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Aquaculture items European market

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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

95



France





UK



a patchwork of different markets

UK 1,4 million

France 2,2 million

Spain 2,3 million

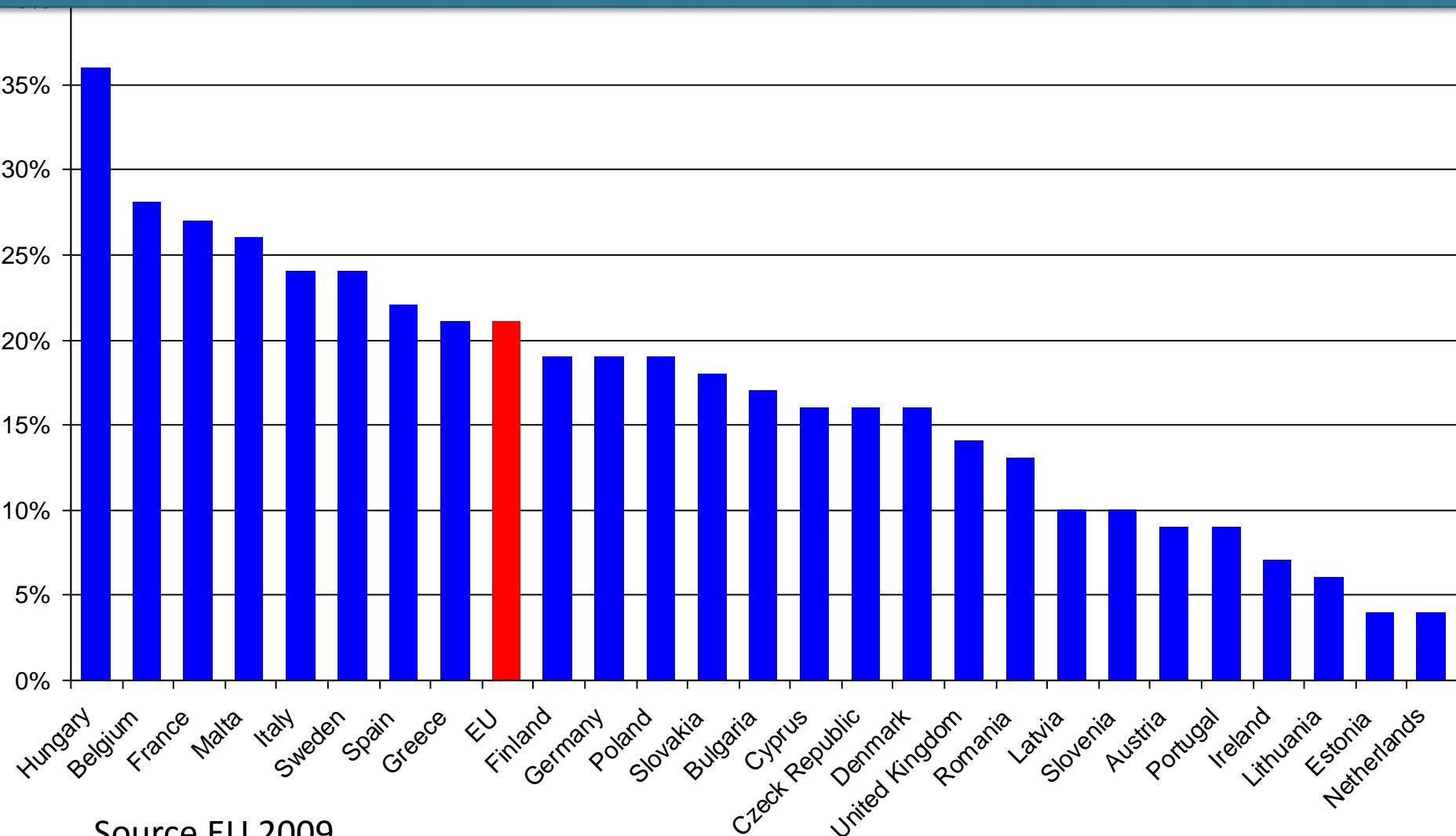
Portugal 0,7 million

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. \rightarrow 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



Processing

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

- Protected designation
- National brands
- Etc

Appellations/labels aquaculture products

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

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

Number one strength: 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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