



Evaluation of the EU marketing standard

**Focus on the
sustainability dimension**

Purpose of the evaluation



- Is the current marketing standards framework for fishery and aquaculture products fit for purpose?
- Does it allow achieving the objectives of the Common Market Regulation?
 - enable the market to be supplied with sustainable products
 - allow operators to fully exploit the potential of the internal market
 - Facilitate marketing activities based on fair competition (→ help to improve the profitability of production)
 - Ensure that imported and EU products comply with the same requirements (level-playing field)

Public consultation

155 replies received:

- 89 respondents answering in their personal capacity

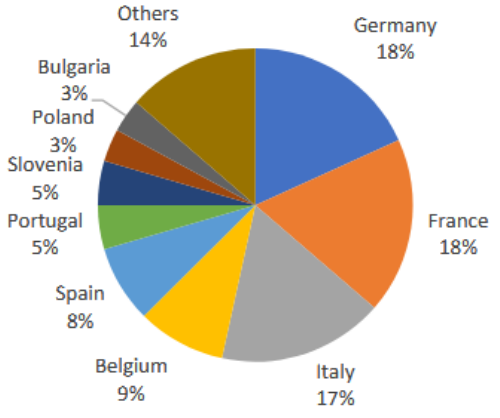


Figure 5 : Assessment of seafood quality

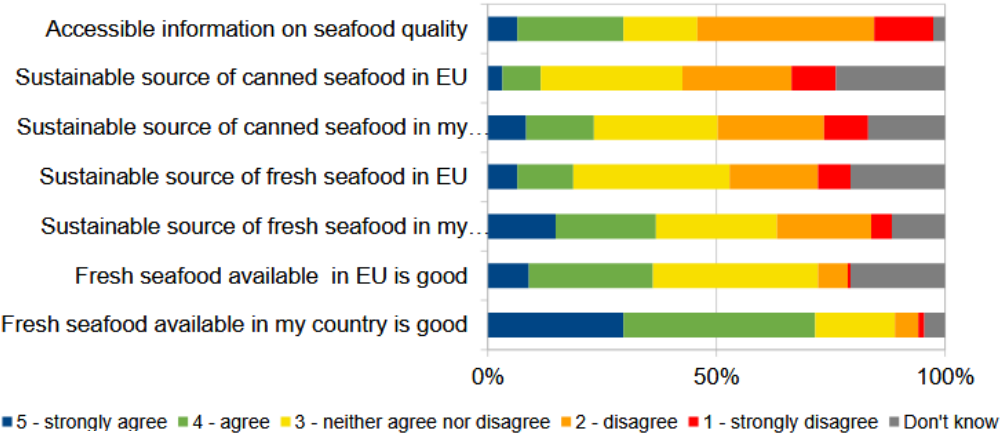
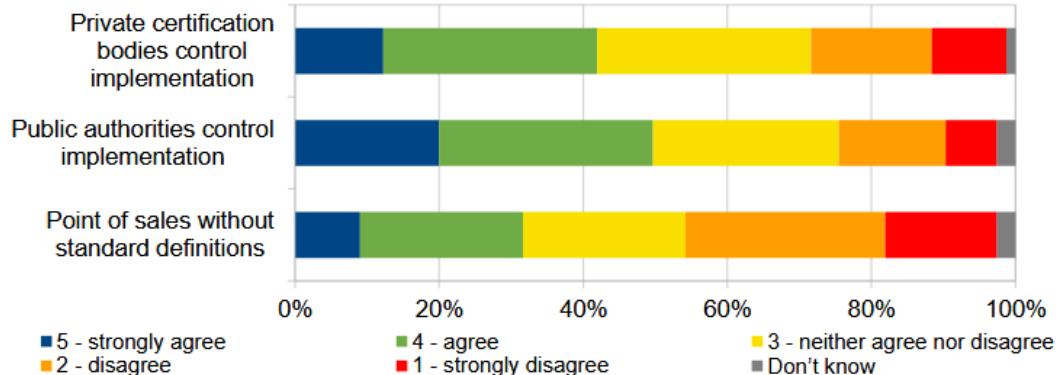


Figure 6 : Trust in various actors



Key messages

Sustainability, transparency and fair competition emerged as key drivers of the generally favourable view of standardisation. Although some mentioned that relationships across the supply chain work better than top-down norms, the survey shows that points of sales are less trusted than public authorities. Lack of clarity, harmonisation and enforcement may mean that seafood generated from unsustainable and deceptive practices can enter the market and challenge norm-abiding businesses. Moreover, transparency for the end-user was strongly encouraged.

"It is important to inform better the consumers about the sustainability and real environmental cost of each product. If the market is open to foreign products, the marketing standards should be equal to all the products in order that all follow the same minimum standards before they reach the supermarket or selling point"

"When buying fish/seafood, It is hard to find products whose fishery had no negative impact on the environment because the conditions are mostly not clear"

[Source](#)

What did the marketing standards do?

- No conflict with conservation rules (Minimum Conservation Reference Size= Minimum Marketing Size).
- If no MCRS, MMS avoid that undersized fish be sold, but other measures ensure sustainability

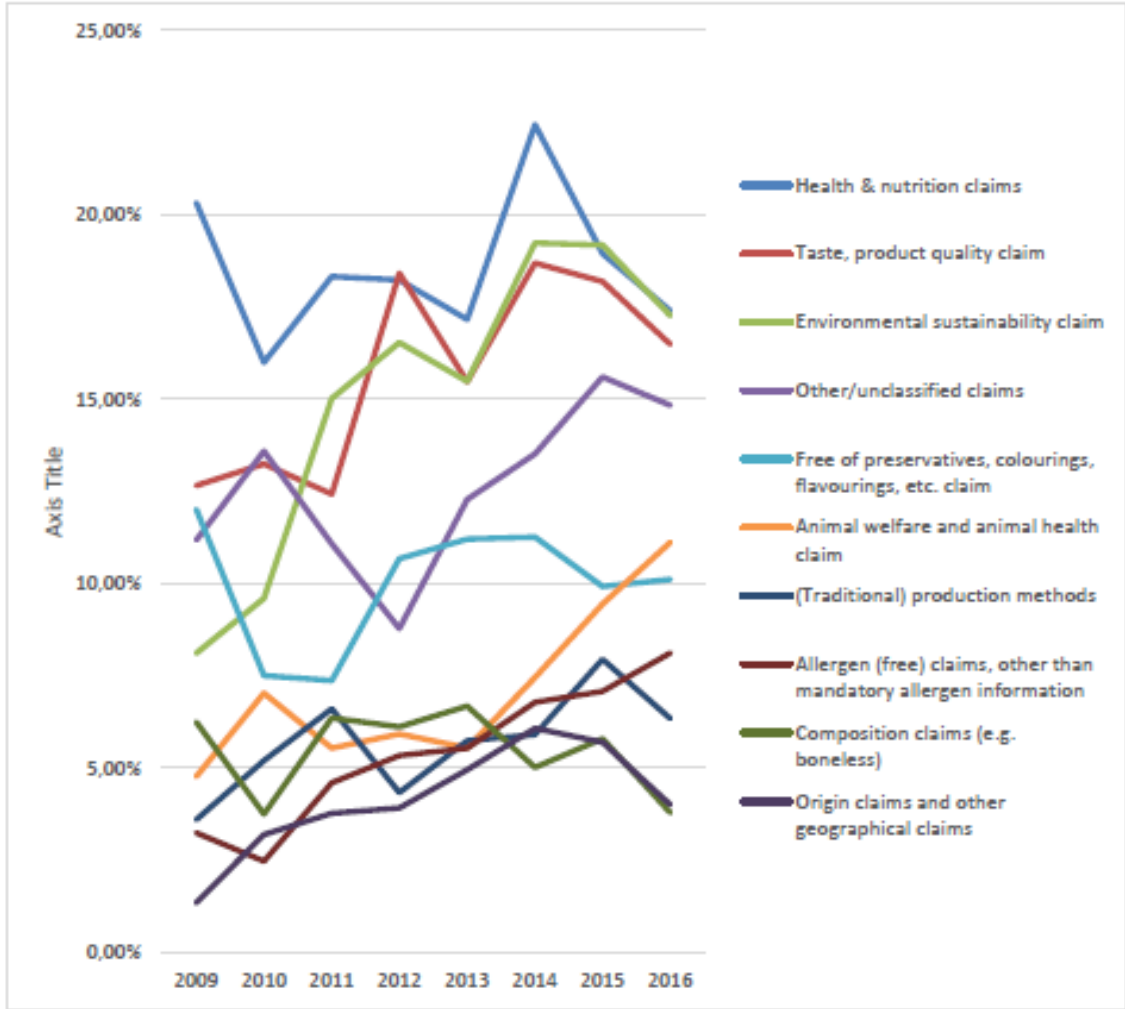
Problem: 2/3 of supply to the EU market comes from imports. Marketing standards apply to 13% of those imports, and MMS to only 1-3%.

→ private standards commonly used on top of EU marketing standards

And what about the other dimensions of sustainability (e.g. social)?

But is there a market demand?

Figure 9 Evolution of the top 10 policy areas used on FAPs (n=13,746 products)



[Source](#)

And where is it coming from?

Final report on the feasibility of an EU Ecolabel:

Much is made of the role of consumers but the analysis of the development of ecolabels has also suggested that consumer demand is often assumed. The development of ecolabels is mainly retailer driven and ecolabels are primarily used as an assurance mechanism and therefore have been incorporated into purchasing decisions and sourcing policies.

[Source](#)

Study on EU consumer habits vis-à-vis FAPs:

59% of retailers indicated they propose eco-labelled products [...]. No significant sales increase has been observed after the introduction of eco-labelled products. [...] The eco-label logo may not be displayed for final consumer in order 1) not to add confusion for consumers with information not needed and 2) to avoid paying royalty fees [...].

[Source](#)

When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(%)

What about consumers?

		The product's appearance (freshness, presentation, etc.)	The cost of the product	The origin of the product	The brand and quality labels (e.g. GI, PDO)	How easy and quick it is to prepare	The environmental & social impact	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		59	52	41	23	23	17	1	1	1
BE		53	55	31	20	26	20	1	0	0
BG		64	68	38	17	18	11	0	1	1
CZ		70	64	28	13	34	3	1	1	0
DK		66	41	31	24	27	19	3	1	2
DE		46	41	43	38	20	25	0	3	1
EE		81	72	30	10	23	4	1	0	1
IE		48	47	39	25	39	16	1	1	0
EL		81	78	61	16	14	7	1	0	0
ES		65	56	39	14	20	10	1	1	1
FR		63	49	51	27	22	20	1	1	1
HR		49	70	47	13	16	10	0	0	0
IT		63	51	56	22	24	10	1	0	1
CY		80	64	41	11	11	10	0	1	1
LV		74	67	33	13	21	3	2	0	1
LT		78	72	22	15	20	4	2	0	0
LU		65	30	40	33	16	22	3	1	0
HU		60	64	45	32	26	7	1	0	0
MT		70	43	28	20	30	13	1	0	0
NL		60	46	24	26	30	32	2	2	0
AT		53	48	52	40	28	23	1	0	0
PL		59	58	33	14	22	8	1	2	3
PT		81	70	40	21	13	5	1	0	1
RO		64	57	39	22	21	5	1	1	1
SI		65	49	52	13	19	8	2	0	0
SK		53	73	38	11	29	5	2	0	2
FI		65	53	59	12	34	18	2	0	0
SE		44	39	42	46	16	47	1	1	1
UK		50	46	20	18	31	24	2	2	1

- 1st MOST FREQUENTLY MENTIONED ITEM
- 2nd MOST FREQUENTLY MENTIONED ITEM
- 3rd MOST FREQUENTLY MENTIONED ITEM

Source



Conclusions

- Capacity of marketing standards to enable the market to be supplied with sustainable products is at best marginal
 - objective set for the standards in 2013, without reviewing their content
- Supply chain significantly relies on private systems to procure sustainable products, but:
 - Only some aspects of sustainability are looked at.
 - Standards look at sustainability at catching level, what about product impacts further down the chain?
 - Plurality of private definitions of sustainability, often diverging and not always in line with CFP goals.