



What is organic fish? European consumers' perceptions and understanding

Pirjo Honkanen, Ingrid Olesen and Themis Altintzoglou

Nofima

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Presentantion outline

Objective

Background

Theoretical framework

Methodology

Results

Conclusions



European Organic Aquaculture – Science-based recommendations for further development of the EU regulatory framework and to underpin future growth in the sector

WP3.1 Objective:

To assess consumer perceptions, sentiments and understanding of organic aquaculture to promote consumer confidence and acceptance of organic farming principles



European
Commission

FP7-KBBE. 2013.1.2-11 Assessment of organic aquaculture for further development of European regulatory framework

Coordinator: Åsa Maria Espmark.

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Background

Low consumption

- Price
- Availability
- Marketing and awareness of organic seafood

Confusion with other Eco-labels



Objective

1. Explore consumer familiarity with and usage of organic labels
2. Study terms and concepts consumers find relevant for organic fish, and how important they are



Theoretical framework

Labels:

- Tools assisting consumers' decision making
- Create transparency
- Can increase trust

Need:

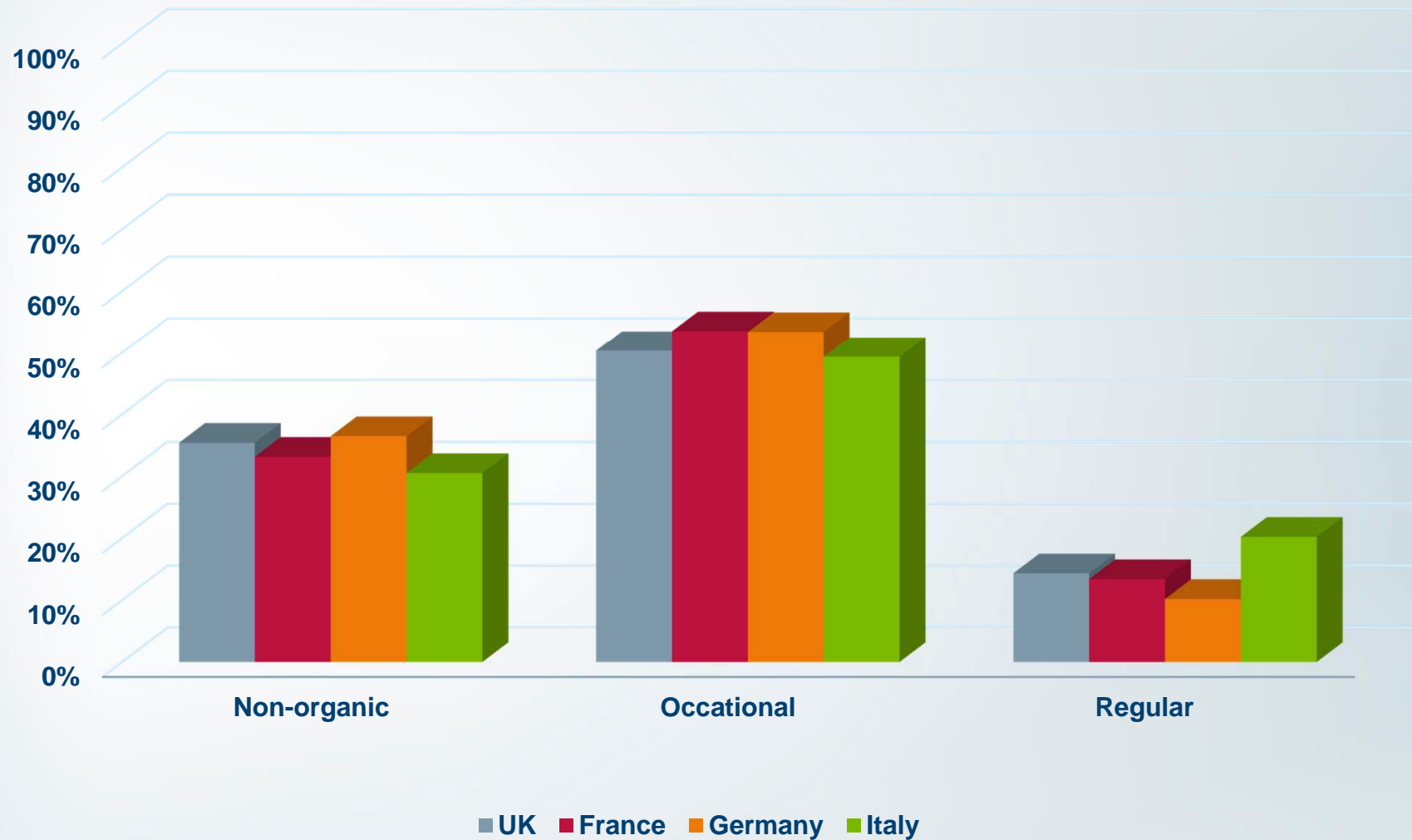
- Attention, awareness, knowledge

Methods

- Litterature review
- On-line survey
 - 2000 respondents
 - Germany, UK, France, Italy
 - 25% organic food consumers
- Descriptive analysis
- ANOVA



Organic fish consumption



The Euro-leaf

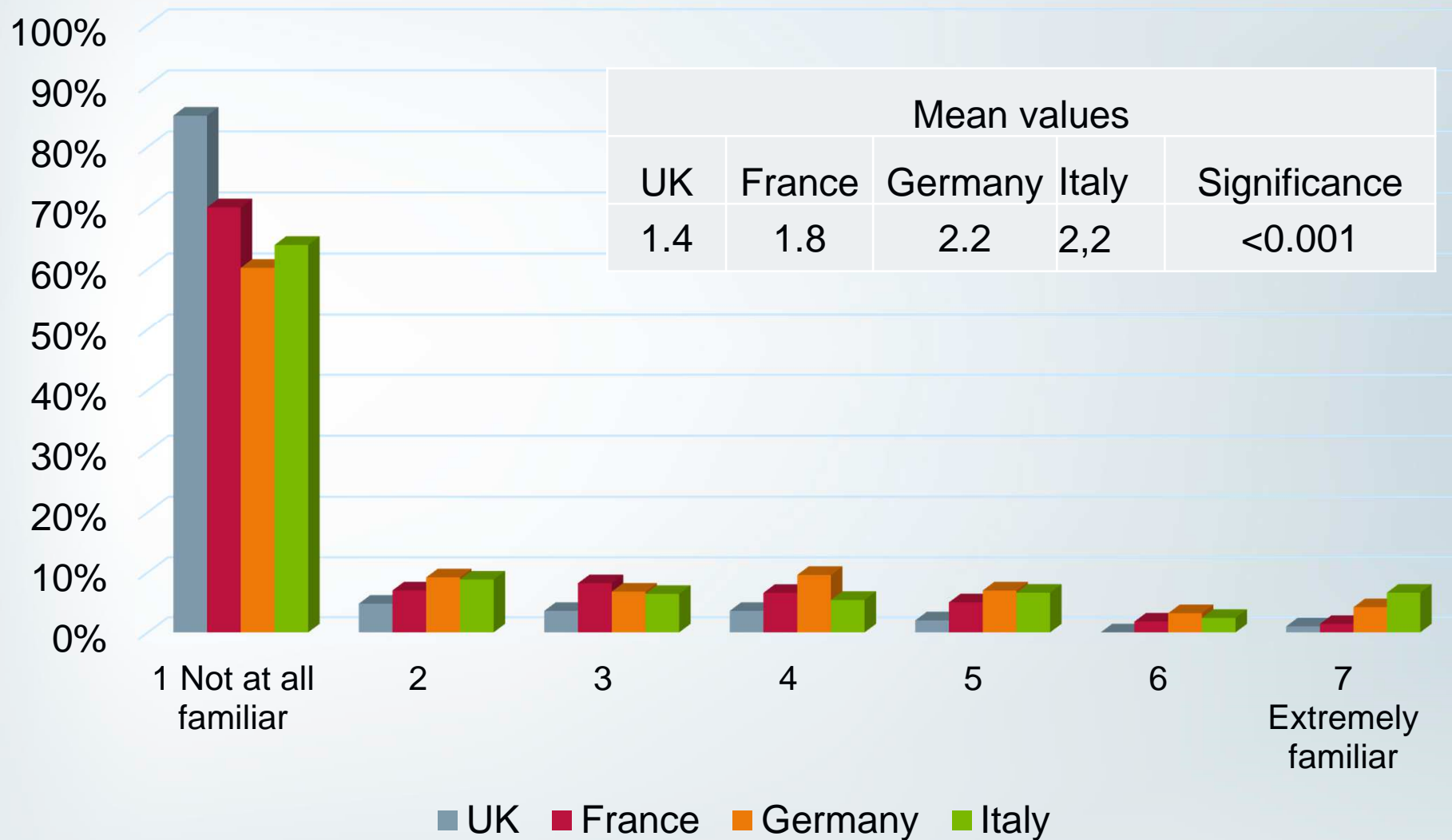
“The main objective of the European logo is to make organic products easier to be identified by the consumers”

(http://ec.europa.eu/agriculture/organic/downloads/logo/index_en.htm)

- **Does it work?**



Familiarity of the Euro-leaf logo



Usage of the Euro-leaf logo

How often do you take the label into account when buying fish?

	Never	Sometimes	Always
UK	92%	8%	1%
France	78%	21%	0.4%
Germany	76%	22%	3%
Italy	66%	22%	12%

UK



24% Familiar
65% Unfamiliar
(49% Totally unfamiliar)



24% Familiar
67% Unfamiliar
(50% Totally unfamiliar)



10% Familiar
84% Unfamiliar
(69% Totally unfamiliar)



3% Familiar
93% Unfamiliar
(85% Totally unfamiliar)

France



53% Familiar
24% Unfamiliar
(8% Totally unfamiliar)



19% Familiar
63% Unfamiliar
(37% Totally unfamiliar)



8% Familiar
85% Unfamiliar
(70% totally unfamiliar)

Germany



48% Familiar
34% Unfamiliar
(11% Totally unfamiliar)



25% Familiar
61% Unfamiliar
(41% Totally unfamiliar)



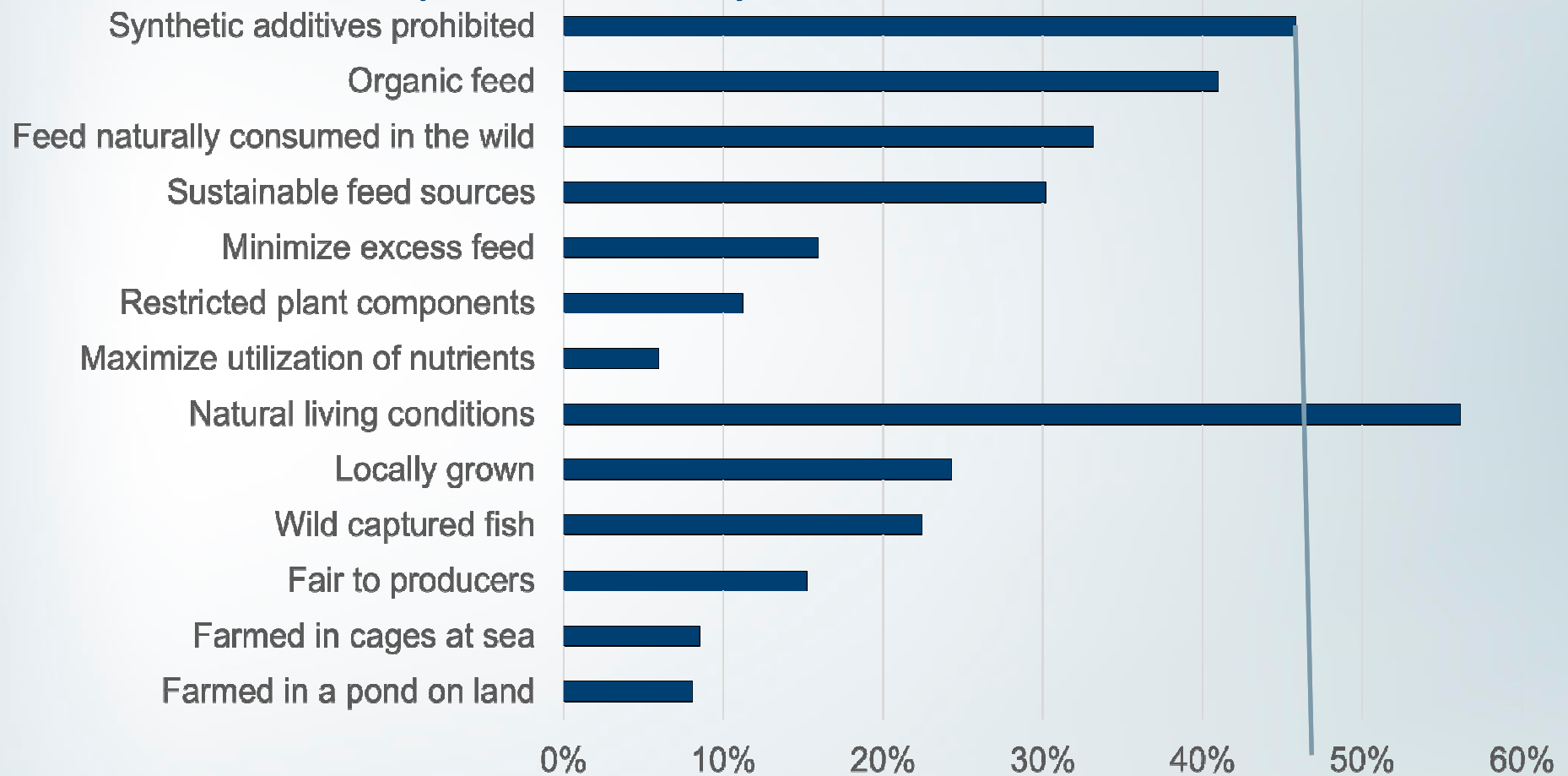
14% Familiar
76% Unfamiliar
(60% totally unfamiliar)

Objective

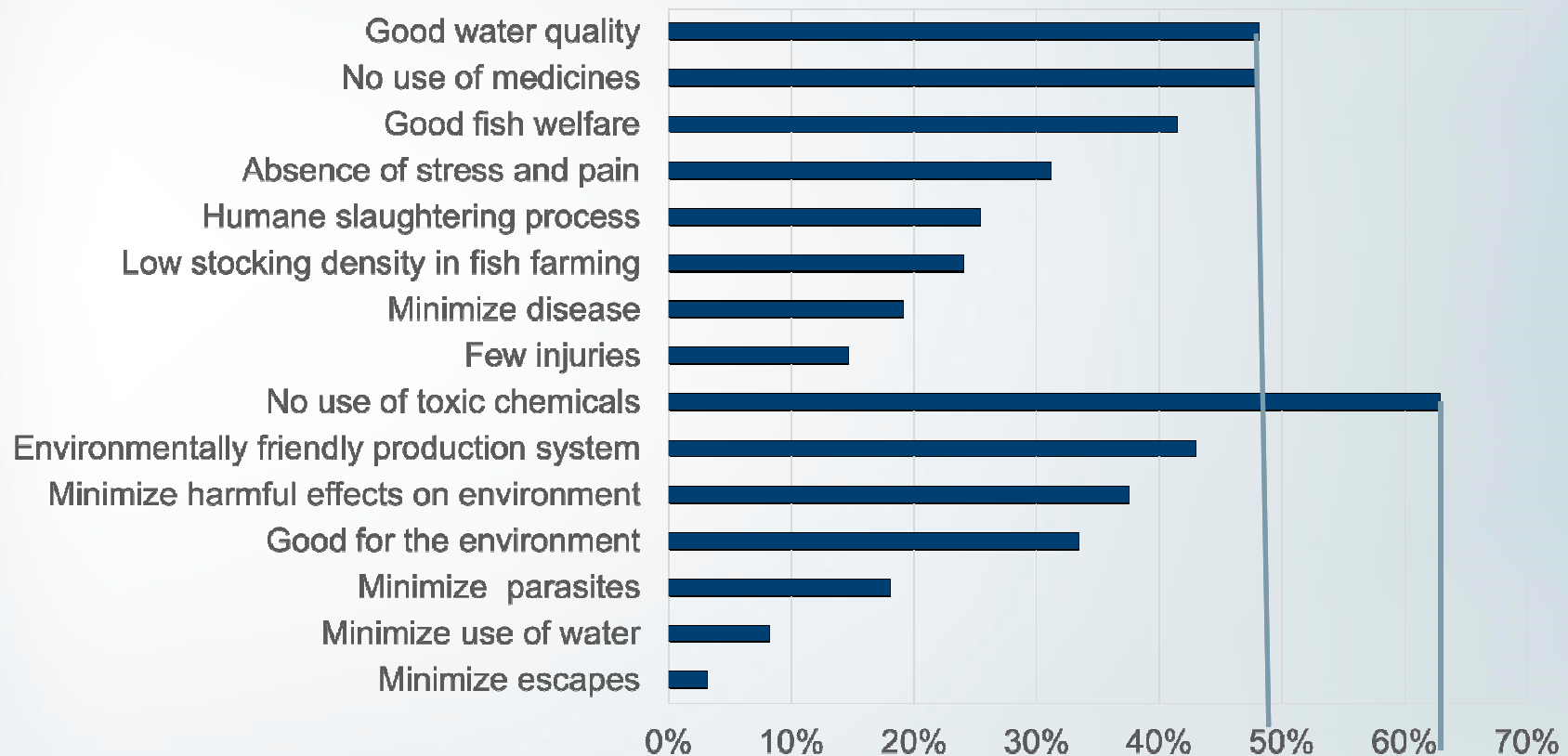
1. Explore consumer familiarity with and usage of organic labels
2. Study terms and concepts they find relevant for organic fish, and how important they are



Defining features of organic fish - Feed and production systems



Defining features of organic fish - Fish welfare and environmental impact



Conclusions

- Consumers are more familiar with the national organic labels than the Euro-leaf
- Co-labeling as an alternative:
 - More expensive for exporting companies. Costs are already higher in organic production
 - Consumer confusion over many labels

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Conclusions

Most respondents define organic fish as:

- High fish welfare with No use of medicines & Good water quality
- Production system with Natural living conditions
- Organic feeds with No synthetic growth promoting additives
- Environmental friendly production without use of toxic chemicals
- Otherwise production system issues not considered as very relevant

- Consumers' perception of organic fish deviate from EU regulations in some aspects
- Confusion about farmed/wild fish among some (19-27%)

Conclusions cont.

- Need for communication strategy for the Euro-leaf

→ Increase awareness and familiarity



- Need to differentiate the leaf from other Eco-labels

→ Increase knowledge of organic aquaculture and the Leaf
Consider more natural living conditions, less medicine, no toxic chemicals and synthetic feed additives in regulation and promotion

- Increase availability in retail – product variety



Thank you for your attention!

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