EU consumer habits regarding fishery and aquaculture products

Special Eurobarometer 515

MAC GA meeting – 16 September 2021

Third edition of the Eurobarometer

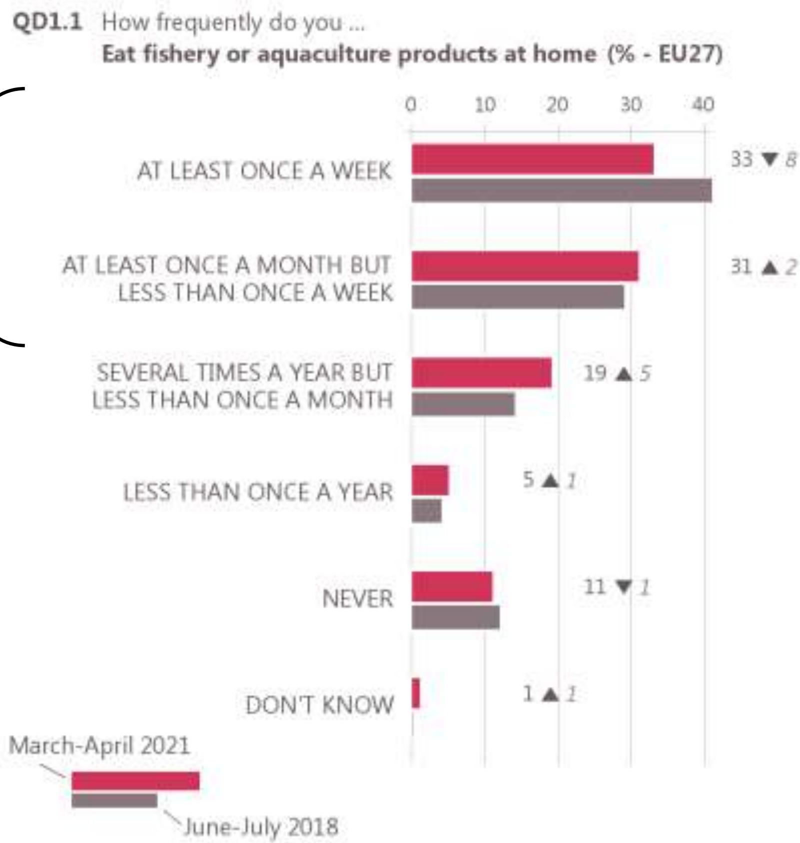
- https://europa.eu/eurobarometer/surveys/detail/2271

- Fieldwork: 16th March – 12th April 2021
- Several communication materials:
  - **Report and summary**
  - **Factsheets per Member States in EU languages**
  - **Infographics**

I. CONSUMER HABITS REGARDING FISHERY AND AQUACULTURE PRODUCTS

Consumption of fishery and aquaculture products at home

64%



Almost two thirds of respondents (64%) eat FAPs at home at least once a month, declining by 6 pp. since 2018

Base: All respondents (26,669)

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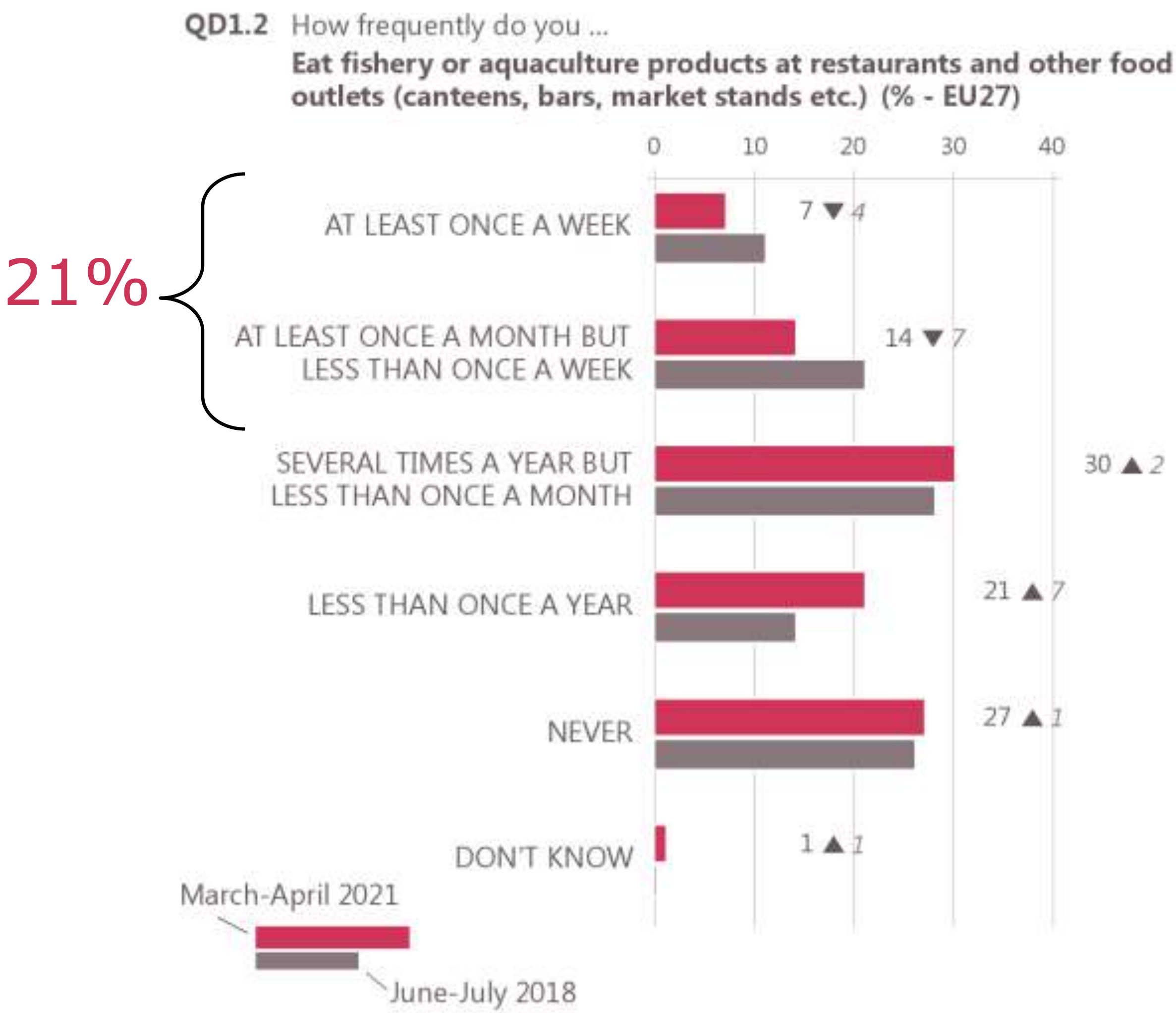
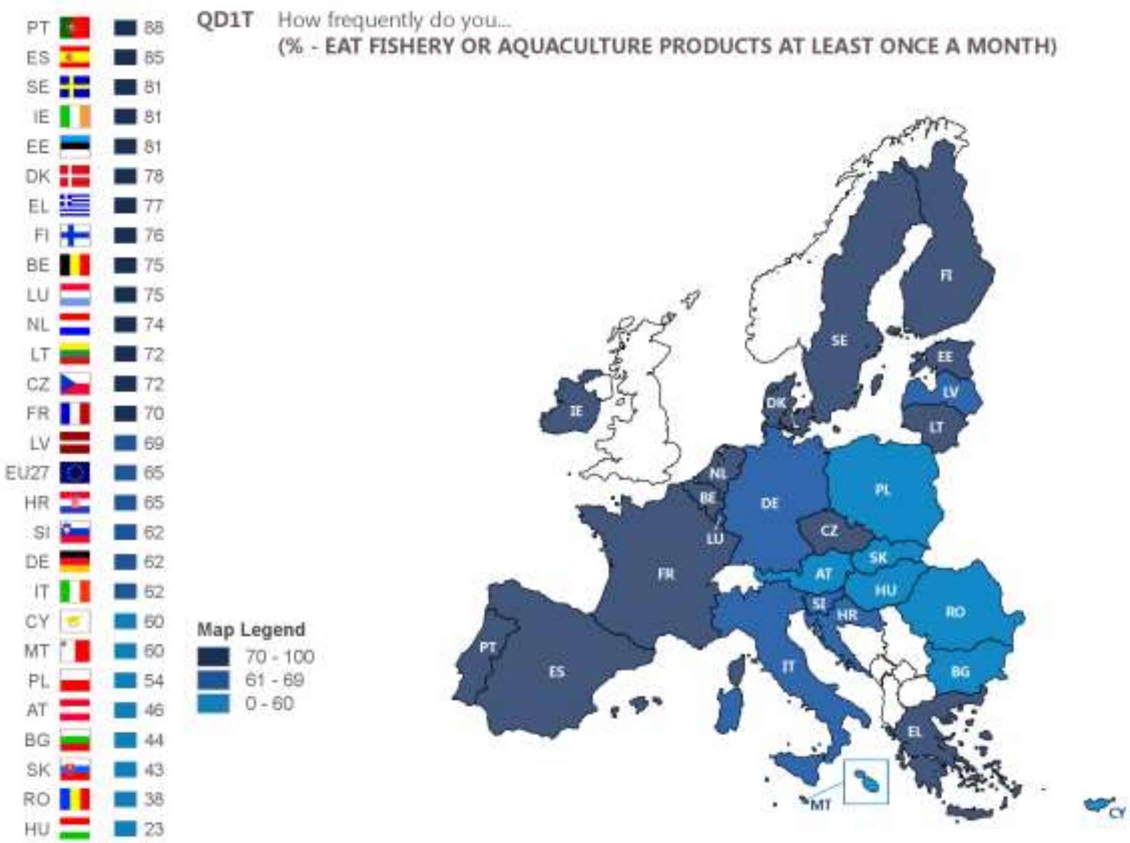
Consumption of fishery and aquaculture products at restaurants and other food outlets



21% eat FAPs at restaurants or other food outlets at least once a month, a decrease of 11 pp. since 2018)

Base: All respondents (26,669)

Consumption of FAPs across EU



With a few exceptions (Malta, Cyprus, Czechia), respondents in land-locked countries are less likely to eat FAPs at least once a month than those in countries with coastlines

Base: All respondents (26,669)

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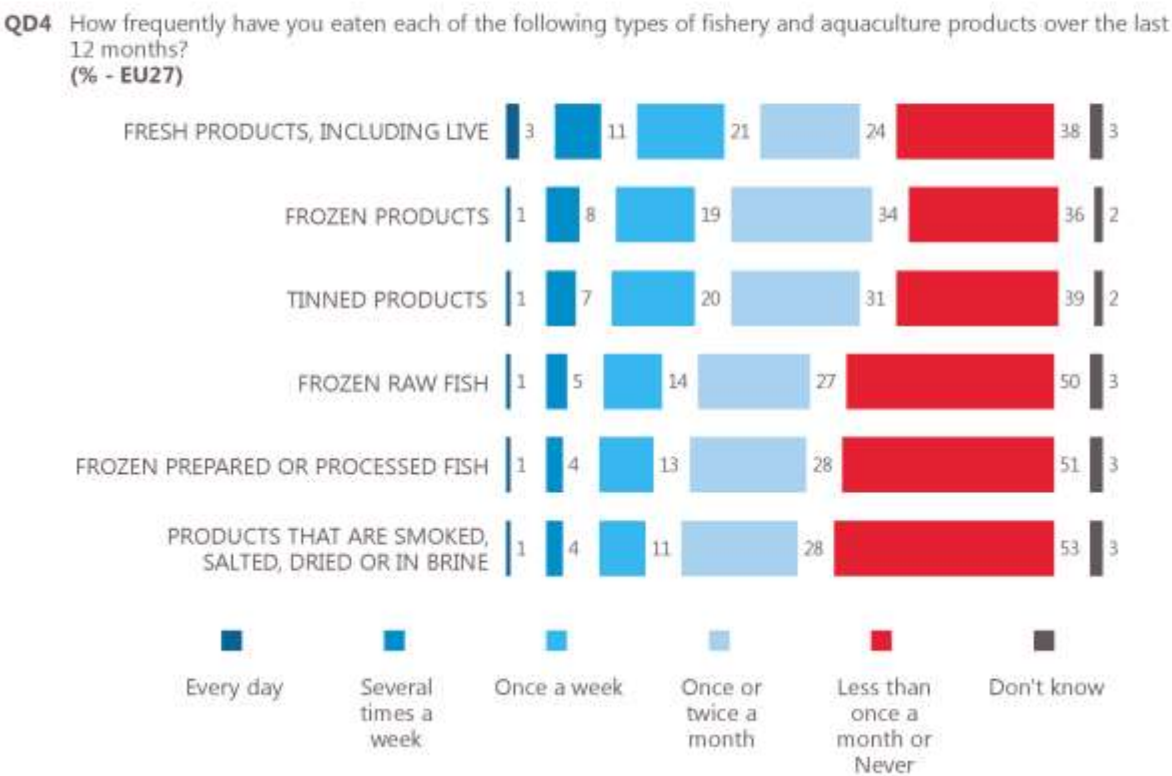
Consumption per type of fishery and aquaculture products

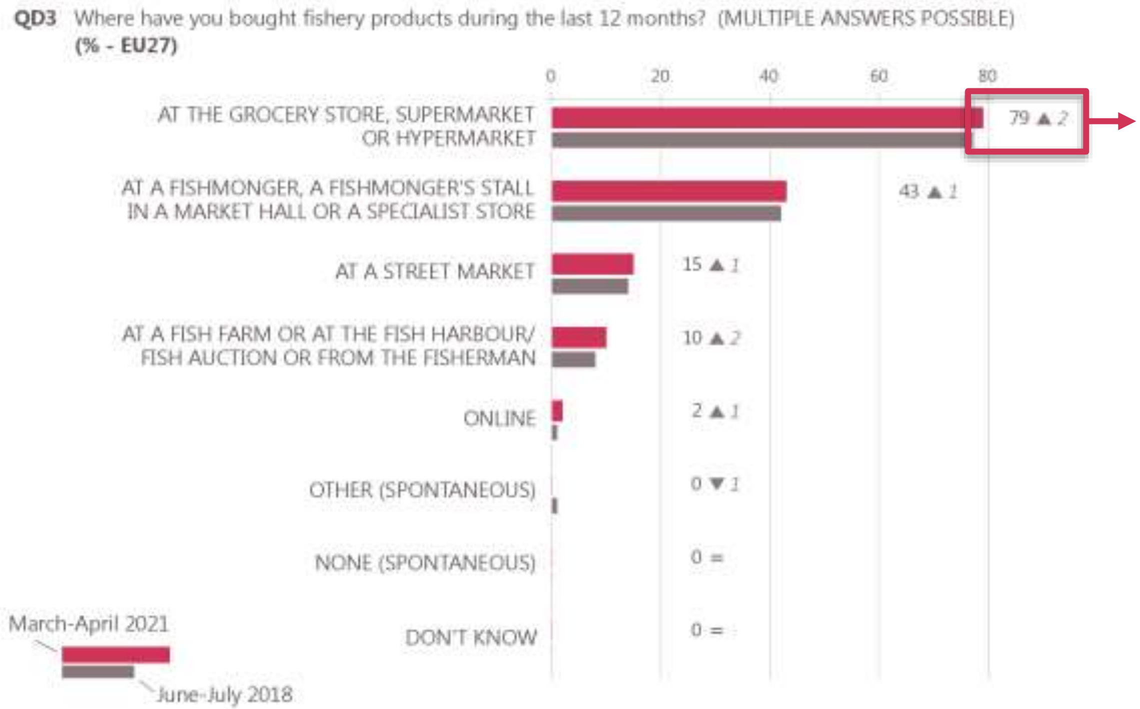


Respondents who eat FAPs are most likely to eat fresh products, including live at least once a week (35%), closely followed by frozen, as well as tinned products (both 28%)

Base: Respondents who eat FAPs at least several times a year (22,574)

Where EU consumers buy fishery and aquaculture products

Almost eight in ten respondents who buy fishery products do so at the grocery store (79%), supermarket or hypermarket, followed by 43% at a fishmonger, a fishmonger's stall in a market hall or specialized store



74%
eat FAPs at least once a month

79%
buy FAPs at least once a month

Lead answer in
26 countries

Base: Respondents who buy FAPs at least several times a year (21,179)

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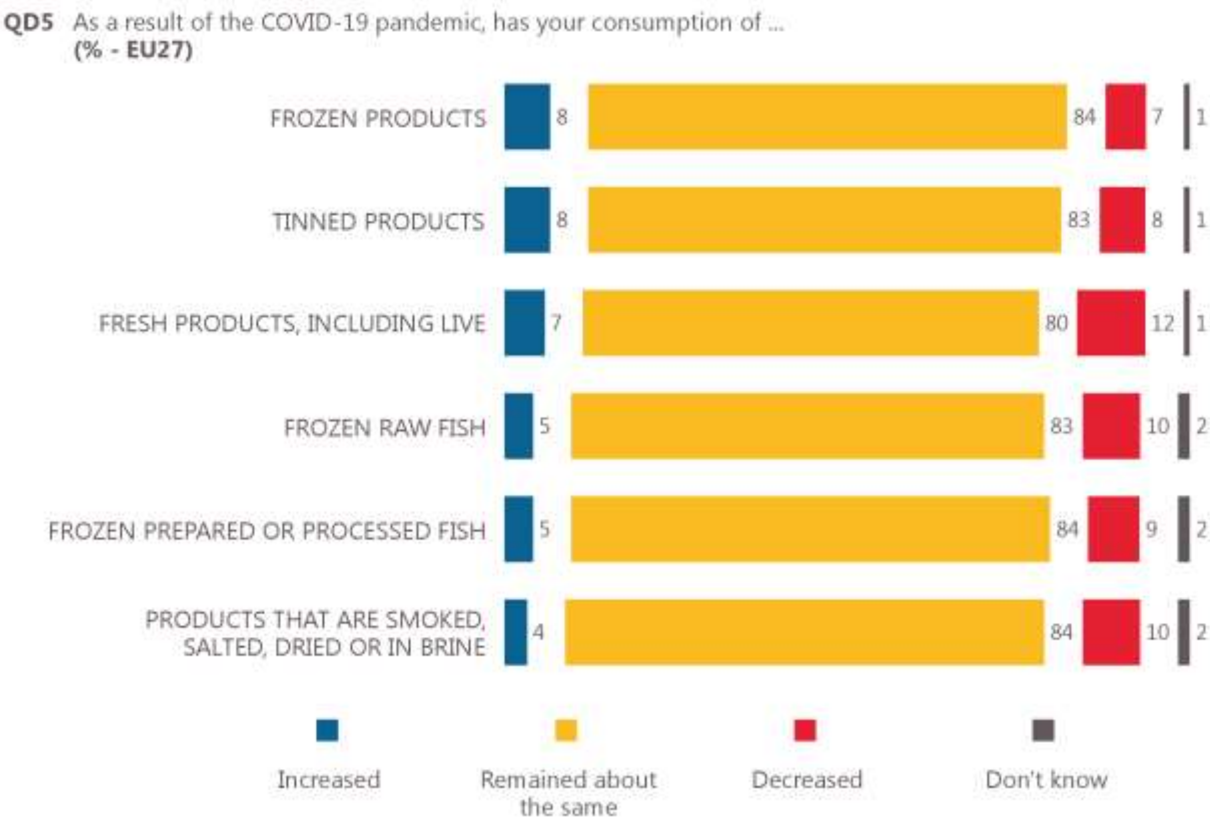
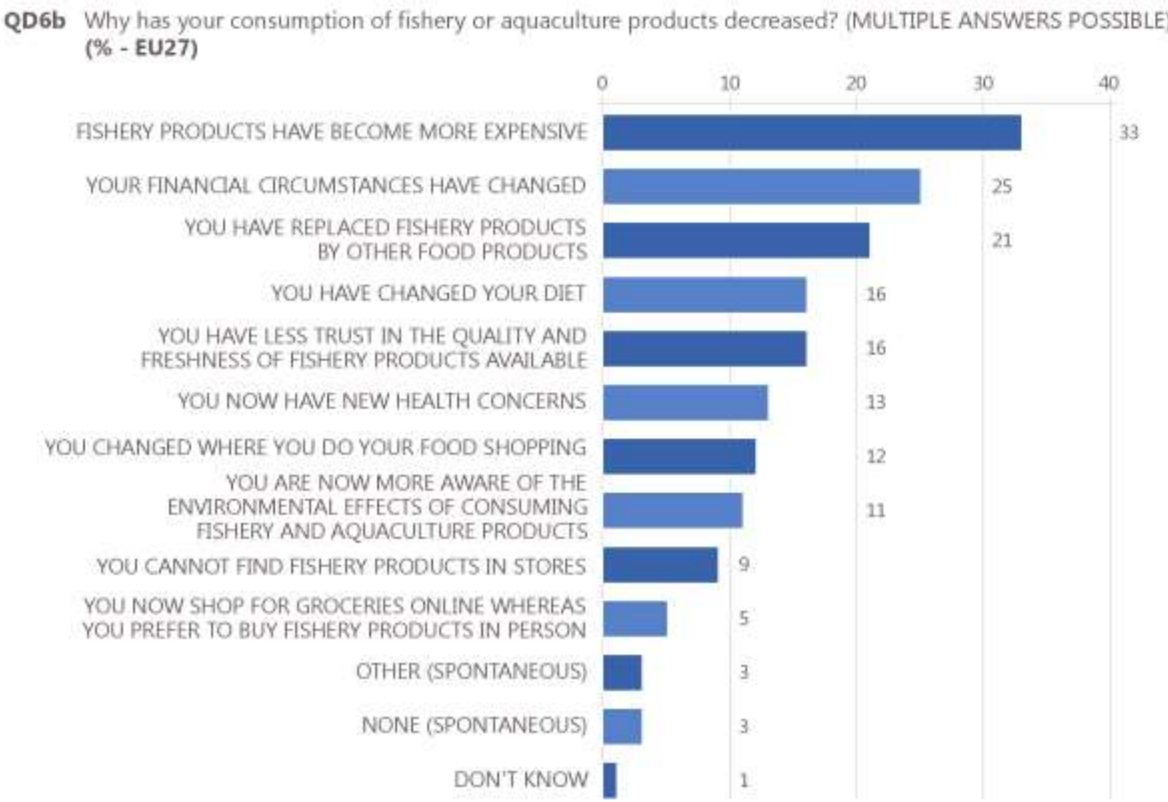
II. CHANGES IN CONSUMPTION AS A RESULT OF THE COVID-19 PANDEMIC

Changes in consumption due to the Covid-19 pandemic



Self-declared change in consumption indicates that the COVID-19 pandemic has largely unaffected habits

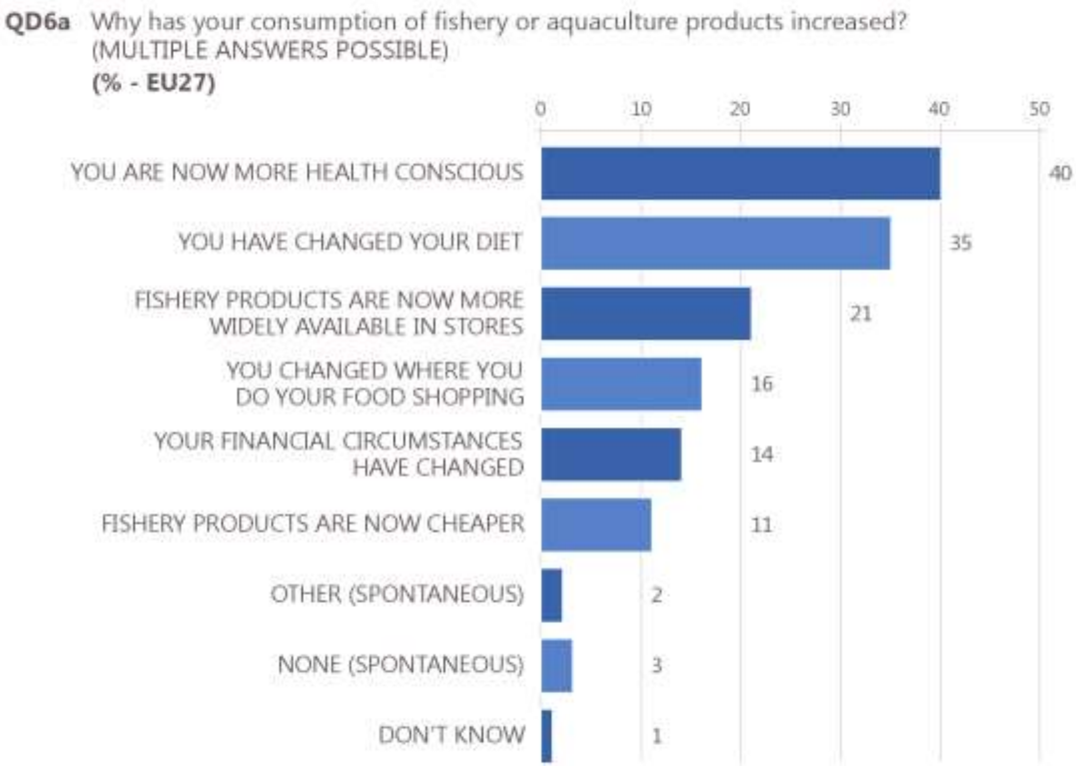
Reasons for decreasing consumption of fishery and aquaculture products



For respondents who decreased their consumption of FAPs as a result of COVID-19, the main reason was that these products have become more expensive (33%), followed by changes to their financial circumstances (25%), and replacing fishery products by other food products (21%)

Base: respondents who decreased their consumption of FAPs as a result of COVID-19 (2,964)

Reasons for increasing consumption of fishery and aquaculture products



Base: respondents who increased their consumption of FAPs as a result of COVID-19 (2,110)

Among respondents who increased their consumption of FAPs as a result of COVID-19, being more health conscious is the most mentioned reason (40%), followed by changes to diet (35%), and finding fishery products more widely available in stores (21%)

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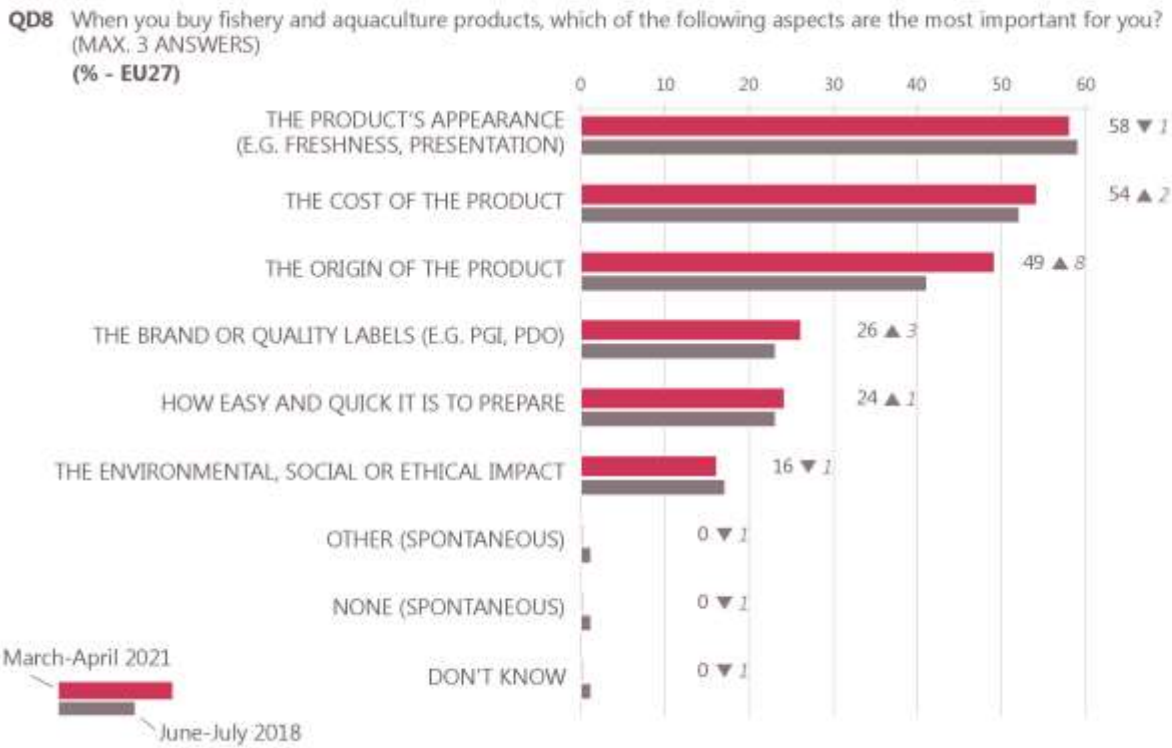
III. PREFERENCES REGARDING FISHERY AND AQUACULTURE PRODUCTS

Most important aspects when buying fishery and aquaculture products



The most important aspects for respondents when buying FAPs are their appearance (58%, stable. since 2018), the cost of the product (54%, +2 pp.), and the origin of the product (49%, +8 pp.)

Base: Respondents who buy FAPs at least several times a year (21,179)

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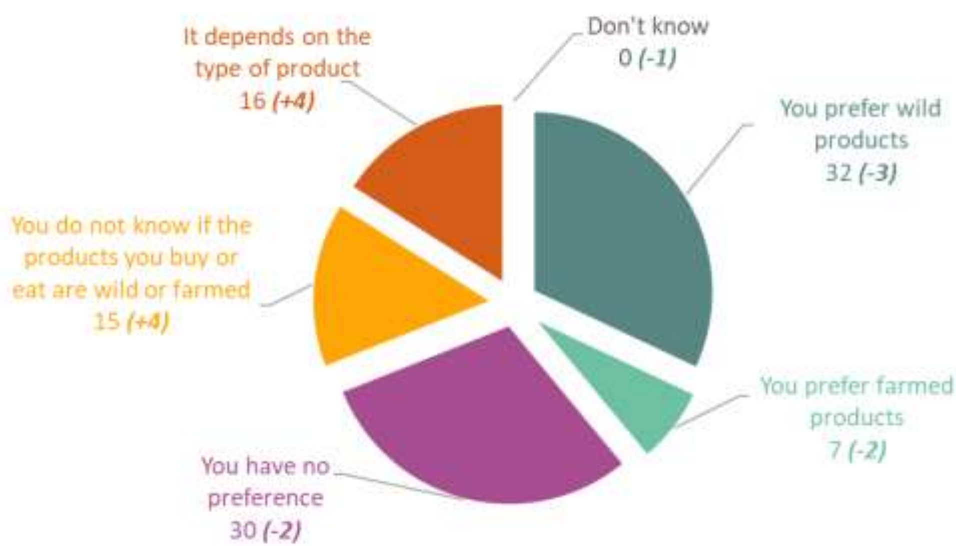
Preferences regarding wild or farmed products

Most consumers of FAPs prefer wild products (32%, -3 pp.) or state that they do not have a preference (30%, -2 pp.). A significant share (16%) says that it depends of the product(+4 pp.)

QD7 Fishery and aquaculture products can be wild or farmed. Would you say that...
(% - EU)



(Mar./Apr. 2021 - June/July 2018)

Base: Respondents who buy or eat FAPs at least several times a year (22,844)

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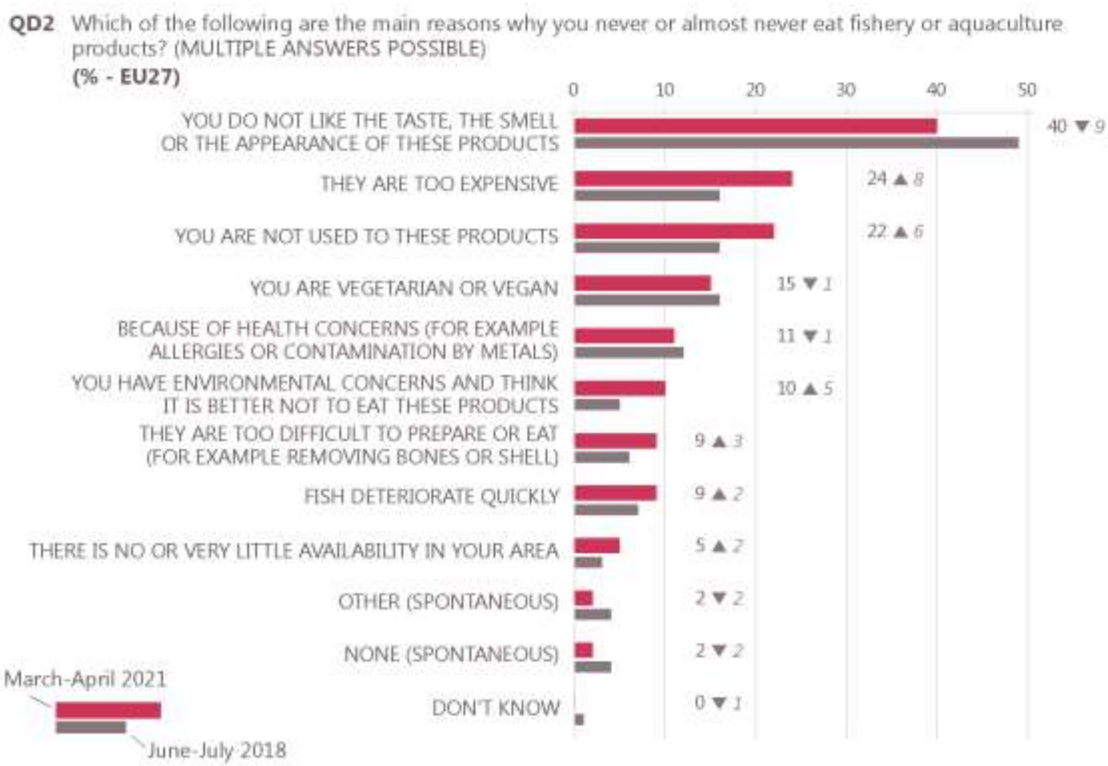
Reasons for not eating fishery and aquaculture products



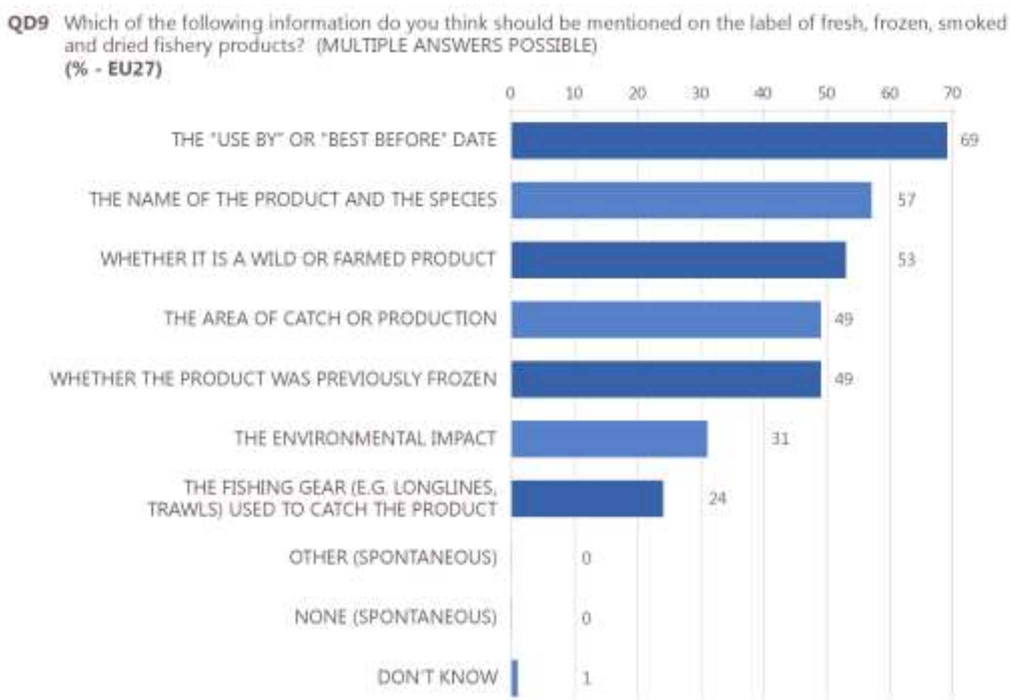
Respondents who never or almost never consume fishery or aquaculture products mostly do not like the taste, the smell or the appearance of these products (40%, -9 pp.), think they are too expensive (24%, +8 pp.), or are not used to these products (22%, +6 pp.)

Base: respondents who never or almost never eat FAPs (3,933)

IV. INFORMATION ON FISHERY AND AQUACULTURE PRODUCTS

Relevance of mandatory information for fresh, frozen and dried products

In first place, respondents (69%) state that the “use by” or “best before” date should be displayed on the label of fresh, frozen, smoked and dried fishery products, followed by the name of the product and the species (57%), and whether it is a wild or farmed product (53%)



Base: respondents who buy or eat FAPs at least several times a year (22,844)

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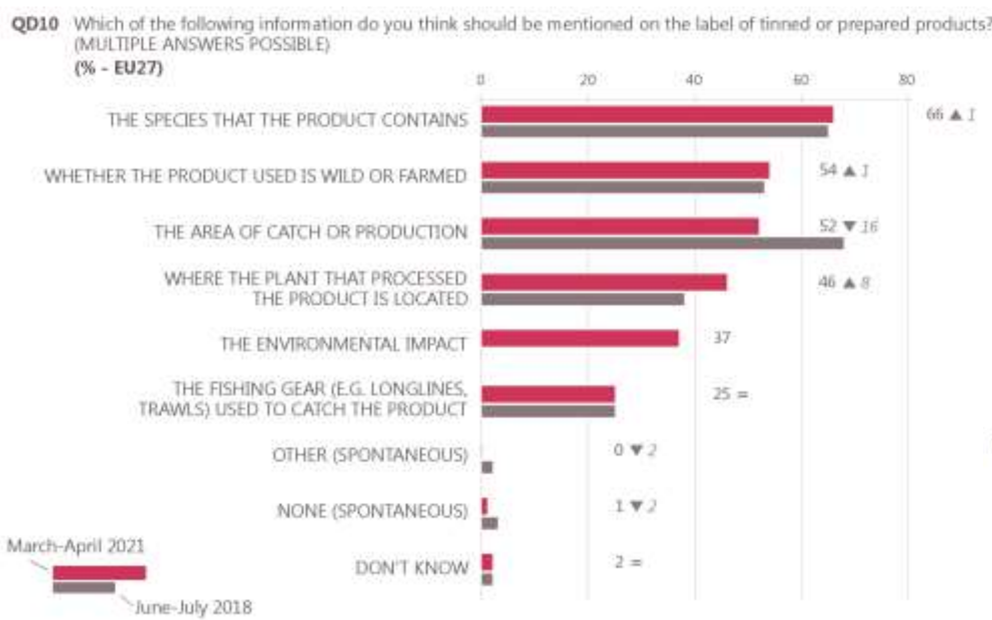
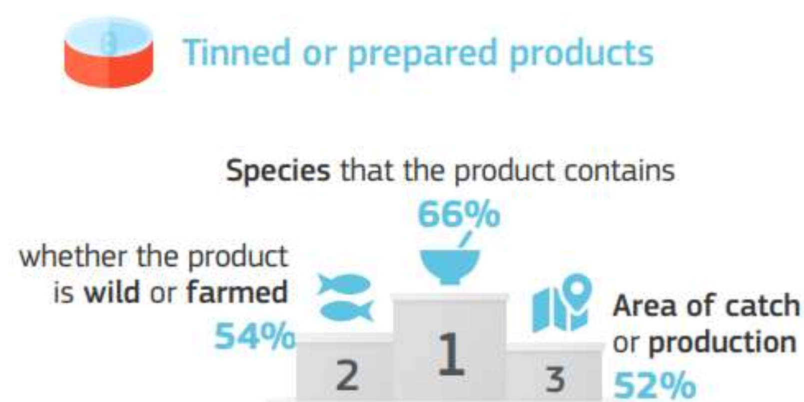
Relevance of mandatory information for tinned and prepared products

When it comes to tinned or prepared products, labelling should specify the species that the product contains (66%, +1 pp.), whether the product used is wild or farmed (54%, +1 pp.) and the area of catch or production (52%, -16pp.)





Base: respondents who buy or eat FAPs at least several times a year (22,844)

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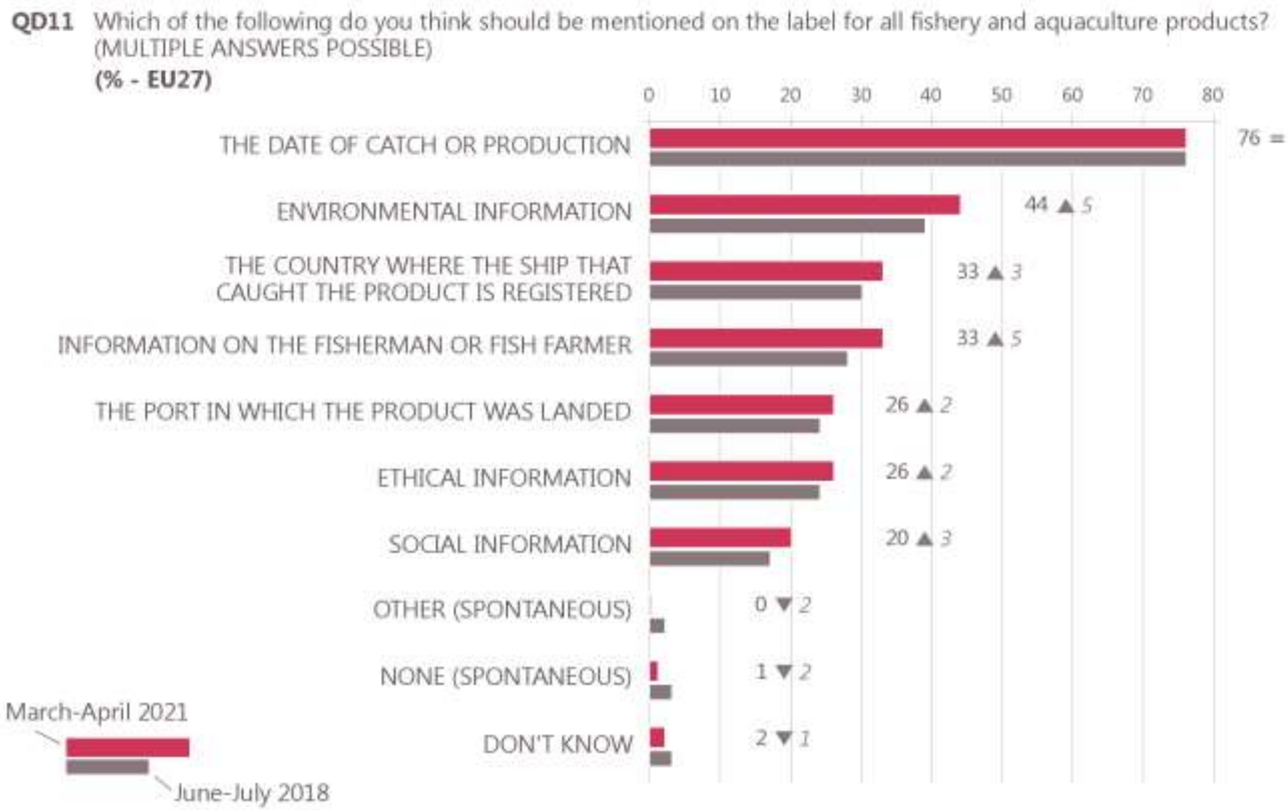
Interest in voluntary information



When it comes to FAP products more generally, respondents think the date of catch or production (76%, with no change), followed by environmental information (44%, +5 pp.) should be included on the labels

Base: respondents who buy or eat FAPs at least several times a year (22,844)

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MAIN FINDINGS 1/2

- EU consumers eat FAPs regularly, although with lower frequency in landlocked countries, and preferably at home.
- the share of Europeans who eat fishery or aquaculture products at home and at restaurants at least once a month has decreased since 2018 (respectively -6 and -11 percentage points).

- The **product's appearance** is still the key factor when buying fishery and aquaculture products and the main reason for never eating them, although **price** is also an important factor. Moreover, **the origin** of the product has gained ground in 21 Member States compared to 2018 and confirms to be the third most important purchase factor.
- The proportion of respondents who hold a strong preference for either **wild or farmed products** has decreased in the majority of Member States compared to 2018. At the same time, they are now more likely to say that it depends on the type of product.

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MAIN FINDINGS 2/2

- The survey confirms consumers' expectations **that prepared/preserved products** be also accompanied by sector-specific information such as the name of the species, whether the product is wild or farmed or the area of catch or production.
- Importance to the information on **the date of catch/harvest**, since 76% of EU consumers of them would like to see it on labels for all kind of FAPs.
- Even if **environmental information** continues to stand way below with 44% of consumers declaring that this should appear on the label, this information has gained significant interest since 2018. The results confirm the growing interest for environmental, social and ethical information but show at the same time the limited weight in the purchasing decision that consumers still allocate to these aspects compared to other food attributes.

- It seems that the **COVID-19 crisis** has not affected significantly and lastingly the consumption habits of FAPs in the EU. While this is positive news for our sector, promotion of less expensive, or less popular, but nutritious species is essential for FAPs to continue contributing to the EU's food security. In particular, since financial aspects were the main cause affecting consumption during the pandemic.