ITALIAN CONSUMER'S PURCHASING BEHAVIOUR TOWARDS ORGANIC SEAFOOD: OPENNESS OR SKEPTICISM?

GRAB-IT
Gruppo Ricerca Agricoltura Biologica

ASSOCIAZIONE SCIENTIFICA CENTRO DI PORTICI

Organic farming and agro-ecology as a response to global challenges
June 27 to 29, 2018
Capri (NA), Italy

crea
Consiglio per la ricerca in agricoltura e l'analisi dell'economia agraria

mipaaf
ministero delle politiche agricole alimentari e forestali

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Centro di Zootecnia e Acquacoltura

1990s

Extensive organic carp production in Germany and Austria

1995

Organic salmon project (Ireland)

Develop standards for organic salmon, based on the IFOAM principles and the EEC No 2092/1991

2000

Organic shrimp production

Solve environmental problems of intensive production
Alternative business model for the shrimp industry
Strengthen the position of small scale producers

2003

IFOAM Aquaculture Expert Group

2007

ORGANIC REGULATION

EC No 834/2007

on organic production and labelling of organic products and repealing regulation (EEC) No 2092/91

2009

IMPLEMENTING RULES

EC No 710/2009

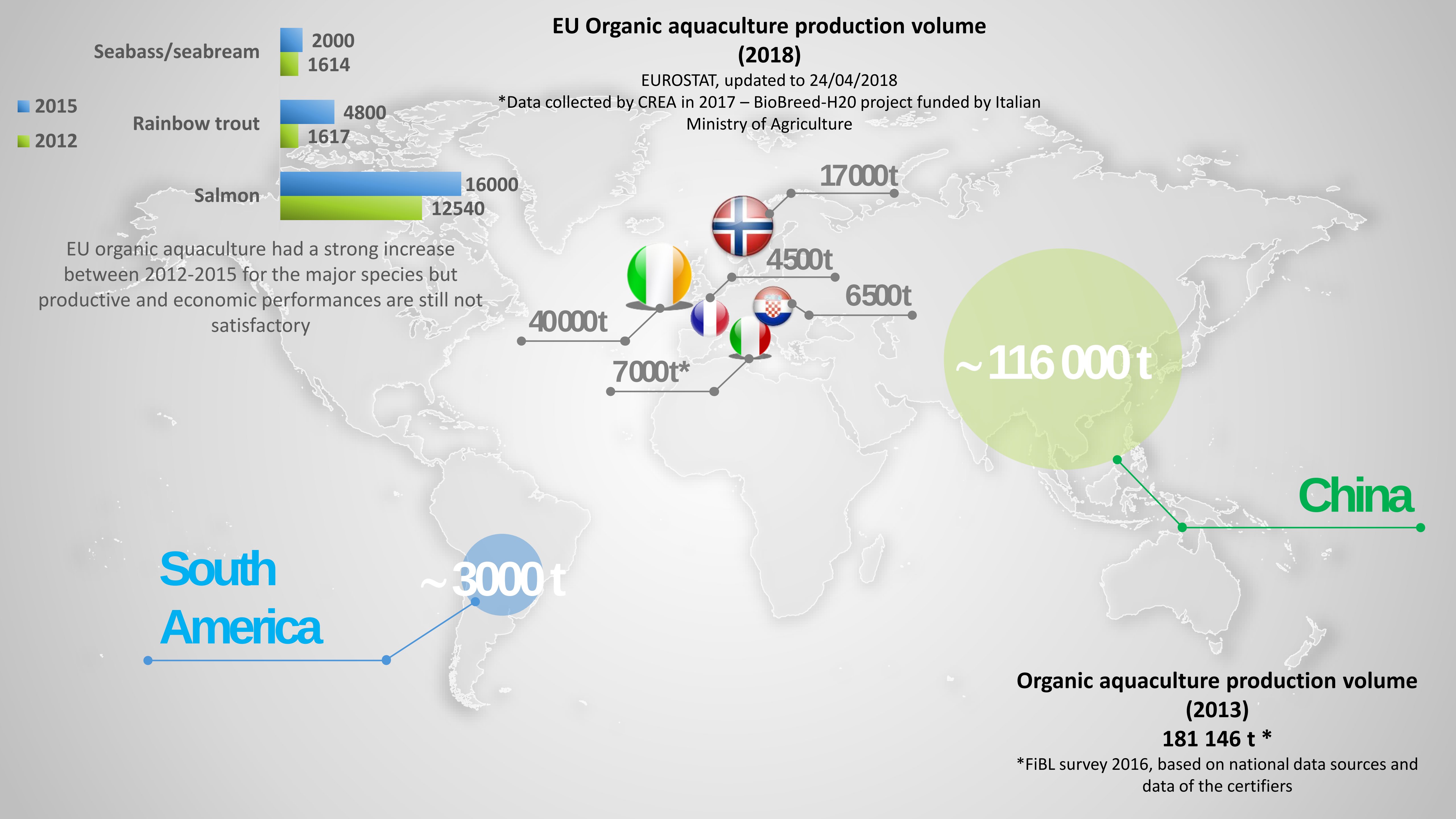
laying down detailed rules for the implementation of EC No 834/2007, as regards laying down detailed rules on **organic aquaculture animal and seaweed production**

2018

ORGANIC REGULATION

EC No 848/2018

on organic production and labelling of organic products and repealing regulation (EC) No 834/07


EU Organic aquaculture production volume
(2018)
EUROSTAT, updated to 24/04/2018
*Data collected by CREA in 2017 – BioBreed-H20 project funded by Italian Ministry of Agriculture
Seabass/seabream
2000
1614
Rainbow trout
4800
1617
Salmon
16000
12540
2015
2012
EU organic aquaculture had a strong increase between 2012-2015 for the major species but productive and economic performances are still not satisfactory
17000t
4500t
6500t
40000t
7000t*
~116 000 t
China
South America
~3000 t
Organic aquaculture production volume
(2013)
181 146 t *
*FiBL survey 2016, based on national data sources and data of the certifiers

Major concerns

1 Fish farmers

High costs of production and certification (6%)
Technical issues (juveniles availability and feed quality) (24%)

2 Retailers

High prices, limited volumes and range of available products
Competition with wild fish from responsible fishery/fish farmed responsively

3 Consumers

Confusion (what is organic and what is not?)
Overlap with other concepts (natural, wild, ecological, sustainable)
Too many logos and ecolabels

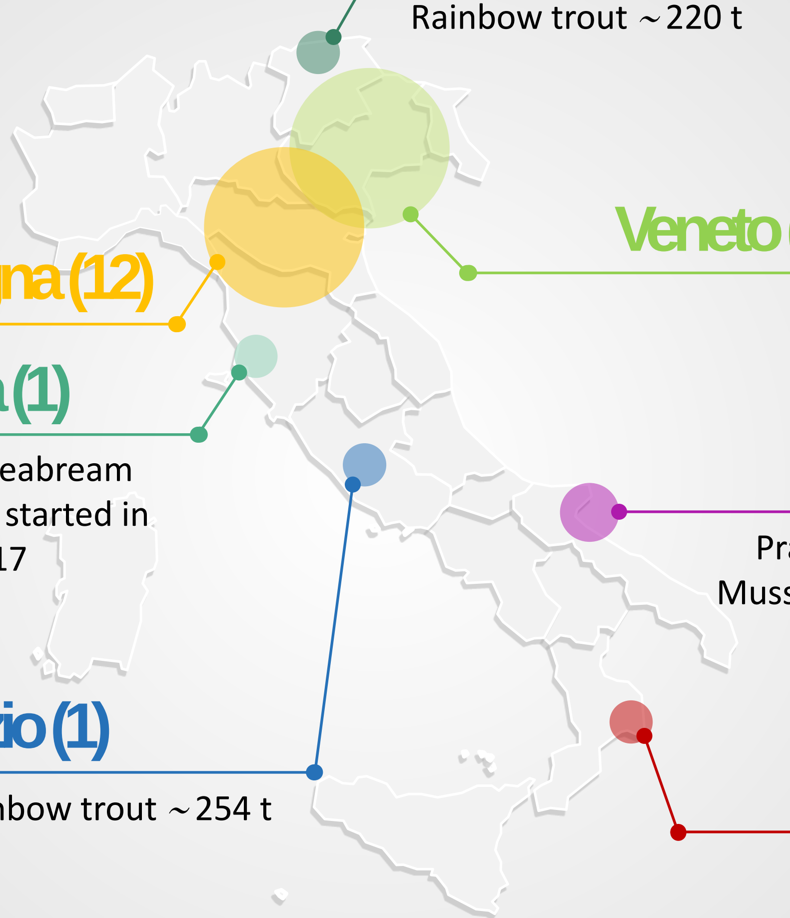
Organic aquaculture in EU

of total aquaculture production

Source EUMOFA – Report on EU Organic Aquaculture 2016

Italian Organic aquaculture production volume (2016)

Data collected by CREA in 2017 – BioBreed-H20 project funded by Italian Ministry of Agriculture



Trentino-Alto Adige (1)

Rainbow trout ~220 t

Veneto (13)

Mullet ~29 t
Gilthead seabream ~ 25.5 t
Seabass ~2 t
European eel ~3 t
Prawn ~0.35 t
Sand smelt ~2.5 t
Rainbow trout ~77 t
Mussel ~ 593 t
Clam ~ 263 t
Oyster ~ 4 t

Emilia-Romagna (12)

Mullet ~60 t
Gilthead seabream ~ 0.15 t
Seabass ~72 t
European eel ~ 0.15 t
Mussel ~3720 t

Toscana (1)

Gilthead seabream
Production started in 2017

Puglia (2)

Prawn ~5 t
Mussel ~ 1780 t

Lazio (1)

Rainbow trout ~254 t

Calabria (1)

Seabass ~8 t

Diversity

6 FARM TYPOLOGIES
10 FARMED SPECIES

Both intensive and extensive systems

3.4% of Italian aquaculture production

1 **Data collection**

Number, position and typology of Italian farms
Total and commercialized annual production

2 **Promotion**

Assessing the interest for organic seafood of large and small retailers, canteens, GAS

3 **Communication**

Promoting communication and information exchange among stakeholders

4 **Survey**

Outline the Italian seafood consumer and promote awareness

Survey

A Consumption habits

SEAFOOD CONSUMPTION
Where, when and what do you eat out of the household?

Purchase habits **B**

How often do you buy FARMED SEAFOOD?
Which products?
How much do you spend for FARMED SEAFOOD?
Where do you buy FARMED SEAFOOD?

C Attitude/awareness towards organic

Do you buy organic food/seafood?
What would you call "organic"?
What do you expect from "organic seafood"?
Would you pay more for "organic seafood"?

Survey in collaboration with
ESSELUNGA
October 2017-February 2018
7392 answers

Survey

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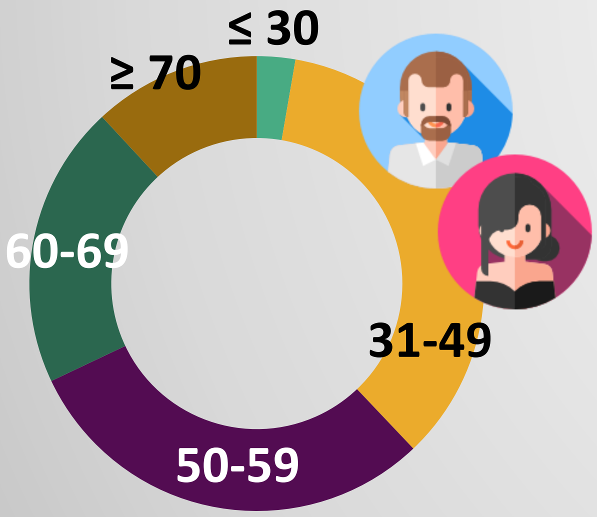
Sample

ONLINE SURVEY (available at www.biobreed.it)

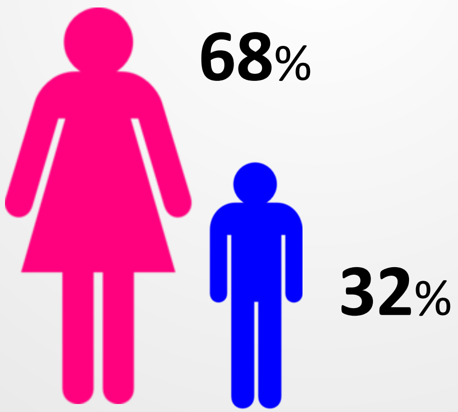
AGE

Medium age consumers are largely represented



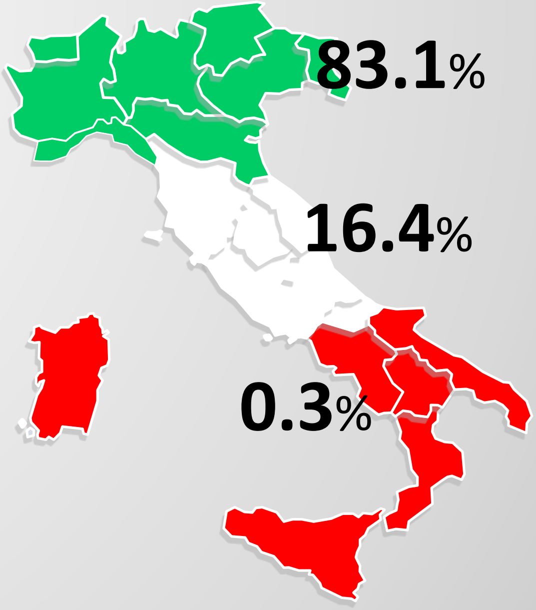
GENDER

Females are more represented



DISTRIBUTION

Northern regions are more represented

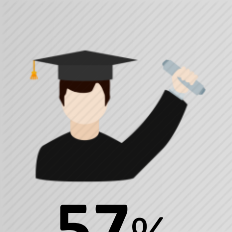


Valle D'Aosta is not represented

Sample

CREA SUBSAMPLE

Education level



The sub-sample is characterized by a high education level

57%

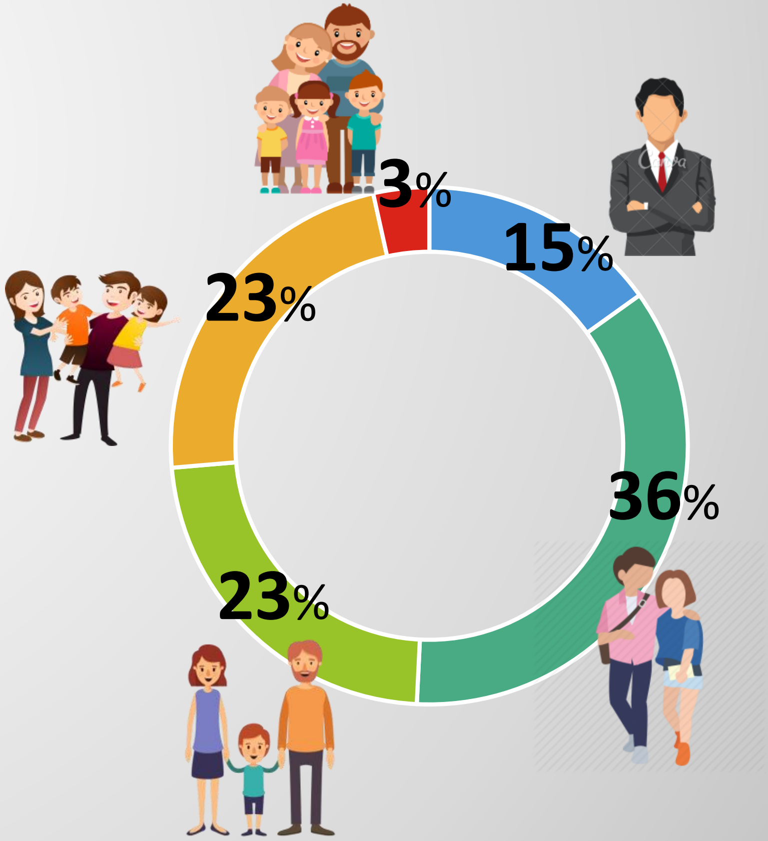
Degree/master

Income

The medium family income was
€ 20 000-40 000

49%

No of people in the house



Employment

Freelancer are largely represented

34%

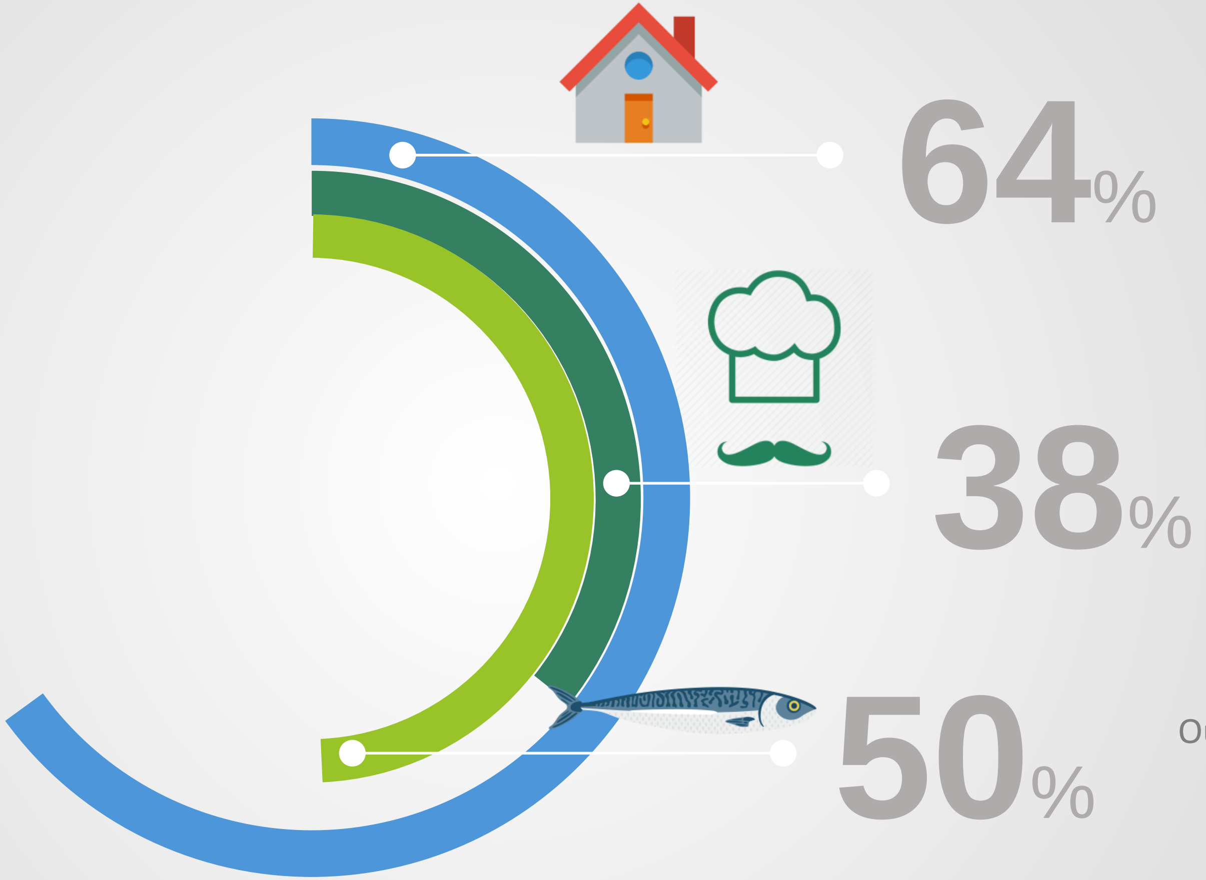
Marital status

Married/Unmarried partner

70%

Consumption habits

Out of the house, Italians use to eat marine fish (**50**%)



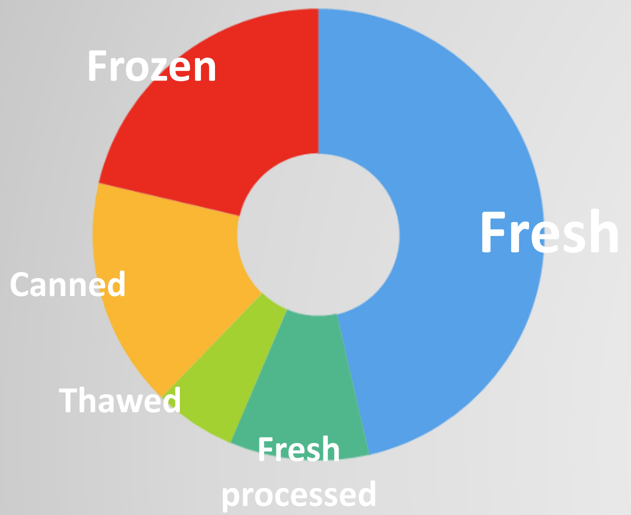
Italians use to eat fish at home

They use to go out to eat fish less than once a month
50% prefer Italian restaurants

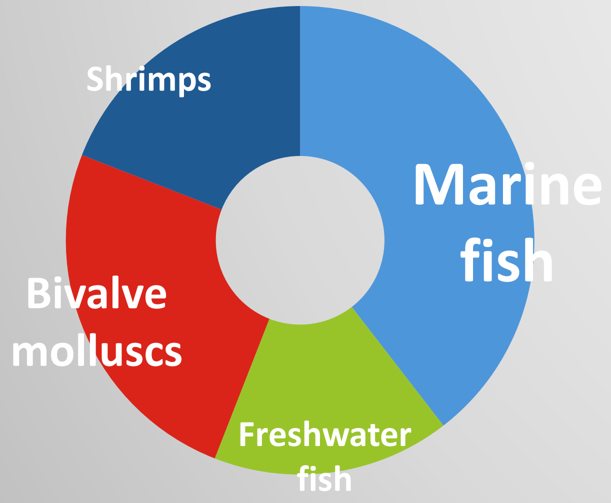
Out of the house, Italians use to eat marine fish

Purchase habits

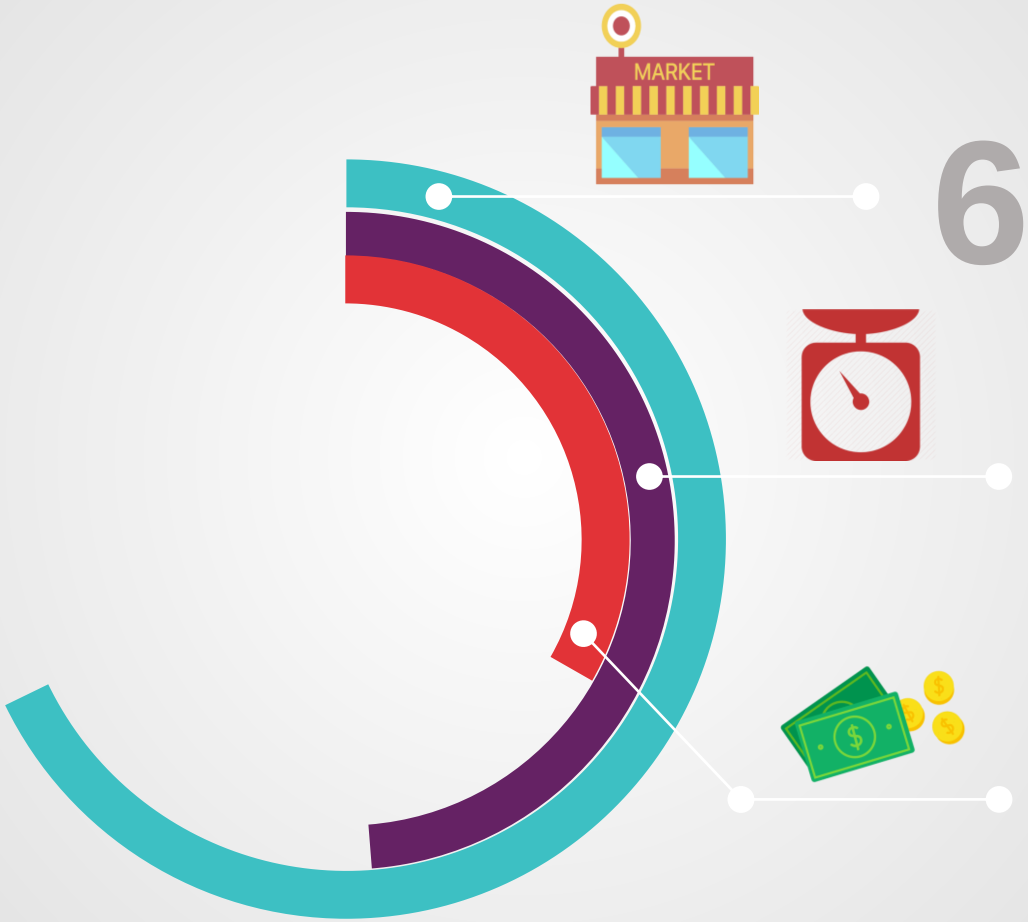
Italians use to buy FARMED FISH fresh
Because of “smell, flavor and taste” (**41**%)



Italians use to buy marine FARMED FISH
(seabream and seabass - **56**%)



Specific for FARMED FISH



67%

Italians use to buy FARMED FISH at the supermarket

49%

Italians use to buy less than 2 kg/month

and **29**% less than once a month

33%

They spend on average € 20-50/month

Attitude/awareness towards organic

	Principle of **HEALTH**	Organic agriculture should sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible
	Principle of **ECOLOGY**	Organic agriculture should be based on living ecological systems and cycles, work with them, emulate them and help sustain them
	Principle of **FAIRNESS**	Organic agriculture should build on relationships that ensure fairness with regard to the common environment and life opportunities
	Principle of **CARE**	Organic agriculture should be managed in a precautionary and responsible manner to protect the health and well-being of current and future generations and the environment

IFOAM Organic Principles

Attitude/awareness towards organic

Principle of **HEALTH**

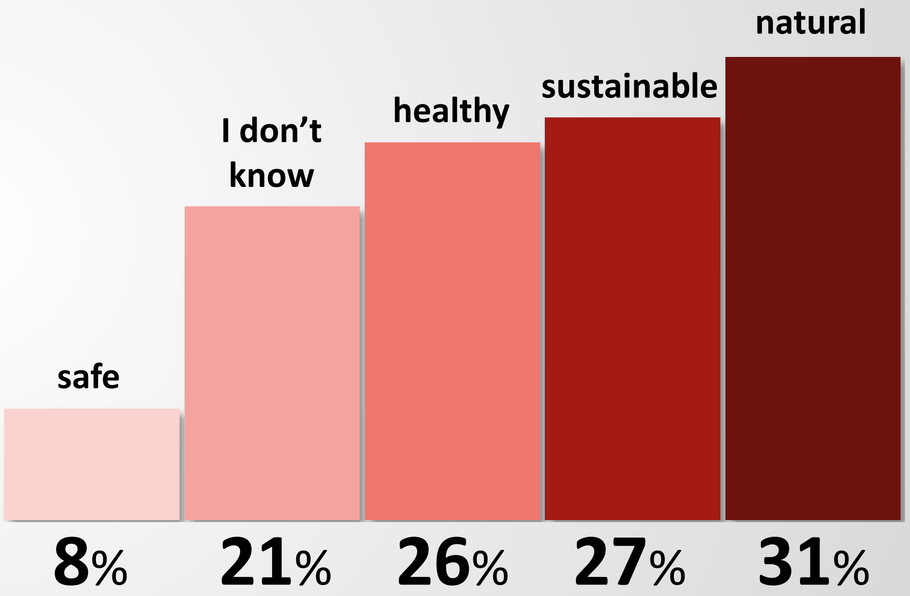
Principle of **ECOLOGY**

Principle of **FAIRNESS**

Principle of **CARE**

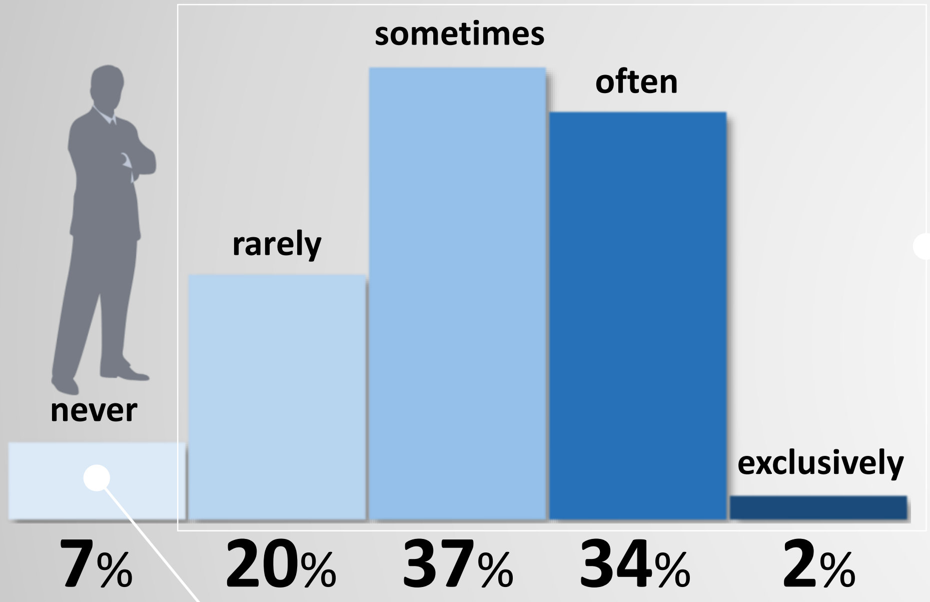
IFOAM Organic Principles

What do you mean for ORGANIC?

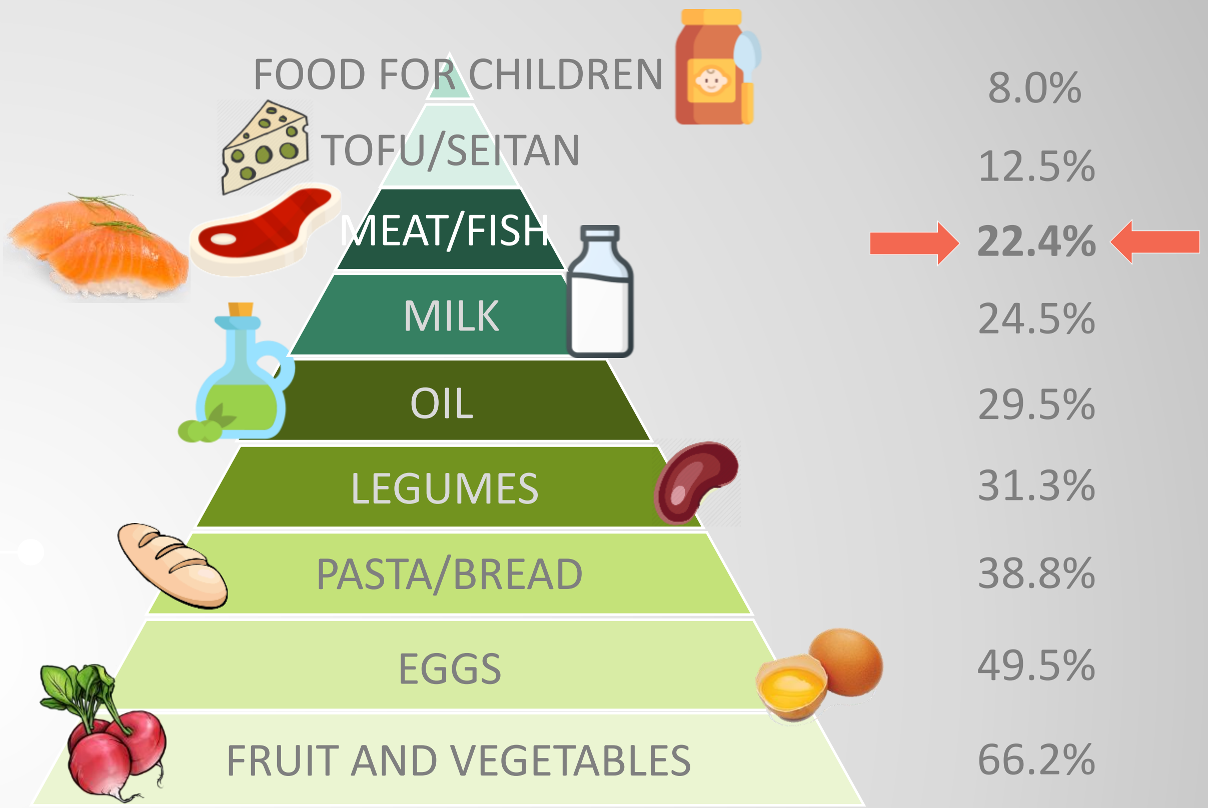


Attitude/awareness towards organic

How often do you buy ORGANIC FOODSTUFF?



WHAT?



WHY NOT?

1. **DISTRUST** – Italians do not believe that a difference exists between conventional and organic (N. 244 – 3.3%)
2. **PRICE** – Italians do not buy organic foodstuffs because they are too expensive (N. 219 – 2.9%)
3. **CONFUSION** – Italians do not understand the difference between organic and conventional (N. 64 – 0.9%)

Attitude/awareness towards organic

More than **31**% of the people interviewed **<u>never</u>** buy **ORGANIC SEAFOOD**

WHY?

I don’t have enough information about organic seafood

I don’t find organic seafood in the stores

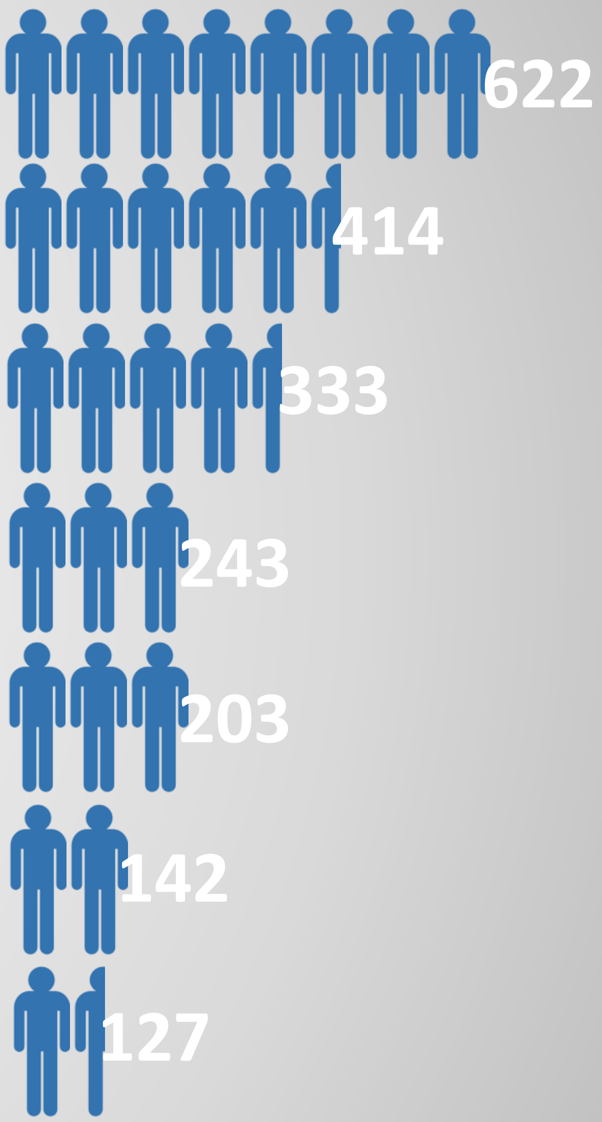
Organic seafood is too expensive

I prefer *wild* seafood

Distrust: organic is a fraud

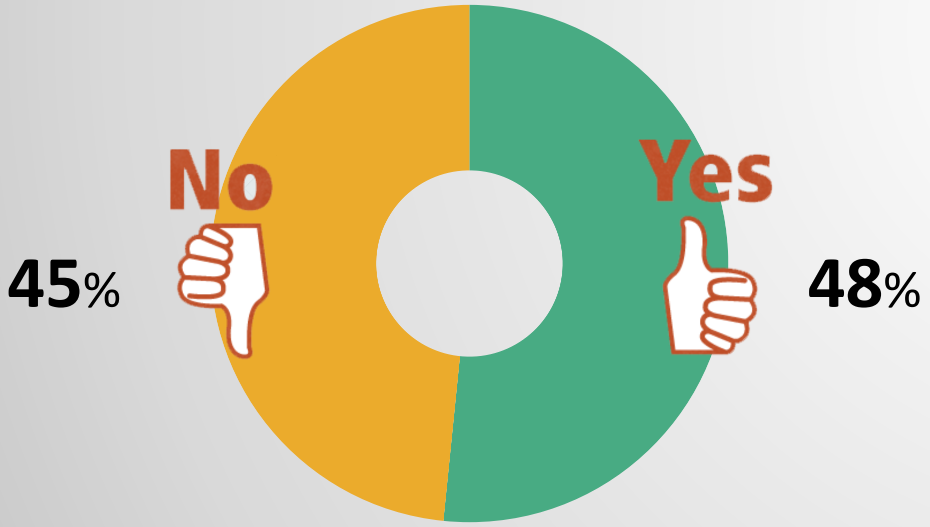
I don’t find any difference between organic and conventional

Limited supply

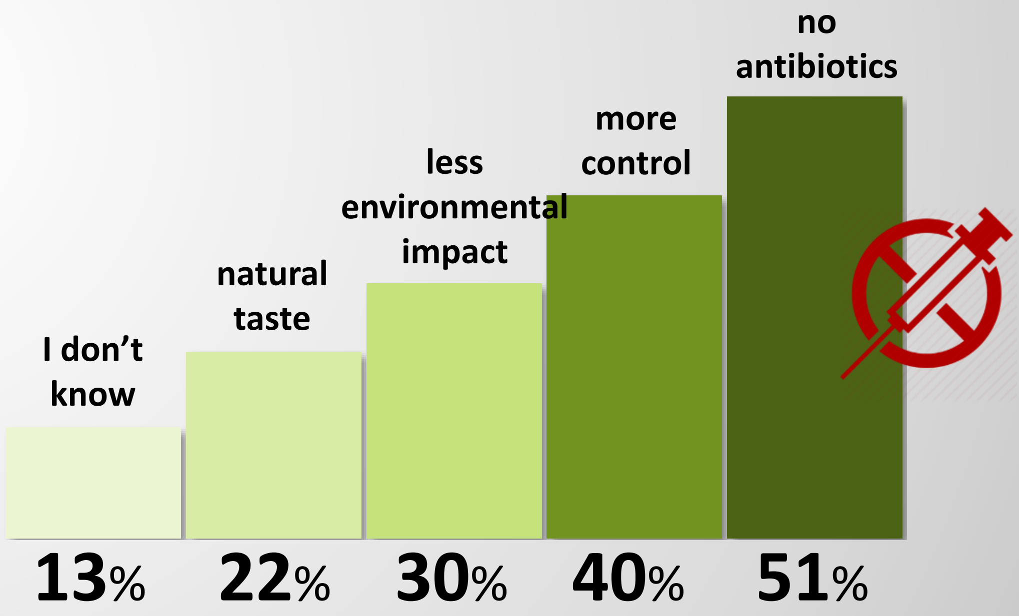


Where to now?

Would you pay more for ORGANIC SEAFOOD?



What do you expect from ORGANIC SEAFOOD?



Conclusions

1 **88.3%** of people interviewed use to **eat seafood**

2 **99.8%** of people (5541 of 5553) use to **buy farmed seafood**

3 **22.4%** of people use to **buy organic seafood**
Who doesn’t, complains about **poor information** and **scarce availability**

4 **58%** of Italians have clear in mind that **organic** means **sustainable** and **based on ecological processes**

48% of Italians would pay an **overcharge** for organic seafood, as long as the use of antibiotics is banned and the chain is closely monitored

Conclusions

1

6% of people interviewed (N = 467) don't **purchase organic food**
They are **distrusted**, **confused**, and not willing to pay more

2

21% of people **don't know** what **"organic" means**, and **34% mix up** with other concepts

3

8.4% of people claim **more information** about organic seafood

The results of the survey will be used to GUIDE PRIVATE STAKEHOLDERS AND PUBLIC ADMINISTRATORS TOWARDS SUITABLE PRODUCTIVE AND MARKETING STRATEGIES SUPPORTING ORGANIC AQUACULTURE

Conclusions

PUBLIC ADMINISTRATION

1. **Support research** in order to overcome technical issues and increase production
2. **Support fish farmers** through public funding of research in order to accomplish policy objectives
3. **Promote the chain-based approach** and **communication among stakeholders** through the development of stable platforms

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PRIVATE STAKEHOLDERS

1. **Promote consumer awareness** through fair advertising and marketing
2. **Improve quality, sustainability** and **traceability** of **farmed seafood**
3. **Invest** in **certification**

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