

EU survey on certification of aquaculture products – Main conclusions

A survey on quality certification for aquaculture products was published on Europa website from 20 April to 15 June 2007. The purpose of the survey was to explore the views of the aquaculture sector on existing quality certification systems and assess their interest in possible future European action in this domain.

The questionnaire covered a number of core issues, including opinions of/reactions to the existing certification schemes, attitudes to different types of control (internal, business-to-business, sector-level, independent bodies), and an input on how the EU can best play a role in this area. The survey was accessible on line in 20 official languages of the European Union.

The main conclusions of the survey are presented below.

Participants

The sector has been informed of the survey by different ways: press release in the professional media, interviews and visits of stands during the Seafood exhibition, a letter sent to the stakeholders interested and deemed to be interested.

228 answers have been received, 97 have been collected by interviews during the Seafood show, and the rest has been completed through Internet. The survey can therefore be regarded as representative.

Geographical distribution of participants

177 participants originated from European Union Member States, they originated from 21 Members States;

51 answers are from third countries, mainly from 19 countries exporting to the EU. USA, Norway, Thailand are the most represented.

The profile of answers does not differ significantly when comparing the EU answers with third countries answers. The results presented below therefore encompass all the 228 answers received.

[Table 1: Geographical distribution of participants](#) ( ~52 Kb)

Activity of the participants

All range of activities is represented: primary production, processing and sales, services.

[Table 2: Professional activity of the participants](#) ( ~12 Kb)


Participants' use of existing labels

Labels reputation

Table 3: Which of the labels listed below do you know? Do you know what it stands for? ( ~34 Kb)

- This question aimed at evaluating the reputation of the labels existing on the market.
- Quality management system labels like ISO-9001, British Retail Consortium and HACCP are the most known ones.
- Organic label is the second well known label, with similar reputation in all countries.
- Fair trade, mass retail premium range labels and protected geographical indications (PGI) are in the third position. Their reputation varies considerably depending on the country concerned.
- National labels, or too specific labels, have a good reputation in countries of origin: Label Rouge is mainly known in France and UK, Guaranteed traditional speciality is known in Italy and Greece


Which information attracts your interest?

Table 4: You are in front of a display of aquaculture products bearing quality symbols. If prices and presentation are similar, what type of information is going to influence your choice most? ( ~34 Kb)

- The objective was to enquire about the kind of quality mark that would be susceptible to guide our purchase. Quality marks can be differentiated by the key information carried out by the label; the question therefore measured the interest of participants for this information. In other words, are we as citizens more attracted by a label which value fair trade, organic production or by a label said as "promoting sustainable development"?
- Three types of "quality" emerged: environmental friendliness, organic production (or similar), and region of origin. Those three ones have the highest score as "very interested", and have a good score as "interested".
- Next come Quality Management System which shows as an attracting quality mark too.
- Fair trade, animal welfare and authenticity/tradition show as attracting values. Even though they are mainly regarded as "interested", they come in third.
- Geographical indications, production under a brand name and mass retail came in the last place. At EU level, mass retail premium range was even considered as "not very interested".
- Some discrepancies can be seen when comparing these results to the question regarding the reputation of labels. This could show that people would be attracted by values and qualities like environmental care, animal welfare or tradition which are not necessarily represented by labels existing on the market.


Investing in a quality mark

Which quality mark?

Table 5: You decide to invest in a quality certification procedure (or a quality label) for aquaculture, you choose in order of preference: ( ~16 Kb)

- The objective was to identify which kind of programme is susceptible to be selected by producers once they decided to engage in a quality scheme.
- Sustainable development is, by far, the first choice for participants. Sustainable development is described here as a scheme associating all environmental, social and economic criteria. This could partly explain why such theme is so attracting.
- Organic production is the second preferred option, and ecolabel emerged as the third one.
- Fair trade is considered a good second or third choice; less interest is shown for geographical indication (IGP) which appeared as a fifth choice.

What type of control, and why?


Table 6: What type of control would you choose for this quality label/certification? ( ~14 Kb)

- Certification by a third party is by far the preferred type of control.
- The "no control" is clearly regarded as the last possible choice.
- Control by the sector showed as the preferred second option, and control by the distributor - as part of a business to business agreement – is the third option.
- Internal control by the producer showed dominant as the fourth choice but scored a number of votes as the first or second choice too.
- Where reasons for choosing a control system are analysed, three criteria are dominant: control reliability and strictness, certifier's independency, and business strategy. The importance of flexibility and cost is not clearly established.

Table 7: You have opted for one type of control. What were the reasons for your choice? ( ~12 Kb)

Sector's views of the current situation

Sector assessment of the emergence of quality labels

Table 8: As a professional, what do you think about the fact that quality certification and quality labels are becoming increasingly common? Would you say that: ( ~15 Kb)

- A selection of the opinions recently expressed by stakeholders was proposed. Participants were invited to give their assessment of it.
- The sector clearly sees quality labels as a good promotion tool, and considers that they reassure and attract consumers and have stimulated the aquaculture sector.
- A public intervention to guard against adverse effects is called for, which can perhaps be linked to the fact that the multiplicity of labels is seen as having a negative impact on the market.
- Participants also regard labelling as a good promoter for sustainable development, and support that sector labels (= scheme) can bring the trade closer together.
- Last but not least, the aquaculture sector considered that the information associated with the labels is not verifiable and a good majority of participants considers that the consumer does not have access to the information required to understand the difference between labels!

Action expected at EU level

Table 9: If action was taken at European level, what should it cover? ( ~15 Kb)

- A list of possible EU actions has been proposed, most of them have been suggested by stakeholders.
- Action at EU level is called for, as showed by the first question. This confirms the question asked in 4.1 on the need for public intervention.
- The demand for intervention, as expressed, should cover: optimisation of control procedures, promotion of labels among consumers, encouraging the sector (= inter-professional) action and providing financial support.
- Participants also called for keeping national labels, and for limiting EU intervention to the preparation of

guidelines.

- The sector is balanced about the need for creating an EU logo.
- The interest of encouraging mass retail quality label is regarded as slightly positive at global level, while EU participants rejected this possibility.

Conclusions

- Organic production, environmentally friendly production and schemes supporting sustainable development (i.e. including action at environmental, social and economic level) are regarded by the sector as the most attracting quality certification scheme.
- Control should preferably be done by third party bodies. Control by the sector is an alternative option.
- Quality marks and labels are considered as having a positive effect on the market. They attract the consumers. However, participants considered that consumers do not have access to the information required to understand the difference between labels! This at medium term could spoil any efforts made to develop quality certification system!
- Finally, an action at EU level is called for. This action should address control procedures, public promotion, financial support, encourage action at sector level and proposing guidelines.