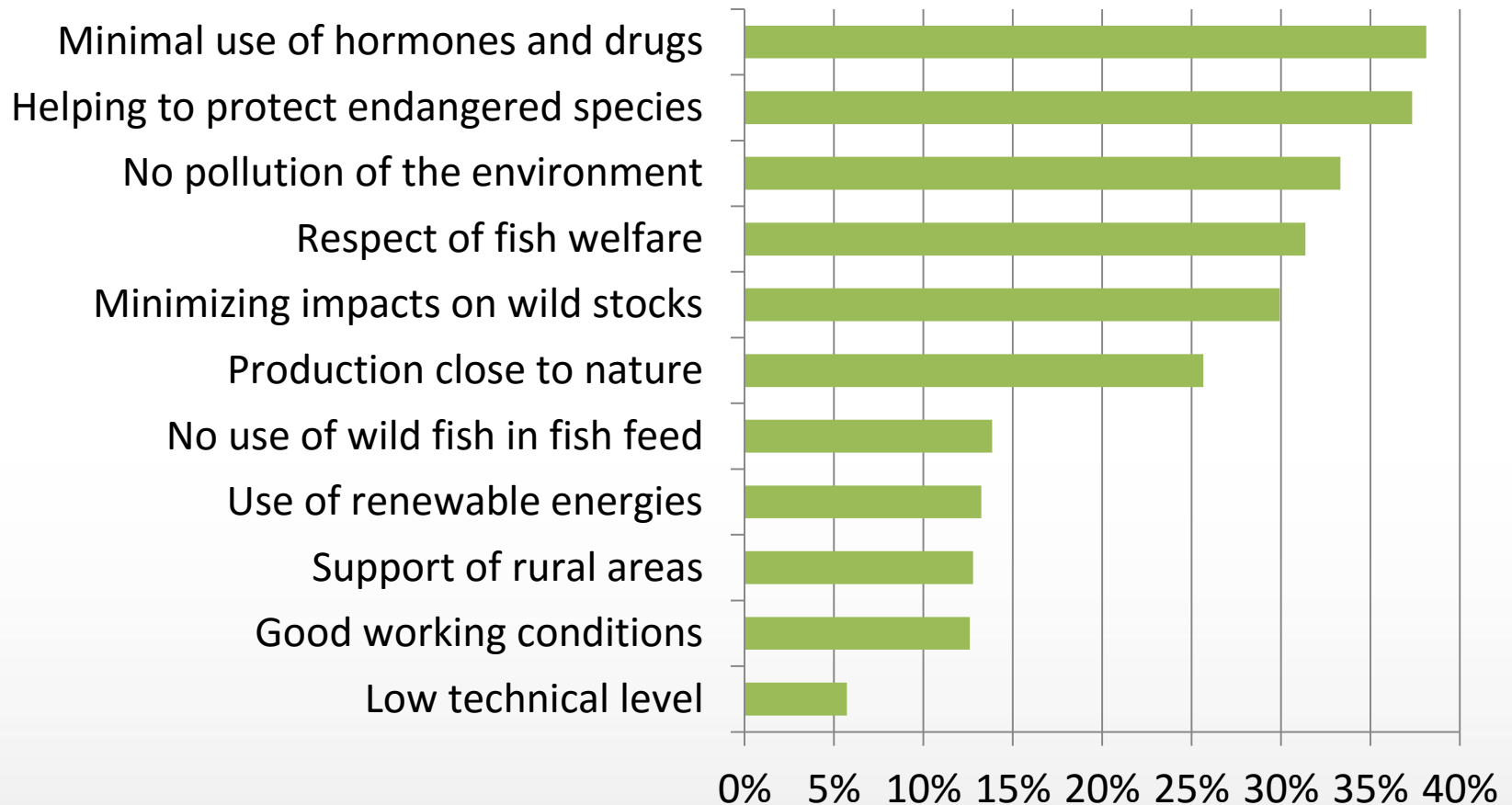
Aspects of sustainable fisheries



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

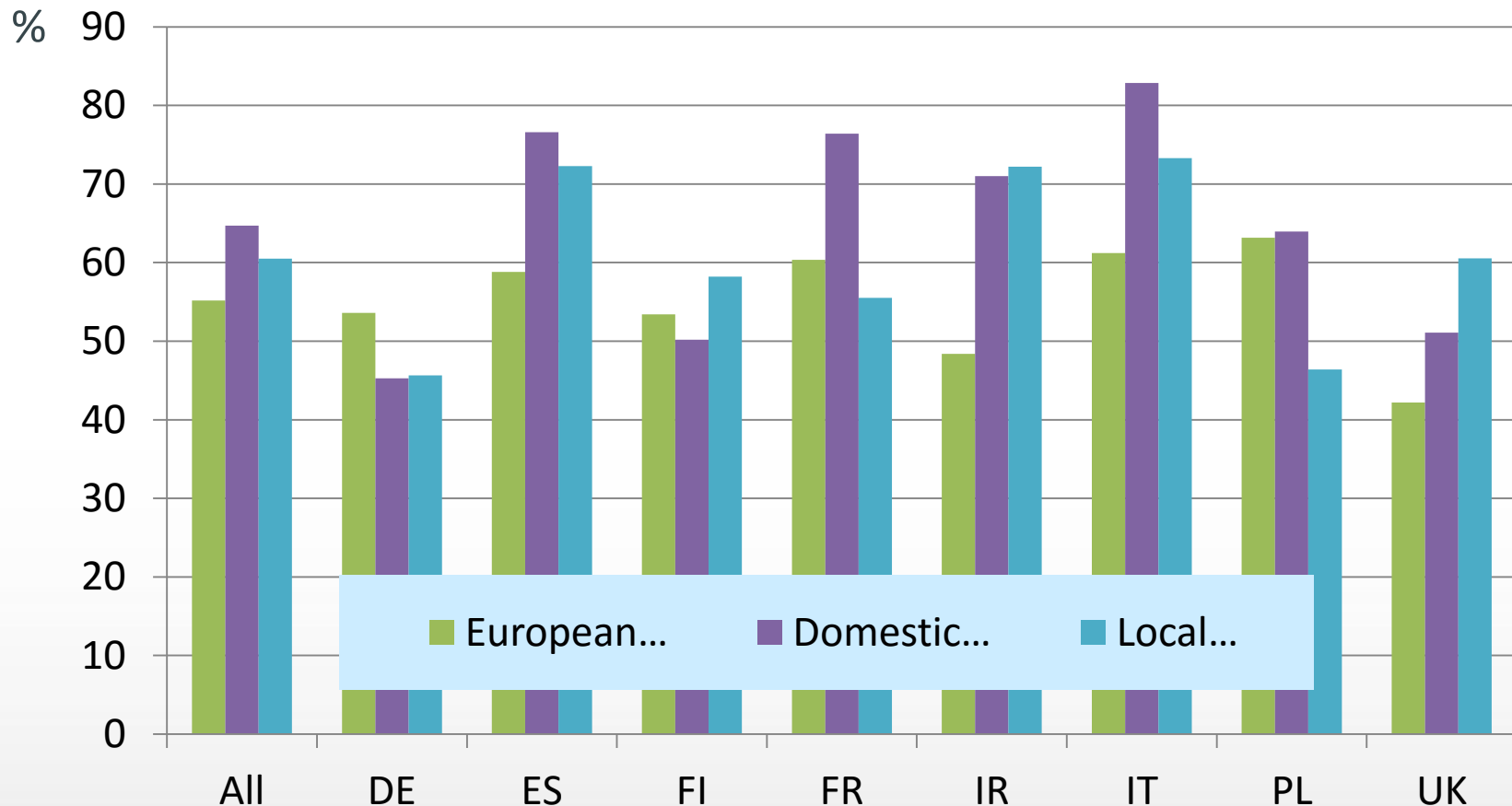


Aspects of sustainable aquaculture



Which are the three most decisive elements of sustainable fish farming from your point of view?

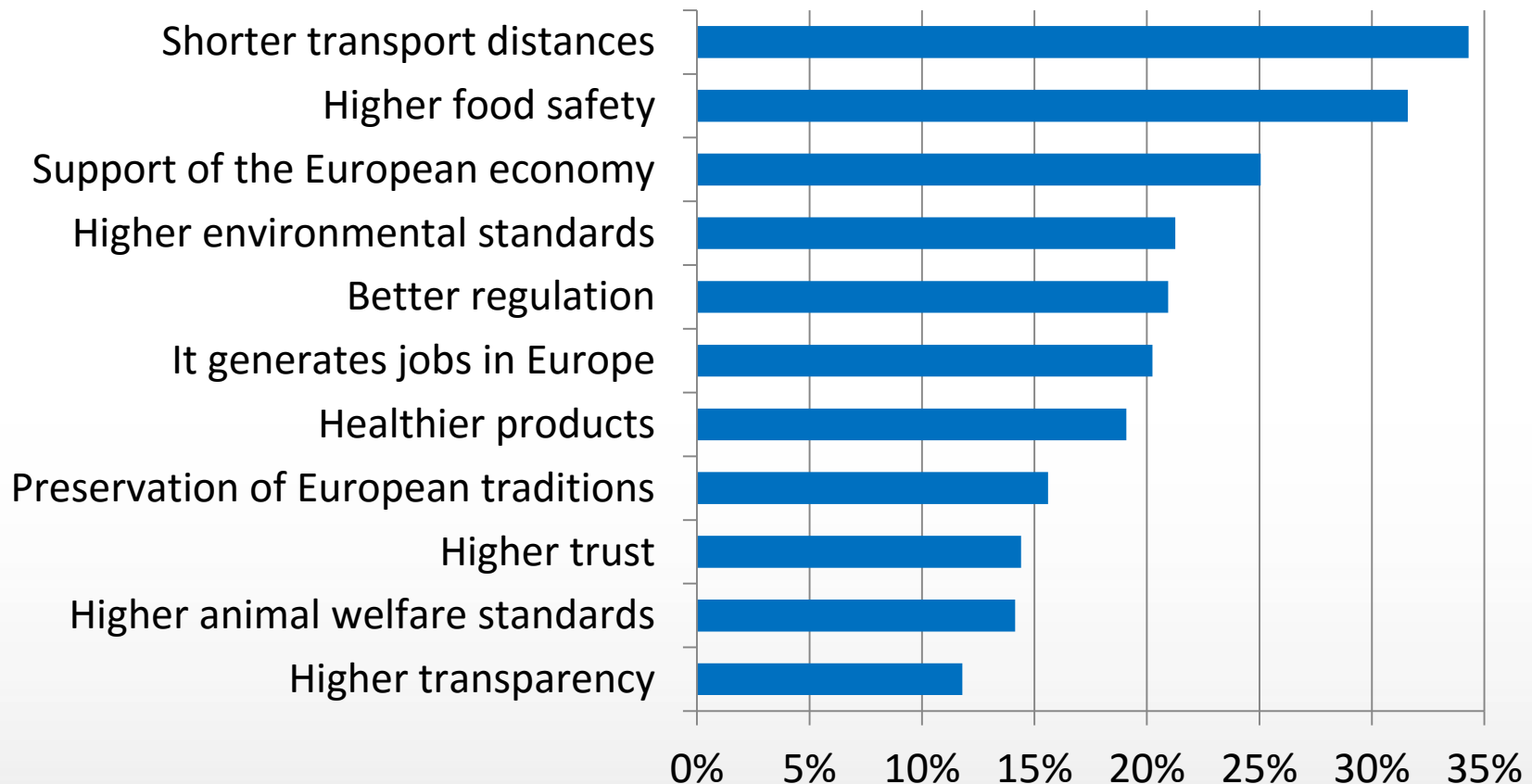
Consumers' preferences for origin of seafood (% of participants)



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



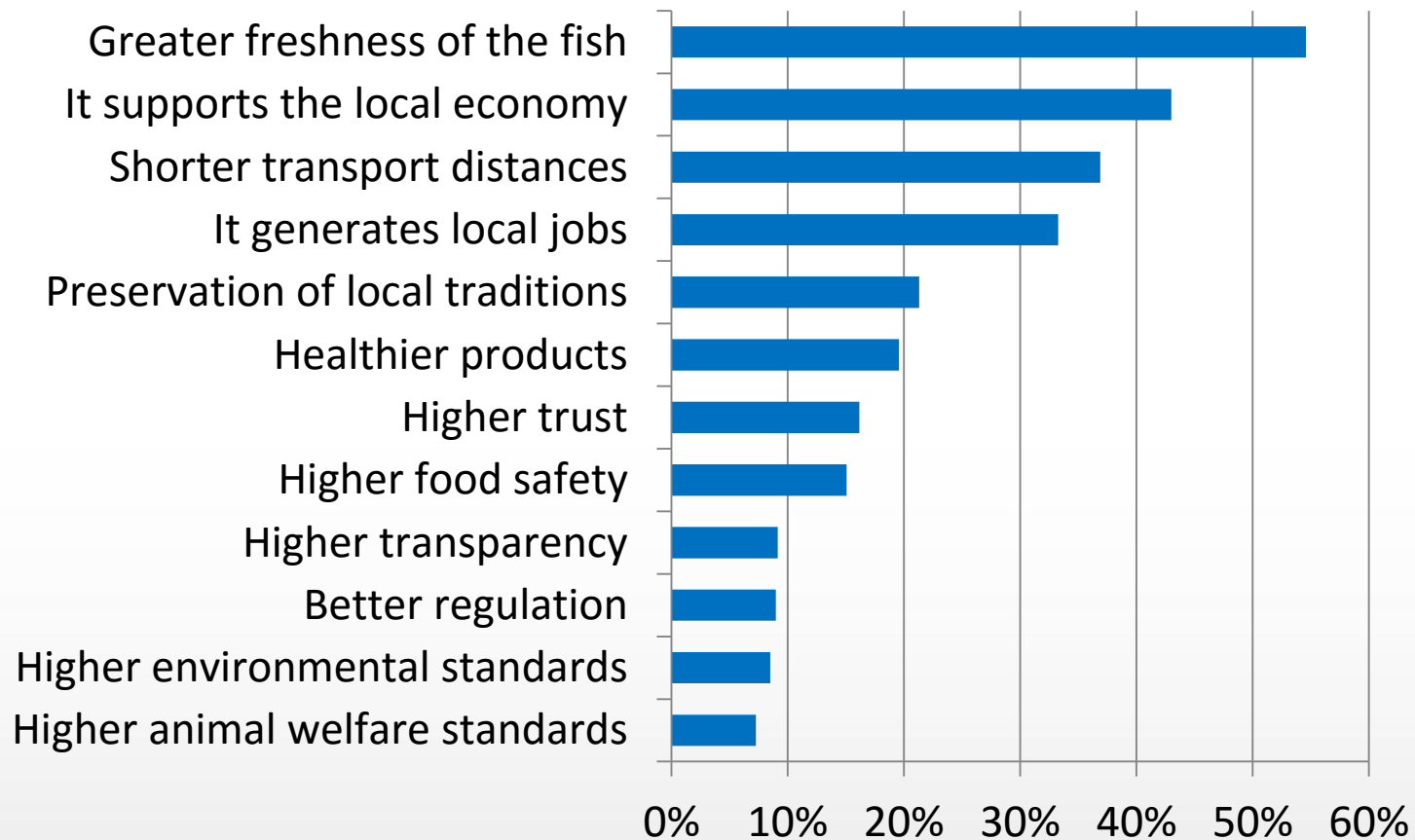
Reasons for preferring European fish



Why is European production important to you?



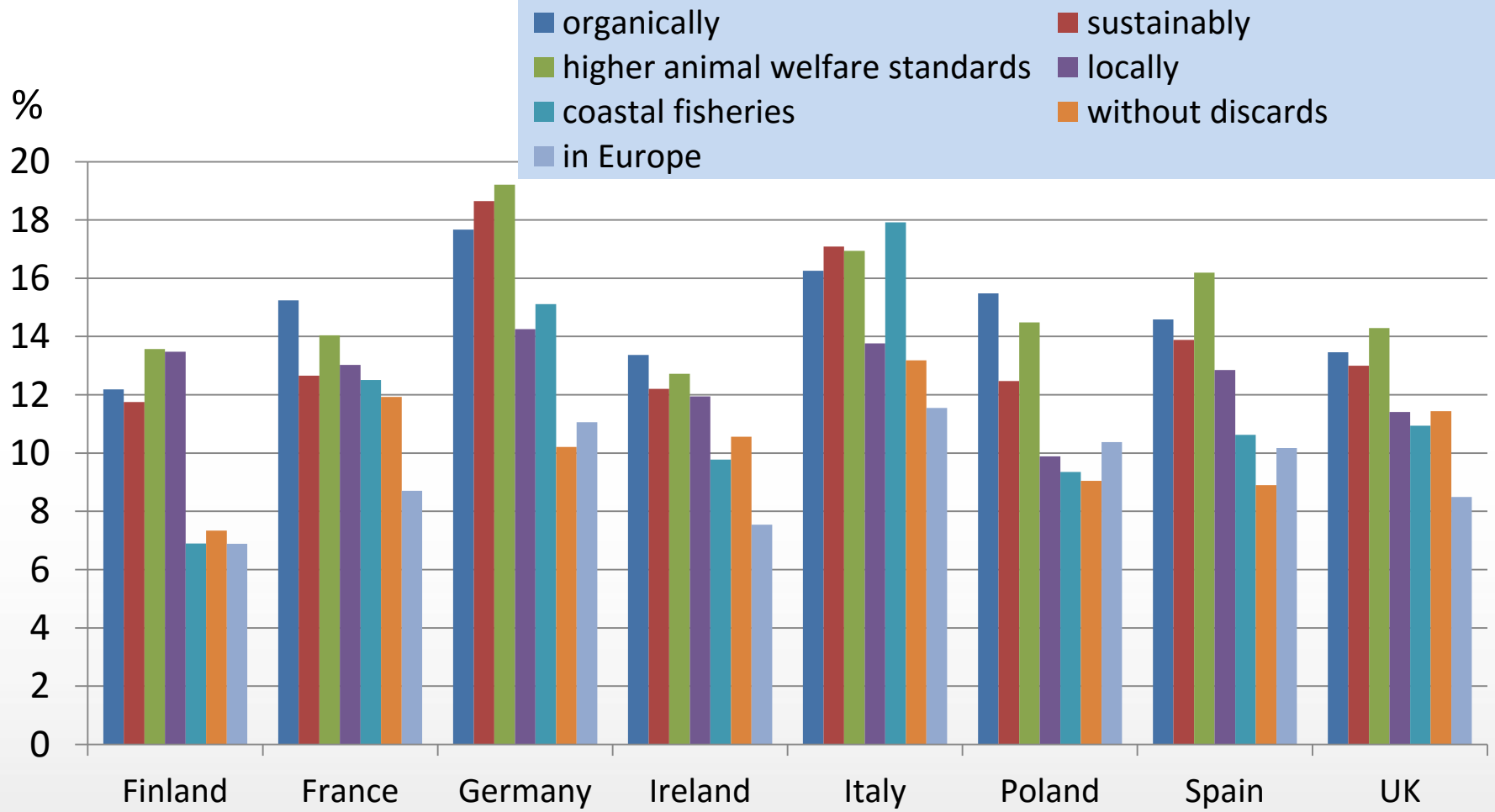
Reasons for preferring local fish



Why is local production important to you?



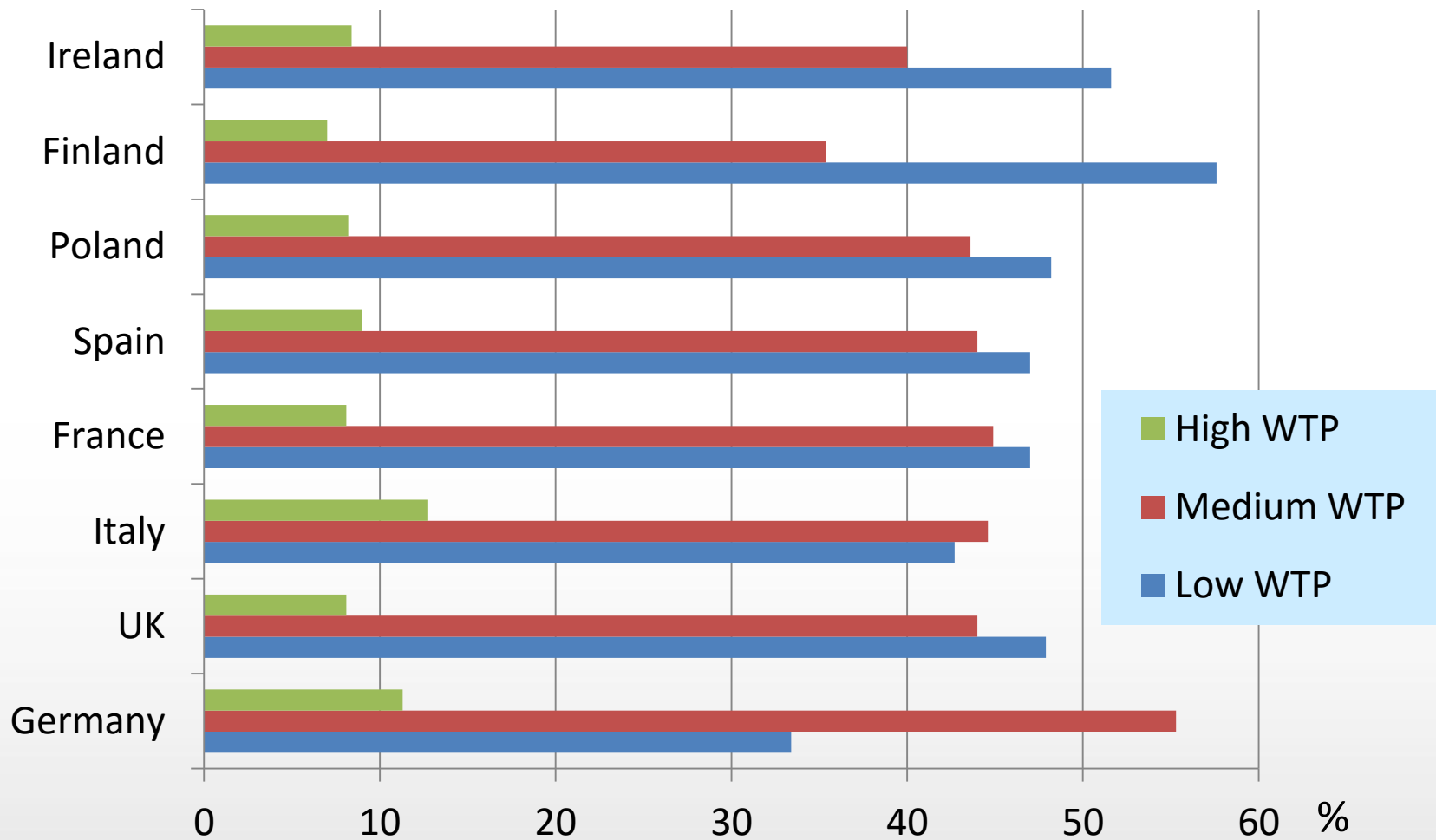
Additional WTP for ...



How much would you be willing to pay for a fish that is caught/ produced...



Consumer segments based on their Willingness to Pay





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!

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Fish consumption

Variable / Description	Country								
	All	DE	FI	FR	IT	PL	UK	ES	IR
Number of observations	4103	530	500	517	513	502	507	534	500
Occasional fish consumers	47	57	68	43	30	59	46	21	54
Less than once per month	9	8	13	9	4	10	10	4	14
Once per month	10	13	17	9	4	14	9	3	13
Two to three times per month	28	36	38	25	22	35	27	14	28
Regular fish consumers	53	43	32	57	70	41	67	79	46
About once per week	32	33	22	40	37	32	34	33	28
More than once per week	21	10	10	17	33	9	33	46	18