

# Aquaculture items European market

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[www.marketing-seafood.com](http://www.marketing-seafood.com)

# Europe world's largest market

1. Europe: not one Market
2. Aquaculture seafood: consumers perception
  1. Challenges

# Europe a 13 million tonnes seafood market



# Wild and farmed

13 million tonnes

Wild  
10 million

Aquaculture  
3 million

Finfish 8  
Shellfish 2

Finfish 1,5 million  
Shellfish 1,5 million

# But not one market a patchwork of different markets



# Of great complexity

- Market size and consumption per capita
- Consumers' habits and preferences
- Distribution
- Consumption of farmed seafood
- Sensitivity to environmental issues



France



UK





# a patchwork of different markets

UK 1,4 million

France 2,2 million

Spain 2,3 million

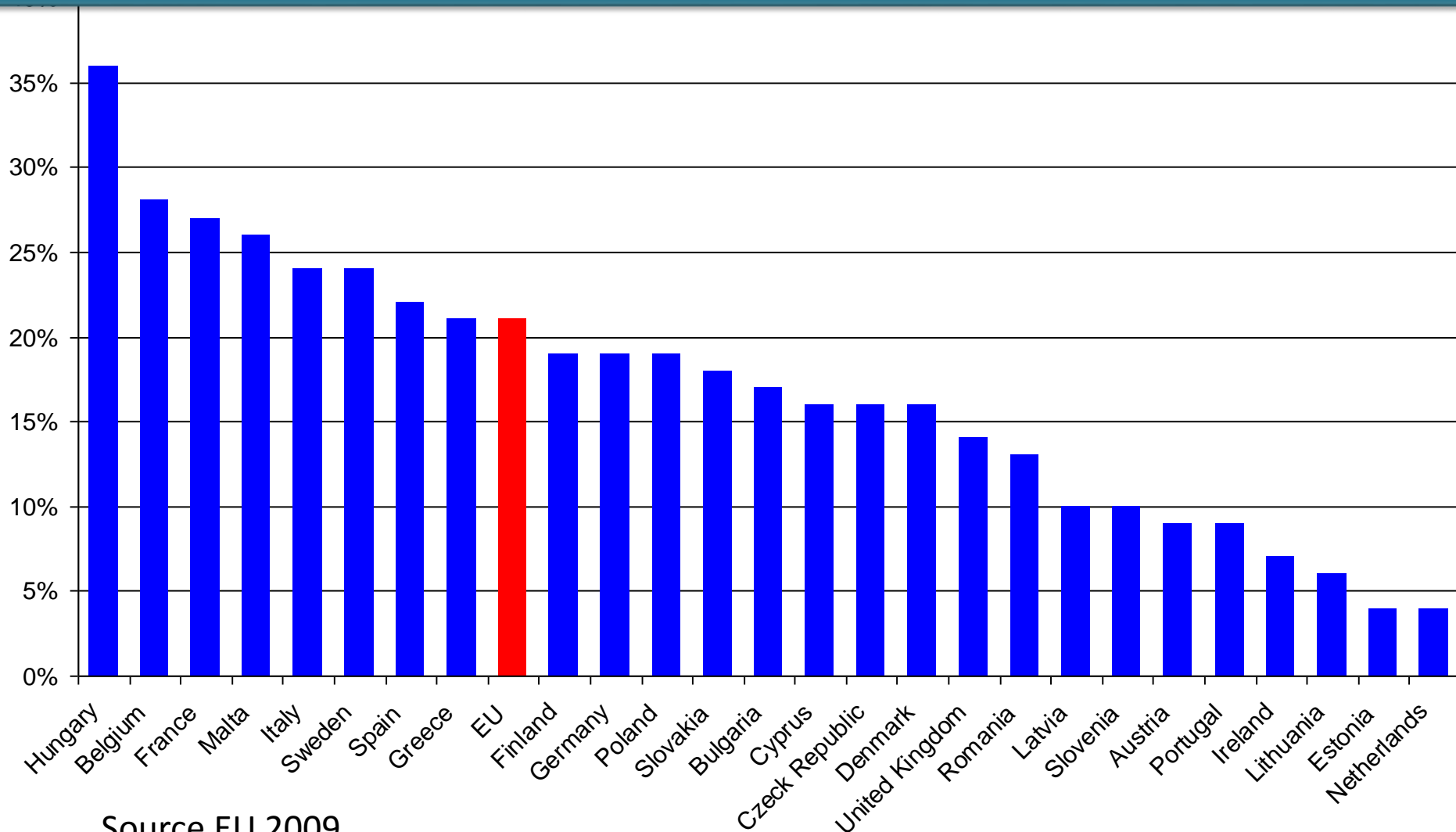
Portugal 0,7 million



Germany 1,3 million

Italy 1,7 million

# Proportion of farmed seafood



Source EU 2009

# Some common traits

- EU = Global dependence upon external supplies (total imports 30 billion €)
- All markets import farmed seafood
- Growing importance of aquaculture products
  - In volume and % of total supplies
  - Same species/ *pink wave*
- Growing importance/ dominance of large scale players
  - supermarkets, catering
- Burgeoning interest in locally produced and organic food
  - Slowfood

# Image\* of farmed seafood

- Farmed seafood has an excellent image in terms of:
  - Nutritional content
  - Freshness
  - Year-round availability
  - Price, cheaper than wild seafood
  - Participate to the wild resource conservation

\*Compilation of several European consumers studies

# Negative attributes

- Use of antibiotics
- Use of colorants and chemicals that may be excessive for environment, for human beings
- Stressful environment for the fish
- Fear of GMO feed and fish

# Market Challenges

- Future demand?
  - Population (+50 million inh.  $\implies$  2025) = +1 million tonnes
  - Economic situation
  - Competition with other sources of proteins
  - Position of domestic fish compared to imported?
  - Demand of young consumers?

# Market Challenges Specific to aquaculture

- Image of products and industry?
  - Communication
- Consumers' satisfaction
  - Quality, taste, convenience, reassurance, social values
- Health assurance
- Environment friendly

# Value added products

## labelling

- Organic



- Protected designation
- National brands
- Etc

## Processing

- Convenient products such as fillets, portion sized, pre-packed
- Other preparations



# Appellations/labels aquaculture products

	Attribute	Time-frame	Initial cost	Level of complexity	Level of recognition by consumers	Available to foreign products
<b>Organic label</b>	Environment / health	2 to 5 years	15 - 50 000 €	***	***	yes
<b>AOC/ PDO</b>	Terroir	2 to 5 years	15 - 50 000 €	***	**	yes
<b>PGI</b>	Terroir	2 to 5 years	15 - 50 000 €	***	*	yes
<b>TSG</b>	Terroir & know how	2 to 5 years	?	*	-	
<b>Collective brands</b>	Freshness / terroir	< 1 year	< 15 000 €	**	*	yes
<b>Regional brands</b>	Terroir	< 1 year	< 15 000 €	*	**	no
<b>National brands</b>	Origin	< 1 year	< 15 000 €	*	*	yes

*Source: Why and how to label seafood products: a practical guide*

# Number one strenght: proximity



Proximity=

- Cost advantage
- Better service
- Freshness

# Conclusions

- The image of seafood is positive (health) and fairly consistent across European countries
- The image of aquaculture and farmed fish with European consumers is diverse and not consolidated (need for positive campaign)
- Europe is a potentially growing market for value added products
- Don't neglect your domestic market

Thank you for your  
attention

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