



## COMPONENT REPORT

# Consumers in Europe and their buying habits and attitude towards Seafood from Vietnam

Ms. Mag. Karim, Representative of the WWF- Austria



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## Activities WWF Austria

### A.2.2 Study on market potential of sustainably produced Pangasius in Europe

Sustainable Pangasius  
market potential in Europe

Final recommendation:  
“Explore how responsible  
practices at the farm and  
processing level contribute  
to improved quality.”



Study on market potential of sustainably produced Pangasius in Europe  
Project: Establishing a Sustainable Pangasius Supply Chain in Vietnam  
Author: Carsten Rieger, Independent Consultant  
Contracted by: WWF Austria  
September 2013



SUPA



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## Activities WWF Austria

B 1.1. Identification of buyers and awareness raising:

- WWF Austria is working via the WWF network and contacts to retailers and importers

Company contacts include:

Edeka, Aldi, Rewe, Metro, ASDA, Sainsbury's, Tesco, Eroski, El Corte Inglés, Albert Heijn, Ahold, Profish, Amacore, Carrefour, Del Haize, Migros, Coop, Spar, ICA, Concept Cool, Hofer, Yuu N Mee, Karnerta, Transgourmet, Binca seafood



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VNCPC



WWF

## Activities WWF Austria

B 1.1. Identification of buyers and awareness raising:

- ASC/MSC Forum in Vienna with key market players
- Aquaculture Forum with Austrian



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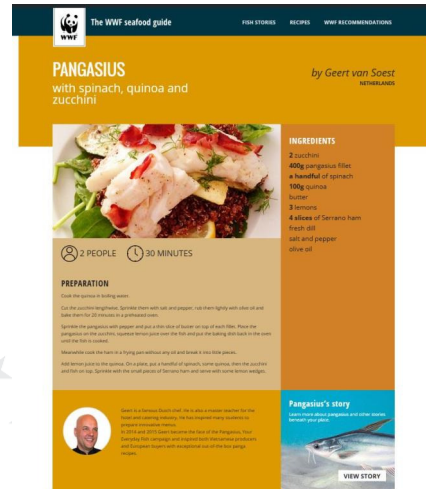


WWF

## Activities WWF Austria

### B 1.1. Identification of buyers and awareness raising:

- Appealing Pangasius recipes on WWF websites in 11 European countries



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## Activities WWF Austria

### B 1.2. Participation at European seafood exposition:

- 11 Vietnamese SMEs participated in the SEG (4 in year 3 and 7 in year 4)
- SUPA booths at the SEG 14 and 15
- Pangasius Business Forum at SEG 2015



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## Activities WWF Austria

**B 1.3. Buying mission  
with interested retailers**

**2 buying missions conducted**

A photograph of a presentation in a conference room. A man is standing and presenting to a group of people seated at tables. A screen in the background displays the 'LUM MEE' logo and the text 'The spirit of quality'.







## Activities WWF Austria

### B1.4 Capacity building on market requirements:

- During the participations at the European seafood exposition in 2014 and 2015 and at the Viet Fish fair 2014 capacity building activities took place which were important to familiarize with European market requirements and hear the views of retailers and traders.



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## Co-Creation workshop

As part of the international SUPA project WWF Austria initiated and implemented a set of activities focusing on Pangasius. The goal was to develop new ideas for marketing of Pangasius products in Europe, especially in terms of packaging, product and branding (communication). As a further step, these ideas were evaluated and refined together with corporate representatives in expert interviews.



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## Co-Creation workshop

**Summarizing - these were the highest ranked ideas over all three sessions (workshop 1):**



- Improved packaging material -> no plastic, better haptic
- Convenience Pangasius solutions: nuggets, burger, wraps
- YouTube Pangasius channel
- Cooperation with a chef or cooking show format: e.g. Jamie Oliver



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## Co-Creation workshop

**Summarizing - these were the highest ranked ideas over all three sessions (workshop 2):**



- Promote the ASC, talk about its benefits
- Improve appetite appeal of product on pack
- Authentic Vietnam/Asian product line (e.g. on pack message: exotic place of origin; position and communicate Pangasius as Asian specialty; use appealing Asian pictures on pack and in other communication channels)
- Pre-cut Pangasius for Wok/Fondue
- Panga Box with differently spiced filets
- Cooking show with WWF experts

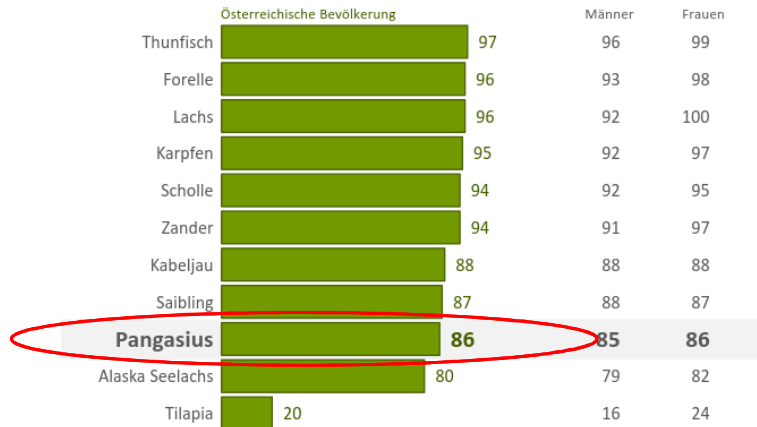


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## Market Poll 2016 Austria awareness of Seafood Species



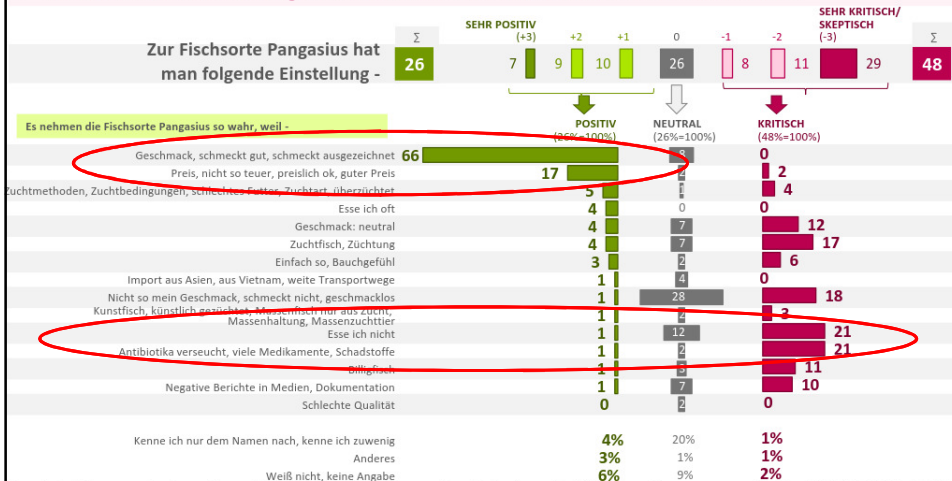
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### Was spricht FÜR / was GEGEN die Fischart „Pangasius“



① Niedriger Preis und guter Geschmack sprechen für Pangasius, neben dem fehlenden Geschmack stören sich die Skeptiker an Pangasius, weil sie ihn als Zuchtfisch wahrnehmen, der geschmacklos ist und mit Antibiotika verseucht ist, deshalb ist man ihn auch nicht

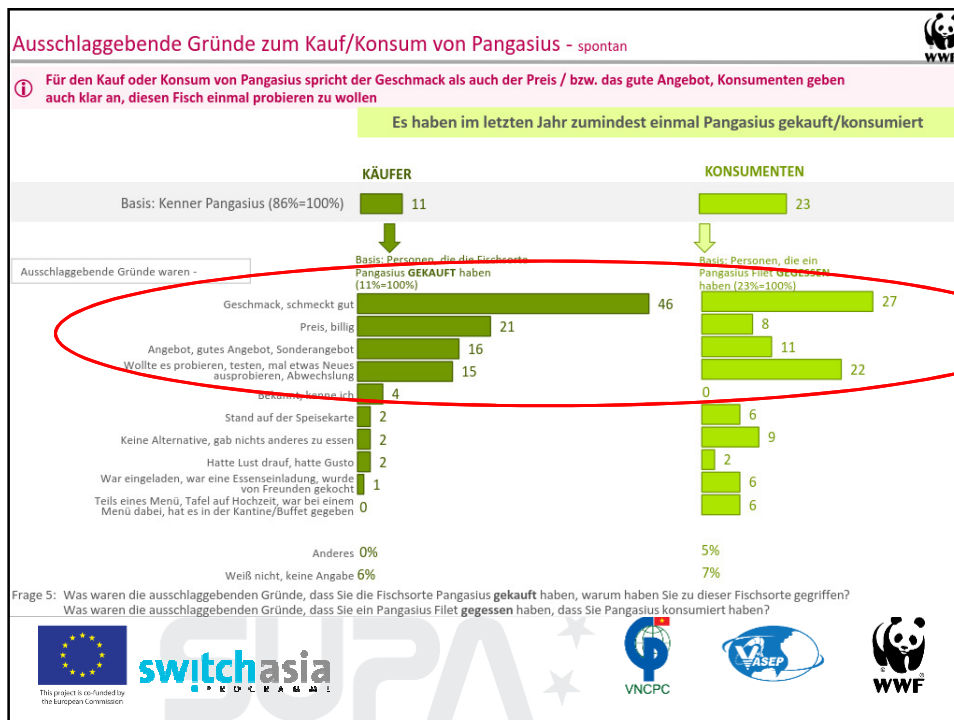


Frage 3: Jetzt kommen wir etwas näher zur Fischart Pangasius: Sie kennen diese Fischart und sind dieser gegenüber ..... (Positiv= +3/+2 / , +1/0 =Neutral, -1/-2/-3 =kritisch: IT entsprechend einblenden) eingestellt. Könnten Sie Ihre Einstellungen begründen, warum nehmen Sie die Fischart Pangasius so wahr?



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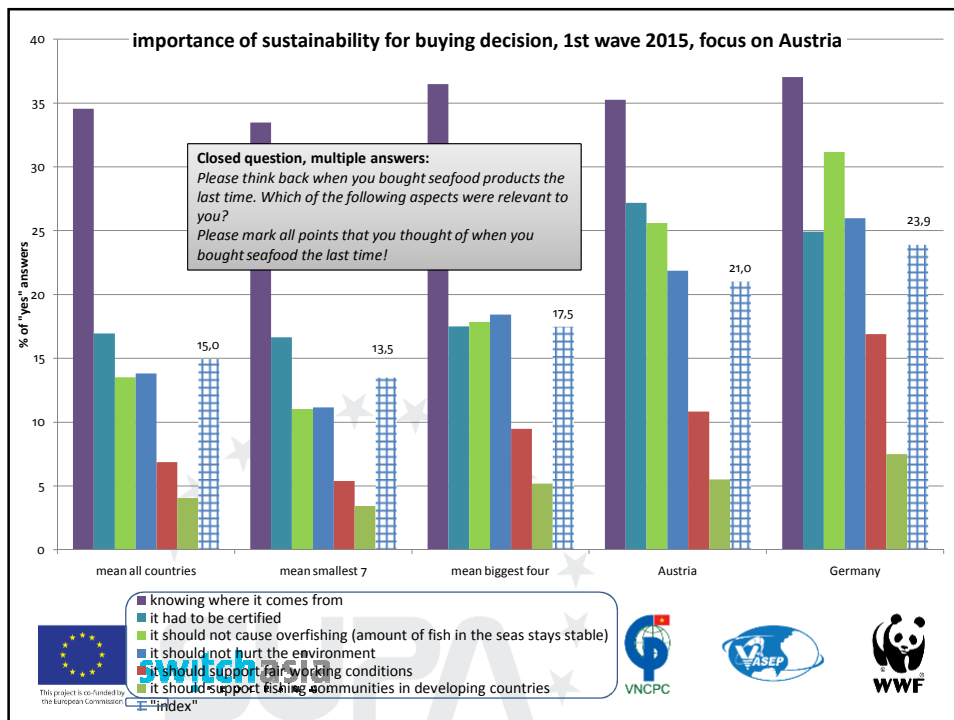
## Summary

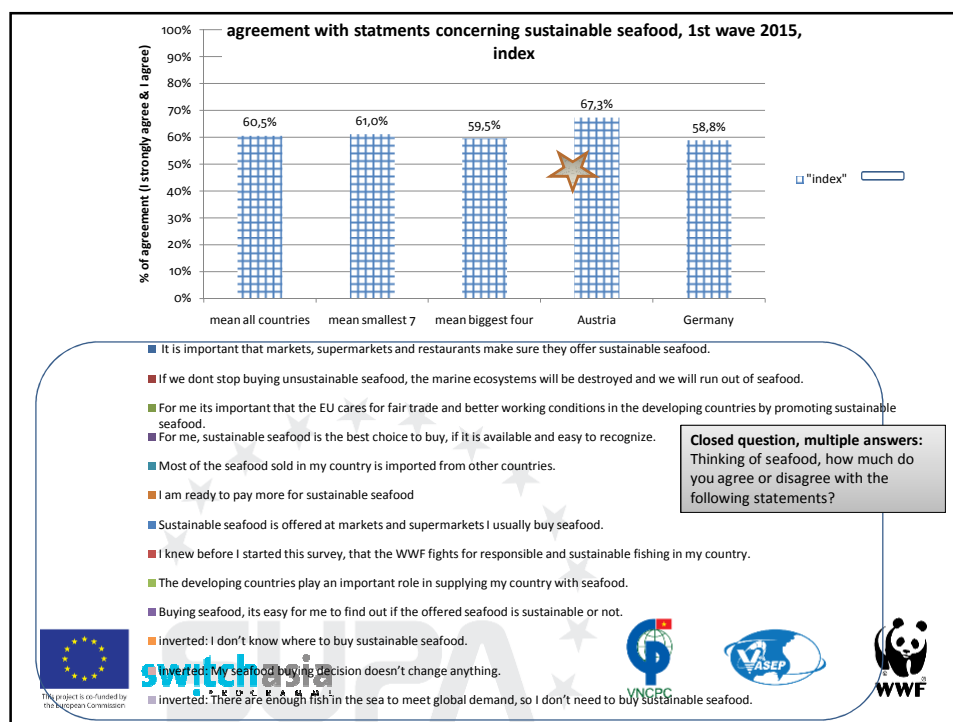
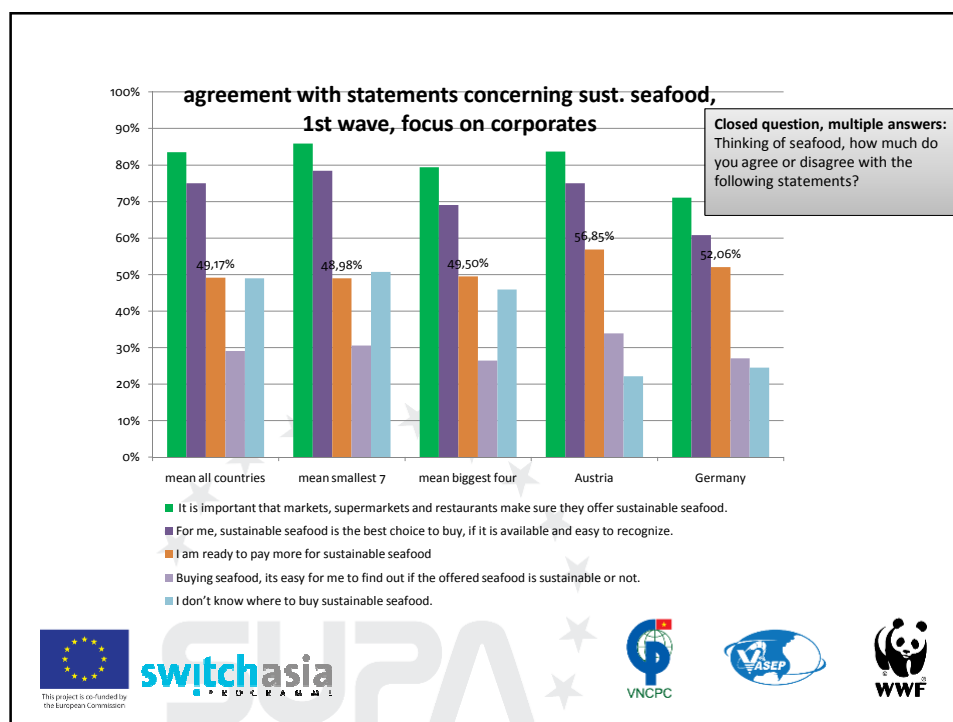
- Pangasius's awareness/recognition is very high with 86 per cent of the population.
- One third (34%) of the Pangasius connoisseurs buy and consume Pangasius
- For purchase or consumption of Pangasius speaks for almost half of the consumers the taste and for about a third also the favorable price / resp. the good offer.
- Almost a quarter of consumers also clearly state that they want to try this fish once.
- Sceptic consumers argue that Pangasius has less taste than other Seafood and that farming is coming with use of Antibiotics

# Market Poll on European Level 11 Countries



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## Challenges

Pangasius in the European market remains challenging:

- Prices are down
- Negative image
- Qualitative concerns due to treatment (Phosphates)
- No higher price incentives for ASC pangasius
- Wrong perceptions
- Competition with other whitefish

## Recommendation

“Explore how responsible practices at the farm and processing level contribute to improved quality.”

Showcase Pangasius as a proud Vietnamese product that is sustainable and of high quality.

Communicate the improvements in Pangasius Production that were achieved during the SUPA project.



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**THANK YOU !**



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