Consumers’ perception of aquaculture products

OECD

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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

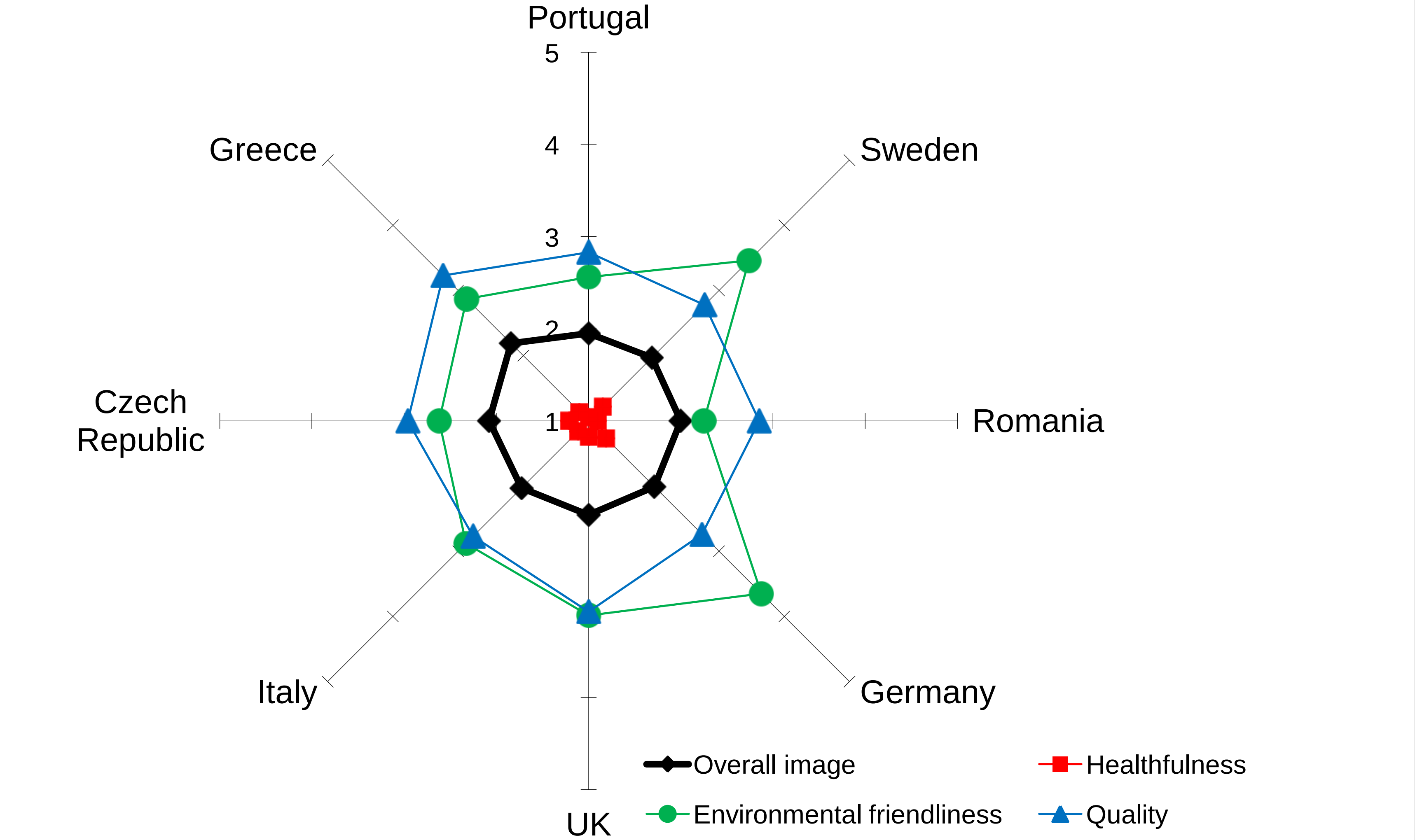
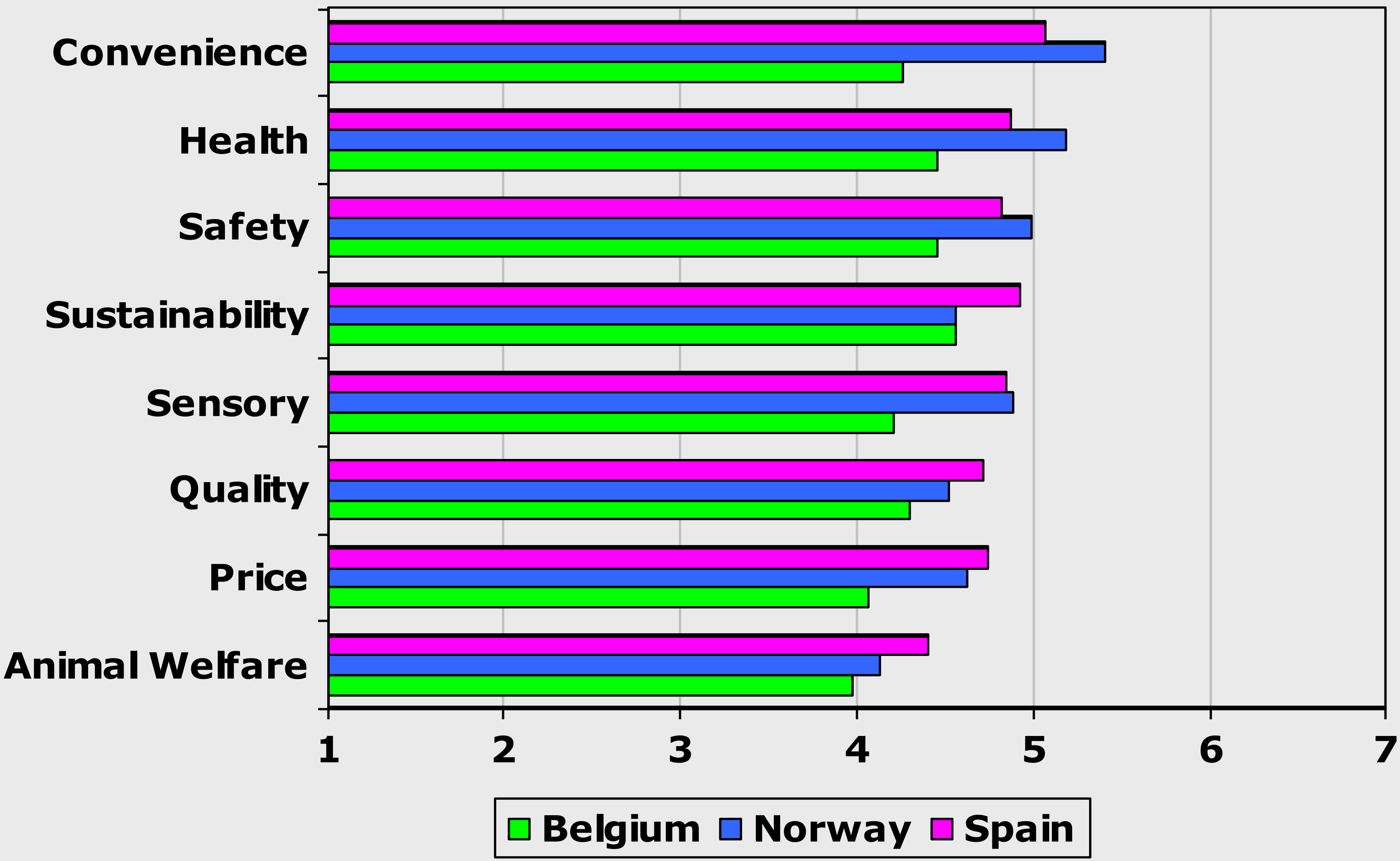
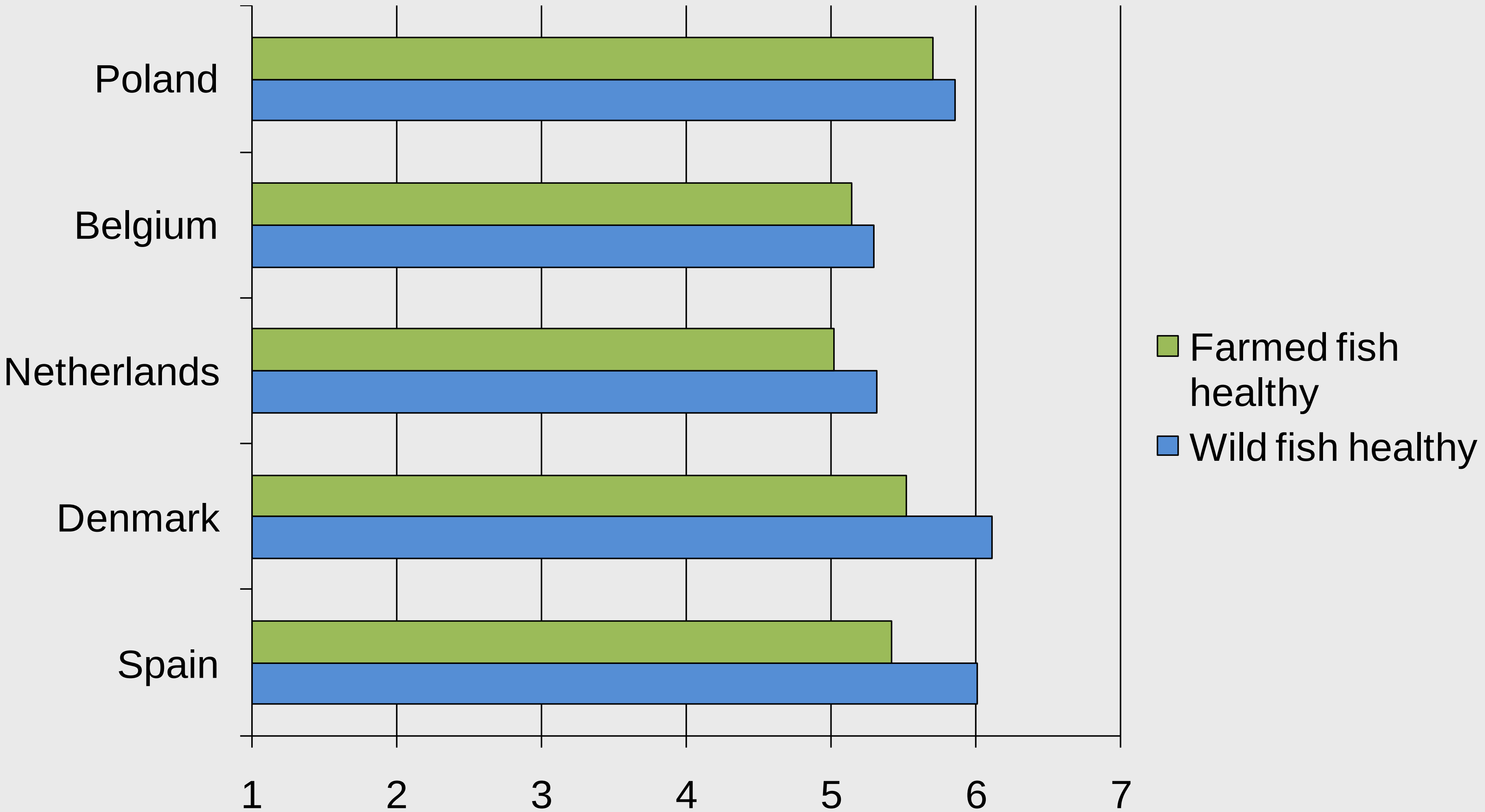


Image of farmed fish

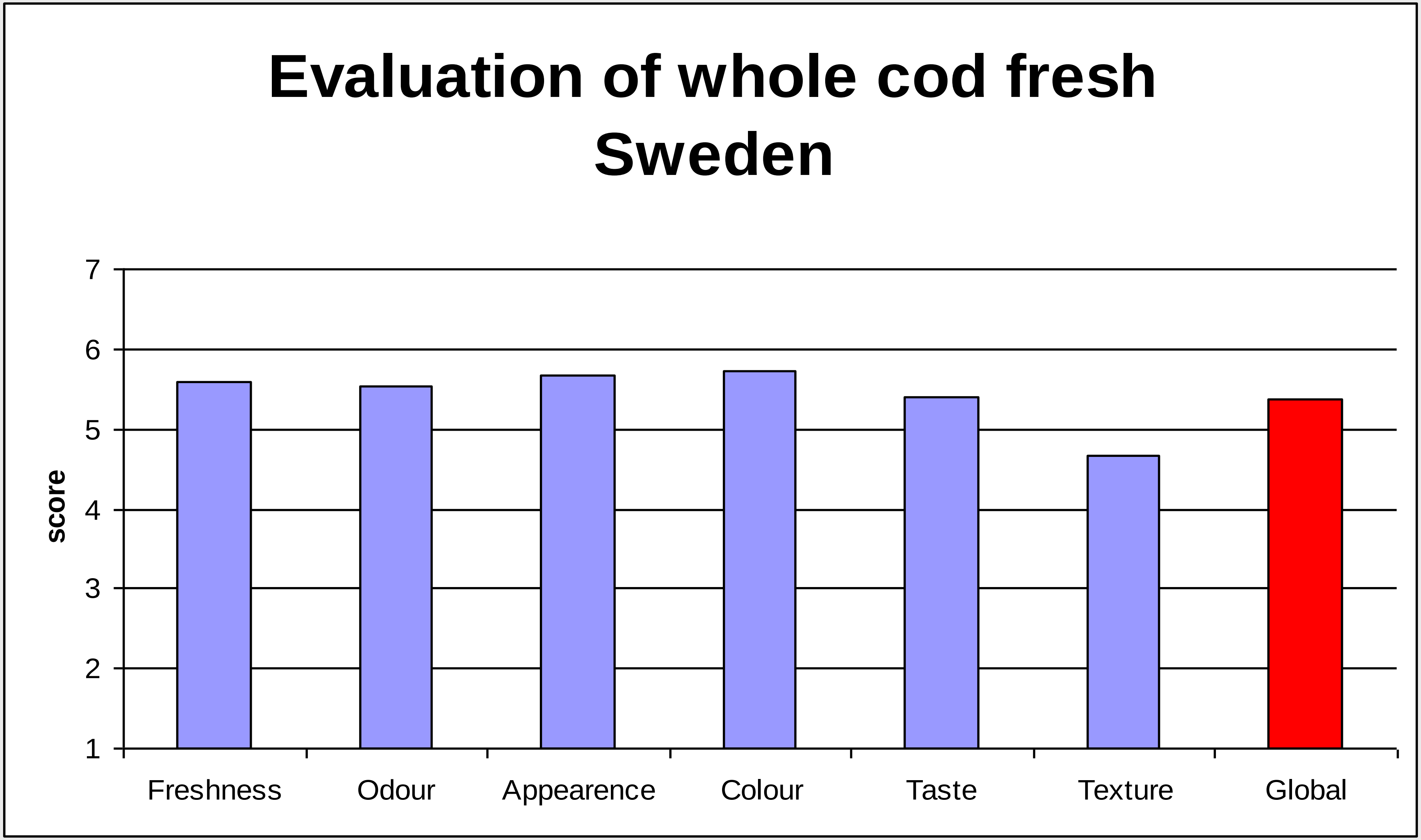


Perception of wild and farmed fish: HEALTH

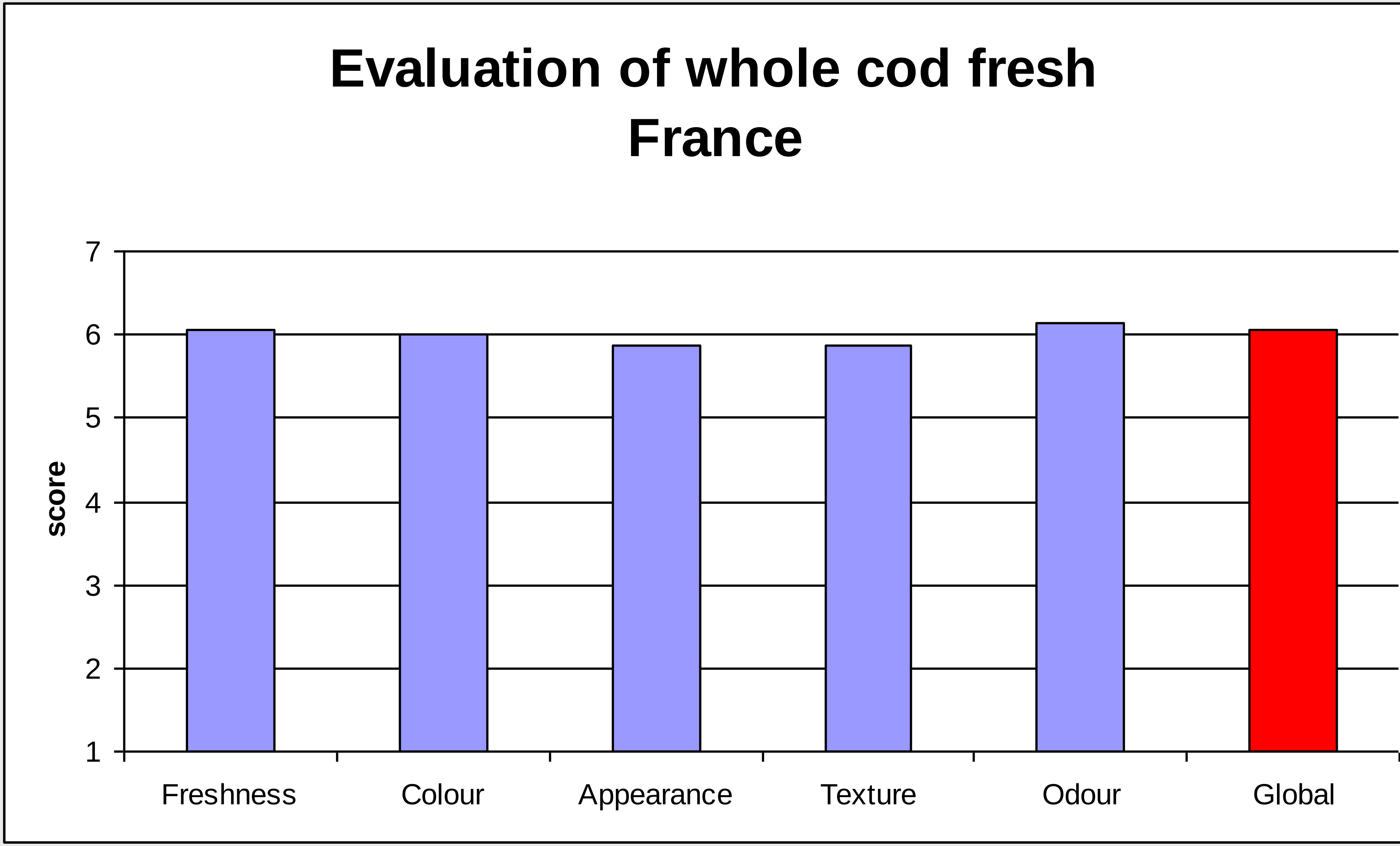


Lack of knowledge

- 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)



Source Nofima (2010)

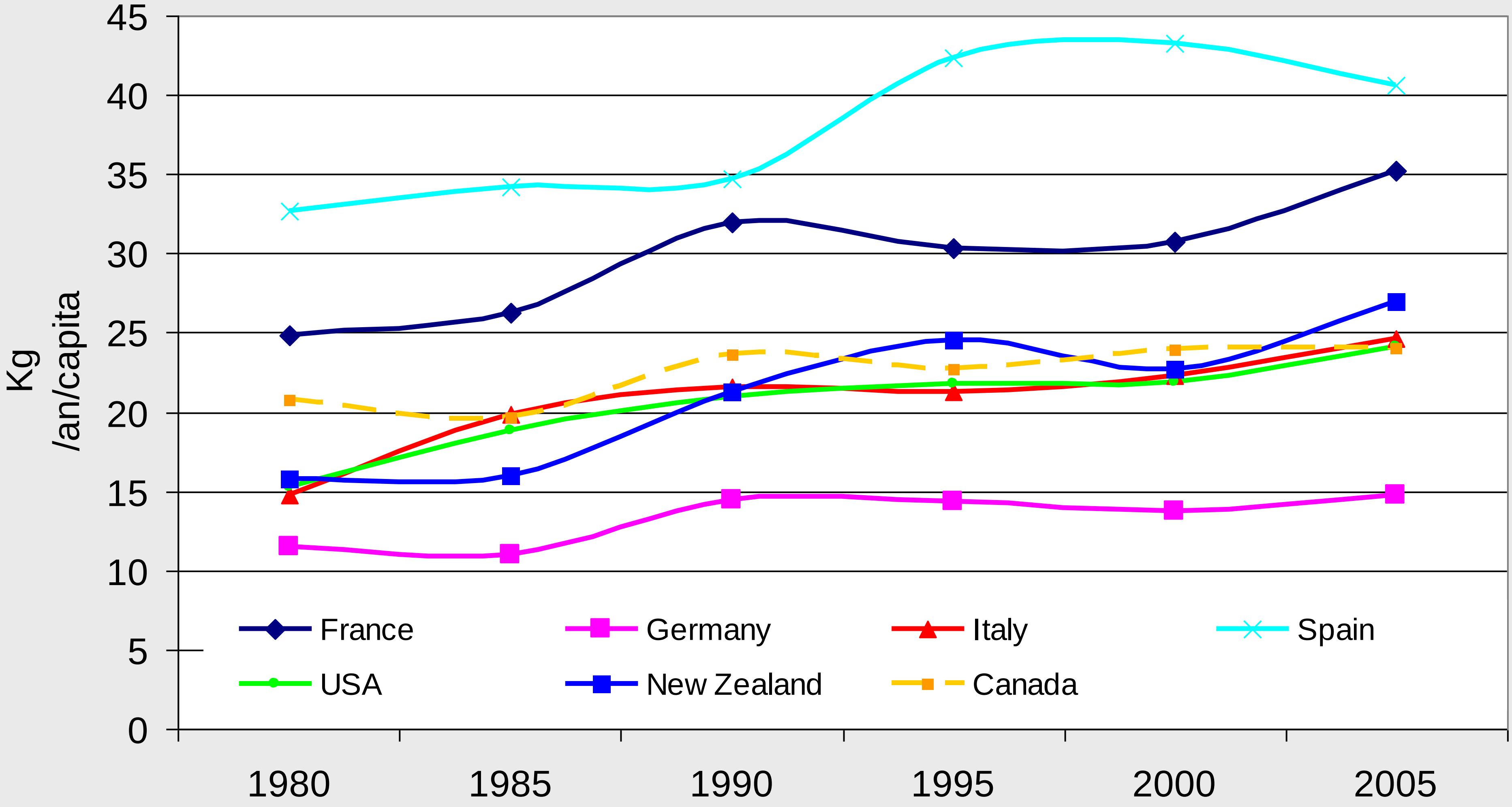


Source Nofima (2010)

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

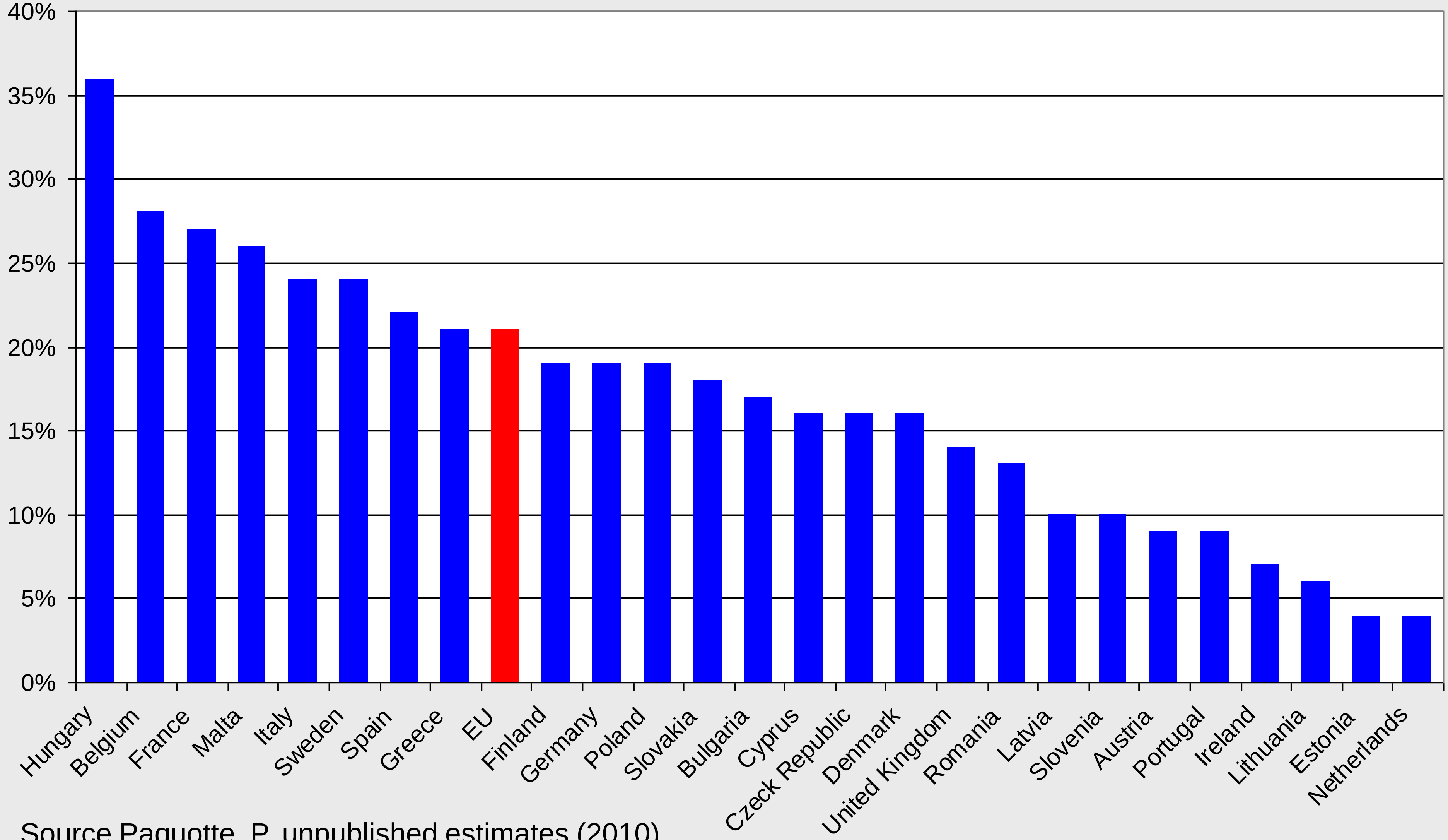
Seafood consumption, kg/y/capit



Source FAO Food Supply (2005)

Aquaculture: market share

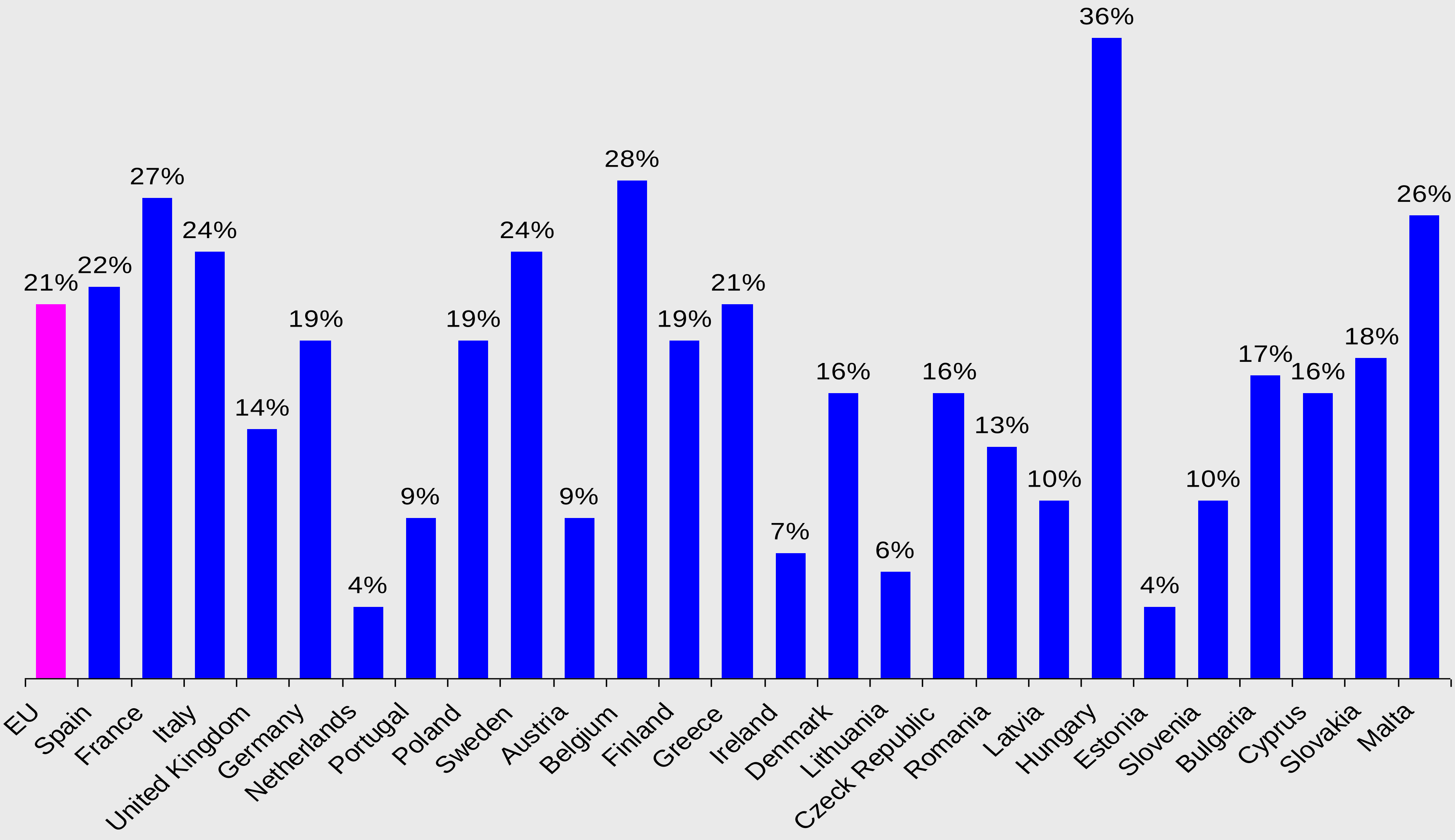
(volume, 2007)



Source Paquotte, P. unpublished estimates (2010)

Aquaculture: market share

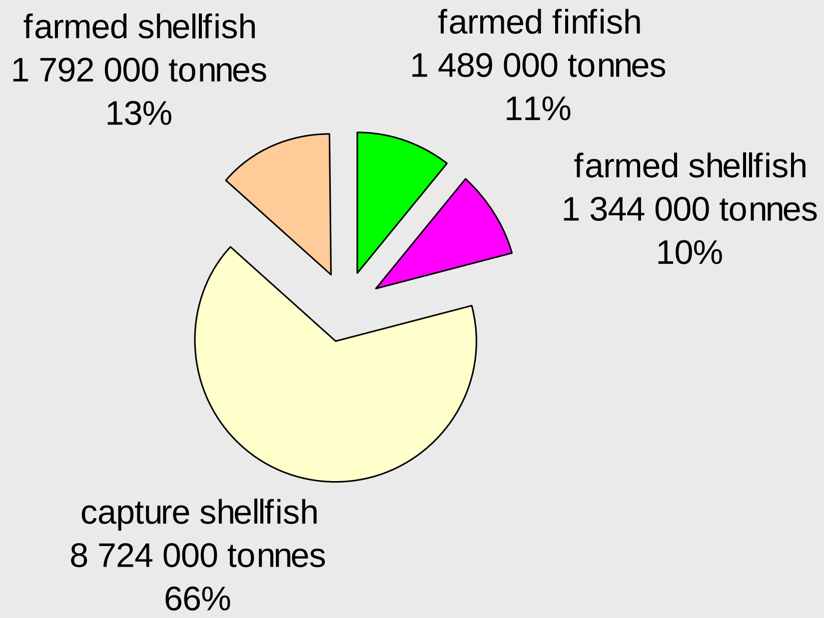
(volume, 2007)



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

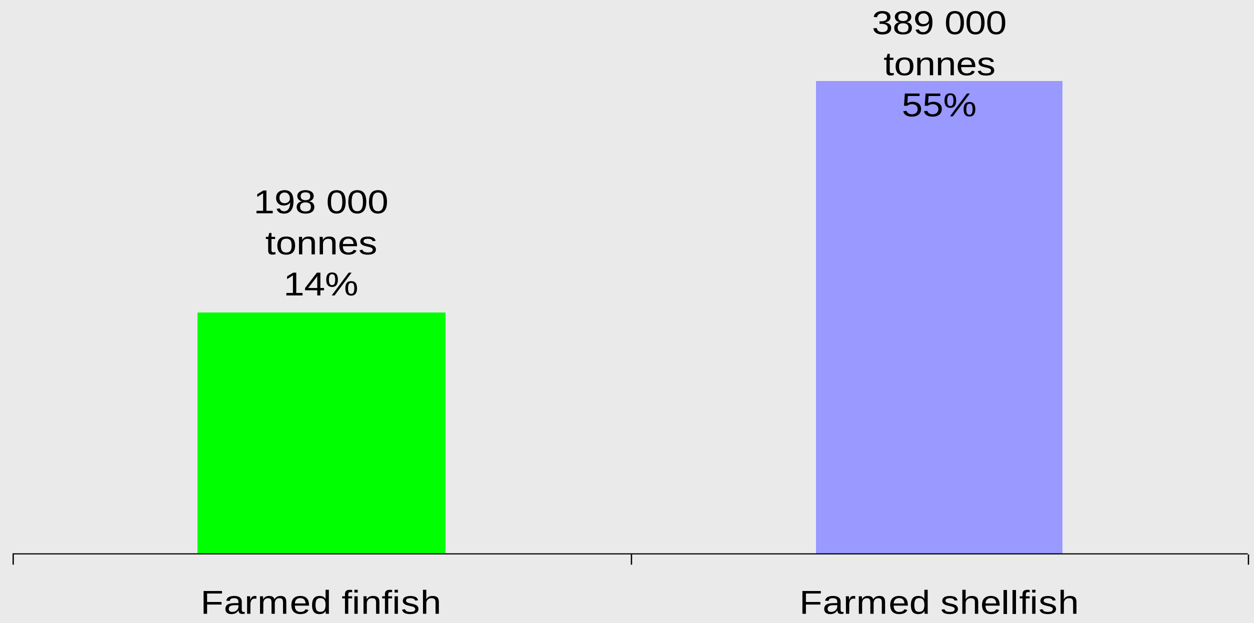
EU 27 Seafood market (2007)



Source Paquotte, P. unpublished estimates (2010)

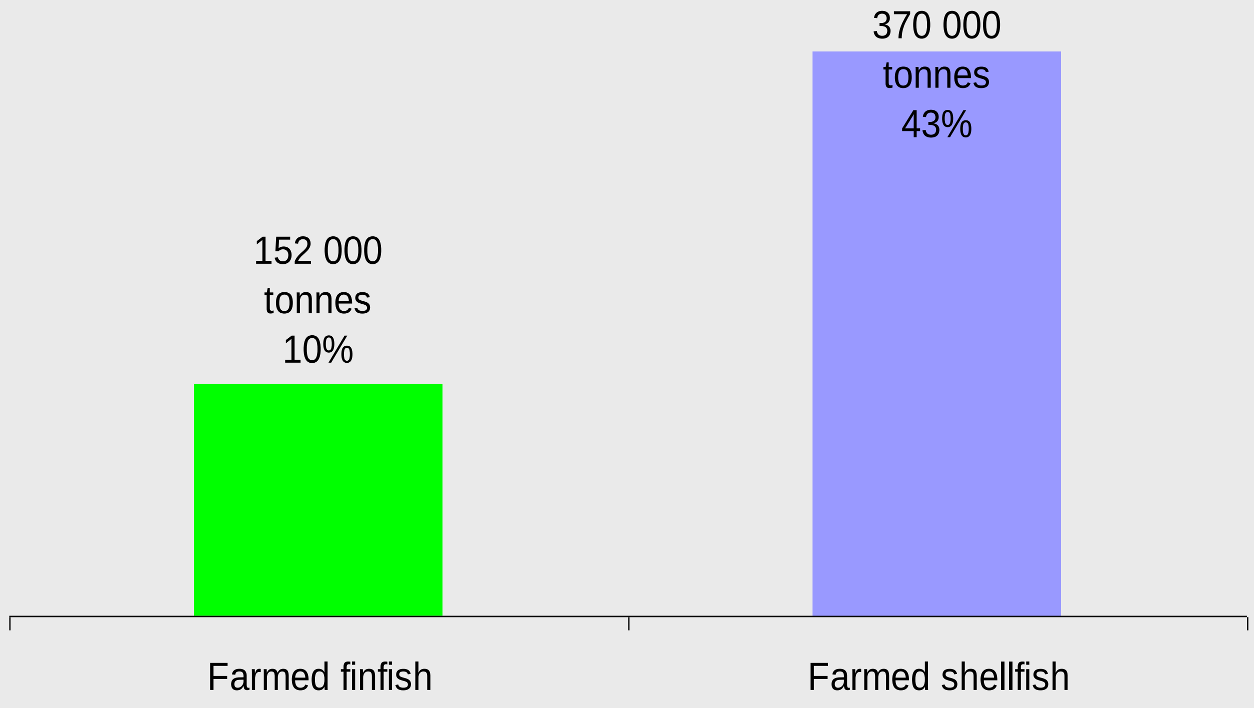
The reality of consumption: France

- In France, the image is inferior to the one of wild fish
- Main species: salmon, shrimps, mussels, oysters, scallops, pangasius, seabass, seabream



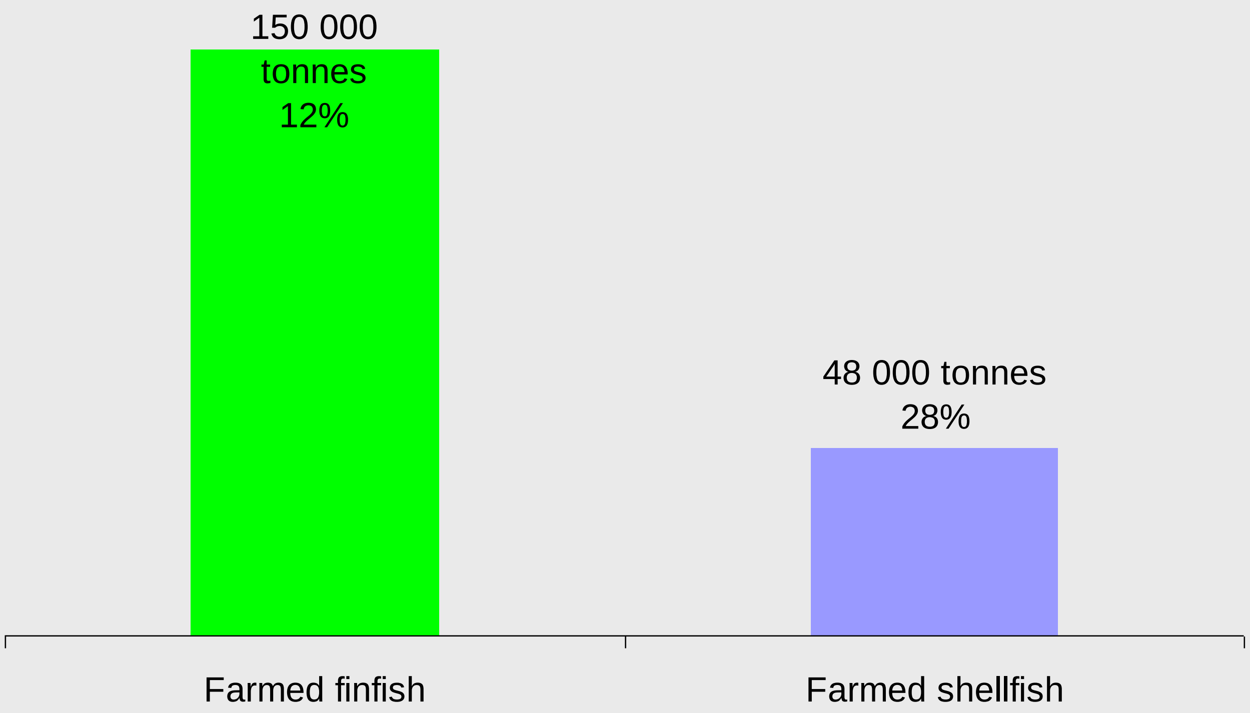
The reality of consumption: in Spain

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



The reality of consumption: The UK

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

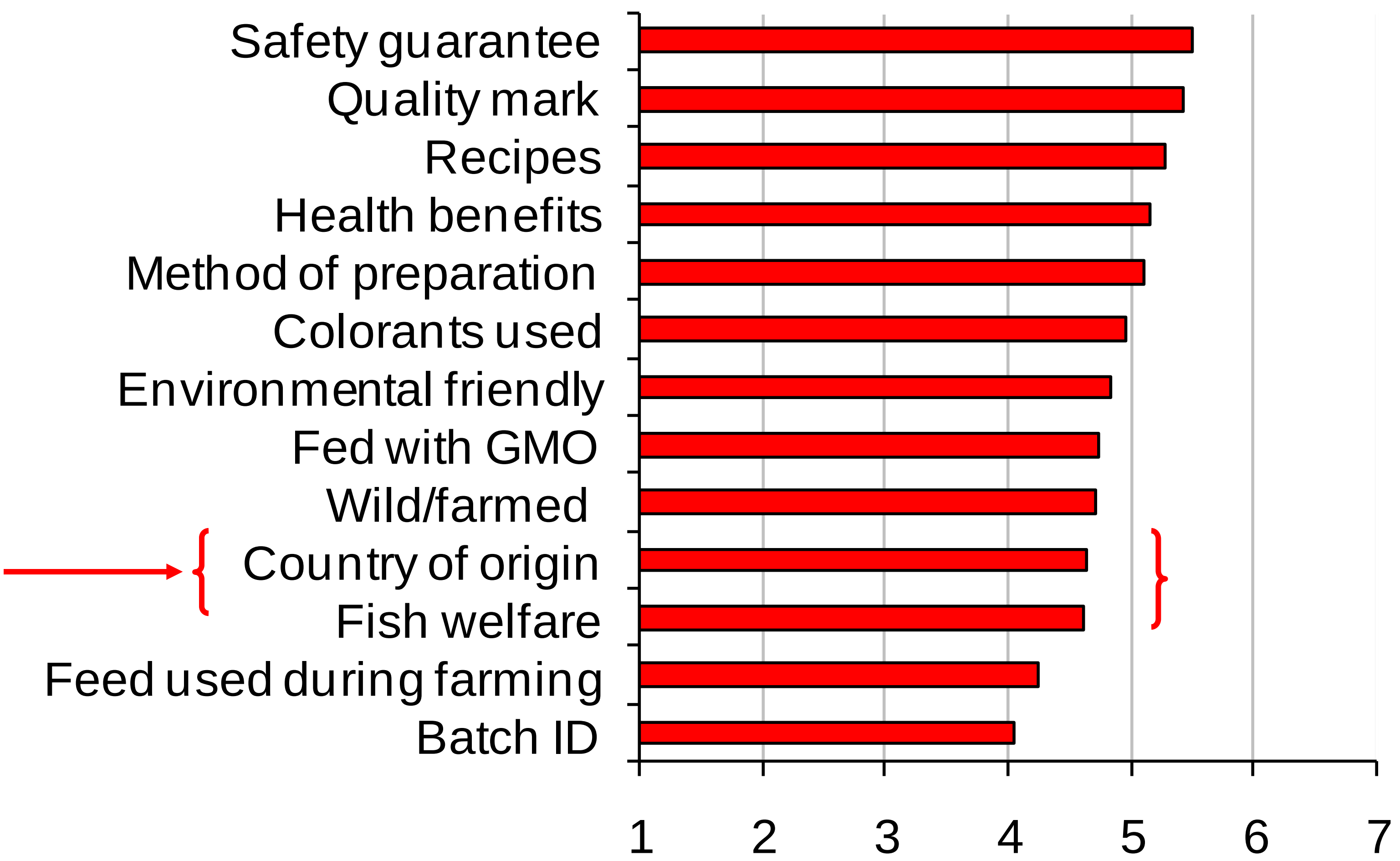


The less processed, the more protected…

- 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



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 uncomplete (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.