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## Consequences of the farming on the image of aquatic products for consumers

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**SUMMARY** - For the consumers, the products of fisheries have usually a very positive image, because they are regarded as healthy, and coming from the sea, which represents a clean and wide space of freedom, linked with holidays. Aquaculture products also benefit from this positive image, as most of the time, the consumers do not know really their origin, as they often do not know that they are not wild products. We propose some thoughts about the marketing of aquaculture products, through different points: (i) the observation of marketing booklets for salmon, showing two possible attitudes: one based on the valorization of the specific advantages of farmed products, and one with no reference to them, entertaining the confusion with wild products; (ii) the results of a short inquiry about the image of aquaculture products, showing that there are three types of attitude: positive, neutral, negative; (iii) the example of classical animal products, for which appeared a differentiation in the markets with the use of designations for products, as an answer to the demand of consumers concerned by animal welfare and natural food; (iv) some thoughts about the utilization of designations for some aquaculture products, as a way to create a segmentation in the market.

**Key words:** aquaculture, products, marketing, image, segmentation, designations

**RESUME** - "Conséquences de l'élevage des produits aquacoles sur leur image auprès des consommateurs". Pour les consommateurs, les produits de la mer ont généralement une excellente image, car ils sont considérés comme des aliments sains, venant de la mer, espace vaste et propre symbole de liberté, associé aux vacances. Les produits de l'aquaculture bénéficient également de cette image positive, car la plupart du temps, les consommateurs ne connaissent pas l'origine du produit, et notamment ignorent que ce ne sont pas des produits sauvages issus de la pêche. Nous proposons une réflexion sur le marketing des produits aquacoles autour de différents points : (i) l'observation de plaquettes promotionnelles du saumon faisant apparaître deux attitudes: soit une valorisation des avantages propres des produits aquacoles, soit une absence de référence au mode de production, entretenant la confusion avec des produits sauvages ; (ii) les résultats d'une brève enquête auprès de consommateurs sur l'image des produits aquacoles montrant qu'il existe trois types d'opinions : positive, neutre, négative; (iii) l'exemple des produits animaux classiques, pour lesquels est apparue une différenciation sous forme de produits labellisés, notamment en réponse aux préoccupations des consommateurs sur le bien-être animal et la naturalité; (iv) une réflexion sur l'utilisation de signes de qualité pour une partie des produits aquacoles, comme voie de segmentation des marchés.

**Mots-clés :** aquaculture, produits, marketing, image, segmentation, signes de qualité

## INTRODUCTION

This text proposes some thoughts about the image of farmed fish for the consumers in the developed countries. For the consumers, the products of fisheries have usually a very positive image, because they are regarded as healthy, and coming from the sea, which represents a clean and wide space of freedom, linked with holidays and pleasure. Aquaculture products also benefit from this positive image, but most of the time, the consumers do not know really their origin.

The information that could be provided to the consumers can be used for three possible targets: one is the need to satisfy the consumers' right to have information, as honest as possible; another one is to use this information as positive arguments for marketing; a third one is, for a part of the products that have some specific characteristics, allowing the attribution of an official designation, to create a market segmentation through differences in the image and/or the taste.

Should the aquaculture products be presented to the consumers as cultured products, instead of fished products ? What would be the reactions of the consumers if they knew that aquaculture is most of the time an intensive production ? How is it possible to promote the aquaculture products by giving information about the culture conditions, which allow a new quality, regarding to freshness, regularity in sizes, excellent conditions for slaughtering and processing ?

All these questions deserve attention, as the aquaculture production is taking an increasing part in the markets. This question has been already pointed out by AVAULT (1991) for the catfish : "people having a tradition of eating channel catfish caught from a nearby river were reluctant to eat a farm-grown fish that has no access to natural food". About quality, PAQUOTTE (1995) also says that on the international markets, the consumer is insufficiently informed about the origin and the characteristics of the products.

We shall first make a brief presentation of the marketing arguments now used for the aquaculture products, and then give the results of a short investigation about the image of farmed products for the consumers.

The comparison with classical animal products is interesting, as this field has been facing for long some marketing difficulties due to the concerns of consumers about animal welfare and environment. We shall present some examples of peculiar husbandry systems leading to some "more natura" products, as an answer to the demand of those consumers, and a way to create a segmentation of the market, especially by using some official designations. We shall also examine what designations are used or can be used for aquatic products.

## AT PRESENT, WHAT ARE THE MARKETING ARGUMENTS USED FOR AQUACULTURE PRODUCTS ?

We must first notice that, on the French market as in the other European markets, there



is no official designation for the aquaculture products, *versus* the wild fish. Then, the knowledge of the consumer, regarding to the purchased product, depends on his own culture, and the information that may provide the retailer.

Among the aquaculture products, some are traditionally known as aquaculture products, like oysters, or freshwater trouts, as there is almost no other commercial source for these products. But there are some possible confusions for quite a lot of products, that can be issued from fisheries as well. Different cases can be observed.

(i) For the mussels in France, there are sometimes some mixing between fished mussels and bouchot mussels; that type of practice is bad for quality, and should be avoided. It is interesting to see that the mussel farmers are more and more concerned with the problem, and during the last year, several trade marks have been registered in different regions (example: la "Charron"). They bring for the consumer a guarantee that the product is issued from bouchot culture.

(ii) France is one of the biggest market for salmon, and the development of the Norwegian aquaculture is responsible for a strong increase of this market, with a very important drop of the price. One can wonder if the French consumer really knows about the origin of this luxury seafood that became common ?

We collected a dozen booklets advertising for salmon during the SIAL in Paris (in 1992 and 1994), from several countries (Ireland, Scotland, Norway). We examined all theses documents through one question: what is the main idea or image used for marketing, and is it linked with aquaculture ? We found two groups of papers (whatever the geographical origin and the year), corresponding to two types of approaches:

- one is based clearly on the image of aquaculture (large picture of farming site, big characters for the title including the word "farming"); the mention of aquaculture is used here as a guarantee of quality, because of the very good conditions for farming, slaughtering, transport; this approach can go as further as building a quality assurance scheme in order to guarantee officially and promote some specifications about farming and slaughtering (example: "Quality Assurance Scheme for Irish Farmed Salmon")
- the other one uses first the image of the sea (by a nice picture showing a wide space and clear water), to suggest freshness and quality, and is much more discreet about the farming (quoted only in the text in small characters, and not shown on pictures): we can say that this marketing argumentation treats farmed products like wild products.

This simple test shows that the marketing can be confusing about the origin of the products, even if the farming can obviously be used as a positive argument.

(iii) The recent development of the seabass production is also responsible for an important change in the market, and it is not clear if the consumers are aware of the origin of the products they buy: wild or farmed?. The French regulation does not make compulsory to inform the consumer about it, but that may happen in a near future, as the fishermen are now complaining about the price drop caused by farmed products. There is actually an investigation being conducted by the French administration to examine the possibility of creating some different names for fished seabass and farmed seabass.

## WHAT KNOWLEDGE DOES THE CONSUMER HAVE ABOUT THE ORIGIN AND PRODUCTION TECHNIQUE, WHEN HE BUYS AN AQUATIC PRODUCT ?

A group of 6 graduate students of the Institut National Agronomique Paris-Grignon, following a course about "Aquaculture and aquatic products chain" realized in 1995 a short inquiry about the image of aquaculture products for the consumers. This work was driven by two professors: one specialized in sociology of consumption, the other one in aquatic products chain. This personal work represented roughly 40 hours by student, i.e. 240 hours in total. This inquiry was conceived as a pre-inquiry, based on open interviews, for preparing the questionnaire for an inquiry at a larger scale, which is planned for next year. The pre-inquiry concerned 24 people, which is a too small group for having any quantitative characterization of the consumers population, but we found some interesting qualitative information in the results, and this is why we decided to present them in this seminar.

The open interview was based on two groups of questions about the consumption of fresh fish. The first one was about the consumption of fish in general, to appreciate the level of fish consumption, and the knowledge about fish in general. The second one concerned the image of farmed fish.

The opinions expressed by the consumers show that we can distinguish at least three groups: the people having a positive image of farmed fish, the "neutral" people, and those having a negative image and rejecting the farmed fish.

### (i) people having a positive image (5 people)

These people eat fish quite often (once to twice a week), and have a common characteristic: the taste is not the main preoccupation for choosing the product. Two types of argumentation were found in that group:

- for people having a good knowledge about farming, the aquaculture products are regarded as a guarantee for "control, cleanliness", opposite to the wild fish harvested in a sea "more and more polluted". Also, farming is regarded as a way of decreasing the fisheries on overexploited fish stocks.
- the other people are mainly motivated to eat aquaculture products because of their availability, freshness, low price, and easy use.

### (ii) The "neutral" people (8 people)

For three people, who obviously have almost no knowledge about fish, and eat very few fish, aquaculture products are regarded as cheap, easy to eat.

Five people have a good knowledge about fish, and eat some regularly. They don't find any difference in the taste between wild and farmed fish. The main advantage of farmed fish (when they know the origin) is the price for 2. Also, they appreciate the fish with few bones, whatever the origin of the fish.

## (iii) The people having a negative image of farmed fish (11)

Most of the people in this group have a good knowledge in fish (they live mostly in coastal areas), and eat fish frequently.

The main arguments against farmed fish are:

- the taste, inferior to that of wild animals: 4 people, but 2 of them eat Norwegian salmon without knowing it is farmed....
- the idea of intensive farming: for 6 people, knowing well about fish, intensive farming is bad because of artificial food (bad smell), pollution by antibiotics, the lack of freedom and space.

Some make a direct relation between the artificial food and the taste of the flesh.

To the question: "would you like some more information about the purchased fish? and what about?", most of the interviewed people (in all the groups) answered yes, and asked for more information about the origin of the product, and the day they were fished. Concerning aquaculture, it is interesting to notice that the marine aquaculture in wide spaces (Norwegian fjords) has a better image than the aquaculture in closed systems (tanks).

**In conclusion**, this short inquiry confirms that the consumers have some concerns about the origin of the fish, and that aquaculture may be regarded as positive because of the specific advantages it brings (freshness, availability), or negative because of the bad image of intensive farming.

## **IN THE FIELD OF MEAT PRODUCTS, WHAT TYPE OF SEGMENTATION IN THE MARKET HAS BEEN CREATED FOR ANSWERING THE DEMAND OF CONSUMERS?**

If we make a comparison with the markets of classical animal products, i.e. meat, eggs, milk, etc., we can underline that during the last years, the consumers have developed a strong concern in animals' welfare, and the husbandry conditions. Of course, this preoccupation is directly linked with an anthropomorphic feeling, which can be assumed to be weaker towards fish than towards mammals or birds. But the general movement against intensive farming, because of the attention paid to animal welfare and pollution problems, could also reach aquaculture field. And it is useful to understand what response could be given to this problem. For instance, some "natural" animal husbandry system have been developed for poultry and pigs, producing some products clearly advertised as coming from outdoor and not intensive farming. There is then a market segmentation induced by the concerns of the consumers. And this segmentation is also an answer to the saturation of the animal products markets in the developed countries.

In the field of meat products, intensification has begun quite early, for poultry and pigs. It allowed a prosperous market with low prices and products diversification, that can be regarded as advantages for the consumers. On another hand, as we said before, there is an increasing concern for animal welfare among the consumers, that obliges the



operators to have some different practices, for farming and slaughtering. In some countries, the pressure can be very important, like in Great Britain with some groups like the Royal Society for the Prevention of Cruelty to Animals, or the Human Slaughter Association.

On another hand, the saturation of the meat markets, the strong competition between the species meats, is a reason for creating new commercial products, leading to a market segmentation. This can be done regarding to the level of quality, or to a better animal welfare, that can be used as marketing arguments.

The French market for animal products and wines has developed a lot of different designations ("quality signs"), which allow an interesting market segmentation, and some guarantees for the consumers. The European Community has created, in 1992, some designations that partly include the French ones. They are defined by the Council Regulation (EEC) n° 2081/92 (Official Journal of the European Communities, 24/07/92). The use of an official designation implies a complete control of implementation of the specifications, by the Government or an agreed organization.

We shall give here a few examples of some animal products characterized by the French quality signs, and explain how they play a role in the segmentation of the market.

(i) The "**Appellation d'Origine Contrôlée**" plays a large role in the identification and promotion of traditional cheeses characteristic of a region. A good example is the AOC Beaufort: a cheese prepared in the Alps with the milk of two local breeds: Tarentaise and Abondance.

The creation of such a quality sign can be summarized simply by: a breed, a land, a product, a channel product. It plays a very important role to keep and promote the traditional husbandry and processing, and to promote a quality product. It is also a way to protect against intensification (there is now a limitation of the cow annual milk production to 5000 liters/year).

The French "Appellation d'Origine Contrôlée" is part of the European quality sign : Protected Designation of Origin.

(ii) The "**Label Rouge**": a registered trade mark of the French Ministry of Agriculture, for the highest quality food .

The Label Rouge has a great impact in the poultry meat production in France: in 1992, it represents 20% of the national production of broilers, and 28 % of the consumers' purchase (Anonymous, 1994). The poultry farming has been early intensified, and during the sixties, a segmentation of the market has been created by a new husbandry system, less intensive. The high quality of the products issued from this type of farming is guaranteed for the consumers by the "Label Rouge".

The principle of the husbandry system is a less intensive system (half density: 10 chicks/m<sup>2</sup> instead of 20/m<sup>2</sup>), a low growth (with a small size breed) leading to a better

meat (with a lower water content). The chickens are fed mainly with cereals (minimum 80 %). An additional valuable characteristic ("fermier", i.e. farmed traditionally) can be obtained if there is an outdoor space for the chickens. A famous example is the "Volailles Fermières de Loué , Label Rouge".

### (iii) **Outdoor farming for pigs**

If the "Label Rouge" has a little impact in the pork production, another special pig farming can be mentioned, as a response to the concerns of animal welfare. It is the outdoor farming, with minimum 50 % of cereals. This farming system is regarded as a traditional husbandry, which allows to sell the pork meat with a good image regarding to animal welfare, under the label "fermier", i.e. traditionally raised. (Example: Orcs Fermiers de la Sarthe).

In fact, there are some negative aspects on the technical and economical points of view, and that is the reason why this type of husbandry has a limited extension.

## **FOR AQUACULTURE PRODUCTS, WHAT QUALITY SIGNS CAN BE USED, AND FOR WHAT PURPOSE ?**

There are a lot of differences between the aquatic products and the other meat products, but it recently appeared interesting to try to use the quality signs for aquatic products, and some surveys have been done to think about the applicability of this approach for aquatic products (FIOM, 1993). This is a very new trend in France, with still very few applications, but we shall speak here about the realizations in aquaculture products.

Compared to fishing activity, which is characterized by the uncertainty of the crop, quantitatively and qualitatively, the aquaculture allows to have some guarantees about the quality for products, if the farming system is clearly defined and respected. The notion of *quality* includes here several aspects: regularity in the products size, and supply, freshness allowed by the best conditions for slaughtering, packaging, transport, and good taste if the culture conditions allow it. Then, these characteristics can be possibly used as specifications allowing a special quality, that can be recognized by an official designation.

Some **official designations** can already be found in the aquaculture products (SCHILLINGER, 1995):

- the "Label Rouge", the highest quality sign of the French Ministry of Agriculture, has been attributed to the Scottish farmed salmon, under control of the Scottish Quality Salmon Limited. The specifications concern: production, harvesting, products quality, packaging, transport.

A very interesting increase in value has been obtained thanks to this sign (+ 36 % for the retail market price between 1990 and 1991).

- the "Label Rouge" for the Marennes-Oléron oysters, "Fines de claires"

The agreement for this traditional product has been obtained in 1989.



Also, we can notice that the bouchot mussel farmers of the Mont St Michel Bay are applying for a AOC (equivalent to the European Protected Designation of Origin), certifying the specificity of the product, in relation with the production site and the farming conditions. The application is now being studied by an experts' committee. This is a first example of an approach that could be used for some other aquaculture products having some characteristics mainly linked with their geographical origin.

Another possible approach is the "**certificate of specific character**", which is a European official guarantee that a product complies with some requirements of the relevant specification, checked by an agreed inspection body. The certificate of specific character is defined by the Council Regulation (EEC) N° 2082/92. This approach is possible for some products which characteristics are not linked with the geographical origin. It could be suitable for fisheries products, or some aquaculture products. Because of the cost of elaboration of the application file, and the cost of promotion of this designation, it should better be committed by a producers' group.

### **AS A CONCLUSION, SOME MORE QUESTIONS....**

Another important question is "Who is the 21st century consumer?". We shall join here PIGOTT (1994) to recall that we must meet the consumers requirements (instead of producing without paying attention to the demand). The general trends of the consumption evolution in the last years (food with low fat content, cholesterol free, low calories content, ready-to-use food ) offer some good opportunities to aquatic products, whatever the origin. The farmed products have some extra advantages, through the stability of quality and the easy logistics that aquaculture brings. But the demand is also very diversified. DEFRANCE (1994), who made an historical analysis from 1955 of the speeches about alimentation in the French media, showed that, after a succession of dominant speeches (about health, fitness,...), the present period (since 1992) is characterized by a diversification of the alimentary models, an individualization of the alimentary choices. On a marketing point of view, it means that there is not one market for one product, but several segments included by a market, allowing a diversification of the products.

It is time for the aquaculture products to come out, to dissipate the doubts about their origin, to use their own characteristics as marketing arguments, to find their right position inside the market. This new approach can open at least two types of position for the farmed products:

- One is for mass markets, as for the american catfish, and it is thus necessary to inform the consumers about the farming and its specific advantages. One question emerges then: is the aquaculture professional circle able to gather and prepare a common message about the farmed product ?
- Another one is for high quality products, answering a specific demand on small segments, and this is the reason why it is interesting to pay attention to the consumers concerns. We may then wonder : Are the customers ready to pay an extra cost for an extra quality ? We find some positive answers to that question in the creation of quality signs and designations in France and European Community.

We say in France: "pour vivre heureux, vivons cachés..." that may be translated by "to live happy, let's live hidden...". We have probably reached the end of this time for the aquaculture products !

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