

# Seafood market trends in the EU following Covid-19

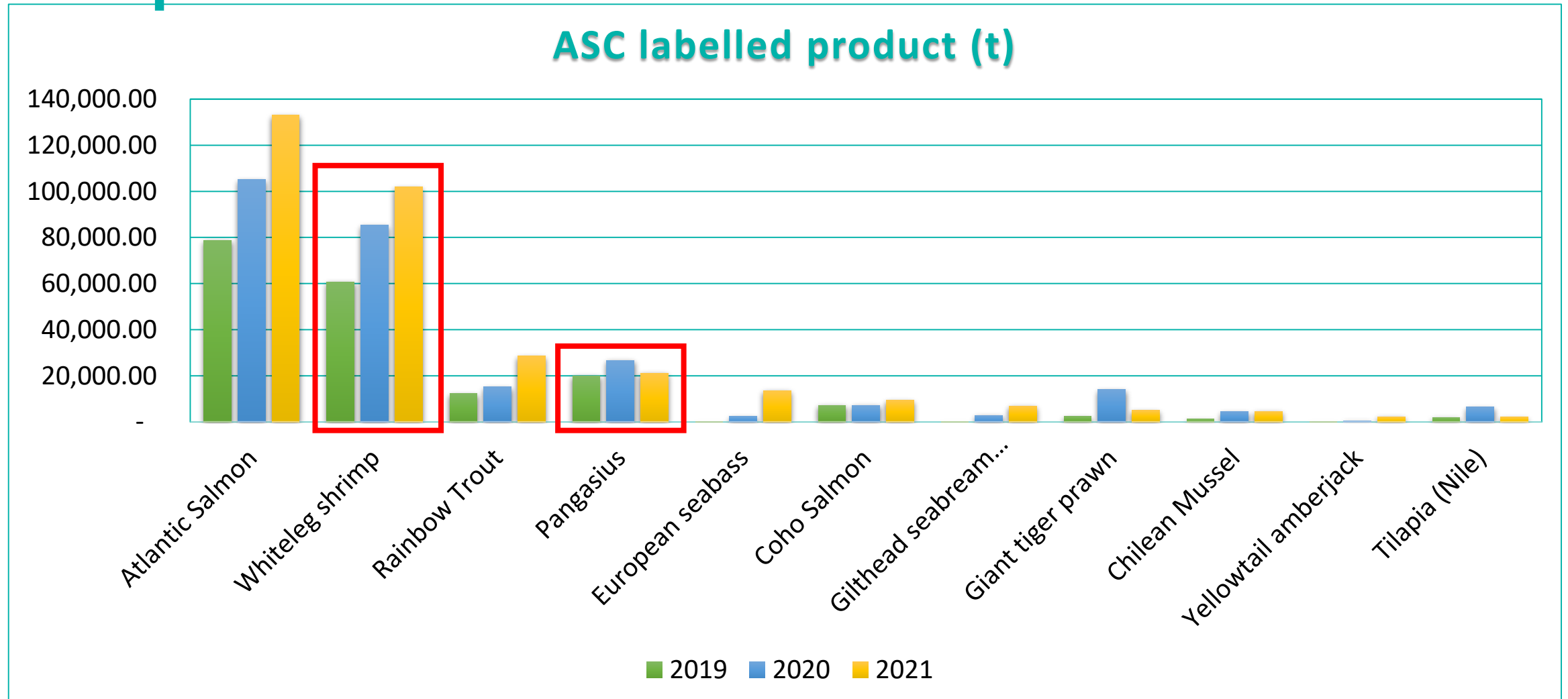
Dennis Wittmann, August 2022  
Aquaculture Stewardship Council  
[www.asc-aqua.org](http://www.asc-aqua.org)



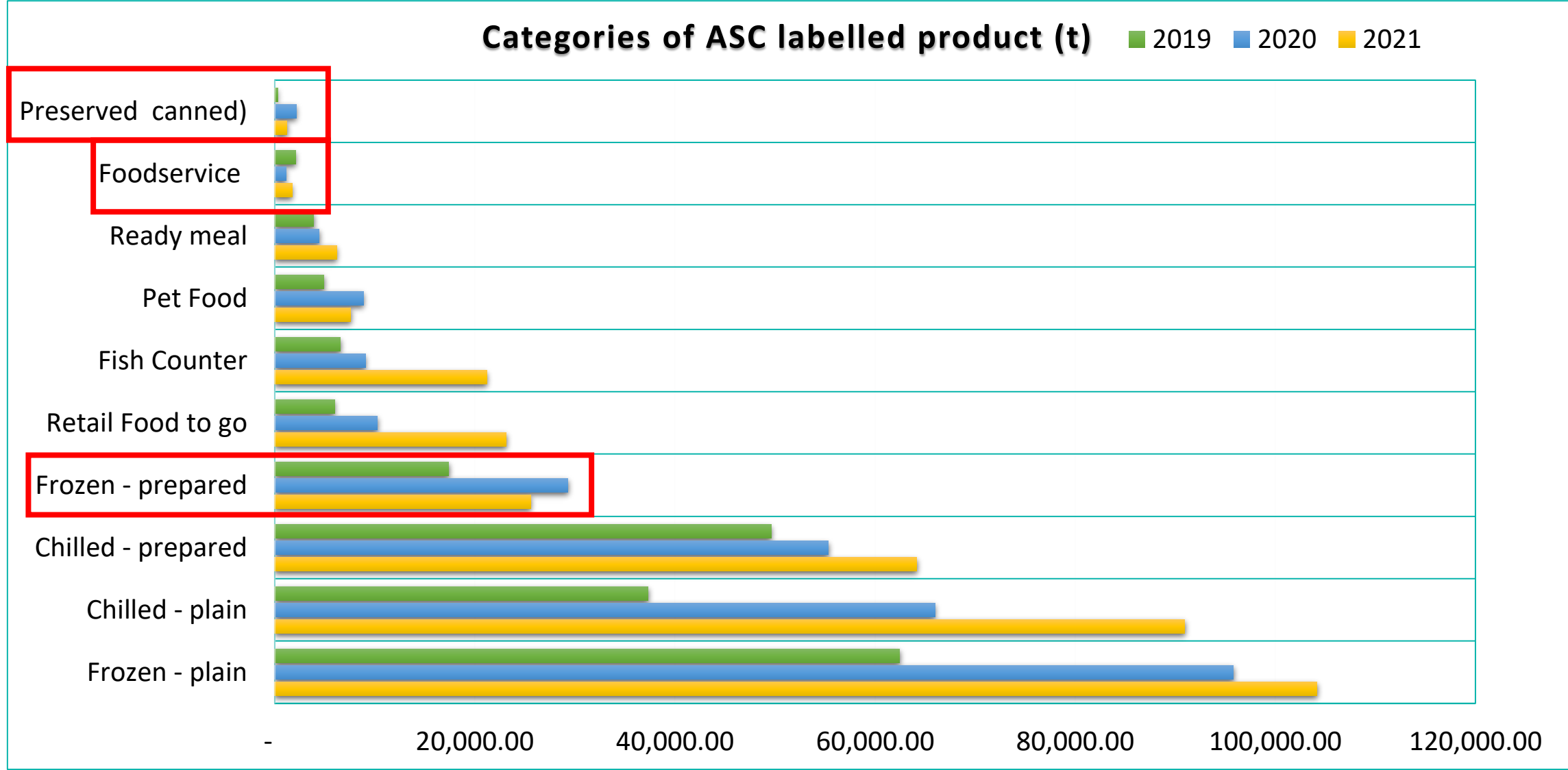
ASC Seafood, Global production



# The most important ASC labelled species in Europe



# The Development of different categories





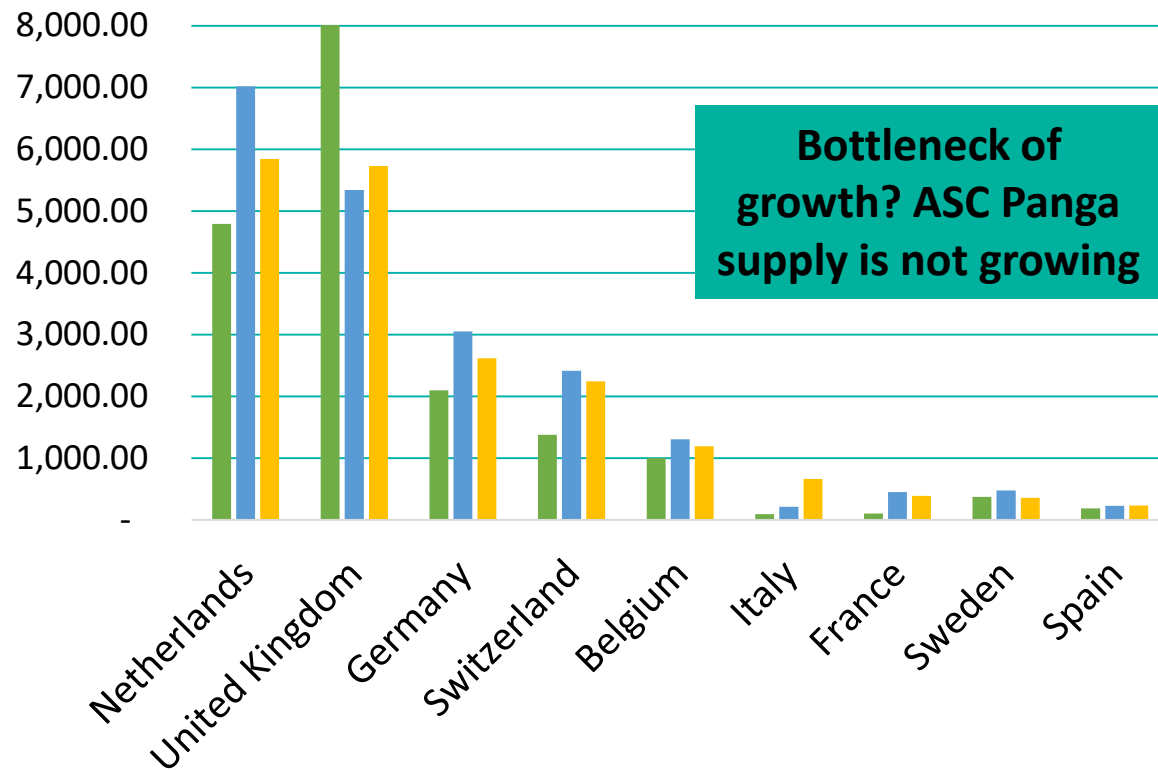
# Quick deep-dive into Pangasius and Shrimp



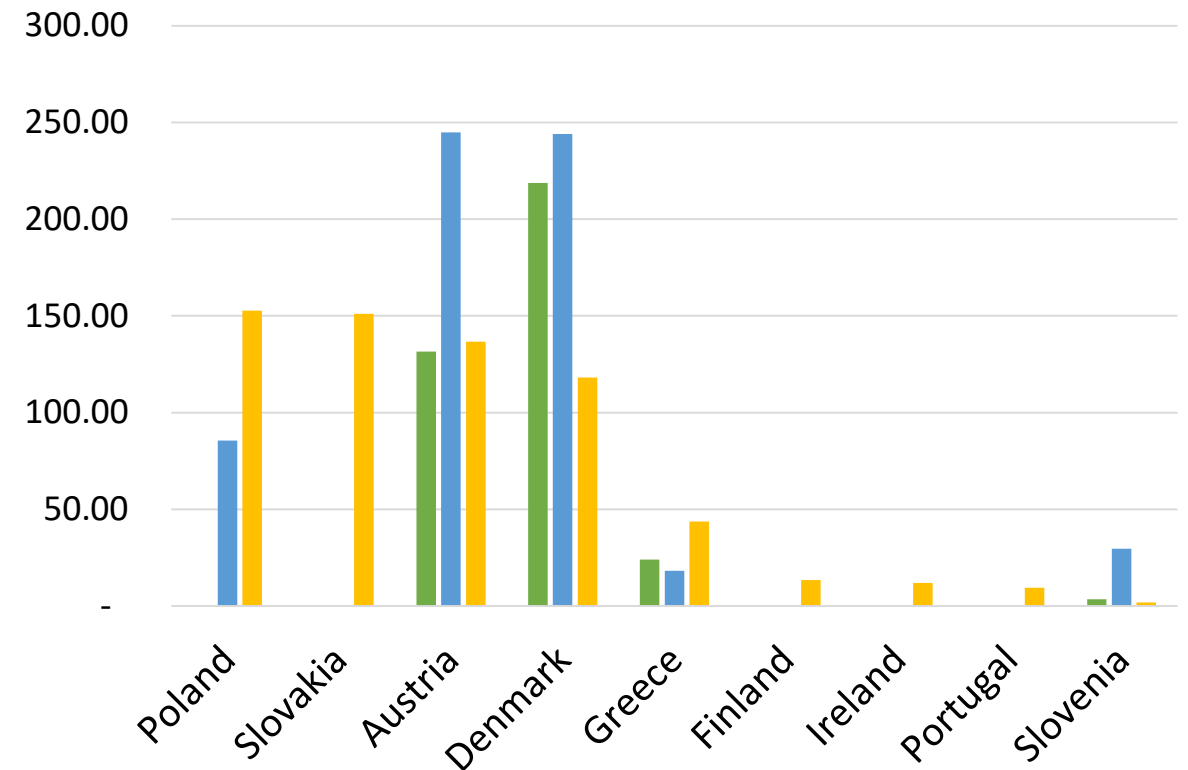


# ASC labelled Pangasius in Europe is stable

Development in the top Pangasius distribution countries in Europe



Top upcoming Pangasius distribution countries in Europe

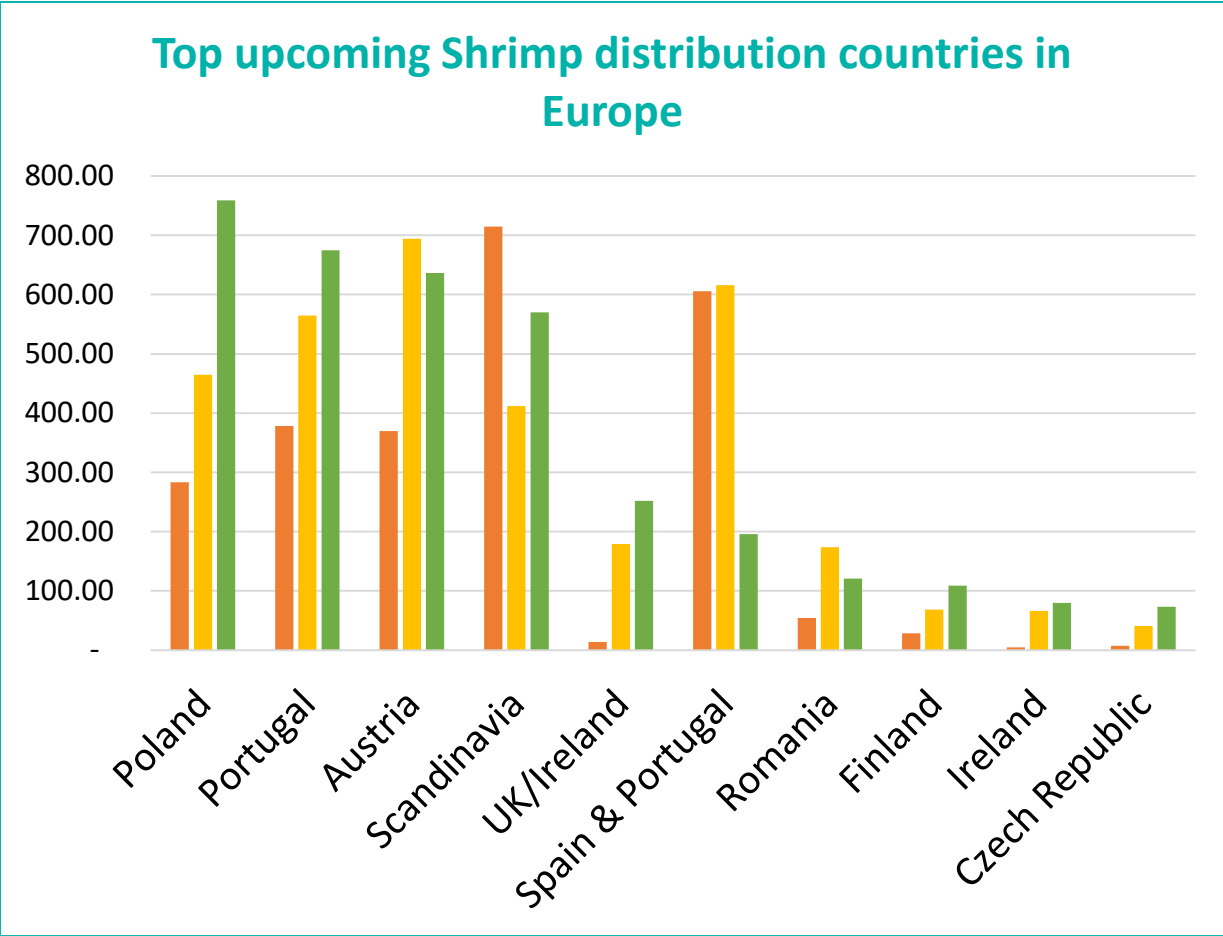
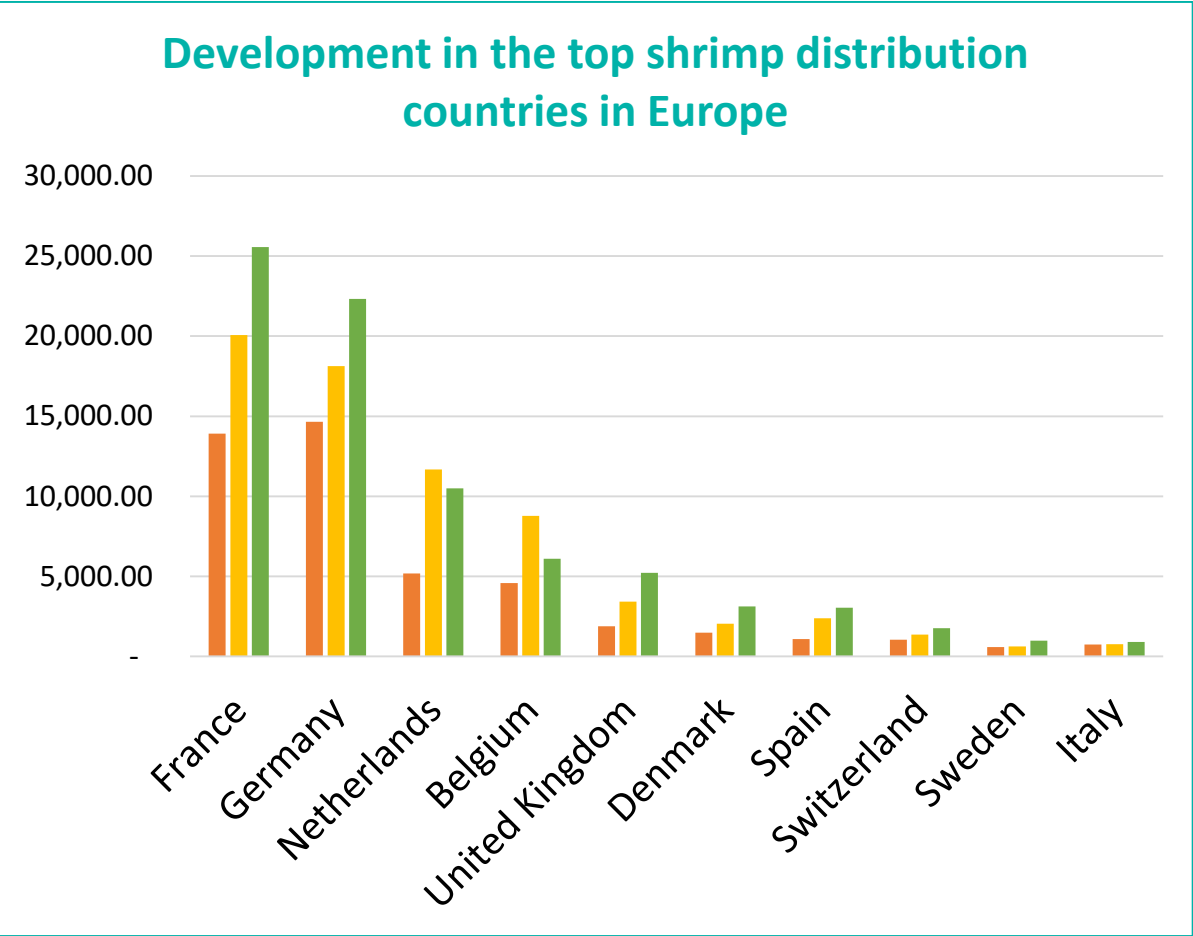


■ ASC Pangasius (t) 2019

■ ASC Pangasius (t) 2020

■ ASC Pangasius (t) 2021

# Upwards trend of ASC labelled Shrimp development in Europe



ASC Shrimp (t) 2019    ASC Shrimp (t) 2020    ASC Shrimp (t) 2021

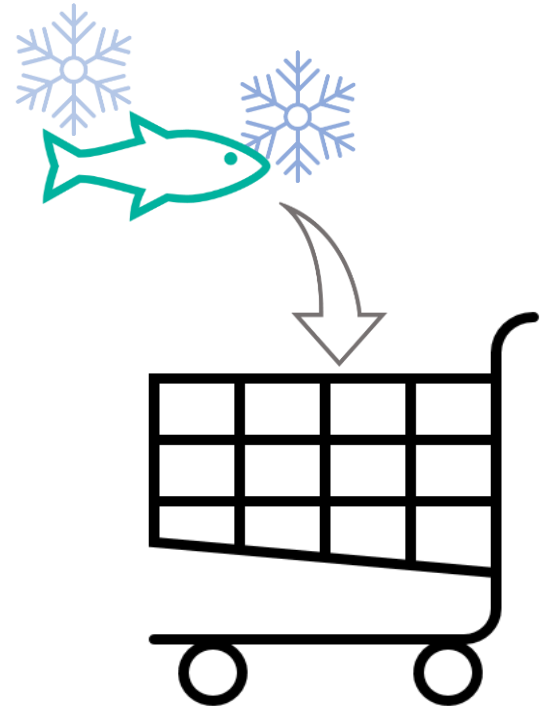
**What does the data and research tell us ?**



# Shopping behaviour changed during Covid

## 2020 was an exceptional year

- The shopping behaviour of consumers changed
  - Went less often to the shop, lowered risk to get infected. -> increase in cans and frozen product
- ASC labelled products sales increased as a result of conscious buying (trust in the label)
- Supply chains were not working as normal
- Hotel Restaurant and Catering businesses were affected severely

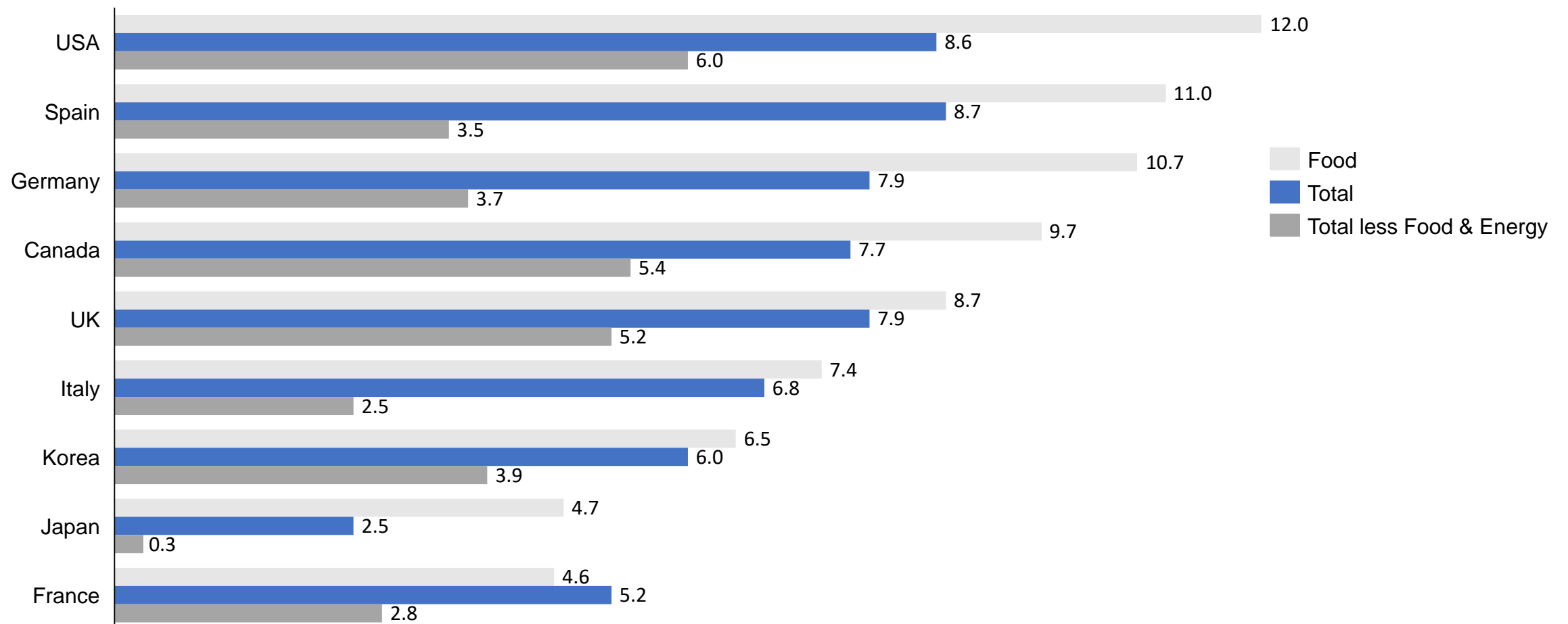


**Now: new situation affecting the seafood market – war in Ukraine**



# Food inflation outpacing Total inflation in many countries

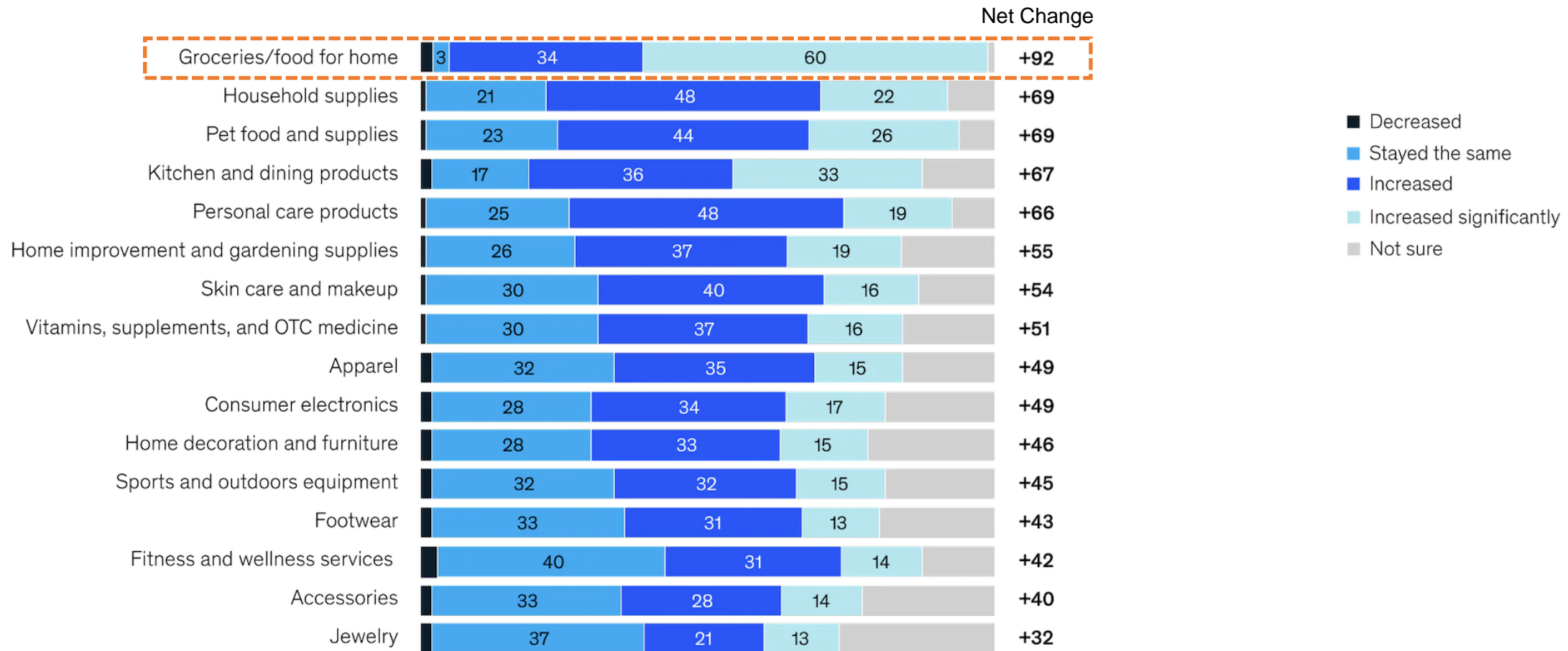
Total, Food and Total less food & energy inflation in selected counties, May 2022



# Consumers also perceive groceries to be the hardest hit category



Price changes perceived in the past 4-6 weeks by category, %

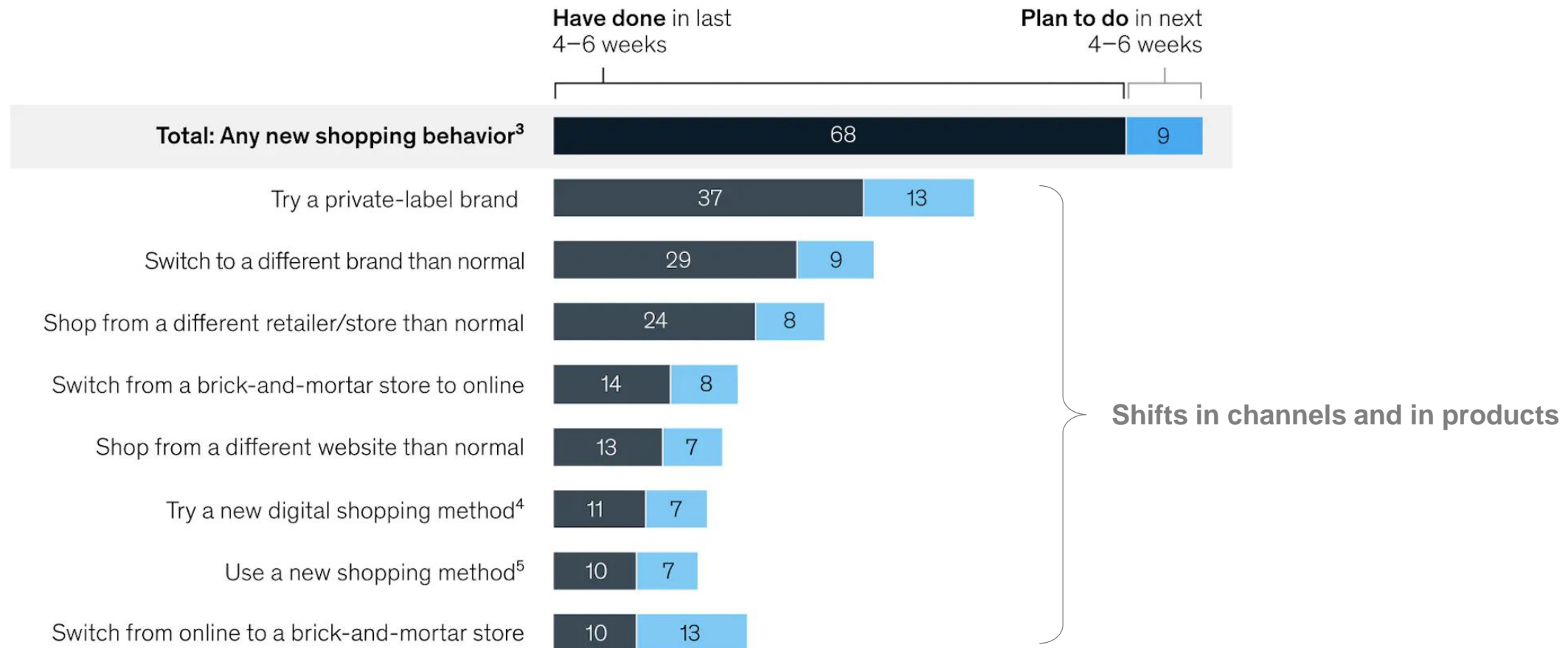




# Over 2/3 of consumers have changed their shopping behaviour in response to inflation



Activities and intended activities when shopping for groceries or essentials, %



# Heavy consumer shift to discounters, especially in Germany



% respondents who shopped at a different retailer/store than normal

Difference from all consumers,<sup>3</sup>  
percentage points

■ < -3 ■ Between -3 and +3 ■ > +3

Channel	All consumers, net change <sup>2</sup>	Germany	France	UK	Italy	Spain
Discounter	19	+28	+18	+22	+4	+22
Supermarket	-8	-12	-24	-9	+2	-4
Hypermarket	-22	-16	-28	-25	-16	-25
Specialty grocery store	-24	-29	-21	-20	-25	-26
Convenience store	-27	-30	-29	-32	-27	-15

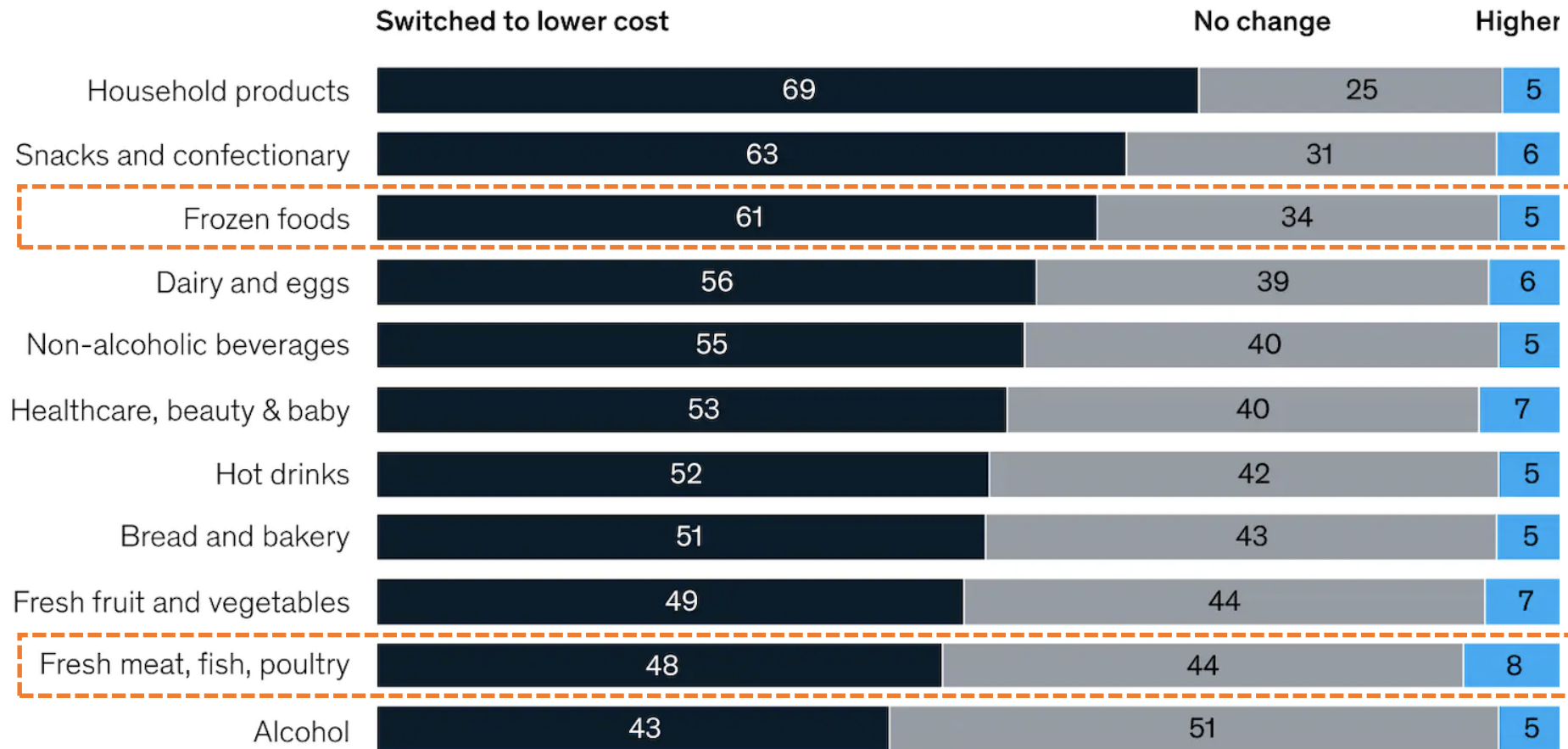
*Are discounters as committed to sustainable seafood sourcing, and to ASC, than other retail channels?*



# Frozen foods exposed to consumer switch to lower cost brands – less so for fresh



% of respondents who switched to a different brand of groceries or essentials in last 4-6 weeks

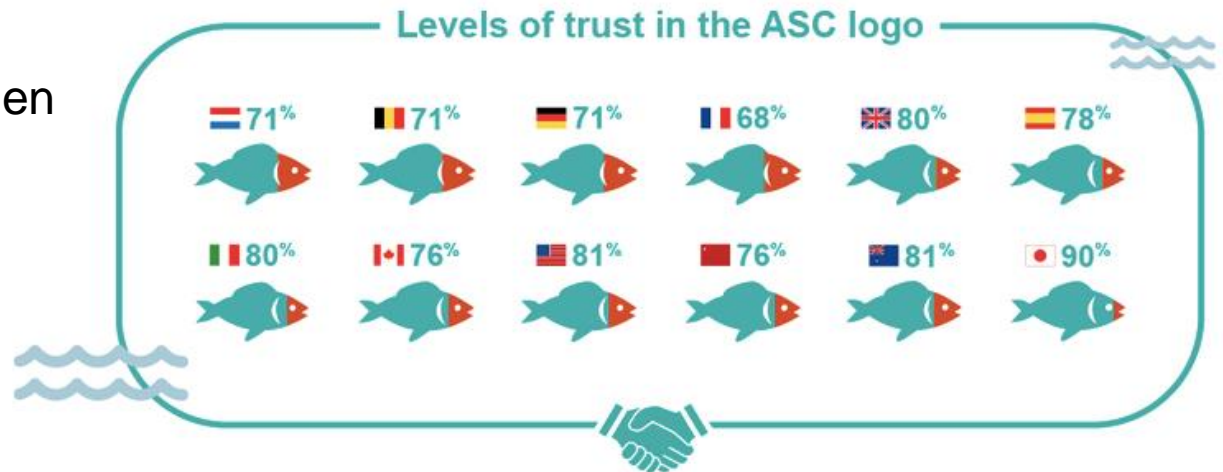


# Consumers agree that...



## Health and Sustainability are the top reasons to buy seafood

- During, and since Covid, European consumers are more **conscious** about what they buy
- Buyers ask for **traceability** and **assurance** that products comply with requirements and expectations
- More than half of the consumers do not perceive seafood to be **sustainable** right now.
- **ASC labelled products** help to take the decision when shopping for seafood





# Thank you for your attention



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