



EU Consumer habits regarding seafood

Bernhard Friess, Director





Bio-Garnelen

aus biologischer Aquakultur



roh & geschält



Serviervorschlag

225 g



European Commission

**ECO-RESPONSABLE
SUSTAINABLE**

Food 4 Good 

*Produits de la mer éco-responsables
Sustainable seafood.*

panure bio
organic breadcrumb



SAITHE FISH FINGERS
TRANCHES PANÉES **LIEU NOIR**
KOOLVIS VISSTICKS
SEELACHS FISCHSTÄBCHEN



Made in France
with **72%** of saithe fillets



Pêche durable • Duurzame visserij
Nachhaltig fischerei

8 x 50g

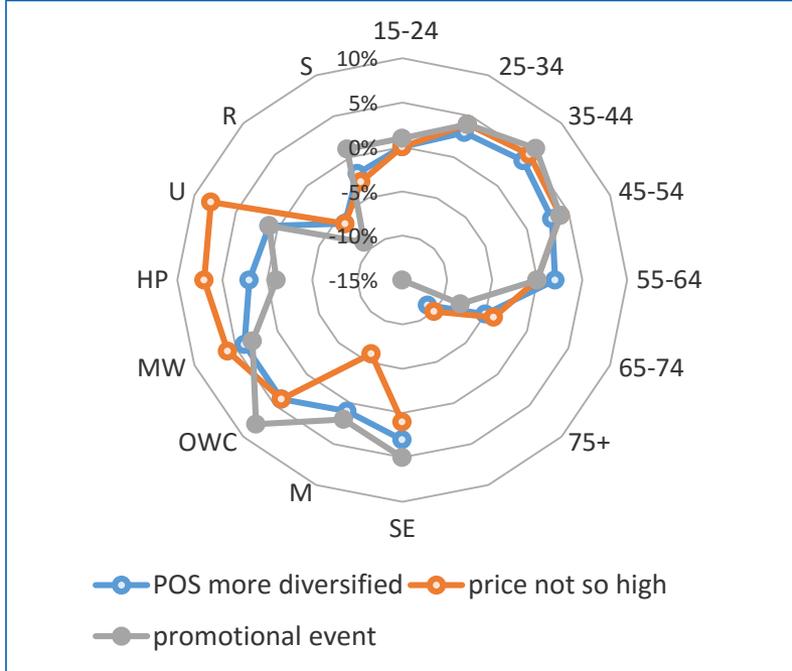
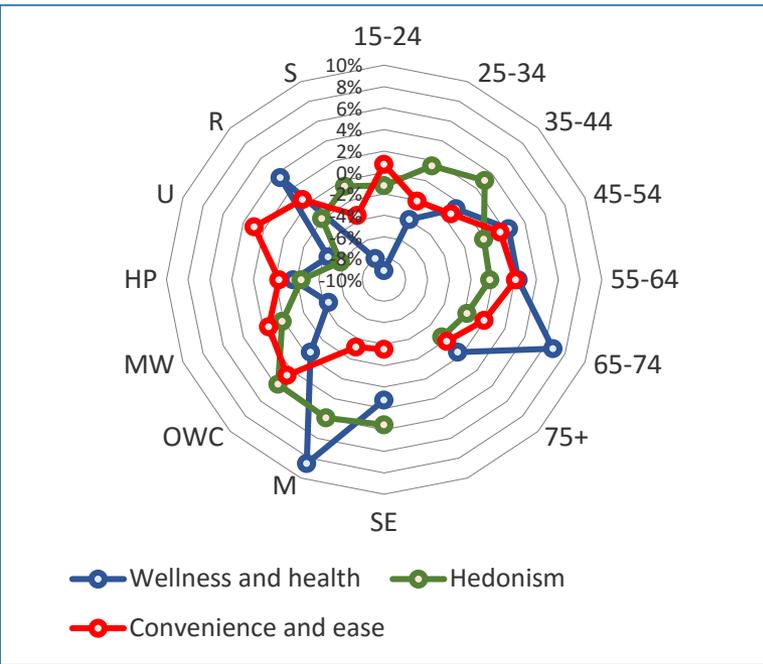
= NET WEIGHT / POIDS NET / NETTO GEWICHT : **400 g e**



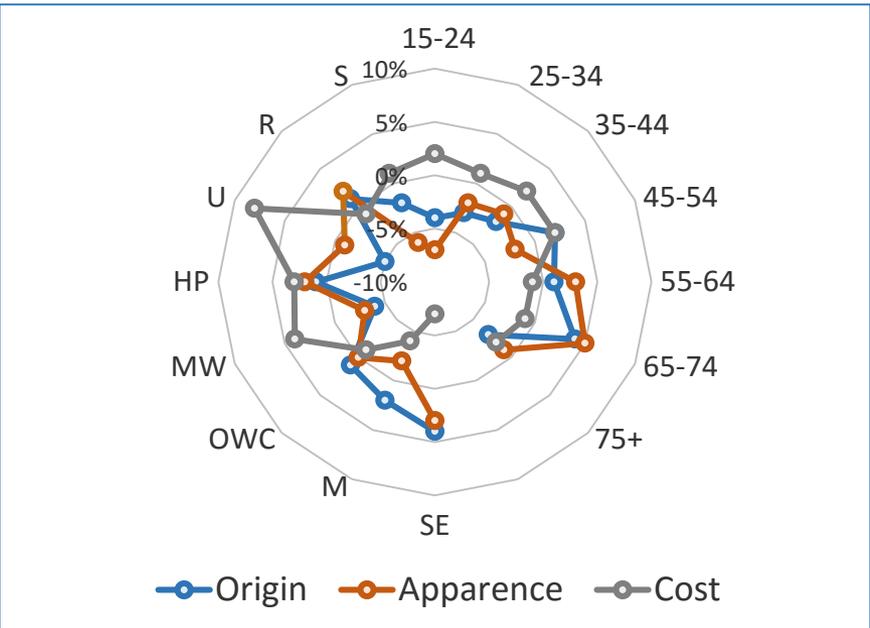
European
Commission

Personal factors for seafood consumption

External factors for seafood consumption



Drivers of purchases





**Thank you
for your
attention!**

**Bernhard Friess, Director for Maritime Policy
and Blue Economy, European Commission**

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EU consumer habits regarding fishery and aquaculture products

METHODOLOGY

- *Survey conducted face-to-face at respondents' home*
- *Fieldwork: June 4th to 13th 2016*
- *Population: Population 15+*
- *Coverage: 28 EU Member States*
- *Number of interviews: 27,818*

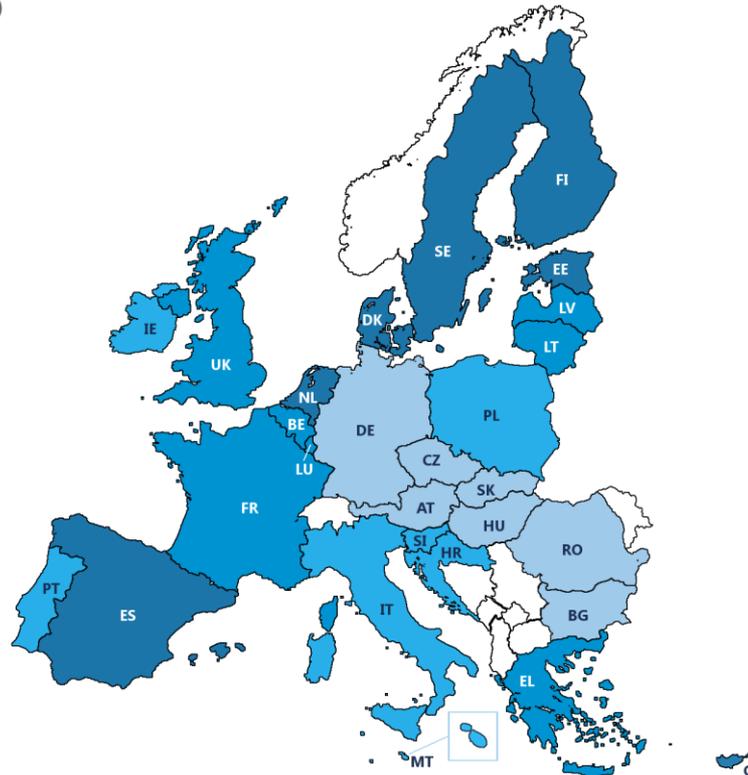
Respondents in land-locked countries are less likely to eat FAPs at least once a month than those in countries with coastlines

ES		93
SE		92
EE		87
DK		87
FI		85
CY		83
NL		82
FR		81
LT		80
UK		79
EL		78
BE		78
LU		78
LV		77
PT		74
EU28		74
MT		74
IE		71
PL		71
SI		69
HR		68
IT		68
DE		67
RO		64
BG		62
AT		57
CZ		56
SK		52
HU		26

QC1T How frequently do you...
(% - EAT FISHERY OR AQUACULTURE PRODUCTS AT LEAST ONCE A MONTH)

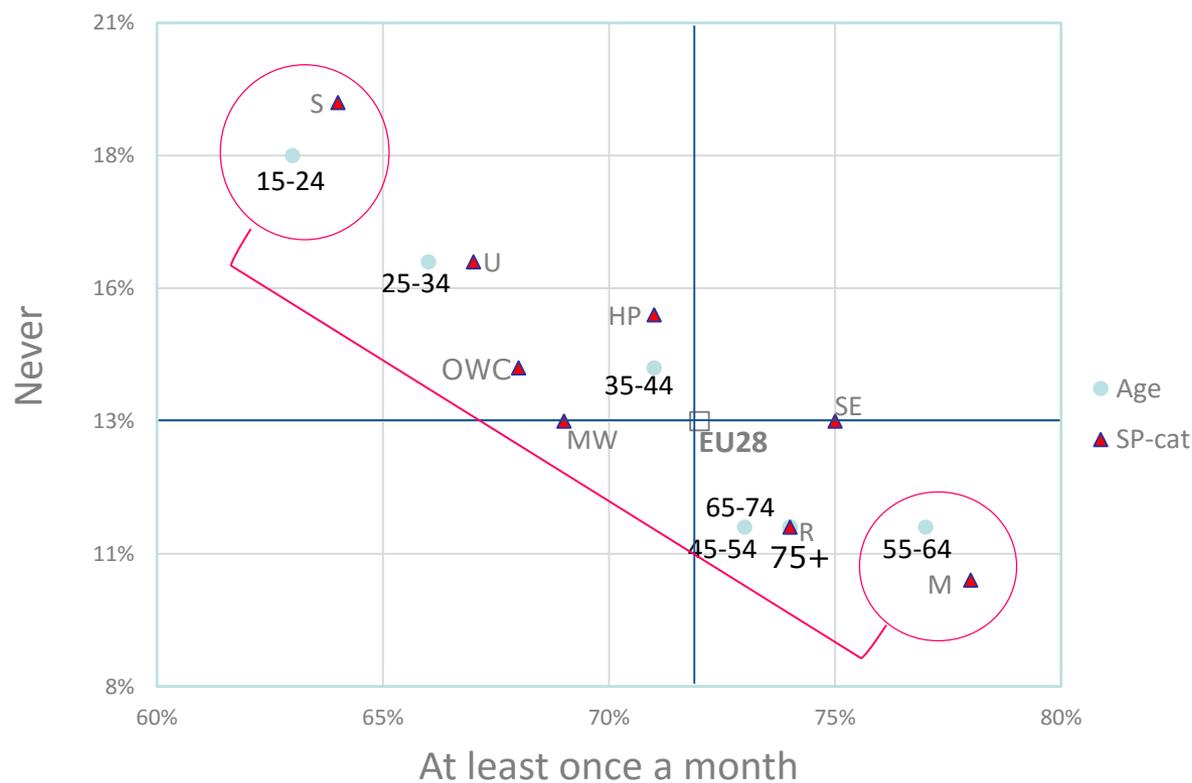
Map Legend

	82 - 100
	77 - 81
	68 - 76
	0 - 67



Base: all respondents
(n=27.818)

Consumption is the lowest among young people and students

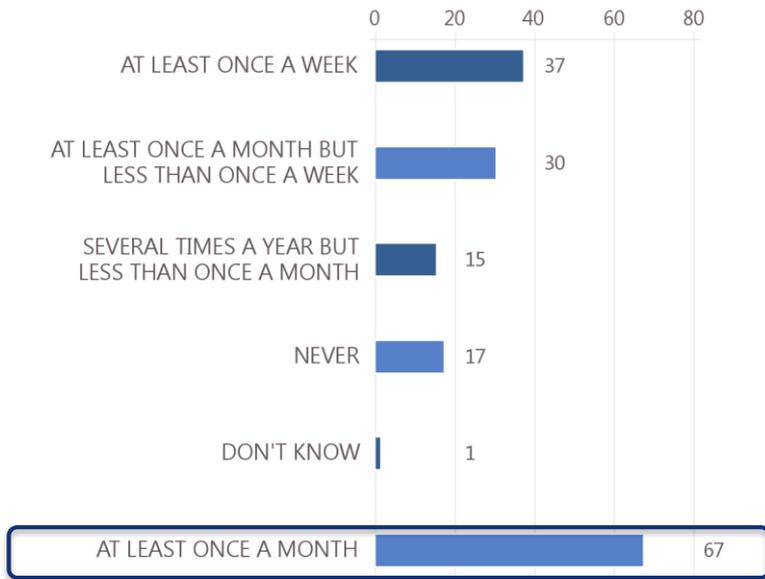


Socio-professional category

- SE = Self-employed
- M = Manager
- OWC = Other white collar
- MW = Manual worker
- HP = House person
- U = Unemployed
- R = Retired
- S = Student

FAP purchase

QC1.3 How frequently do you...
Buy fishery or aquaculture products (% - EU)

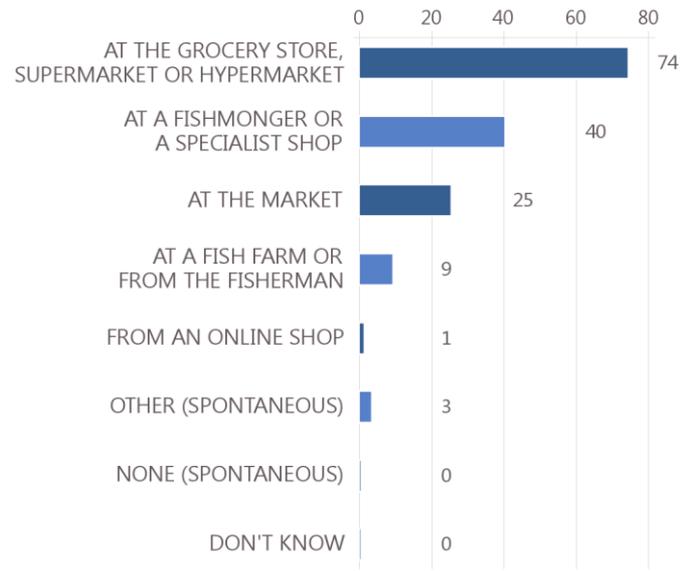


Base: all respondents
 (n=27.818)

	At least once a week	At least once a month but less than once a week
EU28	37	30
Socio-professional category		
Self-employed	40	31
Managers	45	30
Other white collars	33	33
Manual workers	34	31
House persons	38	33
Unemployed	33	29
Retired	43	28
Students	22	27
	56	32
	3	18

Where do people buy? Mostly at supermarkets (74%)

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



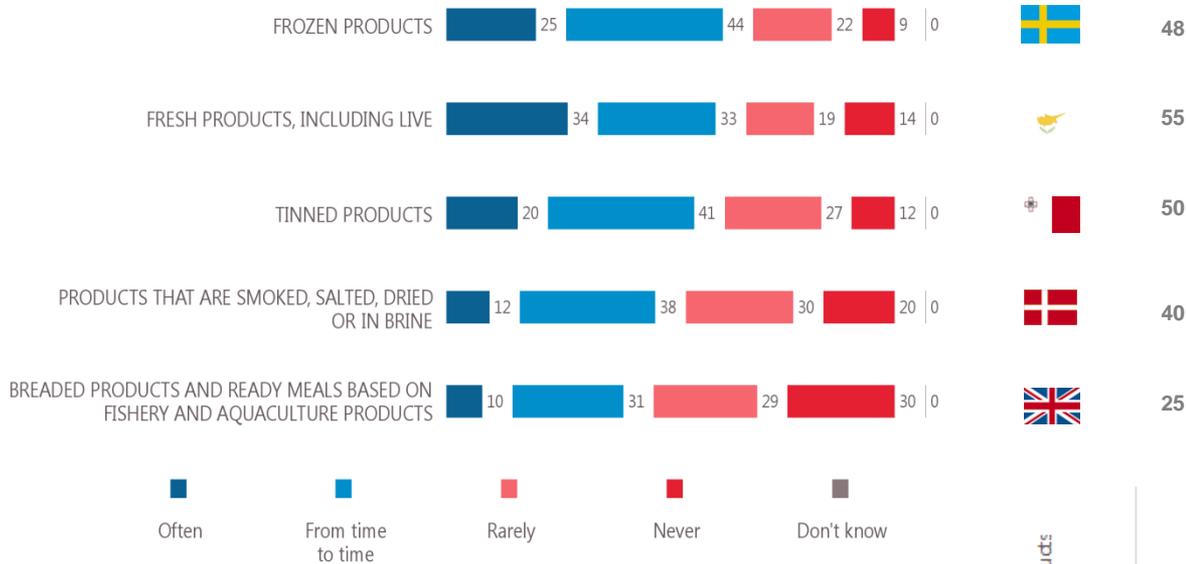
Base: respondents who buy fishery or aquaculture products (N=22,759)

	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

What do people mostly buy

Trend: fresh and convenience / ready-to-eat products

QC4a How frequently would you say you buy each of the following types of fishery and aquaculture products? (% - EU)



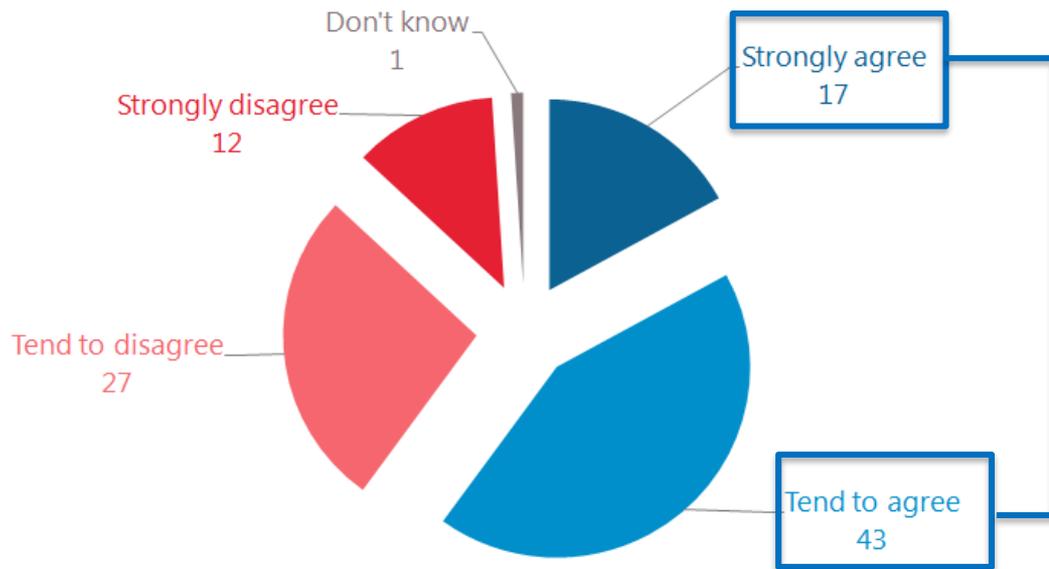
Base: respondents who buy fishery or aquaculture products (N=22,759)

	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
EU 28	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

A large majority of EU consumers agree they like to try new products and species (60%)

QC16.1 Do you agree or disagree with the following statements regarding fishery and aquaculture products?

You like to try new products and species (% - EU)



60%
agree at EU level

68%
aged 25-39

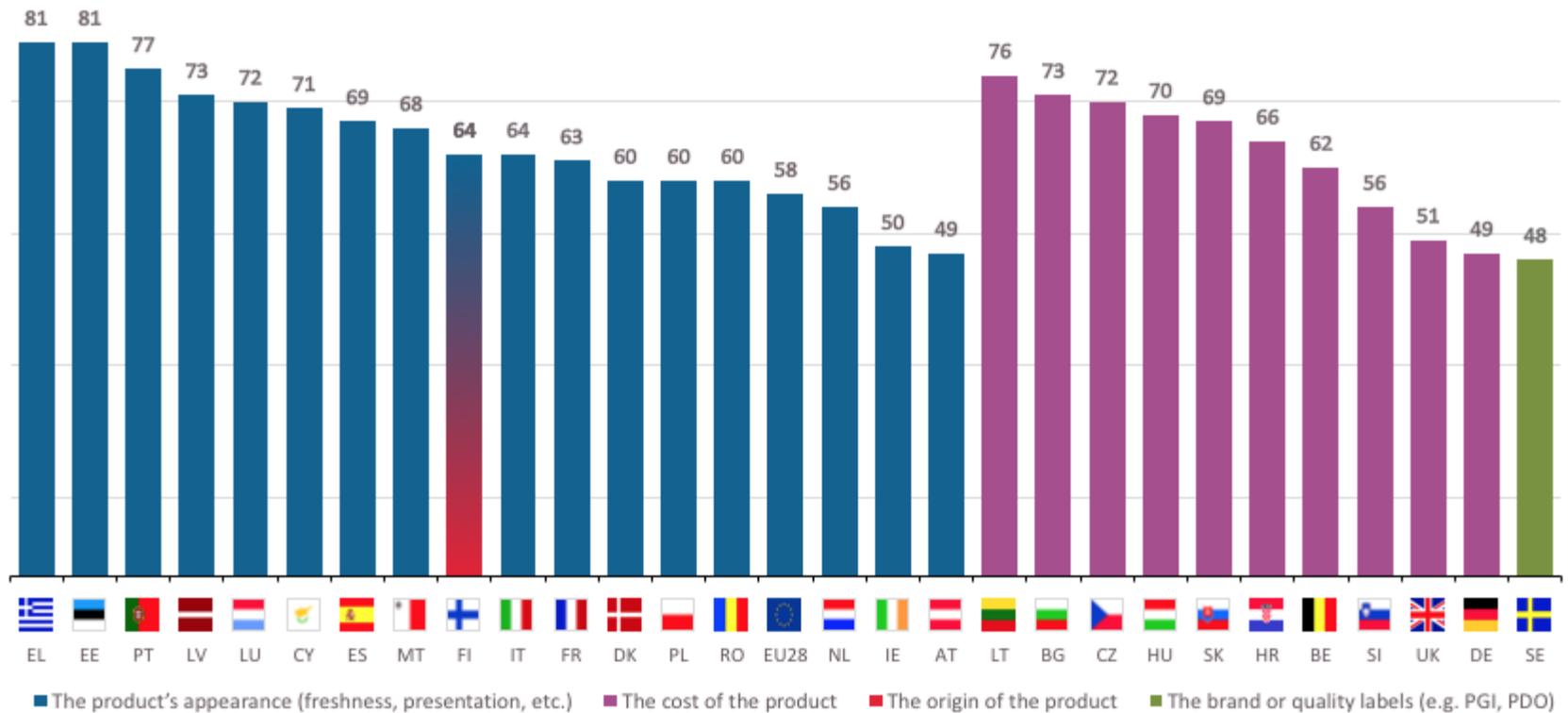
66%
finished education
aged 20+

68-69%
managers and
self-employed

Base: respondents who buy and/or eat fishery or aquaculture products
(N=24,452)

What are the main purchasing factors?

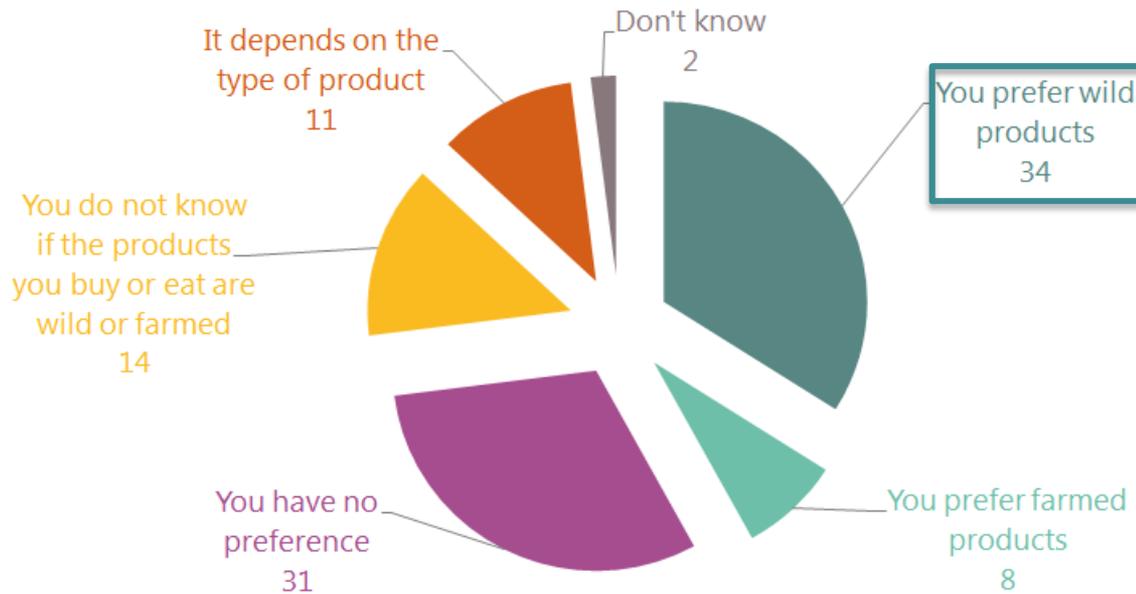
QC9 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)



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

A relative majority of consumers prefer wild products (34%) to farmed products (8%), while 31% have no preference

QC5 Fishery and aquaculture products can be wild or farmed. Would you say that... (% - EU)



39%
aged 55+

56%
prefer sea products

49%
prefer products
from own region

Lead answer in **16**
countries

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

QC7

Do you have any preference in terms of product origin? (MULTIPLE ANSWERS POSSIBLE)
(%)

		Products from your region	Products from your country	Products from the EU	Products from outside the EU
EU28		29	37	14	3
BE		23	31	29	6
BG		25	28	10	1
CZ		19	25	9	2
DK		26	43	18	3
DE		30	30	23	5
EE		27	38	13	2
IE		36	46	14	3
EL		53	76	12	1
ES		33	45	6	1
FR		41	46	14	2
HR		37	57	7	2
IT		35	43	12	3
CY		25	61	14	1
LV		29	35	10	2
LT		14	23	10	2
LU		20	26	42	4
HU		16	26	9	4
MT		27	57	26	1
NL		14	20	15	2
AT		24	31	17	4
PL		18	31	11	5
PT		19	53	10	2
RO		21	47	17	8
SI		43	50	24	1
SK		14	20	14	6
FI		40	63	11	5
SE		42	47	15	3
UK		19	23	7	1

Highest percentage per country

Highest percentage per item

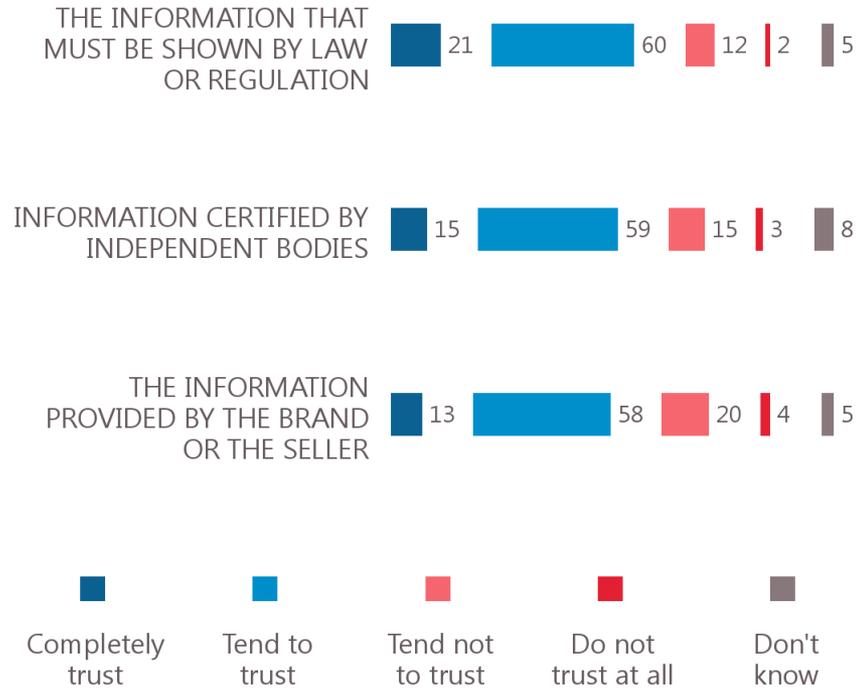
Local and EU is largely preferred

→ Quality schemes largely used by retailers (PDO, PGI, Label Rouge, local supply chains or traceability)

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

Trust in information

QC10 To what extent do you trust or not the following information accompanying fish or aquaculture products?
(% - EU)



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

Interest in voluntary information

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

	Date of catch or production	Environmental information	Ethical information
EU28	76	39	23
Age			
15-24	71	44	27
25-39	77	43	24
40-54	78	42	26
55 +	76	33	19
Education (End of)			
15-	73	29	16
16-19	77	36	21
20+	79	47	29
Still studying	71	48	28

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

Eco-labels: large development over the last decade but no price premium

Consumer matrix

Parameters	Age or socio-demographic group vs EU average		
	Young people/ students	Elderly/ retired people	High socio- professional classes
Consumption frequency	Low	High	High
Wild or farmed	Farmed	Wild	Wild
Preferred products	Processed products	Fresh products	Fresh products
Preferred presentation	Pre-packed	Loose	Both
Openness to experimenting	High	Low	High
Personal purchase factors	None	Wellness, health	Hedonism
Product purchase factor	Cost	Appearance, origin	Origin
Source of information	Internet, friends and family	Store employee, television	Internet

**Thank you for your
attention!**

<http://europa.eu/!mv96WH>