



Consumers' preferences for sustainable fish from Europe

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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 awareness 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**

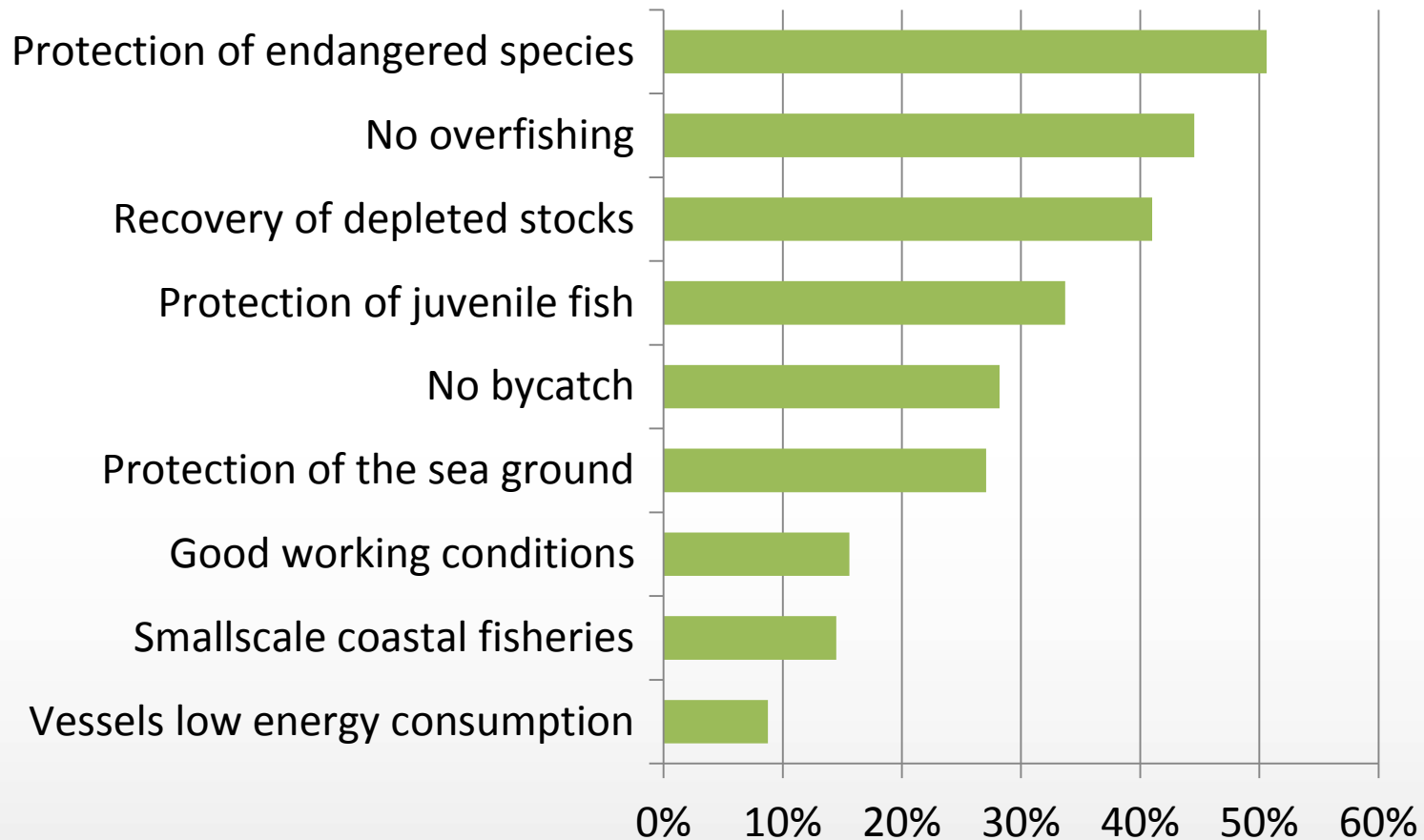


Fish consumption

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



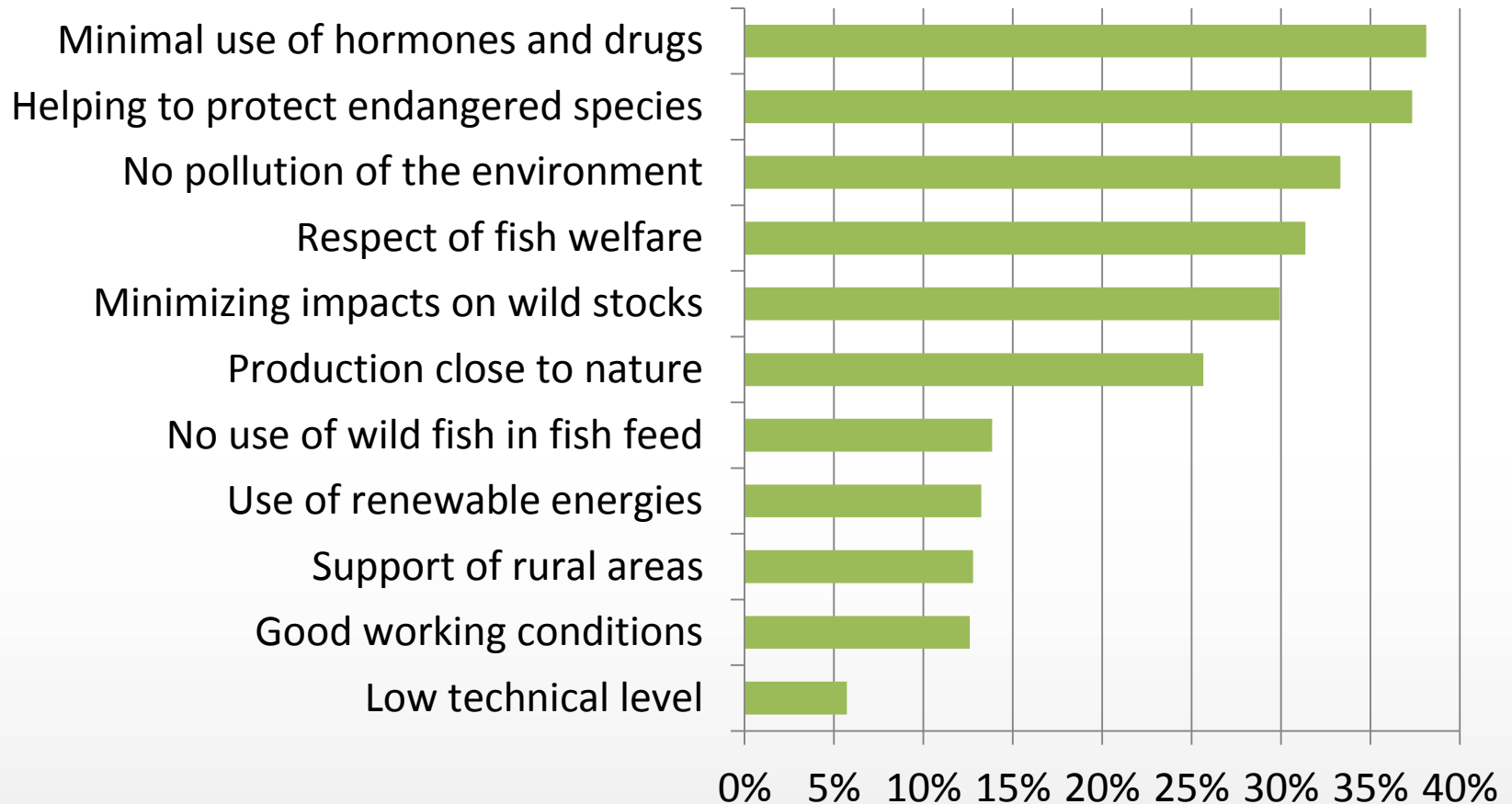
Aspects of sustainable fisheries



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)

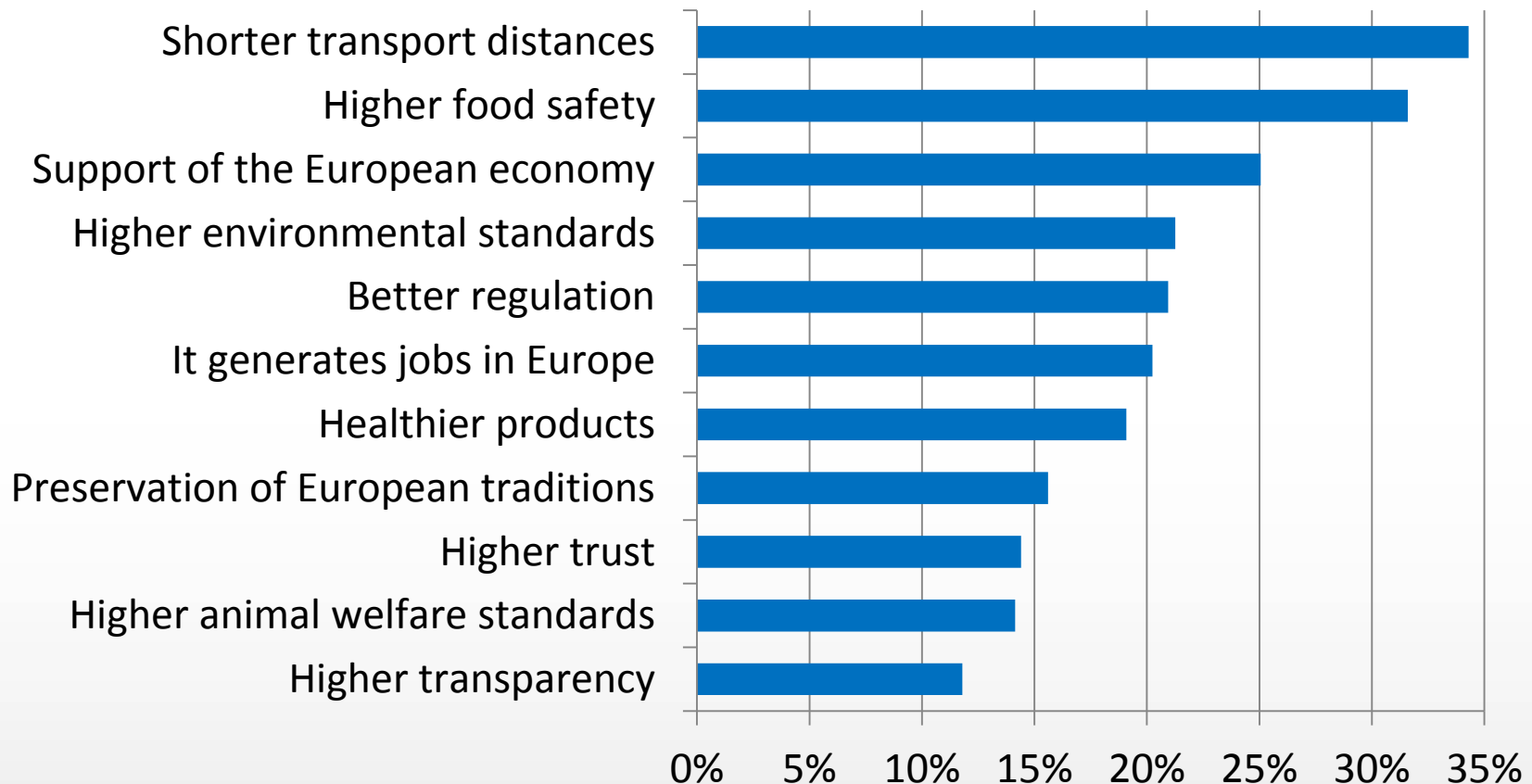


...production	All	DE	ES	FI	FR	IR	IT	PL	UK
European...	55	54	59	53	60	48	61	63	42
Domestic...	65	45	77	50	76	71	83	64	51
Local...	61	46	72	58	56	72	73	46	61
N	4103	530	534	500	517	500	513	502	507

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



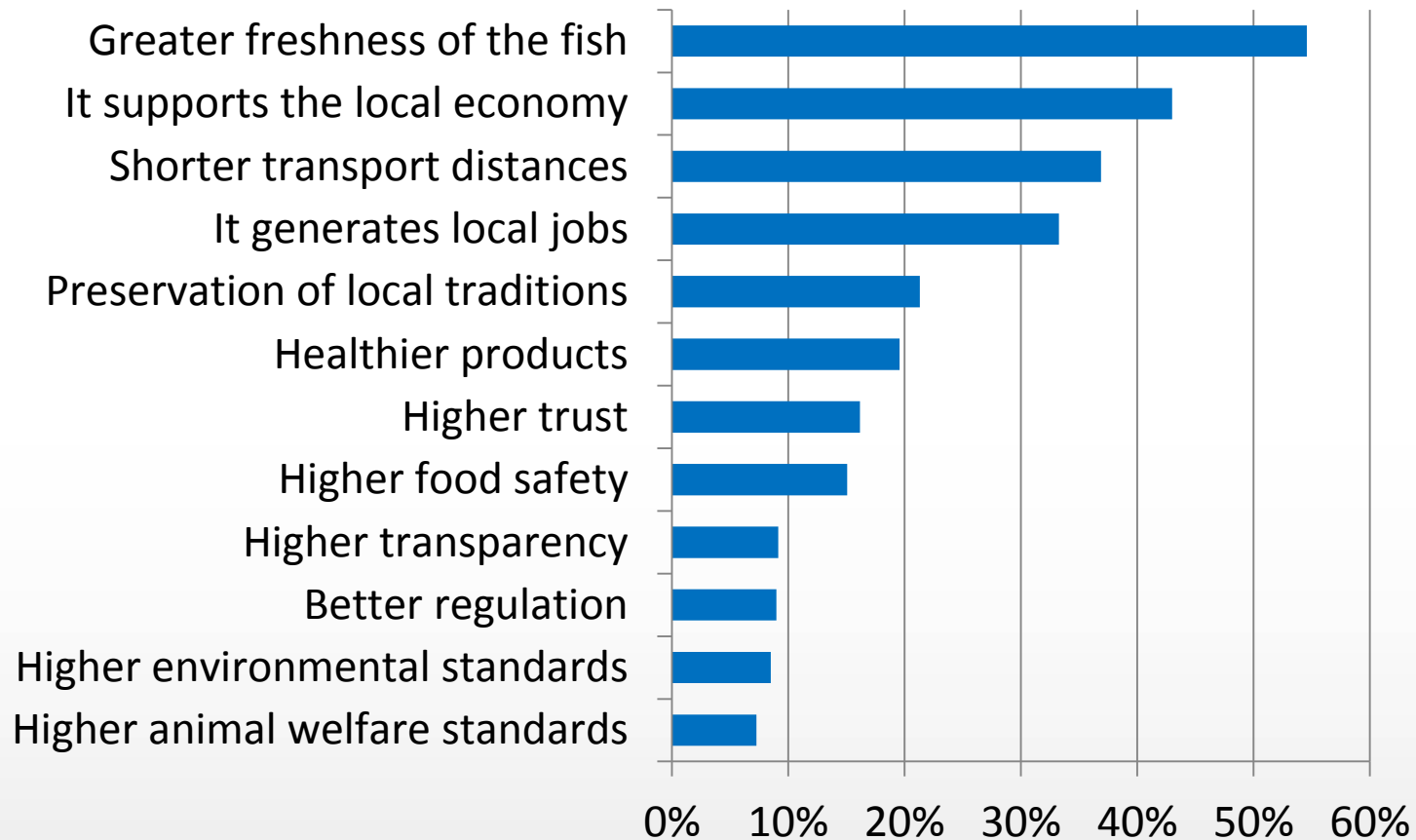
Reasons for preferring European fish



Why is European production important to you?



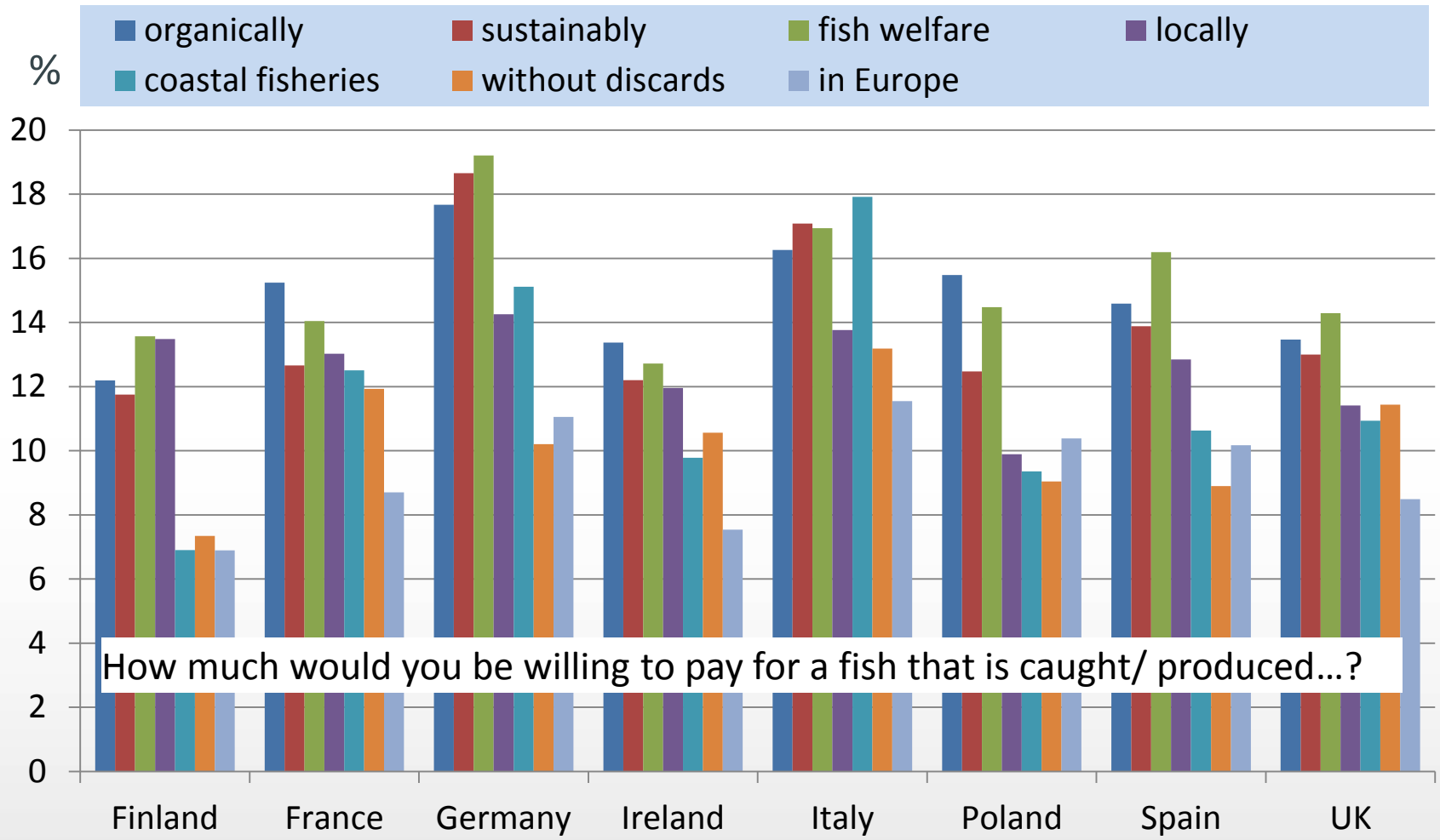
Reasons for preferring local fish



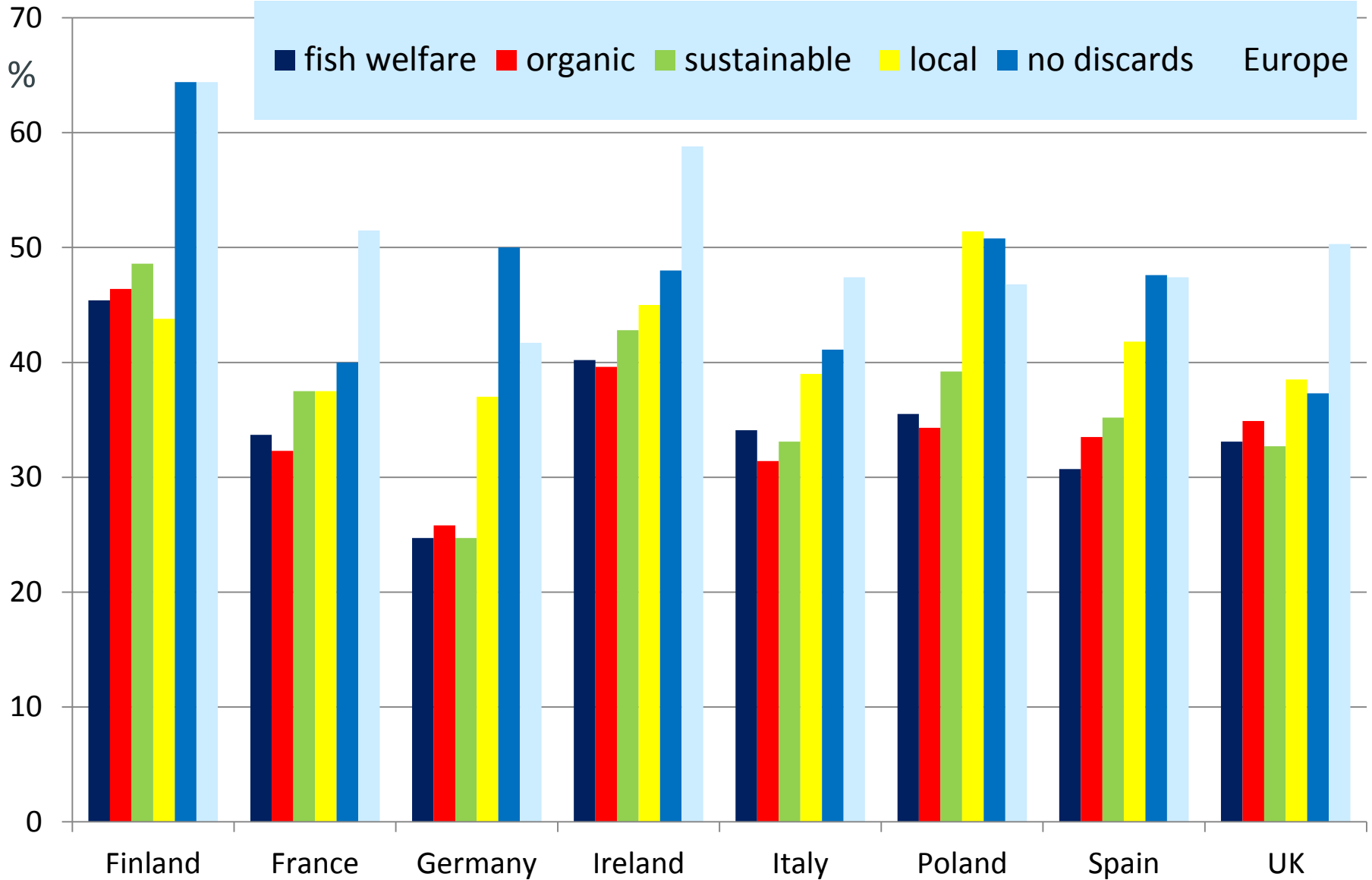
Why is local production important to you?



Additional WTP for ...

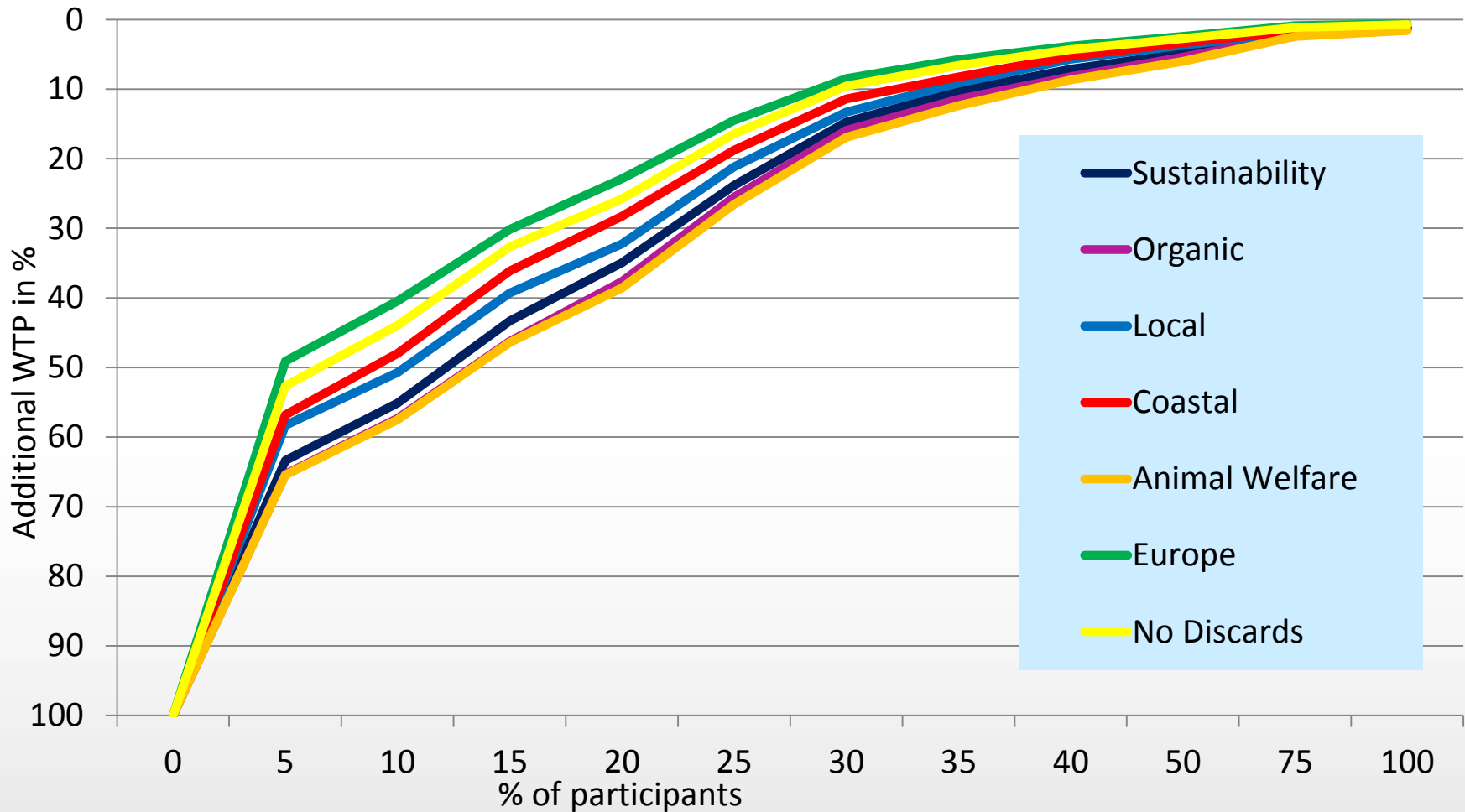


Share of participants without additional WTP



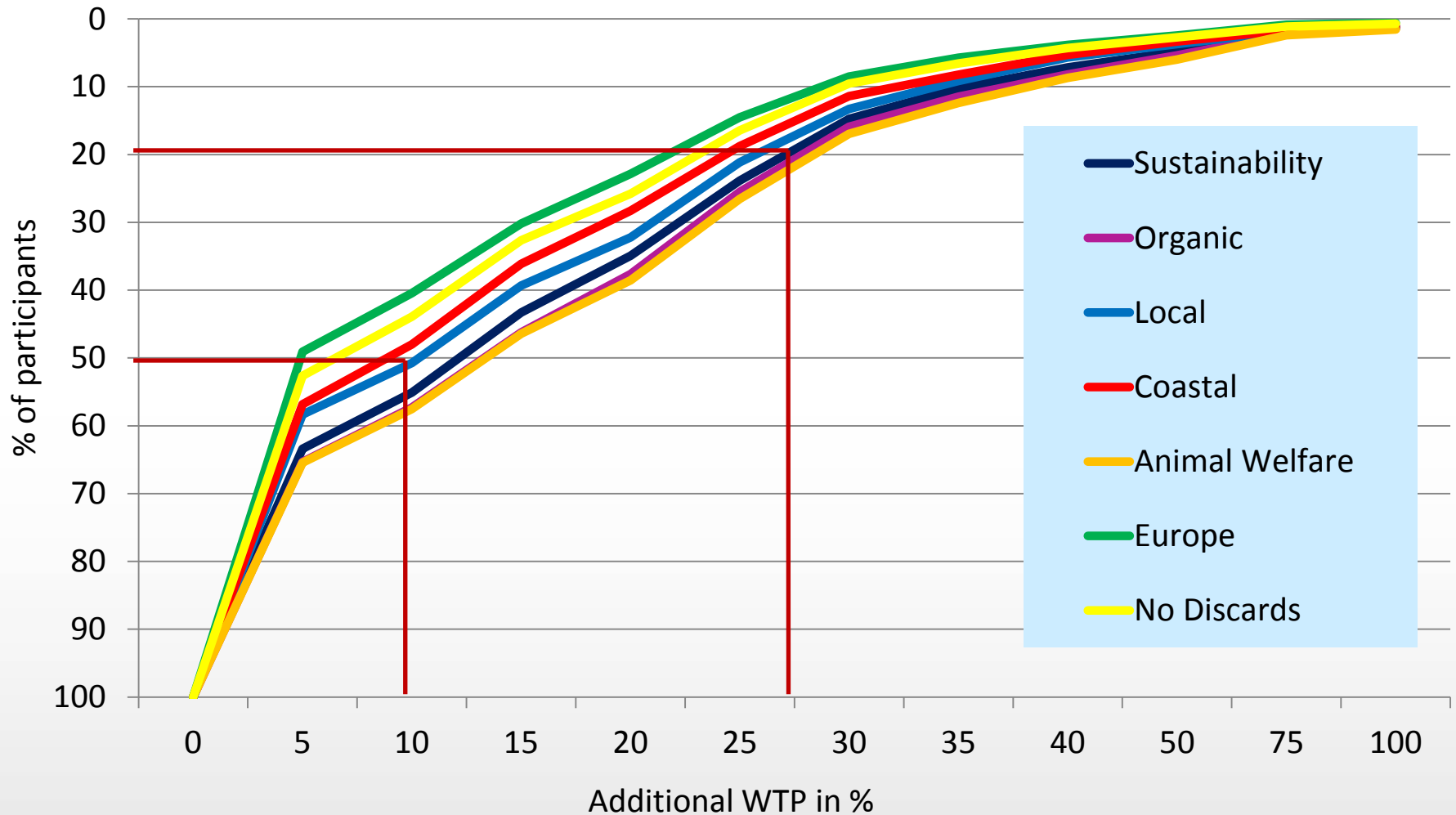


Distribution of additional WTP (All countries)





Distribution of additional WTP (All countries)





Conclusions

- **Consumer preferences for sustainable fish from Europe exist**
- **There is an additional willingness to pay for sustainably, organically, locally produced fish - by part of the consumers**
- ➔ **Higher priced market segment for sustainably produced fish from Europe exists**
- **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**

Further development of fishing and production systems considering consumer expectations needed

Thanks!

Contact

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