



The perspective of a National Administration: the case of seafood consumption and labelling in Spain

Aurora de Blas Carbonero

Subdirectora General de Economía Pesquera

Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente.

ESPAÑA

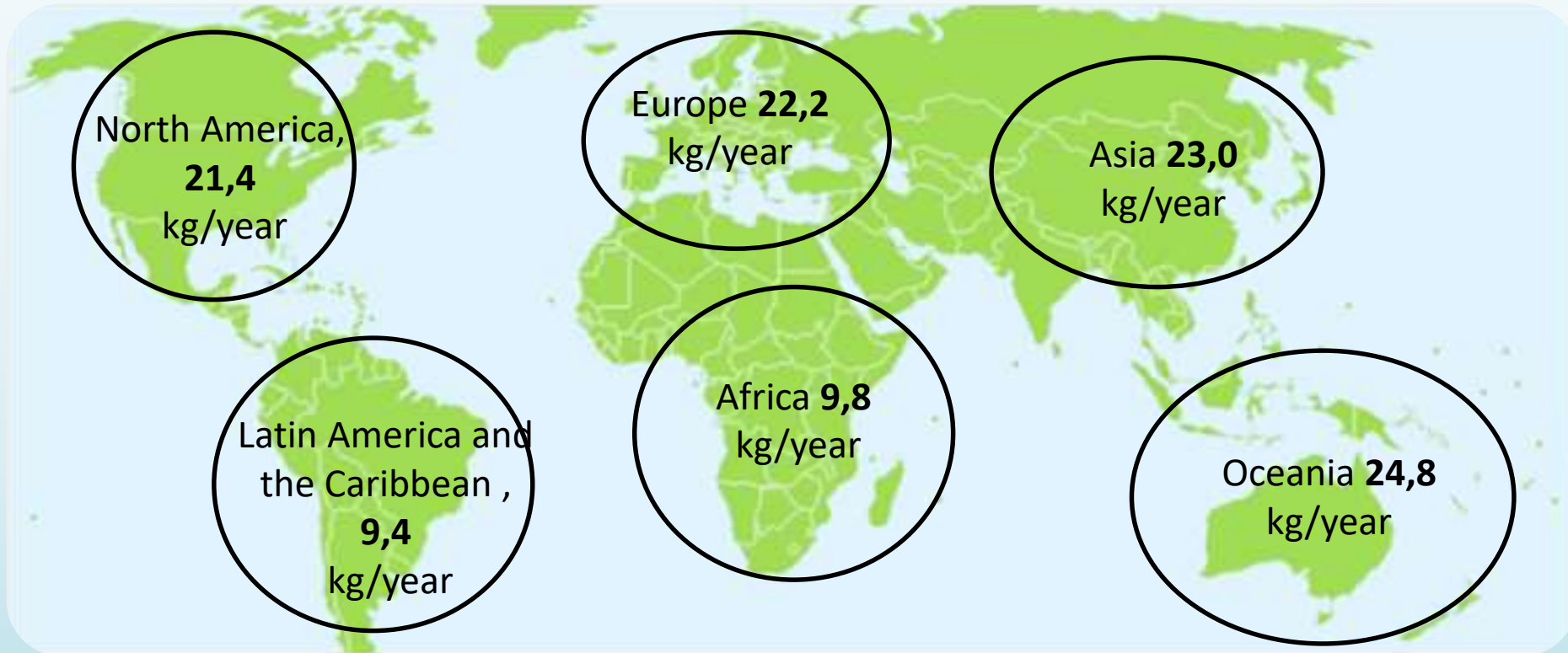
- ✓ CONSUMPTION
- ✓ CONSUMER HABITS and PROFILES
- ✓ INFORMATION AND CONSUMER
- ✓ STRATEGIES

CONSUMPTION



The world consumption of fishery products

Data source FAO 2014, SOFIA report 2016



Industrialized countries:
26,8 Kg/year



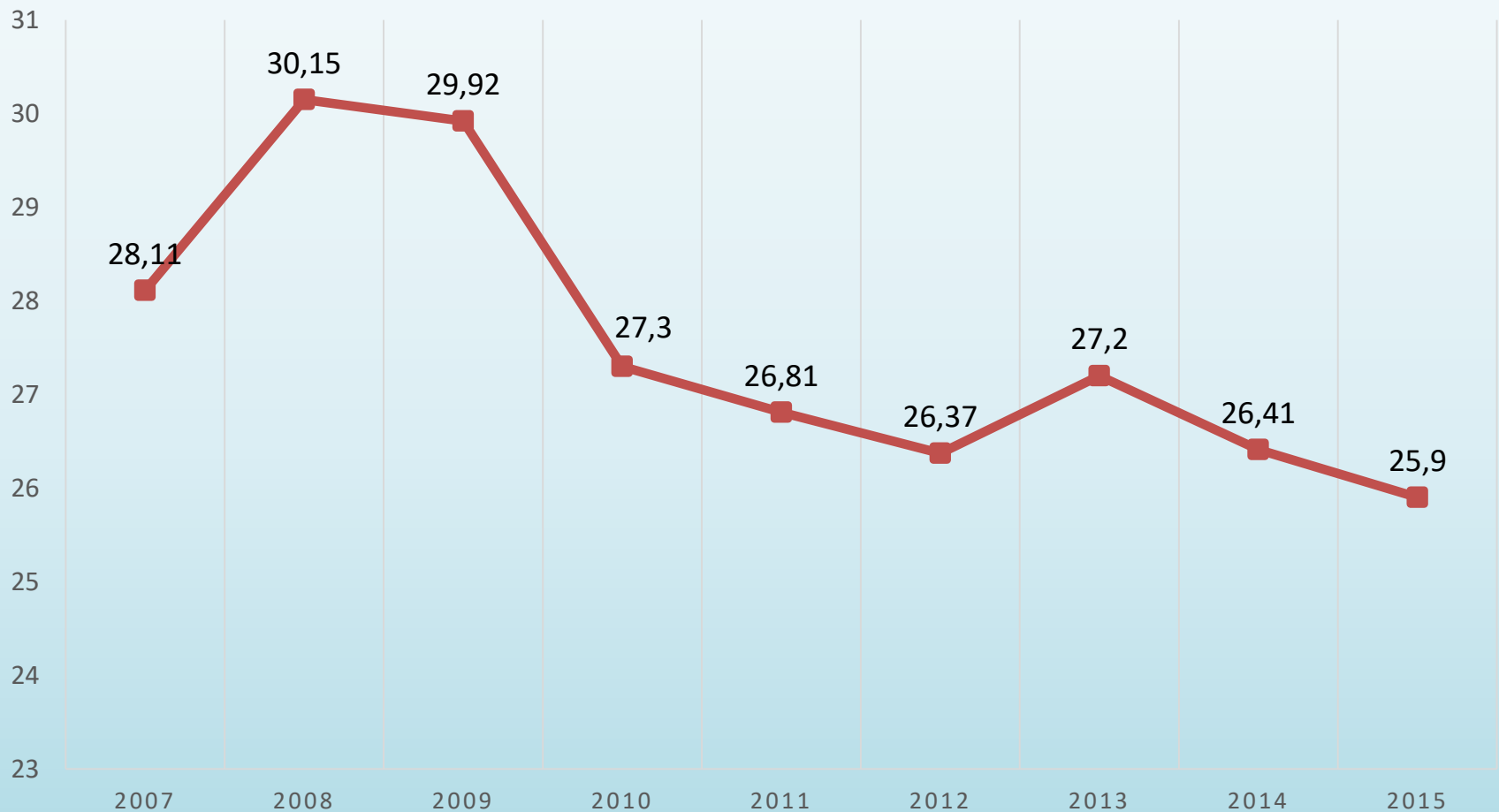
Other developed countries:
20,0 Kg/año



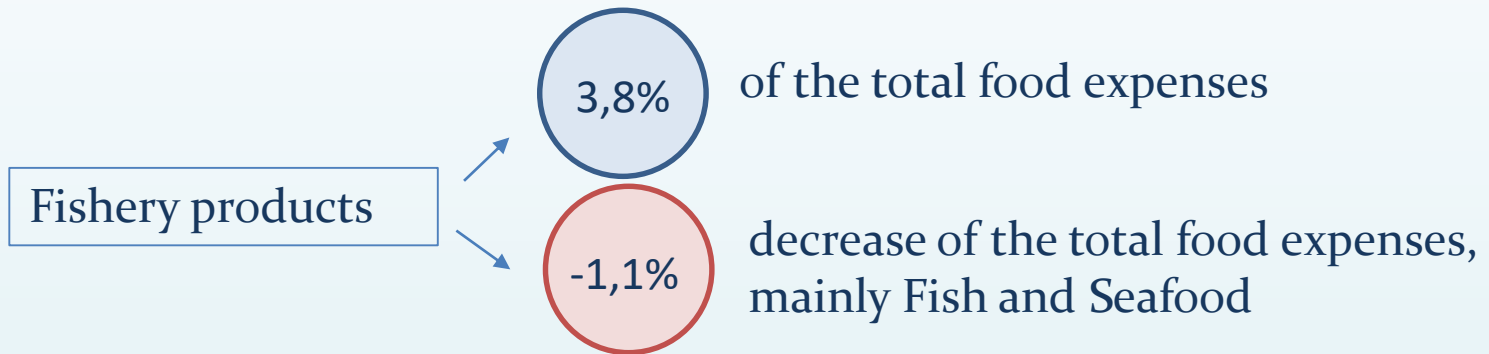
Least-developed countries:
12,4 Kg/año

The household consumption of fishery products in Spain

(MAPAMA)



Fishery Consumption



Why is decreasing?

Price increase in fish and seafood products

The consumption of young people and families is still low in comparison with older people

Discount stores gain market share versus Traditional Channels

CONSUMER HABITS



GLOBAL MARKETS

Different consumers, different needs



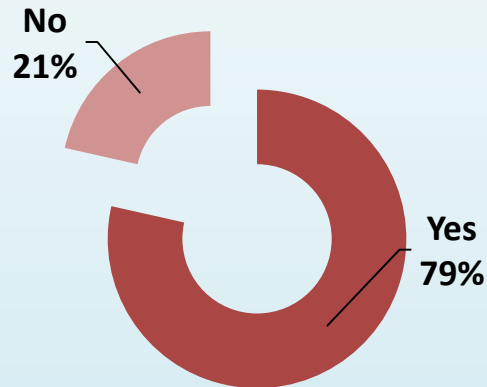
WHICH ASPECTS ARE VALUED BY THE CONSUMERS?

- ❑ **SENSES:** The products must be appealing (appearance, smelling, taste...)
- ❑ **HEALTH:** Natural and fresh, low in salt, without preservatives, with olive oil
- ❑ **ECONOMY:** The Price-quality ratio is a key factor
- ❑ **KNOWLEDGE:** More information on the origin, treatment and production methods

The Value of the Sustainability I

Is Sustainable Fishing Concept known for the consumers?

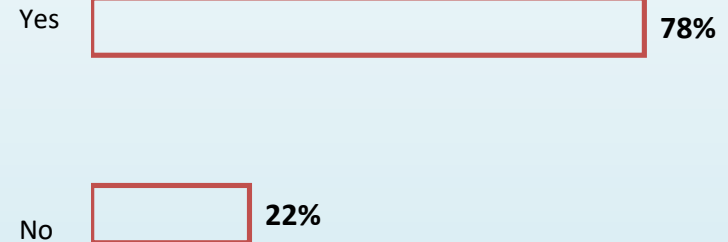
(Base Total: 1.200)



Source: AECOC

Would the consumer pay more for a Fishery Sustainable product?

(Base conocen: 951)



Source: AECOC

79% of the interviewees know the concept of Sustainable Fishing and they would pay more for a product coming from sustainable fisheries.

But....

The value of the Sustainability II

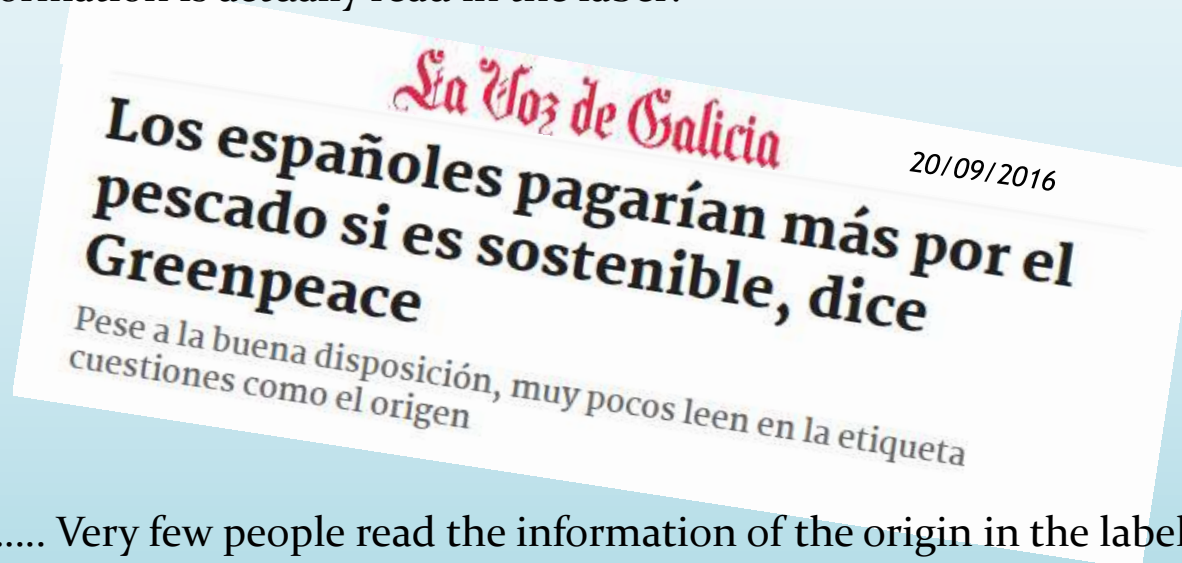
What is answer when other question is raised to the consumer?

Is any reference to sustainability necessary in the label of package?

Tuna (n=751)	Mussels (n=443)	Sardines, anchovies and squid (n=568)	Cockles and clams (n=333)	Prepared; breaded fish (n=484)	Sushi (n=269)
2%	2%	2%	1%	1%	-

Source: AECOC

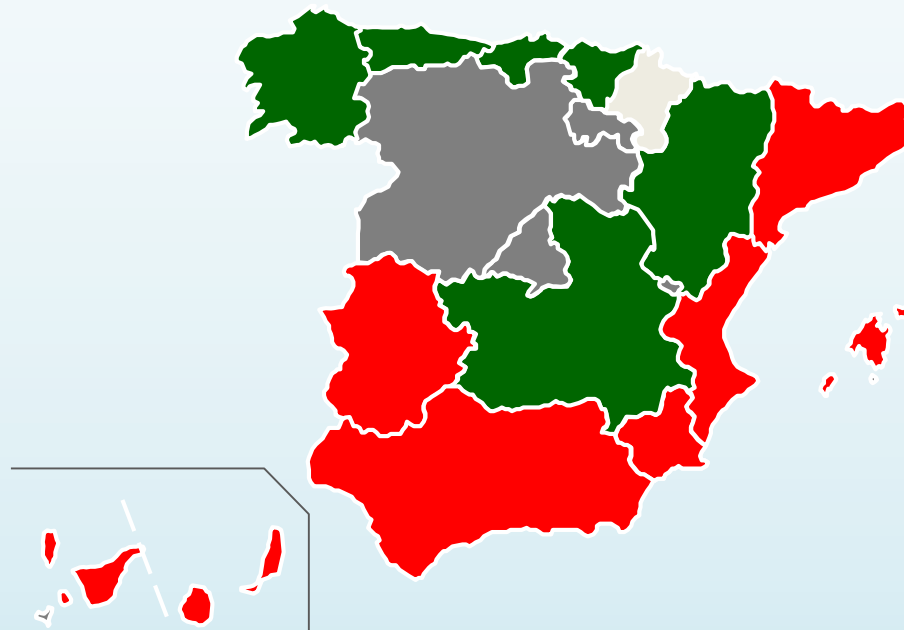
what information is actually read in the label?



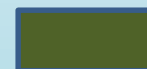
..... Very few people read the information of the origin in the label....



REGIONS AND CONSUMER



The lowest consumer



The biggest consumer

CONSUMER PROFILE



The profile of the highest consumer is old aged couples already retired and with children in adulthood. (People with high purchasing power to spend on themselves).



But...which is the profile of the NO-consumer ??

NO-CONSUMER PROFILE

To find out the profile of No-consumer the Secretary General of Fishing made:

First step: *carried on a survey asking for the frequency of consume*



Who is NO-Consumer? → People that consume fish maximum twice per month.

Which is the age group of the No-Consumer? → Young people with age between 25 and 35 years old

Second step: *designed a study focus on the young people no-consumer of fish and seafood*



...and the final data from this study gave us the next results...

NO-CONSUMER PROFILES



Four different profiles:

The **REJECTERS**:
they never
consume fish and
seafood.



The **BASICS**:
they hardly ever
eat fish and their
preferences are
meat or other
dishes.



The **PRAGMATICS**:
they like fish but
they do not have
time enough to
cook.



The **DISTRUSTFULS**:
they do not refuse but
do not trust in the
origin, or
preservation.



INFORMATION AND CONSUMERS



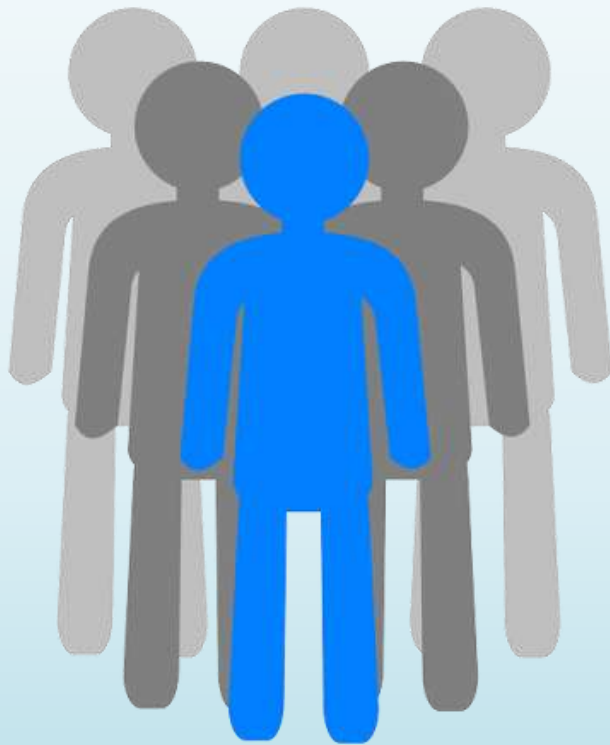
THE INFORMATION CLOSEST TO THE CONSUMER



a a a a



THE POWER OF INFORMATION IN THE PURCHASE DECISION



MERO
OFERTON
9.80 €

HOY
PEZ
LIMON

HOY
OFERTON
BONITO

**IS SUFFICIENT INFORMATION
FOR THE CONSUMER?**







Is too much information efficient for the consumer?

**“Right information creates
trust, trust generates
consumption”**



STRATEGIES



CONFERENCES AND SEMINARS

- THE NEW CONSUMER OF FISHERY PRODUCTS
- CONSUMER INFORMATION
- THE NO CONSUMER OF FISHERY PRODUCTS



STUDIES AND REPORTS

- ANALYSIS OF YOUNG NO CONSUMER OF FISHERY PRODUCTS.
- ANALYSIS OF YOUNG COUPLES WITH KIDS.



NEW TOOLS



#consumepecado



Añadir a la cesta

Activar el pedido en 1-Clic



Thank you!

***SUBDIRECCIÓN GENERAL
DE ECONOMÍA PESQUERA***

