

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

An EU SWITCH-Asia project



SUPA



**Specific Objective 2:** At least 50% of targeted processing SMEs are providing sustainable products with ASC standard to EU and other markets

Status: Currently around 35 farms are ASC certified and this is 16,3% of the total Pangasius production.



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# Outreach Activities

Identification of buyers and awareness raising:

- WWF Austria is working via the WWF network and contacts to retailers and importers
- Market Study developed by Carson Roper with key insights
- Pangasius Business Forum held at SEG 2015 in Brussels
- ASC/MSC Forum in Vienna with key market players
- Co-Creation Workshop was done in Austria
- Aquaculture Forum with Austrian Government
- Outreach to WWF European Network



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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.



# Co-Creation workshop



WWF Workshop, 22.9.16, HLW 10

## What they spontaneously associate with Pangasius:

Cheap, freshwater fish, farmed, a huge amount is farmed per year, tastes nice, quite neutral taste, no bones, it's a big fish, can be used for many recipes, needs spices to taste, can be found next to Kåpt'n iglo products in the freezer sections in supermarkets.



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## Group Work 1 – Ideas to improve packaging and on pack communication



WWF Workshop, 22.9.16, HLW 10

### Output Group Work 1:

This young consumer group had quite an issue with the plastic bags in which the Pangasius filets are mainly packed. They argue that they are not environmentally friendly and the haptic is not appealing. In order to improve the cheap image of Pangasius they would tackle this with priority.

These are the main issues for improvement which they identified:



- Improve packaging without plastic.
- Improve the visibility of the ASC-logo and explain the ratio behind in more detail and more consumer friendly.
- Improve the appetite appeal of the packages: they feel that the food shots are very blurry and pale. Contrast is lacking. Also recipes on the backside were suggested.

#### Group Work 2 – Develop ideas for new Pangasius products and new target groups



WWF Workshop, 22.9. 16, HLW 10

#### Output Group Work 2:

The group developed a lot of convenience ideas with Pangasius- the highlights were:



- **ready to eat wraps with Panga, Panga Burgers, Pangasius nuggets or other coated shapes for kids – pointing out that the boneless not very fish tasty fillet would suit well for these kind of kids products.**
- **Other ideas were backed Panga for the oven with various toppings, Pangasius Lasagne or minced Pangasius balls.**

Wraps and nuggets were at the end ranked very high with 6 and 4 voting points:

#### Group Work 3 – Develop ideas for communication/cooperation/sponsorships that could help Pangasius to enhance its image.



WWF Workshop, 22.9. 16, HLW 10

#### Output Group Work 3:

In this session the participants developed ideas focusing on communication ideas. The most interesting ideas were:



- **YouTube channel (showing the improved farming methods as well as the clean production and possible recipes with Pangasius).**
- **Cooperation with a famous chief like Jamie Oliver or with a cooking show format.**
- **Or simply lectures in schools or in procurement departments explaining what has improved during the last years.**

**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 2:**

**6th of October**

Location: WWF Austria, Ottakringer Straße 114-116, 1160 Vienna

Our second workshop took place at WWF Austria/Vienna, participants were representative consumers with very heterogeneous professional backgrounds.

Participants list:



WWF Workshop, 6.10. 16, WWF Austria



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### Group Work 1 – Ideas to improve packaging and on pack communication



WWF Workshop, 6.10. 16, WWF Austria

#### Output Group Work 1:

The following idea cluster were identified:



- Check your product, tracking, story telling -> tell more on pack about quality but also at the POS
- Position and design Pangasius also for young (cool and modern) families
- Focus more on ASC -> explain and tell people about.
- Increase appetite appeal of the product shot.
- Think about paper/carton box instead of plastic.

### Group Work 2 – Develop ideas for new Pangasius products and new target groups



#### Output Group Work 2:

A lot and a wide area of ideas were created in this second work session:



- **Appetizers:** e.g. Pangasius Carpaccio, smoked Pangasius, Spring Rolls with Pangasius, canned Pangasius, Sour Pangasius in the glass, Pangastrone (fish soup with Pangasius), Panga chips (high in protein)
- **Curry, Pangasius Fingers, Nuggets** (breaded like Fish Fingers), Burger, Pasta filled with Panga, Pizza with Panga, Panga Box with differently spiced filets...
- **Pre-cut to cook at home:** Cube cuts for Wok/Fondue etc., cooking sets
- **Authentic Asian line:** position Pangasius as Asian meal component and establish an appealing world around this topic
- **Focus on protein:** Proto Panga for athletes (might be also as powder)

Group Work 3 – Develop ideas for communication/cooperation/sponsorships that could help Pangasius to enhance its image.



WWF Workshop, 6.10. 16, WWF Austria



Output Group Work 3:



- Online channels to inform about Pangasius: YouTube, bloggers, chat forum
- Cooking show for kids – with WWF experts as trustworthy content provider
- Cooperation with athletes, fitness centers

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

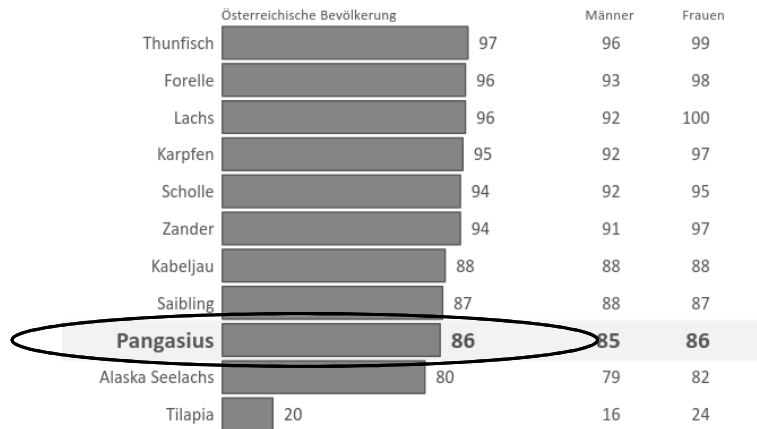


- Promote the ASC, talk about its benefits
- Improve appetite appeal of product on pack
- Authentic Vietnam/Asian product line (e.g. on pack message: exotic place of origin; position and communicate Pangasius as Asian specialty; use appealing Asian pictures on pack and in other communication channels)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





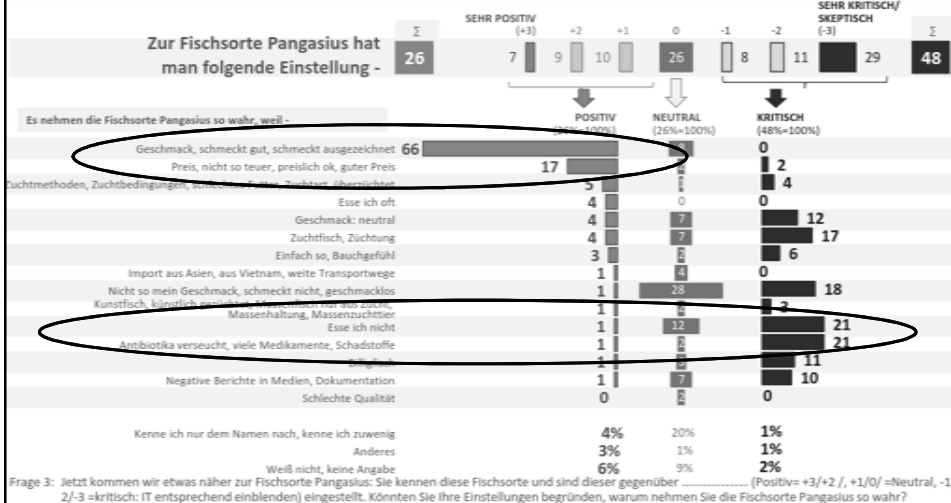
## Market Poll 2016 Austria awareness of Seafood Species

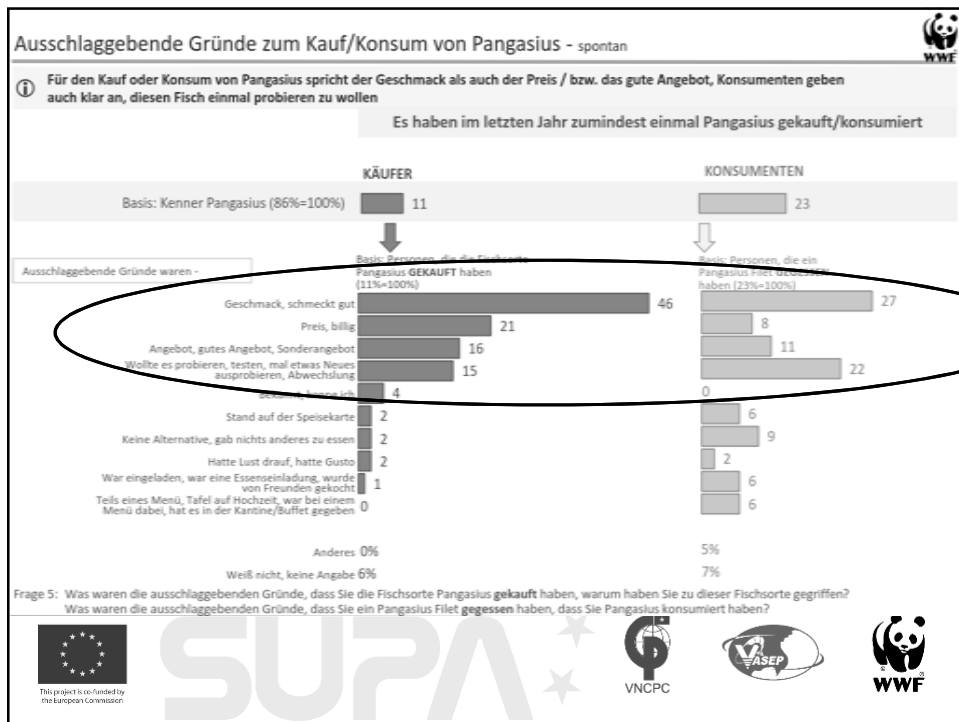


### Was spricht FÜR / was GEGEN die Fischart „Pangasius“



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 versetzt ist, deshalb isst man ihn auch nicht





## 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



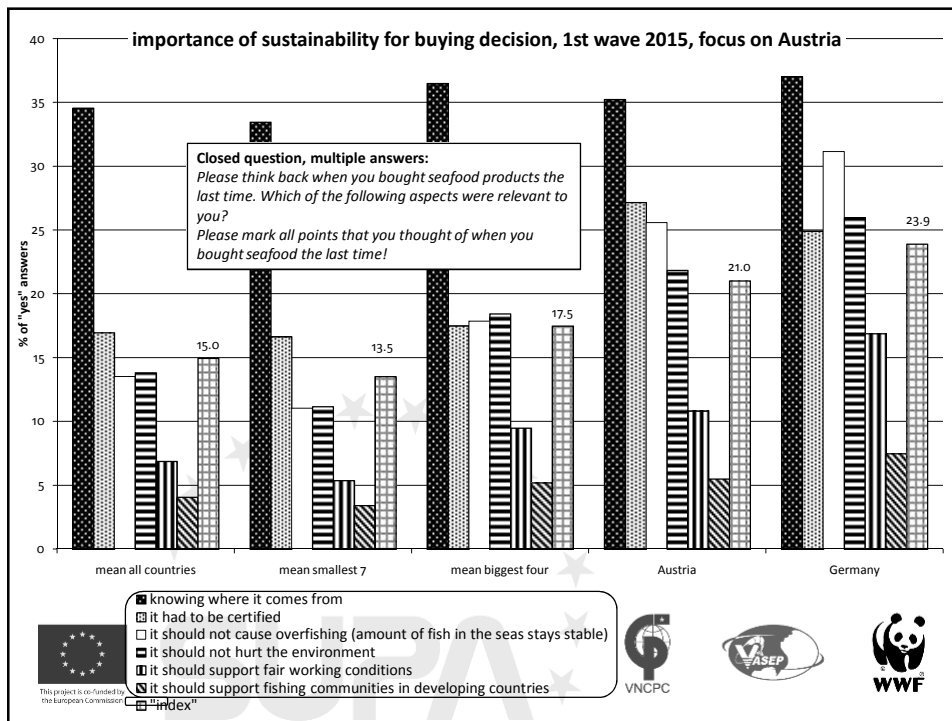
# Market Poll on European Level

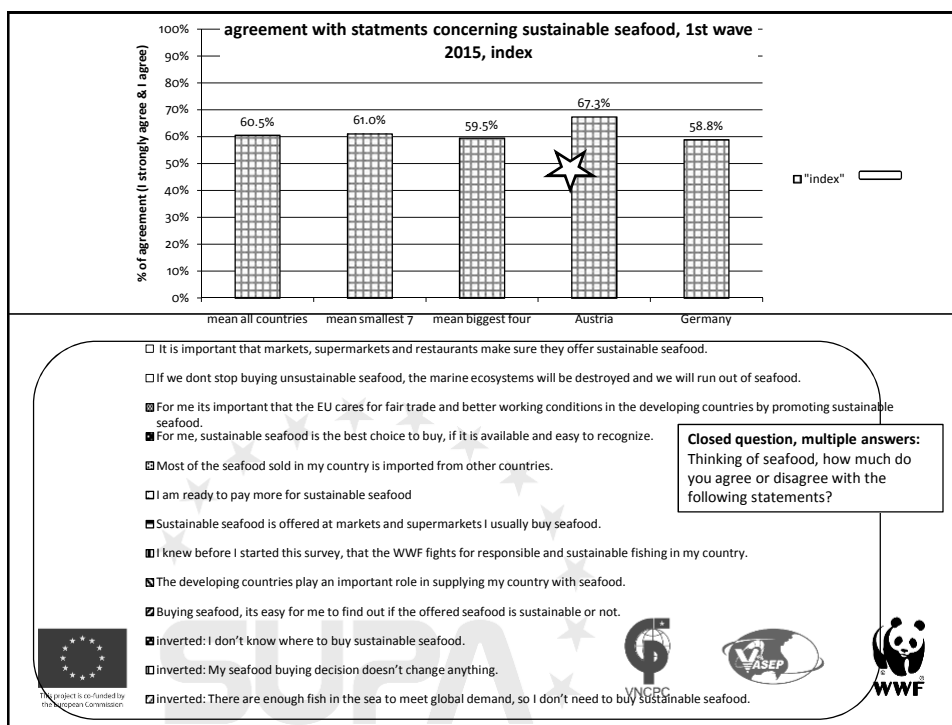
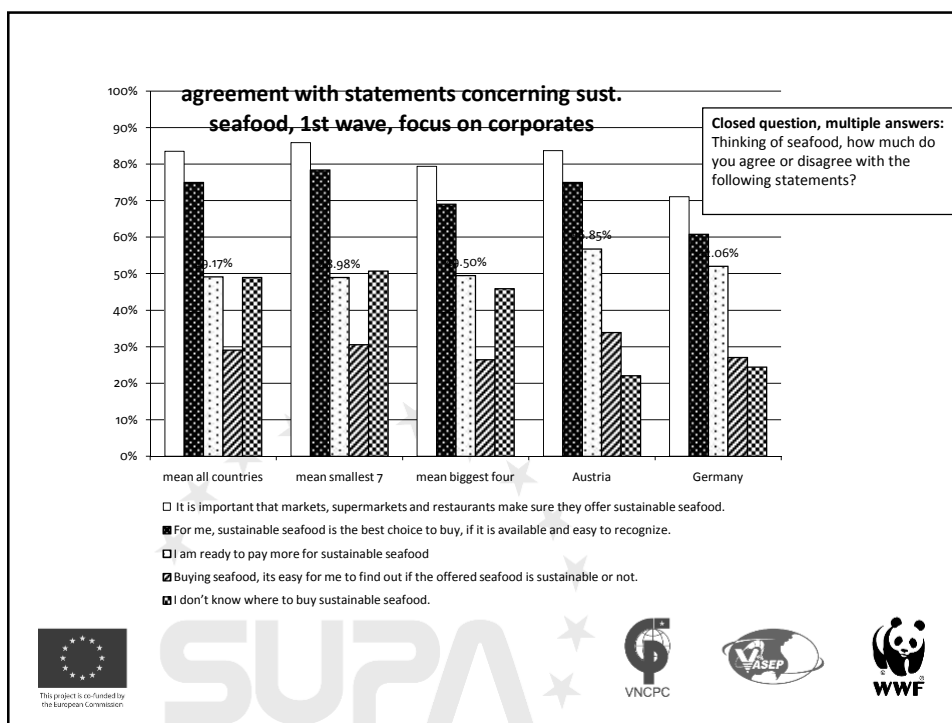
## 11 Countries



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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

We are cooperating with:

- ASC incl. Pangasius testimonials
- CBI: Panga – Your everyday fish, blogger visit
- Positive case story Pangasius promoted via the Fish Forward project (11 European countries) + WWF Network
- We are finalising an ASC impact study (CBA)



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THANK YOU.....



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