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Food and Agriculture
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Продовольственная и
сельскохозяйственная организация
Объединенных Наций

Organización de las
Naciones Unidas para la
Alimentación y la Agricultura

منظمة
الغذية والزراعة
للأمم المتحدة

COMMITTEE ON FISHERIES

SUB-COMMITTEE ON FISH TRADE

Seventeenth Session

Vigo, Spain, 25–29 November 2019

COMMUNICATING AQUACULTURE TO CONSUMERS AND OTHER STAKEHOLDERS

Executive Summary

This document provides a short overview and update on activities undertaken by FAO since the last Session of the COFI Sub-Committee on Fish Trade (COFI:FT) in 2017 in relation to communication and the image of aquaculture products. It focuses on projects and workshops conducted by FAO to improve the image of aquaculture and its products, including technical research studies, partnership with relevant initiatives, as well as collaboration with the General Fisheries Commission for the Mediterranean (GFCM) and the COFI Sub-Committee on Aquaculture (COFI:AQ).

Suggested action by the Sub-Committee

- Comment on FAO's work on communication on products originated from aquaculture and its impact on trade and consumption;
- Provide information and testimonials of national experiences in communication and impact of media related to the image of the aquaculture sector and its products, including the problem of "fake news";
- Advise on ongoing national and regional initiatives and experiences aimed at improving the perception and acceptability of aquaculture;
- Note the relevant studies and activities undertaken by FAO and make recommendations for future work;
- Note the progress achieved in collaboration with different stakeholders and suggest future actions.

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Other documents can be consulted at www.fao.org*



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BACKGROUND

1. Aquaculture is a relatively new industry in terms of global food supplies. Understanding the aquaculture production process and the implications for human health and the environment frequently requires specific technical knowledge, which is not always available to the general public. This lack of knowledge and/or misunderstanding can lead to mistrust of this sector.
2. Communication and information on food products are expected to increase consumers' knowledge and, subsequently, to affect attitudes regarding food choices and dietary behaviour. Consumers, and other agents involved in the food supply system, demand facts regarding food quality, safety and sustainability. In this regard, media (both traditional and social media), as the most common influential source of information in terms of food-related risks, plays a critical role in the dissemination of information about the food industry, whether positive or negative. Unfortunately, negative news has usually been producing a higher impact on consumption than positive news.
3. The 15th Session of COFI:FT (Agadir, 2016) reviewed a working document on the impact of aquaculture supply on trade and consumption¹. It noted the growing role of aquaculture products in national, regional and international markets and welcomed further information and analysis of its impact on the post-harvest sector and trade.
4. The 9th Session of COFI:AQ (Rome, 2017) highlighted the need to improve consumer perceptions on the aquaculture sector in general, and encouraged the Secretariats of the two FAO sub-committees to initiate joint programmes and activities to this end, with the participation of countries, as well as external stakeholders. Some countries noted the important role played by small-scale producers, as well as the need to support them to obtain greater access to markets. They also mentioned the importance of improving the perception of aquaculture products, in conjunction with highlighting the associated benefits of aquaculture products. They further suggested that COFI:FT could raise the profile of all products (from both fisheries and aquaculture) across the whole value chain to ensure that consumers and the general public receive the correct information and relevant facts on fish and fishery products. Such work would require the development of communication products and additional efforts to raise the image of fish in the media.
5. The importance of this coordination of work between the two sub-committees to achieve synergies in relevant areas has been recognized at both sub-committee meetings and this was again recognized during the recently held 10th Session of COFI:AQ (Trondheim, 2019).

TRADE AND MARKET INTEGRATION BETWEEN WILD AND FARMED SPECIES

6. The increase of aquaculture production in the last three decades has generated a significant rise of total fish supply and a positive influence on the development of new markets and the promotion of fish consumption in general. Paired with quality improvements, new product development and improved logistics, which have created a stronger market orientation pattern for fish products, have also been contributing to the globalization of trade of fish and fishery products.
7. Given the importance of farmed fish, it is crucial to understand the bias of consumers to farmed or wild-caught fish. Current knowledge of market integration, that is the non-differentiation by consumers between farmed and wild-caught fish, is based on a small number of species and markets.

¹ <http://www.fao.org/3/a-mp437e.pdf>

Studies indicate the existence of some market integration between wild and farmed individuals of the same species. A recent FAO report² investigated the presence of market integration for a large variety of wild and farmed fish products in the Mediterranean area. However, results of the study showed that there is no, or low, market integration between wild and farmed products in the Mediterranean countries for gilthead seabream, European seabass and other species (turbot, meagre and clams). This lack of integration between farmed and wild products has been explained in the literature by a traditional pattern of consumption linked to the local knowledge of fish, a preference for local products, the use of different market chains, and a persisting negative perception of farmed products in the area. The same study demonstrated that there is, however, market integration for blackspot (red) seabream and Atlantic cod, which can be attributable to the low volumes of farmed products sold.

CERTIFICATION AND VOLUNTARY GUIDANCE TO IMPROVE COMMUNICATION IN AQUACULTURE

8. Certification and voluntary guidance are strategic tools to inform and reward good practices in aquaculture. Providing market-based incentives for producers to engage in responsible aquaculture practices, certification schemes are also utilized to minimize potential negative impacts and increase societal and consumer benefits and confidence in the process of aquaculture production marketing. Many private sector initiatives, like the Global Salmon Initiative (GSI)³ tackling environmental reputation of the salmon industry, and APROMAR's Crianza de Nuestros Mares⁴ communicating good practice in Spanish finfish aquaculture, have opted for either the adoption of existing aquaculture certification standards or developed their own schemes or labels to accomplish an initial goal of improving the image of farmed fish and the reputation of the aquaculture sector. While business-to-business and business-to-consumer certifications remain a strong communication tool, they face several challenges among which associated certification costs and inclusiveness of developing countries and small-scale producers, as well as emerging issues of common concern relating to social responsibility.

9. In addition, the FAO guidelines for certification schemes contribute also towards the increase in confidence of aquaculture products for production, trade and consumption. Furthermore, and in line with the mandate from the 33rd Session of COFI (Rome, 2018), FAO is developing a draft guidance on social responsibility in fish value chains⁵

ROLE OF MEDIA AND THE COLLABORATION BETWEEN FAO AND OTHER INTERNATIONAL INSTITUTIONS

10. Media coverage and public opinion on aquaculture may influence politicians and regulatory authorities, impacting on the industry's overall framework. Media (both traditional and social media) plays a key role in structuring and dominating the public sphere and is one of the most used and preferred information sources. The media's agenda and coverage of the aquaculture industry are central in informing the public about important issues and debates. If people believe the industry has negative impacts on the environment and human health, there is a great possibility that the public will not buy farmed fish or demand a more regulated industry.

11. In many instances, media reporting is initiated by a stimulus or a “trigger” publicity event, which often occurs as a scientific discovery or statement publicized in a scientific journal or a press release from a research institute. Such events have been found to influence the volume of reporting, as well as the way issues are framed within news stories.

² <http://www.fao.org/3/i8220en/I8220EN.pdf>

³ <https://globalsalmoninitiative.org/en/what-is-the-gsi/>

⁴ <https://www.crianzadenuestrosmares.com/de-nuestros-mares/>

⁵ Please see document COFI:FT/XVII/2019/13.

12. FAO is participating in the European Union-funded Horizon 2020 project entitled “Mediterranean Aquaculture Integrated Development (MedAID)”⁶, where 34 partners from 12 countries are working closely to achieve overall increased competitiveness and sustainability of the Mediterranean marine fish-farming sector, throughout the whole value chain. Included in FAO’s contribution to the project activities are aspects related to the improvement of business performance and development of strategic marketing plans of aquaculture products.

13. Within the activities of this project, FAO organized an international workshop on the “role of mass media and aquaculture markets” (May 2018, Rome, Italy) attended by representatives of governments, producers, associations, international experts and specialized fisheries and aquaculture journalists. In this event, participants highlighted that:

- mass media usually has a poor knowledge about aquaculture;
- there is a higher likelihood they are publishing negative rather than positive information on the aquaculture sector;
- the information provided in the media is usually extremely technical and difficult to understand by a non-skilled audience;
- the aquaculture industry lacks a sustained and coordinated communication strategy.

14. During the workshop, it was also highlighted that, although interactive communication in social media is gaining attention from consumers and, thus, increasingly influencing purchase decisions, consumers may also look for alternative sources of information. It was reiterated that continuous interaction with the salesperson could help to contribute to the improvement of consumers’ perceptions about aquaculture, in general, and of certain species, in particular. Specialized journalists highlighted that there is a need for training of media writers and the creation of trustworthy platforms or repositories to allow better information dissemination. In their opinion, many of the media writers are not experts in the area and, due to time pressure in producing the article, information is often collected in a short time, including from sources that could be considered as less reliable. This can trigger the production of fake and misleading news, an issue that needs to be tackled at national, regional and international levels.

15. In the MedAid project FAO is also preparing a research report on the “image transmitted in the media on aquaculture”, where a specific methodology was developed and validated to estimate the impact of mass media on consumers’ perception and purchase behaviour in aquaculture. Currently, data collection for Spain is finished, and work is ongoing for Italy and Greece. The outcomes of the research will be disseminated on the FAO GLOBEFISH⁷ website.

16. Within MedAID FAO is also participating with GFCM in the preparation of promotional material on the positive externalities of sustainable aquaculture and benefits associated with aquaculture products addressing the public at large and consumers, within the framework of the Sustainable Development Goals (SDGs) and according to Blue Growth principles. In addition, an on-line survey and regional workshops targeting a wide range of stakeholders are being implemented, endeavouring to identify the critical factors that influence the social acceptability of aquaculture. Two workshops have already been held – one in Montpellier (France) at AQUA 2018 in August 2018, and the second in Monastir (Tunisia) in April 2019. A publication is being developed to serve as guidelines to improve social acceptability of aquaculture in the Mediterranean and the Black Sea, aiming to assist policy-makers and other relevant stakeholders in the implementation of good practices to unlock the potential of sustainable aquaculture and to contribute to improving the overall perception of aquaculture products by the general public.

⁶ <http://www.medaid-h2020.eu/>

⁷ www.globefish.org

17. The work undertaken by the GFCM and the results of the workshop have also highlighted the need for countries to include in their national strategies and plans for aquaculture specific components to improve social acceptability of aquaculture, including a communication plan targeting key stakeholders and addressing the public at large, particularly consumers, on the positive externalities of sustainable aquaculture and the benefits associated with aquaculture products.

FAO'S NEXT STEPS

18. FAO endeavours to share and disseminate information and results of the MedAID Project to other regions. Such a project provides a starting point for a comprehensive multi-stakeholder regional assistance to improve the performance and image of the aquaculture sector and aquaculture products. While the project is still ongoing, there is an opportunity to learn and capitalize on the approach for similar initiatives to be launched in different regions. Such initiatives could stem from FAO Regional Fishery Bodies and would build on existing strong collaboration with aquaculture networks, such as the Aquaculture Network for Africa and the Aquaculture Network for the Aquaculture Centres in Asia-Pacific.

Sustainable Aquaculture Guidelines

19. During its 9th Session, COFI:AQ requested FAO to develop the Sustainable Aquaculture Guidelines (SAG) based on successful experiences on aquaculture development in different areas. For this purpose, an Expert Consultation⁸ was organized in Rome in June 2019, which provided a roadmap, methodology and content, as well as a list of thematic modules, to be developed by making use of existing guidelines and lessons learnt from case studies of sustainable aquaculture achievements.

20. During the 10th Session of COFI:AQ Members agreed on the suggestions made by the Expert Consultation - in particular on the list of thematic modules that include a chapter on aquaculture value chains, consumers, markets and trade - encompassing the following six thematic modules:

- perception and acceptability;
- nutritional value, quality and safety of aquaculture products;
- marketing of aquaculture products;
- fair and productive aquaculture value chains;
- quality and certification and voluntary schemes; and
- compliance with international standards.

21. COFI:AQ also indicated its strong support to the proposal to convene regional consultations and encouraged all Members to contribute to the SAG by sharing their experiences in these consultations.

22. The joint work by the Secretariats of both sub-committees will contribute to the development process of the SAG, in particular, the components about trade and marketing, *inter alia*, perception and acceptability of aquaculture and aquaculture products.

⁸ <http://www.fao.org/3/na410en/na410en.pdf>