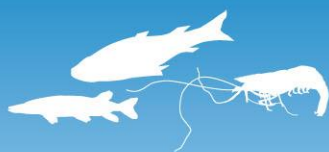


# Findings from a recent study on perception of aquaculture products in France

16 April 2010

OECD



## Supply balance in France (2008)

1000 tonnes (live weight)	Landings	Aquaculture	TOTAL	Aqua. rate
Production	463	244	707	35 %
Imports	1 525	430	1 955	22 %
Exports	419	73	492	15 %
<b>Consumption</b>	<b>1 568</b>	<b>602</b>	<b>2 170</b>	<b>28 %</b>
self-sufficiency	30 %	41 %	<b>33 %</b>	

Source : FranceAgriMer

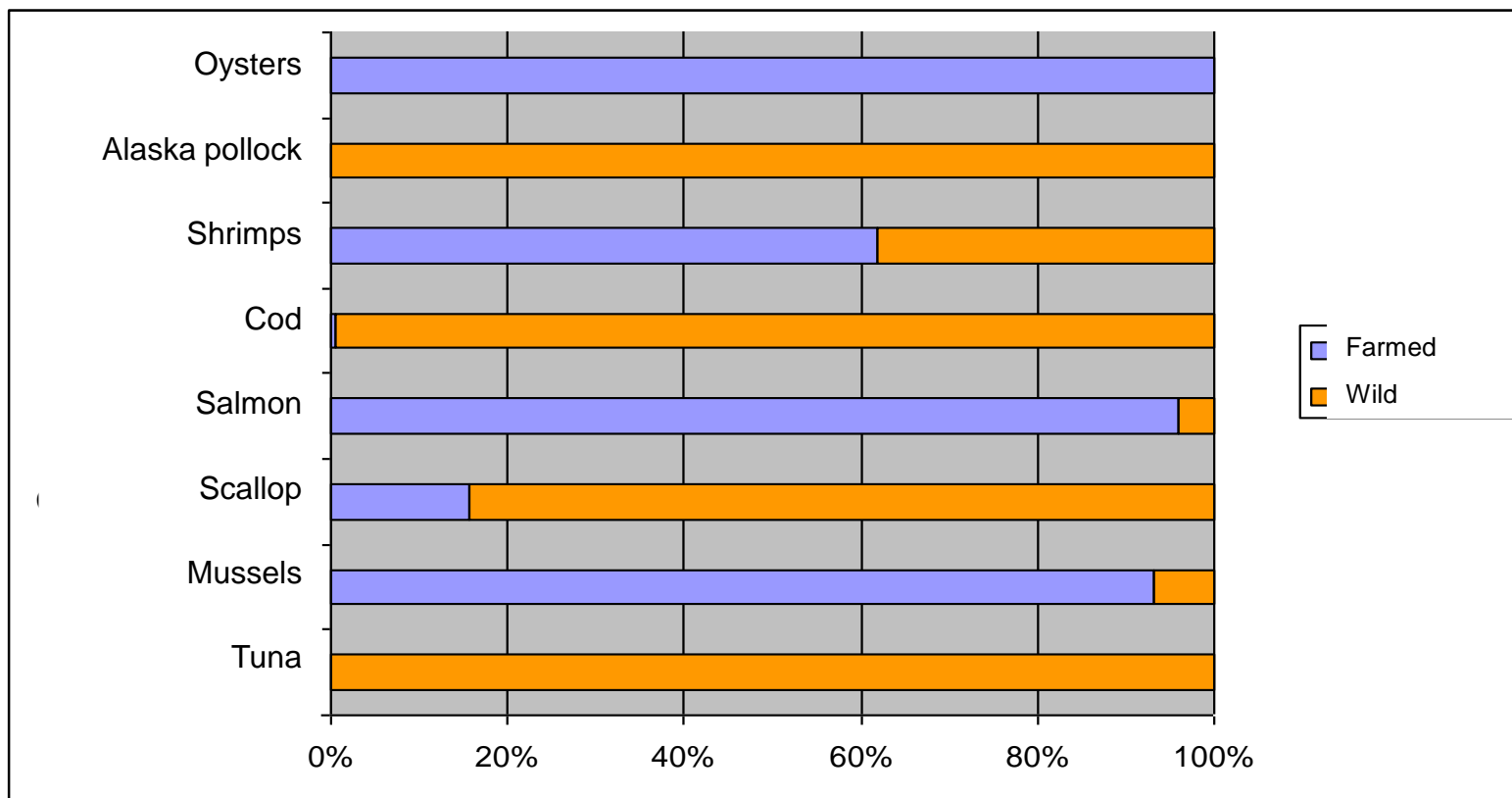
## Consumption in France (2008)

1000 tonnes (live weight)	Landings	Aquaculture	TOTAL	Aqua. rate
Fish	1 228	206	1 434	14 %
Molluscs	227	315	542	58 %
Crustaceans	89	81	169	48 %
Cephalopods	24	0	24	0 %
<b>TOTAL</b>	<b>1 568</b>	<b>602</b>	<b>2 170</b>	<b>28 %</b>

Source : FranceAgriMer

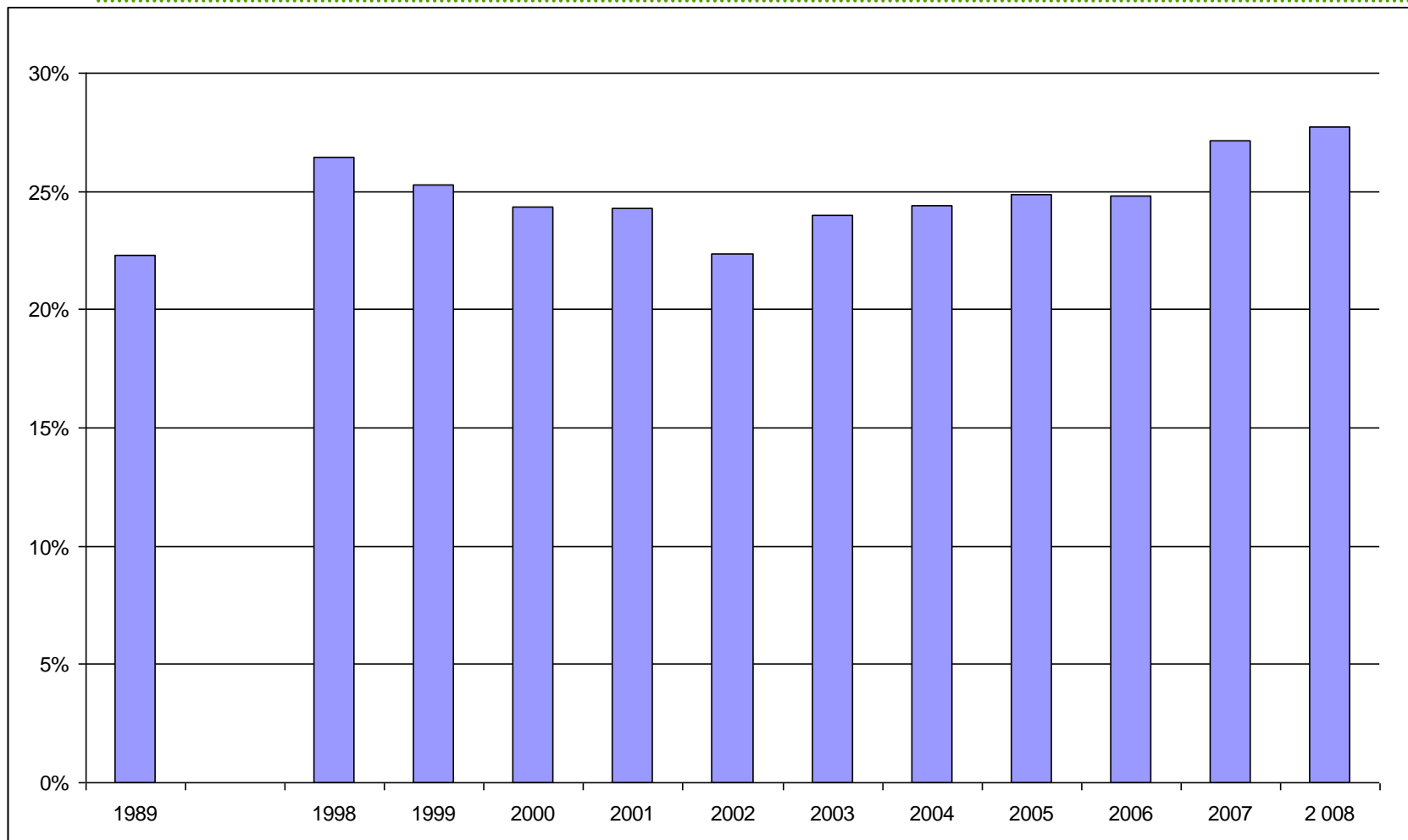
# Main species

Species with consumption (live weight) > 100 000 tonnes

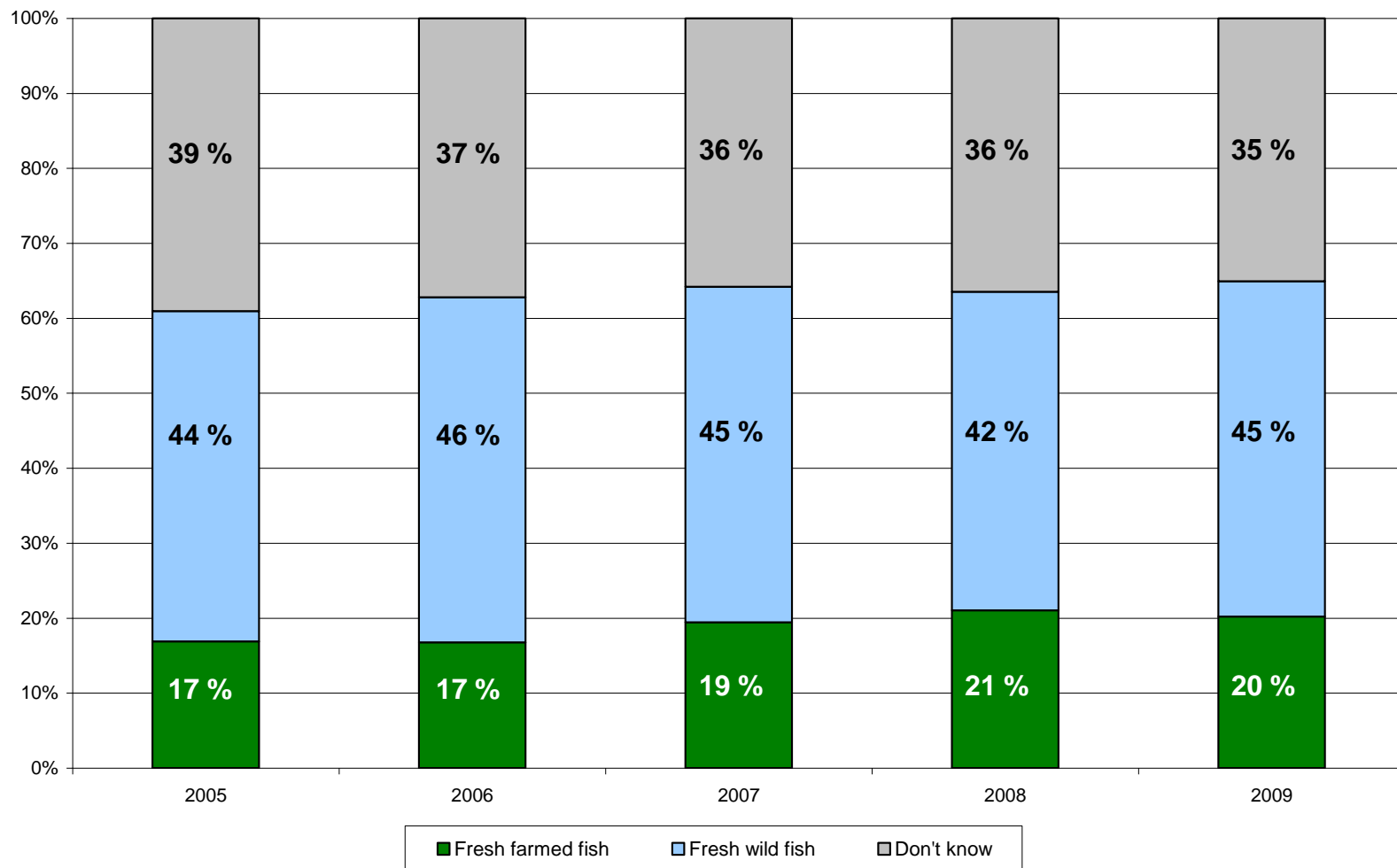


Source : FranceAgriMer

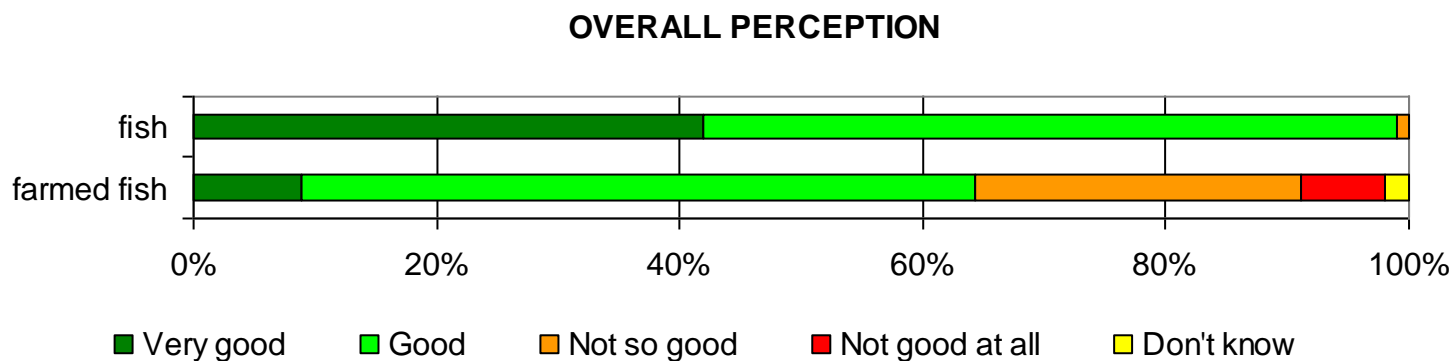
## Part of the farmed products in the French consumption



# Households purchases declaration



# Farmed fish perception : consumers



The farmed fish perception is not as good as for fish in general, but the average perception remains quite good (> 60 %)

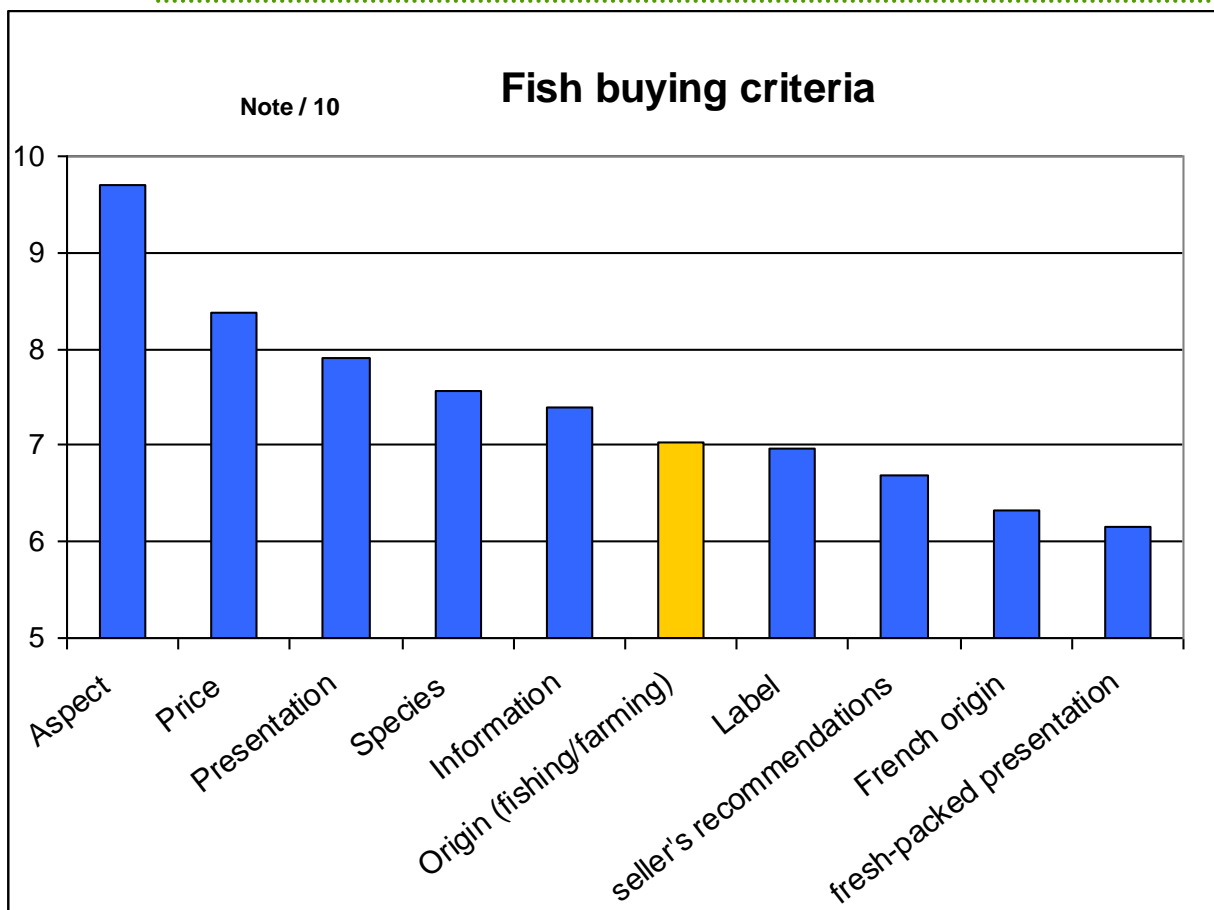
# Farmed Fish perception : consumers

## BUYING PREFERENCES





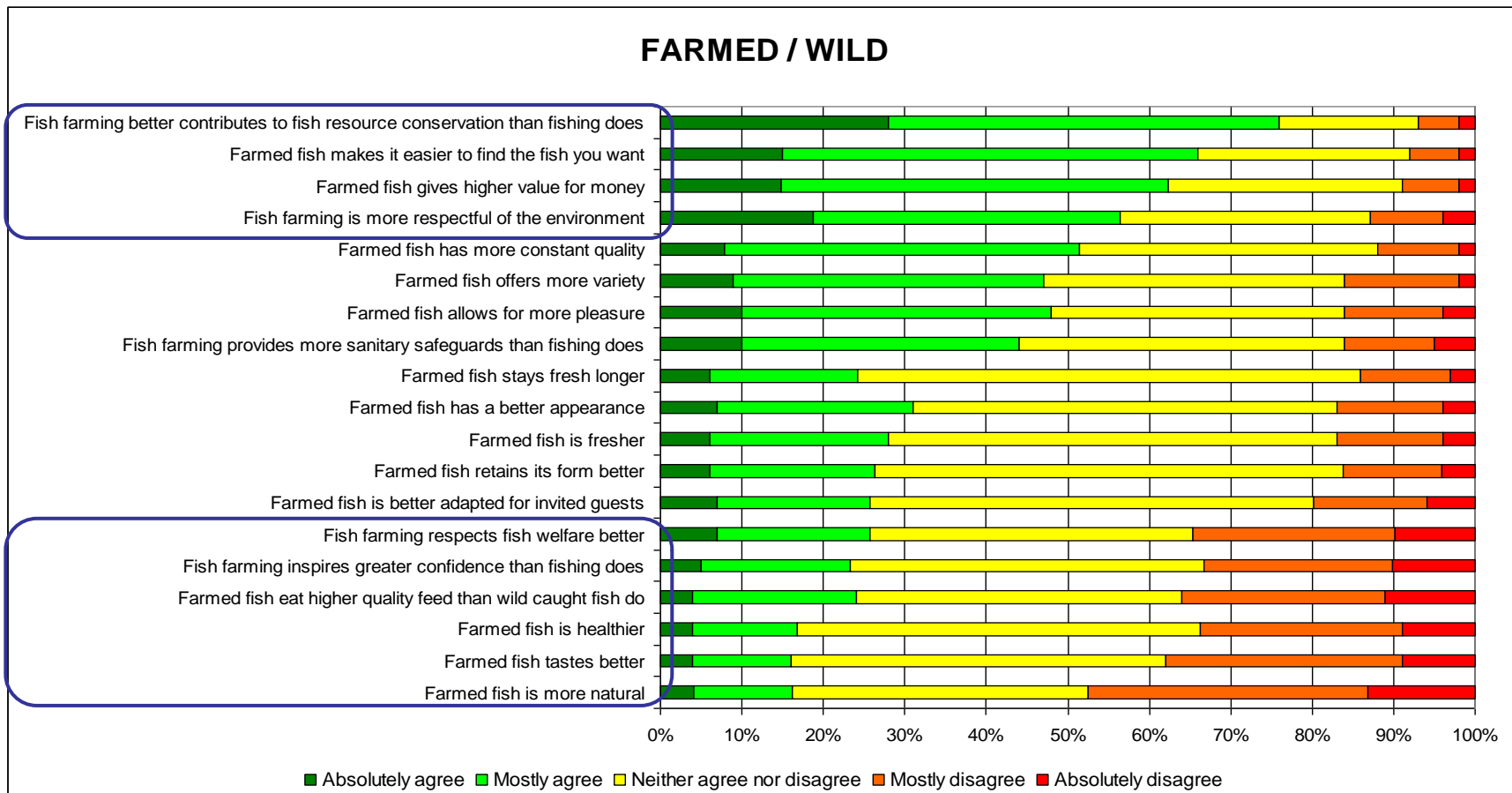
# Farmed Fish perception : consumers



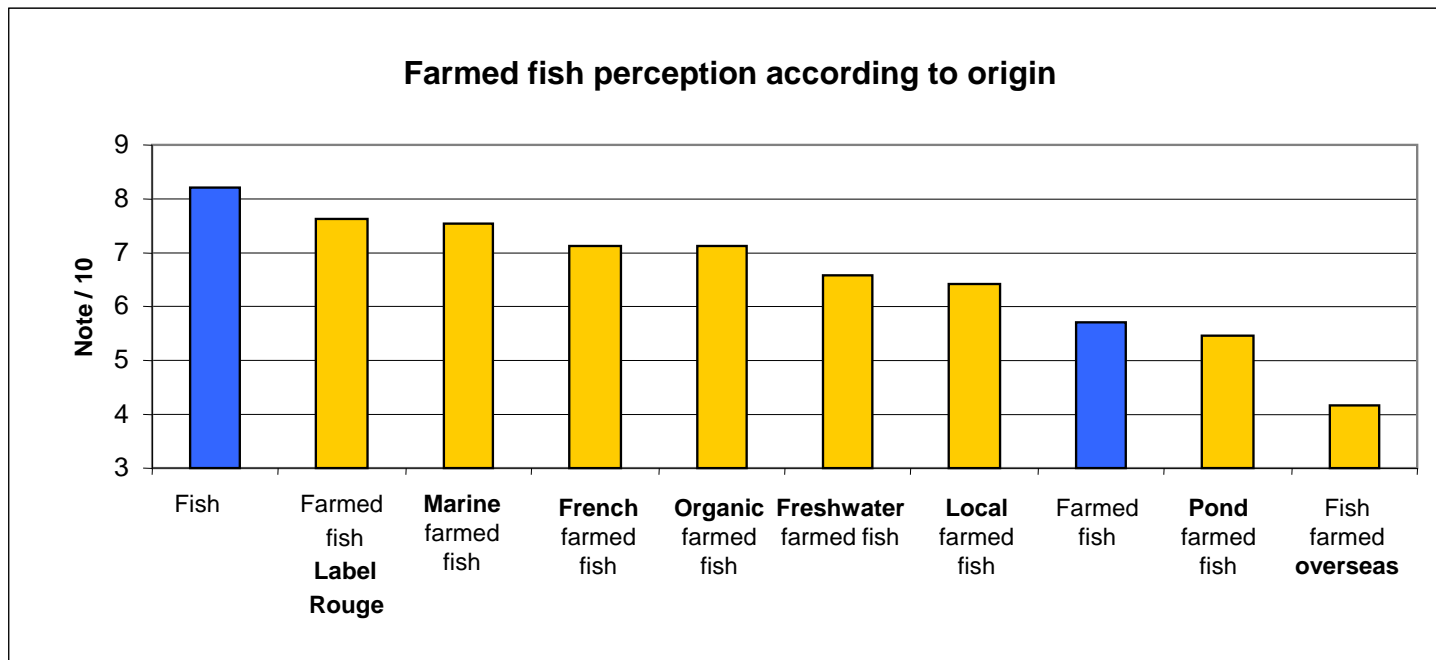
The wild or farmed origin is very important for 37 % of the consumers and rather important for 29 %.

Perception can change according to the sex, the age, the consumption level

# Farmed Fish perception : consumers

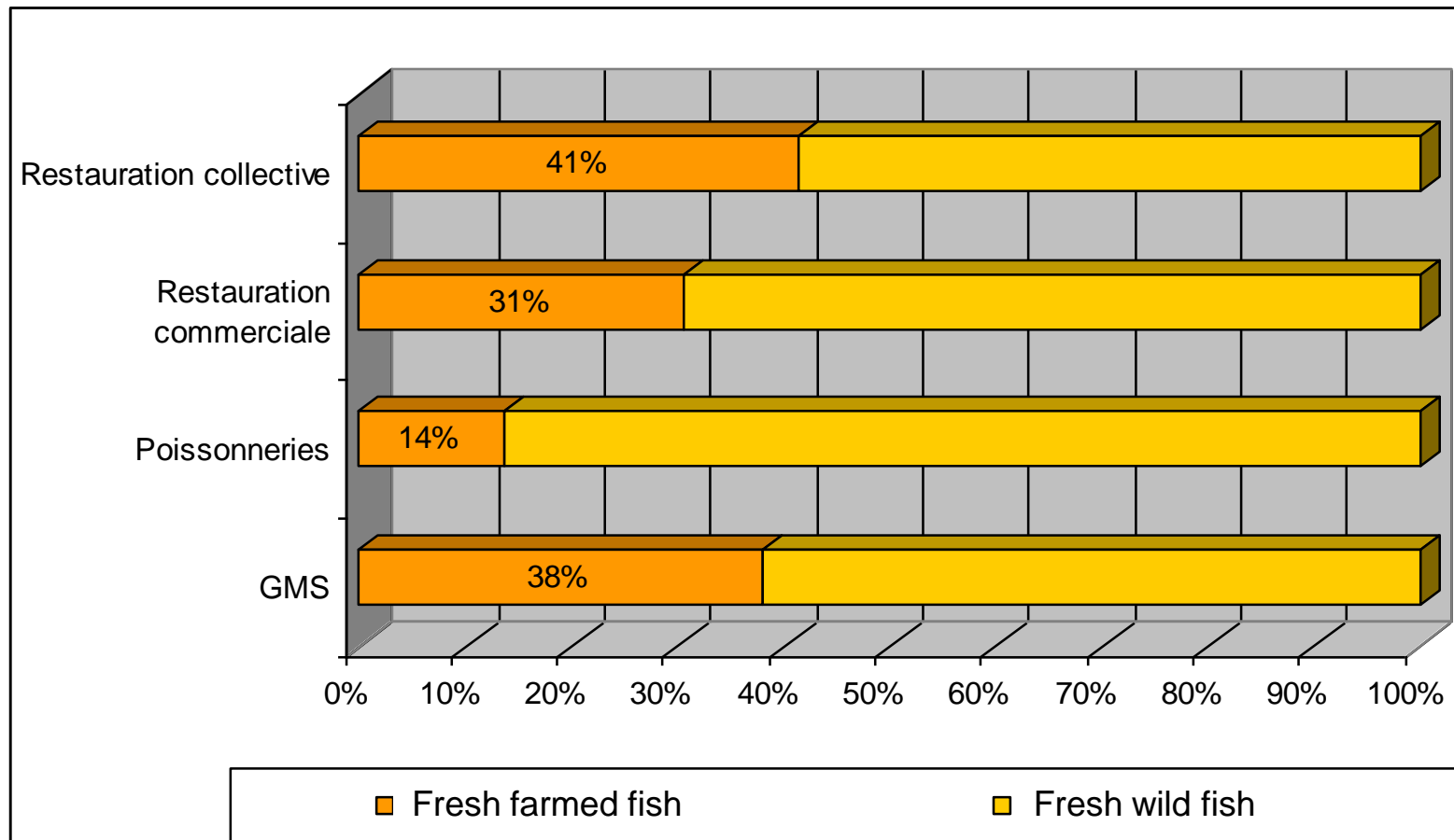


# Farmed Fish perception : consumers



Information on the origin can improve consumer perception

## Breakdown of purchases by distribution channel (value, 2008)



Source : FranceAgriMer, Kantar, GIRA

# Farmed Fish perception : distribution channels

	Supermarkets	Fishmongers	Wholesalers	Restaurants
POSITIVE	<ul style="list-style-type: none"> <li>+ Regularity</li> <li>+ Practicality</li> <li>+ Global profitability</li> <li>+ Price</li> <li>+ Traceability</li> <li>+ Freshness</li> </ul>	<ul style="list-style-type: none"> <li>+ Regularity</li> <li>+ Price</li> <li>+ Practicality</li> <li>+ Labels</li> <li>+ Freshness</li> <li>+ Profitability</li> </ul>	<ul style="list-style-type: none"> <li>+ Regularity</li> <li>+ Traceability</li> <li>+ Price</li> <li>+ Conservation</li> <li>+ Aspect</li> <li>+ Freshness</li> </ul>	<ul style="list-style-type: none"> <li>+ Price</li> <li>+ Practicality</li> <li>+ Sustainability</li> <li>+ Traceability</li> <li>+ Regularity</li> <li>+ Security</li> </ul>
NEGATIVE	<ul style="list-style-type: none"> <li>- Taste</li> <li>- Confidence</li> <li>- Nutritional qualities</li> <li>- Animal welfare</li> <li>- Fish feed</li> <li>- Naturalness</li> </ul>	<ul style="list-style-type: none"> <li>- Fish feed</li> <li>- Naturalness</li> <li>- Environmental respect</li> <li>- Confidence</li> <li>- Animal welfare</li> <li>- Taste</li> </ul>	<ul style="list-style-type: none"> <li>- Taste</li> <li>- Profitability</li> <li>- Confidence</li> <li>- Fish feed</li> <li>- Animal welfare</li> <li>- Nutritional qualities</li> </ul>	<ul style="list-style-type: none"> <li>- Nutritional qualities</li> <li>- Animal welfare</li> <li>- Confidence</li> <li>- Naturalness</li> <li>- Taste</li> <li>- Overall quality</li> </ul>



## To conclude

- Relative unawareness of characteristics of the seafood's ways of production
- Ambivalent perception of the farmed seafood
- Aquaculture has to convince the distribution channel and the purchasing advisors



*Thank you for your attention*