



EU CONSUMER HABITS REGARDING FISHERY AND AQUACULTURE PRODUCTS

ANNEX 3 MAPPING OF NATIONAL CAMPAIGNS

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European Market Observatory for
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Abbreviations

| | |
|---------|--|
| APROMAR | Association of Marine Aquaculture Producers |
| B2B | Business-to-business |
| B2C | Business-to-consumer |
| CFP | Common Fisheries Policy |
| EFF | European Fisheries Fund |
| EU | European Union |
| FAO | Food and Agriculture Organisation |
| FOESA | Spanish Aquaculture Observatory Foundation |
| FROM | Spanish Regulation and Market Organisation Fund for Fish |
| OPAC | Inland Aquaculture Organisation |
| OPMEGA | Organisation of Producers of Galician Mussels |
| MAGRAMA | Ministry of Agriculture, Food and Environment of Spain |
| QR | Quick Response |
| PR | Public Relations |

1 Objectives and approach

According to the study's methodological guidelines, Task 3 "Consumer Survey – Mapping of National Campaigns" is based on the following work:

- Mapping and review of national promotional campaigns to improve the image of fishery and aquaculture products that were carried out in all 28 Member States (MS);
- Mapping and review of promotional campaigns to improve the image of fishery and aquaculture products carried out on the EU level;
- Summary of general findings based on the overall assessment of the campaigns on the EU level, the EU subregional level and each MS level.

The inventory of the national campaigns includes several components, including geographical factors, types of campaigns, types of products, main focus areas of the campaigns, product trends, consumer trends, and factors influencing consumer demand and purchasing behaviour.

The inventory of Task 3 included the following steps:

- 1) Identification and mapping of national promotional campaigns to improve the image of fishery and aquaculture products in all 28 MS.
 - (i) The European Fisheries Fund (EFF) co-funded campaigns were identified by reviewing the list of final beneficiaries of EFF, published by the EFF Managing Authorities, or by contacting the Managing Authorities of the EFF and the European Maritime and Fisheries Fund (EMFF) about projects supported in the field of promotional campaigns to improve the image of fishery and aquaculture products.
 - (ii) All other campaigns/promotional campaigns funded through other sources (private/public) were identified through desk research and by contacting institutions/boards/associations, which manage/have managed national or regional campaigns.
- 2) Provision of the review and a summary of the promotional campaigns to improve the image of fishery and aquaculture products on the EU level.
- 3) Provision of the review of the national campaigns and a summary of the national campaigns on the subregional level.
- 4) Provision of the review of the national campaigns and a summary of the national campaigns in each EU MS.

Subregions of the EU

As in Tasks 1 and 2, the presentation of the findings in Task 3 was classified by the countries' subregional grouping. The scope, focus areas, and characteristics of the campaigns supported under the EFF measure "Development of new markets and promotional campaigns" in Axis 3 "Measures of the common interest" vary significantly from country to country. The same observation is made for other (public/private) campaigns. However, some common features on the subregional level were identified. For this reason, analysis of the national campaigns continued its classification on the subregional level. The table below provides classification of the MS on the subregional level.

| Western EU | Northern EU | Central EU | Eastern EU | Southern EU |
|---------------------|--------------|---------------------|----------------|---------------|
| Ireland (IE) | Denmark (DK) | Austria (AT) | Lithuania (LT) | Portugal (PT) |
| United Kingdom (UK) | Sweden (SE) | Czech Republic (CZ) | Latvia (LV) | Spain (ES) |
| Netherlands (NL) | Finland (FI) | Slovakia (SK) | Estonia (EE) | France (FR) |
| Belgium (BE) | | Slovenia (SI) | Romania (RO) | Italy (IT) |
| Luxembourg (LU) | | Hungary (HU) | Bulgaria (BG) | Croatia (HR) |
| Germany (DE) | | | Poland (PL) | Greece (EL) |
| | | | | Cyprus (CY) |
| | | | | Malta (MT) |

Reasons to redefine the subregions may appear after the completion of other tasks of the study.

2 General findings about the EU-level campaigns

In 2013, the European Commission, with the governments of MS and the European Parliament, agreed to reform the Common Fisheries Policy (CFP) to enhance the European fishery and aquaculture sectors and make them more environmentally, economically, and socially sustainable. Since the reform of the CFP, two European-wide public information campaigns have been carried out by the Commission: "Inseparable" and "Farmed in the EU", focusing on the sustainability of captured fish and farmed species in the EU.

The sustainable-fish awareness campaign "**Inseparable**", which began in 2014, is meant **to promote the consumption and trade of sustainable products from fisheries**. The campaign is directed at all European populations, including the B2B and B2C segments. All captured species were included. It highlights the four elements of handling fish in the sustainable way: "Know", "Eat", "Sell", and "Buy". The "Know" module highlights the importance of knowing about sustainable seafood, which helps to ensure its availability for future generations. The "Eat" module concentrates on consuming sustainable fish and improving the diet. The "Buy" module underlines the choice of sustainable fish, and the "Sell" module focuses on maintaining the interest of businesses as well as the sustainability of marine ecosystems.

Media communication and **PR events** are the campaign's main activities. Media communication is performed through social media, TV advertising, and an online platform. The website contains information

from the European Commission and about the Common Fisheries Policy, inspirational stories about sustainable seafood, and information covering sustainable seafood in EU MS.

Three events were organised in Hamburg, Turin, and Athens in 2014. They included promotional activities, such as **educational activities**, **dissemination of informational material**, and **interactive exhibitions** to raise awareness of sustainability issues. In Athens, a special focus group included schoolchildren. They and their teachers were encouraged to create artwork and presentations on the topic of European-wide sustainable fish and the size of juveniles.

The sustainably farmed fish-awareness campaign, **“Farmed in the EU”**, is a part of the “Inseparable” campaign. It began in 2014 and promoted consumption of aquaculture products. It is directed at the B2C segment, targeting the whole European population. All species from European aquaculture were included in the campaign.

Media communication, PR events, and a special school project “Farmed in the EU” are the campaign’s main elements. Media communication is provided through social media, TV advertising, and an online platform. The PR events were organised during trade fairs in Brussels and Milan in 2014. The **“Farmed in the EU” school project** was designed to raise awareness of the aquaculture sector among Europe’s teenagers (12–18-year-olds). The project aims at bringing students closer to the fish-farming sector, allowing them to explore its role in food production and in preserving the environment, and discover the different business and career opportunities aquaculture offers. The project is currently being piloted in 20 schools across 10 EU countries (the Czech Republic, France, Germany, Greece, Hungary, Ireland, Italy, Poland, Spain, and the UK). A key part of the programme is an on-site visit by a local fish farmer, giving students the opportunity to talk to an expert and to take part in the interactive visitor session. A project kit and a booklet “Farmed in the EU. Learning about European aquaculture” were designed to help teachers plan and run the project. National educational authorities were involved in the campaign to encourage the use of the kit and the booklet in schools.

3 General findings about the national campaigns

Whether carried out by public authority or by private operators or organisations, campaigns are a well-developed and widespread instrument to promote fishery and aquaculture products. Support for this type of promotional measures has been a mainstay of EU funding for fisheries since its early days.

In the period 2007-2013, the objective of EFF Axis 3 “Measures of Common Interest” was to support measures of common interest with a broader scope than measures normally undertaken by private enterprises and which contribute to meeting CFP objectives, such as ensuring that fishing and aquaculture activities are environmentally, economically and socially sustainable and that they provide a source of healthy food for EU citizens. The measure “Development of new markets and promotional campaigns” aspires to enhance the quality and value of fishery and aquaculture products and to develop new markets, as well as to implement promotional campaigns for fishery and aquaculture products.

The reviewed national promotional campaigns of fishery and aquaculture products are quite diverse from MS to MS. Analysis of the promotional campaigns by MS reveals differences in the scope, number, and nature of the campaigns at the subregional level and in each MS. In general, however, their objective is to **increase the consumption of fishery and aquaculture products by raising consumer awareness of the products’ health/nutritional benefits in the human diet.**

The **main findings** about the national campaigns include the following:

- A total of 685 promotional campaigns and projects¹ **to facilitate consumption of fishery and aquaculture products and to improve the image of these products** were carried out between 2007 and 2015 in 26 EU MS. There were no relevant campaigns carried out in 2 EU MS (Austria and Luxembourg).
- Southern European countries organised the largest number of promotional campaigns, and the broadest ones. Spain had by far the most campaigns as well as the largest scope of activities. Spain was responsible for the majority of the campaigns run both in the Southern EU subregion and across the EU. Its EFF operational programme in 2007-2013 focused on improving the competitiveness and productivity of the fishery industry, **promoting fishery and aquaculture products and securing their continuous positive image**.
- France, Portugal, and Italy's many campaigns focused on **strengthening the image of local fishery products**, highlighting **underutilised regional species** as a potential driver of their regional and national economic development.
- Eastern and Central EU countries with large aquaculture industries carried out many promotional campaigns with broad scopes. Poland, Romania, and Bulgaria concentrated their campaigns on **improving the image of fishery and aquaculture products, highlighting farmed domestic species**.
- The overall objective for all MS was **to increase consumption of fishery products and raise public awareness of the benefits of fishery and aquaculture products in the human diet**. In several countries across Europe, the primary goal of the campaigns was **to increase the demand and consumption of fishery and aquaculture products caught/farmed in sustainable way taking into consideration environmental aspects**. Training and educational programmes were developed **to raise consumer awareness of quality, sustainability and safety aspects of fishery and aquaculture products**.

3.1 Overall assessment

Existing data on the final beneficiaries of the EFF co-funded campaigns and campaigns funded by other private/public sources in the 28 EU MS have been collected, examined, and summarised. Evaluation of both types of campaigns was available only in some cases. No promotional campaigns for fishery and aquaculture products were identified for two countries (Austria and Luxembourg).

The main goals of the campaigns are as follows:

1) Increasing consumption of fishery and aquaculture products

The target to increase consumption of fishery and aquaculture products was one of the main objectives of the national campaigns in all EU MS. In most countries, it was the campaign's key objective, especially

¹ The total number of promotional campaigns also includes promotional projects due to the specific campaign encoding system in Spain.

in countries with low fish consumption. In countries with relatively high fish consumption, the key focus area was securing fish consumption for the future.

2) Improving the image of fishery and aquaculture products

Improving the image of fishery and aquaculture products was a topical focus area in several countries of the Eastern, Western, Central, and Northern EU subregions. Campaigns carried out in Bulgaria, Estonia, Denmark and Germany directly targeted the improvement of the products' image by informing consumers about the health benefits and high value of fishery and aquaculture products and reducing prejudices against the products such as, for example, negative perceptions related to aquaculture products. Some countries in the Southern EU subregion (Italy, Spain, Portugal, and France) did not have campaigns directed at improving the image of fishery and aquaculture products, presumably because consumers in those countries already have a positive image of fishery and aquaculture products.

3) Promoting sustainable fishery and aquaculture products

Campaigns promoting sustainable fishery and aquaculture products were carried out predominantly in the Southern, Western, and Northern EU subregions. Italy, Ireland, and the UK were the leading countries where consumption of sustainable fishery and aquaculture products was encouraged as the direct focus area of the campaigns on the regional and national levels. The countries applied various promotional tools, while dissemination of information was one of the most common elements in most of the cases in form of educational programmes and the creation of regional and national quality schemes for fishery and aquaculture products, such as “Crianza de nuestros mares”, “Trucha del Río” “Galician Mussels” and other.

4) Promoting local fishery and aquaculture products

Nearly all countries had campaigns directed at the promotion of local fishery and aquaculture species. Increasing recognition and market value of local fishery and aquaculture products represented the main catalyst for increasing consumption of fishery and aquaculture products in most of the countries.

5) Promoting underutilised fish species of low commercial value

A special emphasis on the promotion of underutilised and “neglected” fish species of low commercial value was among the direct targets in campaigns in the Southern and Northern EU subregions. Most campaigns with this goal were organised in Italy and Portugal. Educational and training activities and identification of new markets for underutilised species were the main areas of action for innovative use of underutilised species.

6) Strengthening consumer awareness of the health/nutritional benefits of fishery and aquaculture products

Improving consumer awareness of the health/nutritional benefits of fishery and aquaculture products was one of the main goals of the promotional campaigns in all EU subregions. Informing consumers of the health/nutritional benefits of fishery and aquaculture products is important to projecting a positive image

of the fishery and aquaculture products. This was applied in all countries and, in most countries, it included educational activities.

The table provides an overview of the assessment results grouped by the main goals of the campaigns.

| Main goals of campaigns | Southern EU countries | Eastern EU countries | Northern EU countries | Western EU countries | Central EU countries |
|---|-----------------------|----------------------|-----------------------|----------------------|----------------------|
| Increasing consumption of fishery and aquaculture products | X | X | X | X | X |
| Improving the image of fishery and aquaculture products | | X | X | X | X |
| Promoting of sustainable fishery and aquaculture products | X | X | X | X | |
| Promoting of local fish species | X | X | X | X | X |
| Promoting of under-utilised fish species of low commercial value | X | | X | | |
| Strengthening consumer awareness of health/nutritional benefits of fishery and aquaculture products | X | X | X | X | X |

Assessments of the campaigns' promotional actions are classified by the following types of communication activities:

Media communication and PR

Media communication and PR activities were applied in all of the promotional campaigns across EU MS. The most common communication channels included public and private media communication at the local and national level (newspapers, magazines, TV, radio, billboards and internet). In most countries, the websites were created ad hoc for the campaigns. Most of the campaigns concentrated on consumers, although many campaigns included both consumers and business. Many campaigns were generic and addressed to all consumer groups on the national and regional levels. Some campaigns targeted selected consumer groups, such as younger consumers (18–35-year-olds), children (kindergartens and schools), families with children and women.

Distribution of promotional materials

The distribution of promotional materials was part of nearly all campaigns. Some campaigns ran on a small scale exclusively focused on the dissemination of promotional material. In most cases, however,

dissemination of promotional material was a minor feature of the campaign. Examples of promotional materials include books, cookbooks, leaflets, recipes, stickers and gadgets.

Collaboration with the retail sector

Cooperation with the retail sector was an important element of promotional campaigns in several EU subregions, especially for those campaigns aimed at promoting regional and underutilised fish species of low commercial value. In general, promotional tools included the distribution of informational material, advertising in local newspapers, radio commercials, in-store demonstrations, cooking shows and tastings, and strategic positioning of fish products outside traditional product shelves. Price promotion was carried out to a lesser extent, depending on the retailers' strategies.

Collaboration with food outlets

Food outlets represent an important distribution channel of fishery and aquaculture products to end consumers. Great emphasis was placed on the collaboration with the food outlets in all EU subregions. The Southern subregion, including Italy, France, and Spain had the most extensive and diverse cooperation with this sector. Activities included the training of restaurant chefs and developing networks with the sector and other industries such as tourism. Other activities included culinary classes, the placement of underutilised fish and seafood species on restaurant menus, promotion of special events in restaurant, and special offers for promoted fish and seafood species. Another important aspect of cooperation with food outlets was collaboration with schools and canteens.

Education of younger consumers

The education of younger consumers was important element in many promotional campaigns across EU countries. Most countries conducted specialised programmes, concentrating on collaboration with schools and kindergartens. The campaigns focused on environmental, cultural, and gastronomic traditions of the regions, emphasising consumption of fishery and aquaculture products. The objectives were to teach children about the nutritional value of fishery and aquaculture products, how to recognise different fish species, and the differences between wild and farmed fish species. These activities included presentations by nutritional experts, tasting events, competitions, and other actions. Promotional materials included leaflets and brochures with e.g. special recipes for children.

The table provides an overview of the assessment results grouped by the applied communication activities.

| Communication activity | Southern EU countries | Eastern EU countries | Northern EU countries | Western EU countries | Central EU countries |
|--|-----------------------|----------------------|-----------------------|----------------------|----------------------|
| Media communication and PR | X | X | X | X | X |
| Dissemination of promotional materials | X | X | X | X | X |
| Collaboration with the retail sector | X | X | X | X | |
| Collaboration with food outlets | X | X | X | X | X |

| | | | | | |
|--------------------------------|---|---|---|---|--|
| Education of younger consumers | X | X | X | X | |
|--------------------------------|---|---|---|---|--|

Despite the large number and the scope of campaigns, consumer awareness, product trends, and consumer trends were not evaluated and therefore not available for most of the campaigns. The effects were measured only for some of the campaigns, and they can be summarized as follows:

- Increased consumption of fishery and aquaculture products,
- Increased awareness of the health/nutritional benefits of fishery and aquaculture products,
- Growing consumer interest in value-added fishery and aquaculture products,
- Increased consumption of local fishery and aquaculture products,
- Growing tendency towards consumption of fresh fishery and aquaculture products,
- Increasing demand for culinary education using fishery and aquaculture products.

3.2 Major findings – Southern EU countries

The largest fishery and aquaculture products markets are located in Southern EU countries. Historically, France, Spain, Italy and Portugal have been the largest consumer markets for fishery and aquaculture products in Europe. Furthermore, Southern EU countries have the largest annual average per capita consumption, with Portuguese, French, Spanish and Italian consumers highly valuing fishery and aquaculture products in their diets.

A large range of promotional campaigns was carried out in Southern EU countries, where Spain led in the number, variety, and scope of campaign activities. Many campaigns were carried out in France, Portugal, Italy and Greece, whereas only a few campaigns were implemented in Croatia, Malta and Cyprus.

In a nutshell:

- Southern countries are the EU countries with the largest number and scope of **educational activities targeting future consumers of fishery and aquaculture products** in order to secure the nation's health and maintain sustainable fish consumption for years to come.
- Southern countries with historical traditions of fish consumption concentrate strongly on **promoting local fishery and aquaculture products**, preserving the quality of their local and artisanal fishery and aquaculture products,
- **The identification of new domestic market possibilities** and involvement of the retail and food service sectors are important features of the campaigns in the Southern EU countries.

EUMOFA – EU consumer habits regarding fishery and aquaculture products

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| | ES | FR | PT | IT |
|---|---|--|---|---|
| Number of campaigns | 455 ² | 99 | 17 | 17 |
| Geographical area | National/regional | National/regional | National/regional | National/regional |
| Main objectives | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products, emphasizing local species - Promoting the image of aquaculture products - Promotion sustainable fishery and aquaculture products - Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products <p>Increasing awareness of fishery and aquaculture products among younger consumers</p> | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products, emphasizing local fish species - Increasing awareness and consumption of fishery and aquaculture products - Increasing awareness of fishery and aquaculture products among younger consumers | <ul style="list-style-type: none"> - Increasing consumption of local fishery and aquaculture products - Increasing market value and recognition of local fishery and aquaculture products - Increasing awareness of fishery and aquaculture products among younger consumers | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products - Promoting local fish species of low commercial value - Identifying new domestic markets for fishery and aquaculture products - Improving the quality, safety and sustainability of fishery and aquaculture products - Increasing awareness of fishery and aquaculture products among younger consumers |
| Types of products | Seabass, seabream, turbot, oysters, mussels, Albacore tuna, Bluefin tuna, anchovy, sardine, hake, mackerel, horse mackerel, rainbow trout, octopus, squid | All fishery and aquaculture products with a focus on local species | All fishery and aquaculture products with an emphasis on species of low commercial value - Atlantic chub mackerel, octopus, cuttlefish | Pelagic species, tuna, seabass, seabream, trout, carp, groundfish, cephalopods, bivalves and other fish and seafood species |
| Factors influencing consumer demand and purchasing behaviour | n/a | n/a | n/a | n/a |

| | GR | HR | MT | CY |
|----------------------------|-------------------|----------|----------|----------|
| Number of campaigns | 9 | 3 | 1 | 1 |
| Geographical area | National/regional | National | National | National |

² The higher number of promotional campaigns in Spain is explained by the way in which campaigns are calculated. The total number of the campaigns in Spain also includes promotional projects, according to extractions from the EFF monitoring system.

| | | | | |
|---|---|--|---|---|
| Main objectives | <ul style="list-style-type: none"> - Promoting local aquaculture species - Increasing awareness of fishery and aquaculture products among younger consumers - Promoting market opportunities for local fishery products from small-scale fishermen | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products, emphasising local species - Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products - Strengthening consumer awareness of the health/nutritional benefits of fishery and aquaculture products | <ul style="list-style-type: none"> - Increasing national consumption of fishery and aquaculture products - Increasing consumer awareness, interest and knowledge about fishery and aquaculture products |
| Types of products | Pelagic species, groundfish, salmon, seabass, seabream, shrimp, bivalves, cephalopods | Sardines, anchovy, rainbow trout, carp, seabass, seabream | Pelagic species, seabass, seabream, hake, shark | Fishery and aquaculture products in general |
| Factors influencing consumer demand and purchasing behaviour | n/a | Price and availability of fishery and aquaculture products were the main factors influencing consumer demand | n/a | n/a |

Spain

455 campaigns and projects on promotion of fishery and aquaculture products implemented in Spain in 2007–2015 can be classified as follows.



- 15 national public campaigns by MAGRAMA (2007–2014)
- 70 national and regional promotional projects by professional organisations
- 370 campaigns and promotional projects by FROM and other partners

Spain is one of the largest markets for fishery and aquaculture products in Europe, and Spanish regional cuisines are characterised by a large diversity of the species. Spanish consumers greatly appreciate fishery and aquaculture products, however, the national consumption of those products has declined in recent years. According to the Spanish Ministry of Agriculture, Food and Environment (MAGRAMA), Spanish households consumed more than 1.184 million tonnes of fishery and aquaculture products in 2014 (4% less than in 2013). The Spanish per capita consumption in 2014 was 26,4 kg, decreasing by 2,9%, (or 0,791 kg less per person) compared to 2013. The country has launched many promotional campaigns to boost consumption of fishery and aquaculture products. In total, 455 campaigns and promotional projects were funded by the EFF.

Funding of campaigns: All identified campaigns carried out in Spain were co-financed by the EFF. The total costs of the campaigns were EUR 62 million, where the share of the EFF was 69% (EUR 42.8 million).

No national/regional campaigns without support from the EFF have been identified.

Geographical scope: Most of the campaigns were carried out on the national and regional level.

Type of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in Spain are as follows:

- (i) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products;
- (iii) Campaigns promoting fishery and aquaculture products through governmental bodies, the National Association of Marine Aquaculture Producers, several inland aquaculture associations and regional organisations of producers supporting the **creation of denomination of origin** for fishery and aquaculture products **through recognized Protected Geographical Indication (PGI)**.

The majority of the campaigns were generically addressed to all Spanish consumers. Some of the campaigns were specifically focused on women and children as target groups. The majority of the campaigns were medium-term (from 1 to 6 months) and long-term (over 6 months).

Products covered: Many campaigns covered local aquaculture products, such as seabass, seabream, turbot, trout, oysters and mussels. Some campaigns focused on fishery and aquaculture products in general, while other campaigns were dedicated to selected wild marine species (Albacore tuna, anchovy, and bluefin tuna).

Main objectives: The main objectives of the campaigns in Spain are the following:

- Promoting the image of local aquaculture products. The main message was “Spanish aquaculture – freshness guaranteed all year long”,
- Promoting sustainable catching methods for local fishery products. The main message was “Healthy for you, healthy for the sea”,
- Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products. The main message was “Omega 3 – fishery products naturally”,
- Informing consumers about fish labelling. The main message was “Fish labelling tells everything”,
- Promotional campaigns emphasising designation of origin of fishery and aquaculture products through Protected Geographical Indication or other labels (“Galician Mussels”, “Crianza de nuestros mares” and “Trucha del Río”).

Effects of campaigns on consumption: Assessment of the impact of the promotional campaigns on consumption of fishery and aquaculture products in the country has not been made available.

France

The national campaigns (99 campaigns) implemented in France are classified as follows:



- A large-scale private national campaign “Pavillon France” aimed at promoting local fishery products (2012)
- A large-scale public generic campaign aimed at increasing consumption of fishery and aquaculture products (2009-2014)
- Promotional campaigns led by national organisations and quality-scheme organisations (97 campaigns)

France is one of the largest food markets in Europe, where fishery and aquaculture products have historically been highly appreciated. French consumers greatly value fishery and aquaculture products. However, French consumption of these products has been declining in recent years. According to FranceAgriMer, the total average consumption of fishery and aquaculture products decreased from 34,8 to 33,5 kg/capita over the 2009–2014 period. Consumption of finfish increased from 23,2 to 23,6 kg/capita (+1,7%), whereas consumption of shellfish, crustaceans, and cephalopods fell from 11,6 to 9,9 kg/capita (–14,7%). Numerous promotional campaigns have been carried out in France with the main objective of increasing consumption of fishery and aquaculture products in the country.

Funding of campaigns: The total costs of the promotional campaigns were EUR 23.9 million. The support from the EFF accounted for 28% (EUR 6.8 million), while the funding from public funds accounted for 72% (EUR 17.1 million).

The campaign carried out by France Filière Pêche (Pavillon France) was funded by the retailers.

Geographical scope: Most of the campaigns were carried out on the national and regional level.

Type of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in France are as follows:

- (i) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) Campaigns **promoting consumption of local** fishery and aquaculture products **through collaboration with the retail sector**;
- (iii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products;
- (iv) Campaigns promoting fishery and aquaculture products supporting the **creation of designation of origin** for fishery and aquaculture products **through recognized Protected Geographical Indication (PGI)**.

Most of the campaigns were generically addressed to French consumers, while some campaigns focused on younger consumers. The majority of the campaigns were medium-term (from 1 to 6 months) and long-term (over 6 months).

Products covered: The majority of the campaigns targeted fishery and aquaculture products in general. One campaign focused on the promotion of fishery products caught by the French fleet. Several campaigns covered shellfish, farmed fish and processed fishery and aquaculture products. Some examples of quality schemes promoted through the campaigns include Label Rouge and the PGIs Huîtres Marennes Oléron and Moules de Bouchot de la Baie du Mont-Saint-Michel.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products,
- Increasing consumer awareness about health/nutritional benefits of fishery and aquaculture products ,
- Promoting fishery products caught by the French fleet,
- Promoting regional aquaculture species through quality-schemes.

Effects of campaigns on consumption: The impact of the campaigns on the national consumption of fishery and aquaculture products has not been made available.

Portugal

The national campaigns carried out in Portugal (17 campaigns) can be grouped as follows:



- Public national campaigns promoting and enhancing the value of Portuguese fishery products by improving awareness and consumption of local fishery products (four campaigns – “Enhancing the value of fish products”, “New markets and promotional campaigns”, ‘Exhibits and campaigns”, “Fish products communication and promotional campaign”)
- Public/private national campaign targeting children (five campaigns - “Consume fish for a better living”, “Let’s go to the auction houses” “Fish is cool 1”, “Fish is cool 2” and “Fish is cool 3”)
- Public national and regional campaigns to promote the consumption of certain species and new products (six campaigns), and dissemination of information about fishery and aquaculture products (one campaign)
- Private campaign promoting quality and sustainability of fishery products (one campaign in three installments)

Portuguese

cuisine, which has many Mediterranean influences, is famous for fish and seafood dishes, and this is strongly reflected in the national food culture. Portugal is the EU country with the highest annual average fish consumption (57 kg/capita in 2014, according to the General Directorate of Marine Policy), and is among the countries with the highest per-capita fish consumption in the world. Portugal is also among the EU countries that implemented several national/regional campaigns (17 campaigns in 2009-2015).

Funding of campaigns: All identified campaigns were funded by the EFF. The total cost of the campaigns was EUR 3.4 million, of which the share of the EFF co-funding was 56% (EUR 1.9 million), the share of other public funds was 26% (EUR 0.9 million) and the share of other private funds was 18% (EUR 0.6 million).

No national/regional campaigns without support from the EFF have been identified.

Geographical scope: Nearly all the campaigns in Portugal were carried out on the national level. Only one campaign was carried out on the regional level, in the Central region of the country (Coimbra). Most campaigns were public, while only a few campaigns were private.

Types of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in Portugal are as follows:

- (i) Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products;
- (iii) Campaigns promoting **local fishery products** supporting the **creation of a national label** for Portuguese fishery products (CCL label – Comportativo de Compra em Lota).

The majority of the campaigns were generically addressed to all Portuguese consumers. Portugal is one of the leading countries in activities that educate future consumers in order to secure the nation's health and maintain the level of fish consumption stable in the future. As a consequence, several promotional campaigns targeting children were held on the national level. Most campaigns were medium-term (from 1 to 6 months) and long-term (over 6 months).

Products covered: The campaigns covered fishery and aquaculture products in general, focusing on local species. Some campaigns had an emphasis on local species of low commercial value, including Atlantic chub mackerel, octopus and cuttlefish.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products in general,
- Promoting value, quality and sustainability of local fishery and aquaculture products,
- Increasing market value and recognition of local fishery products,
- Raising consumer awareness about benefits of local fishery and aquaculture products as a healthy option for a balanced diet,
- Education of younger consumers and encouraging children to consume various fishery and aquaculture products.

Effects of campaigns on consumption: Out of 17 campaigns analysed, only 6 foresaw a post-campaign analysis. However, it mostly consisted of assessing the immediate effects of the campaigns, such as number of labels used, number of stores participating, number of contacts made, number of radio spots or number of website visits. The analysis did not include the impact on consumers in terms of consumption trend.

It is possible to conclude that the value of the apparent consumption of fish products decreased in the period in which the analysed campaigns were carried out (2009-2015). Apparent consumption of fish products grew significantly from 2000 (EUR 971 million) until 2007 (EUR 1.497 million), but then decreased steadily by 2013 (EUR 1.176 million) as an effect of the economic crisis.

The national campaigns in Italy (17 campaigns) can be grouped as follows:



- Regional public campaigns (nine campaigns)
- National public campaigns (two campaigns - “Fisheat” and “MIPAAF – Mare Nostrum”)
- Private national/regional campaigns (six campaigns – “Pesca Pronta”, “OCEAN47”, “Consumare Giusto”, “Slow Fish”, “Fish Box” and “Mr. Goodfish”)

Representing Mediterranean cuisine, Italian food culture comprises a rich variety of fish and seafood. Average Italian annual fish consumption has been increasing in recent years, reaching 25 kg/capita in 2015, according to the Italian Institute for Services to the Agricultural and Food Markets (ISMEA). This level is higher than the average EU level, but lower than other Mediterranean countries such as Spain, France and Portugal. Seventeen national and regional public and private campaigns have been implemented in Italy in 2007-2015.

Funding of the campaigns: Among the campaigns carried out in Italy, six of the campaigns were co-funded by the EFF³. The total costs of the campaigns co-funded by the EFF is around EUR 1.3 billion. The share of the EFF in the co-funding of the campaigns has not been made available.

Several national/regional campaigns were carried out without support from the EFF⁴. Several national/regional campaigns were conducted at the public level, including “FISH EAT, cibo del mare da amare”, “MIPAAF – Mare Nostrum”, “Un Mare di Qualità”, “Guida al consumo del pesce azzurro” and “Informative campaign for disseminating information on protected fish species”.

Geographical scope: Most of the campaigns were carried out on the regional level, whereas some campaigns were implemented on the national level. The regional campaigns were conducted in the regions of Apulia, Basilicata, Campania, Sardinia, Sicilia, Marche, Veneto or on a multi-regional basis. More than a half of the campaigns were public, while the rest of the campaigns were private.

Type of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in Italy are as follows:

- (i) Campaigns **encouraging and promoting consumption of local** fishery and aquaculture products **through advertising, media communication and PR**;

³ The campaigns co-funded by the EFF include the following: “MITTICO, azzurro principe del nostro mare”; “PESCATO DI QUALITÀ”; “FISH&CHEAP, buono, economico, locale”; “HELLO FISH, la cultura dell’acquacoltura”; “PAPPA FISH, mangia bene, cresci sano come un pesce” and “Promotional campaign for improving the fish products image”. One campaign (“PESCE RITROVATO”) was co-funded by the national public fund, European fund and national private support, including Acquario di Genova, Legambiente, COOP Liguria, Lega Pesca, Sosfteco Sistemati, AGCI, AGRITAL, Liguria Region and European Project “LIFE”.

⁴ The campaigns, carried out without support from the EFF, include private campaigns “Pesca Pronta”, “Ocean 47”, “Consumare Giusto”, “Mr. Goodfish”, “Slow Food” and “Fish Box”.

- (ii) Campaigns **promoting consumption of local** fishery and aquaculture products **through collaboration with retail and food-service sector**;
- (iii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

Nearly all the campaigns were addressed to Italian consumers in general. Three campaigns were also addressed to children as present and future consumers of fishery and aquaculture products. Most of the campaigns were long-term (over 6 months).

Products covered: Local pelagic species (“pesce azzurro”) and seasonal species of low commercial value were the target species in the majority of the campaigns, including anchovy, chub mackerel, Atlantic horse mackerel, round sardinella, sprat, sardine, east atlantic peacock wrasse, blotched picarel, comber, saddled seabream, black seabream and other species. Aquaculture species, such as seabass, seabream, turbot, trout, carp, salmon, mussel, and oyster, were covered by one campaign. Two campaigns included local fish species in general, and one campaign focused on hake and cod.

Main objectives: The main objectives of the campaigns are the following:

- Valorisation of artisanal, local and seasonal fish species of low commercial value,
- Promotion of consumption of sustainable fishery and aquaculture products,
- Promotion of consumption of aquaculture products,
- Promotion of health/nutritional benefits of fishery and aquaculture products,
- Identification of new domestic markets for local fishery and aquaculture products.

Effects of the campaigns on consumption: Impacts of the campaigns on the consumption of fishery and aquaculture products have not been made available.

Greece

The national campaigns in Greece (9 campaigns) can be grouped as follows:



- Three public national campaigns (“Selected frozen fish with the freshness of the sea”, “Diversifying into the restaurant business” and “Love your local market”)
- Six private campaigns (“Love fish”, “Kallisti Food Gallery”, “Kontoveros Seafood”, “Children’s painting competition”, “Nireus Select” and “Nireus Bio”)

Greece has a substantial aquaculture production, and the country is the leading producer of commercial farmed finfish species in the EU. Despite the fact that Greek production of farmed fish has risen in the past 20 years, fish has not acquired a significant role in the Greek diet. While the average annual fish consumption in the EU is nearly 24 kg/capita, Greeks only consume 18 kg of fish a year. A variety of promotional campaigns were run in Greece, mostly focused on increasing fish consumption by educating consumers on the health/nutritional benefits of Mediterranean fishery and aquaculture products.

Funding of campaigns: Two campaigns (“Diversifying into the restaurant business” and “Selected frozen fish with the freshness of the sea”) were co-funded by the EFF. Costs are available for the campaign “Diversifying into the restaurant business”. Of the total EUR 60.941 spent, 43,2% of funding was provided by the EFF, 16,8% by national/regional co-funding and 40% by private co-funding. Information concerning the costs of other campaigns has not been made available.

One campaign was carried out without support from the EFF (“Love your local market”), which was funded by the Piraeus Central market.

Geographical scope: Most of the campaigns were carried out on the national level, while a few campaigns were implemented on the regional level. The regional campaigns were carried out on the Dodecanese Islands and Attika region.

Type of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in Greece are as follows:

- (i) Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The vast majority of the campaigns were addressed to all Greek consumers. A few campaigns targeted restaurant chefs in order to promote fishery and aquaculture products to Greek consumers. One campaign was focused on children as present and future consumers of fishery and aquaculture products. Most campaigns were long-term (over 6 months).

Products covered: The products covered by the campaigns included pelagic species (sprat, herring, mackerel, and anchovy), farmed finfish (European seabass and gilthead seabream), bivalves (mussels) and

cephalopods (squid, cuttlefish and octopus). One campaign was focused on the promotion of organic seabass and seabream, which were certified by BIO HELLAS according to organic standards.

Main objectives: The main objectives of the campaigns are the following:

- Raising consumer awareness of main fishery and aquaculture products from the Mediterranean region and their health/nutritional value in the consumer diet,
- Increasing awareness of fishery and aquaculture products among younger consumers,
- Diversifying value-added fishery and aquaculture products.

Effects of the campaigns on consumption: The effects of the campaigns on consumption are not fully available. The only information available is that Kallimanis (“Kallimanis – Love Fish”) products recorded a growth of 24.5% in value, due to the in-store demonstration in AB Vasilopoulos retail chain.

Croatia

The national campaigns in Croatia (3 campaigns) can be grouped as follows:



- A large-scale public national campaign “Eat what is worth eating” (one campaign)
- Private national campaigns “Frozen but fresh” and “Sime has returned and brought with him fresh fish from the heart of the sea” (two campaigns)

Per capita consumption of fishery and aquaculture products in Croatia is significantly lower than in other Mediterranean countries. It is estimated at 8 kg according to the Croatian Ministry of Agriculture (2013). In 2011-2015, three campaigns were carried out with the main objective of popularising fishery and aquaculture products and increasing fish consumption in the country.

Funding of campaigns: All the campaigns were carried out without support from the EFF. The public national campaign (“Eat what is worth”) was organised by the Croatian Chamber of Economy in collaboration with the Ministry of Agriculture and other partners. No precise information is available about the costs of the campaigns.

Geographical scope: All campaigns were carried out on the national level.

Type of campaigns: The main types of the campaigns for the promotion of fishery and aquaculture products in Croatia are as follows:

- (i) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products **through advertising, media communication and PR;**

- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

All the campaigns were generically addressed to Croatian consumers with long-term duration (over 6 months).

Products covered: Fish from Adriatic Sea, including sardines and anchovy, and local aquaculture species, including seabass, seabream, trout and carp, were in the focus of the national public campaign. A wide range of fish products in fresh and canned forms were covered by the private national campaigns.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products, in particular local products,
- Strengthening the position of local fishery and aquaculture products on the domestic market,
- Raising awareness among consumers about the health/nutritional benefits of fishery and aquaculture products.

Effects of the campaigns on consumption: A survey conducted during one campaign (“Eat what is worth”) on consumer preferences for fishery and aquaculture products demonstrated that the main factors influencing the choice of fishery and aquaculture products were price and product availability.

Malta

One national campaign was carried out in Malta.



- A national public campaign “Eat fresh fish” aimed at increasing fish consumption in the country (one campaign)

Despite the insularity of the country, Maltese people eat much less fish than recommended. While the average annual fish consumption in the EU is estimated at 23,9 kg/capita, in Malta this value is just above 6 kg, according to the Parliamentary Secretariat for Agriculture, Fisheries and Animal Rights in Malta (2014). In addition, a national survey revealed that four out of ten Maltese do not eat fish at all. In order to increase fish consumption and raise awareness of the nutritional value of fish and the importance of having fish in one’s diet, the national public campaign “Eat fresh fish” started in 2015.

Funding of campaign: The campaign was funded under the EFF 2007-2013. The cost of the campaign has not been made available.

No campaigns carried out without support from the EFF have been identified.

Geographical scope: The campaign was implemented on the national level.

Type of campaign: The type of the campaign for the promotion of fishery and aquaculture products in Malta is as follows:

- (i) **Educational** campaign increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaign was generically addressed to Maltese consumers with long-term duration (over 6 months).

Products covered: A special focus of the campaign was placed on aquaculture products produced with a low environmental impact (European seabass and Gilthead seabream) and underutilised fish species of low commercial value (chub mackerel, Atlantic mackerel, amberjack, ray and others).

Main objective: The main objective of the campaign was to increase consumption of fishery and aquaculture products on the Maltese islands through a special focus on three aspects: education, awareness-raising and diversification in consumption of fishery and aquaculture products. The campaign's aims were the following:

- To increase per capita consumption of fishery and aquaculture products, with particular attention to fresh products. The main message of the campaign was "Eat fresh fish";
- To increase consumer awareness of the health and nutritional benefits of fishery and aquaculture products, with particular emphasis on fresh products;
- To promote market supply of underutilised fish species.

Effects of the campaigns on consumption: The impacts of the campaign on consumption of fishery and aquaculture products have not been made available.

Cyprus

One national public campaign was carried out in Cyprus in 2013.



- A national public campaign "Improving the image of fisheries – promotion of fresh seafood" (one campaign)

Of the 2013 annual 22 kg/capita consumption of fish and fishery products in Cyprus, aquaculture products accounted for approximately 3 kg, according to the FAO. One national public campaign "Improving the image of fisheries – promotion of fresh seafood" was implemented in Cyprus in August–November 2013.

Funding of campaign: The campaign "Improving the image of fisheries – promotion of fresh seafood" was co-funded by the EFF. The cost of the programme was EUR 110.000, of which 45,5% –came from the EFF, 45,5% from national/regional co-financing and –9% from private funds.

No campaigns without support from the EFF have been identified.

Geographical scope: The campaign was carried out on the national level.

Type of campaign: The type of the campaign on promotion of fishery products in Malta is as follows:

- (i) Campaign **encouraging and promoting consumption** of fishery products **through advertising, media communication and PR.**

The campaign was addressed to Cypriot consumers in general and had a medium-term duration (less than 6 months).

Products covered: The campaign targeted fishery products in general.

Main objectives: The main objectives of the campaign are the following:

- Improving the image of fishery products,
- Promoting fresh fishery products,
- Raising consumer awareness about the health/nutritional value of fish products in the diet.

Effects of the campaigns on consumption: The effects of the campaign on consumption have not been made available.

3.3 Major findings – Eastern EU countries

Consumption of fishery and aquaculture products in Eastern EU countries is lower than the EU average, varying from 4 kg to 18 kg/capita. The generally lower level of consumption is reflected in the focus areas of the campaigns that were carried out in Bulgaria, Estonia, Latvia, Lithuania, Poland and Romania. Numerous and diverse promotional campaigns were held in these countries, with the following common features for the subregion:

- The objective of the campaigns in all countries was to **increase the consumption of fishery and aquaculture products.**
- Additional goals included **improving the image of fishery and aquaculture products** and **raising consumer awareness of the health/nutritional benefits** related to the consumption of fishery and aquaculture products.
- The campaigns paid great attention to the **education of younger consumers**, focusing on kindergartens, schools and universities in most of the countries.

| | BG | EE | LV | LT | PL | RO |
|----------------------------|----------|----------|----------|----------|-------------------|-------------------|
| Number of campaigns | 18 | 2 | 6 | 5 | 13 | 8 |
| Geographical area | Regional | National | National | National | National/regional | National/regional |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| | BG | EE | LV | LT | PL | RO |
|--|---|--|---|---|---|---|
| Main objectives | <ul style="list-style-type: none"> - Increasing domestic consumption of fishery and aquaculture products - Improving the image and prestige of fishery and aquaculture products | <ul style="list-style-type: none"> -Increasing consumption of fishery and aquaculture products - Improving the image of fishery and aquaculture products - Promoting local fish species | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products - Promoting local fishery products in general - Promoting of the health/nutritional benefits of fishery and aquaculture to consumers | <ul style="list-style-type: none"> - Promoting fishery and aquaculture products from small-scale enterprises | <ul style="list-style-type: none"> - Increasing consumption of local fishery and aquaculture products - Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products | <ul style="list-style-type: none"> - Increasing domestic consumption of fishery and aquaculture products - Raising consumer awareness of benefits of fishery and aquaculture products |
| Types of products | Fishery and aquaculture products | Fishery and aquaculture products | Salmon, lamprey, sturgeon, carp, trout, eel, crayfish, herring, cod, perch | African catfish, trout, salmon, carp, tench, pike, sturgeon | Trout, carp, herring, pike, cod, pike-perch, halibut, sprat, flounder | Carp, European catfish, sander, trout, mackerel, salmon |
| Product trends | n/a | Increased consumption of fish products | n/a | n/a | Increased consumption of trout and carp | Increased demand for fresh fish products |
| Consumer trends | n/a | Awareness of the healthy benefits of fish has increased | n/a | n/a | Demand for culinary education and growing interest in value-added fishery and aquaculture products | Awareness of healthy benefits of fish has increased |
| Factors influencing consumer demand and purchasing behavior | n/a | Prejudices against fish among consumers decreased | n/a | Necessity to improve the quality, variety of recipes and the presentation of fishery and aquaculture products | Awareness of the healthy benefits fishery and aquaculture products and their image has improved | Growing consumer interest in new recipes and environmentally friendly farmed fish |

Bulgaria

In 2013-2015, 18 regional public promotional campaigns were carried out in the country, which can be grouped as follows.



- Regional public promotional campaigns aimed at increasing consumption of fishery and aquaculture products (seven municipalities of the country)
- Regional public promotional campaigns aimed at improving the image of fishery and aquaculture products (eleven municipalities of the country)

Bulgarian consumers have traditionally preferred meat and poultry products, whereas fish is consumed mostly in the coastal regions. In recent years, the national average fish consumption has followed various trends, reaching 5,7 kg/capita according to the Bulgarian Ministry of Agriculture and Food (2014), compared to an average EU fish consumption of 23,9 kg/capita. To encourage Bulgarian consumers to eat more fishery and aquaculture products, eighteen regional public campaigns were carried out in several municipalities.

Funding of campaigns: All the campaigns were co-financed by the EFF. The total eligible costs of the campaigns amounted to EUR 2.289.622. The co-funding from the EFF was 75% (EUR 1.717.216), while the national co-funding was 25% (EUR 572.405).

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: All promotional campaigns conducted in Bulgaria under the EFF 2007-2013 were regional public campaigns. Out of Bulgaria's total 265 municipalities, the campaigns were implemented in 18 municipalities. Thirteen of them (Veliko Tranovo, Vratza, Sviadovo, Suhin dol, Zlatarica, Pazardjik, Banite, Maglij, Svoge, Tutrakan, Sliven, Tvardica, and Maritza) are located in the inner part of the country, and five (Sozopol, Pomorie, Valchi dol, Beloslav and Avren) are located in the coastal zone.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Bulgaria are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns were mostly oriented towards Bulgarian consumers in general, but also targeted younger consumers, focusing on schools and kindergartens. All the campaigns were long-term (over 6 months).

Products covered: The campaigns focused on fishery and aquaculture products in general.

Main objectives: The main objectives of the campaigns are the following:

- Increasing domestic consumption of fishery and aquaculture products,

- Raising consumer interest and knowledge of fishery and aquaculture products,
- Improving the overall image of the fishery and aquaculture products.

Effects of the campaigns on consumption: The campaigns stimulated interest of fishery and aquaculture products consumption in municipalities where there was a need to enhance life quality and welfare. In this way, in spite of the extensive character of the promotional campaigns, they became important social events, supporting consumption patterns with a higher focus on health and nutritional benefits of fishery and aquaculture products in consumers' diet and the overall life quality.

Poland

All the national and regional campaigns (13 campaigns) in Poland can be grouped as follows:



- Two extensive national public campaigns promoting national farmed species, carp ("Pan Karp") and trout ("Now Trout")
- National public campaigns focusing on information to consumers about fishery and aquaculture products (three campaigns – "Fish wins", "Healthy fish" and "Healthy as fish")
- Various regional campaigns (five campaigns – "Healthy fish from childhood", "Tasty cod, tasty flounder", "Eat fish, you will be healthy", "Shaping a healthy model of nutrition among school children", "Tasty flounder")
- National private campaigns: promotion of certain brands of fishery products (three campaigns – "Promotional campaign for fish in Lidl chain", "Lisner brand promotional campaign" and "Frosta brand campaign")

The Polish fish processing sector is one of the largest in Europe, supplying the national market and the EU countries with smoked products (salmon and trout), canned fish (herring, mackerel, and sprat), and ready-to-eat fish products (marinated fish and fish salads). According to the FAO, the national fish consumption was 12,3 kg/capita in 2013, barely 50% of the average per capita fish consumption in the EU. Mackerel, herring and carp are traditional species for Polish consumers, whereas salmon, tuna, trout, and Alaska pollock are becoming increasingly popular. Local freshwater fish species (carp and trout) are popular among Polish consumers; however, their consumption is traditionally cyclical. For example, more than 80% of the carp is consumed during the Christmas Eve supper, so carp producers face a difficult market situation where competition from other species of fish is growing. In order to increase consumption of fishery and aquaculture products, thirteen national and regional campaigns were conducted in Poland.

Funding of the campaigns: Most of the campaigns were co-funded by the EFF, with some campaigns being almost totally funded by the EFF. The cost of the campaign "Now Trout" was EUR 2.457.584, and it was 100% financed by the EFF. The cost of one of the most influential campaign, "Pan Karp", amounted to EUR 1.289.376, of which 92,3% came from the EFF, while the rest was funded through the Fish Promotion

Fund. The cost of another campaign, “Fish wins”, was EUR 99.456, where 72% of funding came from the Fish Promotion Fund and the remainder from the EFF.

Several campaigns were carried out without support from the EFF, such as private campaigns by retail (“Lidl”), and industry (“Lisner” and “Frosta”).

Geographical scope: Most of the campaigns were carried out on the national level. A few of the campaigns were conducted on the regional level in Kujawsko-pomorskie region, including Włocławek, Chocień, Chodecz, Lubień Kujawski, Lubanie, Brześć Kujawski, Lubraniec, Izbica Kujawska, Boniewo and Fabianki communities.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Poland are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The majority of the campaigns carried out in Poland were focused on women as a special target group of consumers. Several campaigns targeted Polish consumers with a special attention to young consumers (18–35-year-olds) and children (primary schools and kindergartens). Some of the campaigns had a focus on adults in the age of 30-50, living in medium- and large-sized cities, with secondary or higher education and middle and high incomes. Mothers and pregnant women were selected as a special focus group in one campaign (“Now Trout”). Most of the campaigns were long-term (over 6 months).

Products covered: Domestic aquaculture products, such as carp and trout, were in the focus in several campaigns. Some of the campaigns had an emphasis on local fishery products, including herring, sprat, cod, flounder, pike and pike-perch.

Main objectives: The main objectives of the campaign are the following:

- Boosting consumption of domestic aquaculture products, particularly carp and trout.
- Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products. The main messages were “Healthy fish”, “Tasty fish” and “Healthy as fish”.
- Improving the image of fishery and aquaculture products.

Effects of the campaigns on consumption: Several post-campaign measurements were taken to evaluate the campaigns’ effect on consumption, and the results of the national campaigns were evaluated as quite strong. In case of “Pan Karp” campaign, the research proved that in 2014–2015, the downward trend in the carp market was stopped and carp consumption increased again by at least 10%. Increased demand for culinary education and growing consumer interest in value-added carp products were some of the results of the campaign.

In the case of the “Now Trout” campaign, several tests on consumer preferences and data collection on trout sales revealed that the campaign’s target was exceeded. The total volume of trout consumption

increased 3.045 tonnes per year (the target was an increase of 1.100 tonnes). Each PLN 1 (EUR 0,23) spent on the campaign resulted in a PLN 5,16 (EUR 1,17) increase in trout sales. During the campaign, the following trends were observed:

- Increasing demand for trout was observed as the result of better distribution, thus increasing the number of Polish households buying fresh trout.
- Consumer interest in grilling fish during summer grew, with a strong preference for two species (trout as the first and salmon as second).
- There was a strong positive correlation between the level of education and income, and awareness of the need of eating fish. The strong preference for eating trout was observed among people with education above the average and with high incomes.
- Lower price sensitivity was noted among consumers who chose trout products in connection with the promotional campaign.

Romania

The national campaigns in Romania (8 campaigns) can be classified as follows:



- National public campaigns to increase awareness of the benefits from consuming fishery and aquaculture products (six campaigns – “Tasty, Healthy, Delicious”, “No meal without fish”, “Eat fish”, “Fishing health”, “Promotion of fisheries products” and “Little and strong”)
- Regional campaign to increase fish consumption and improve quality, safety and traceability of fishery and aquaculture products (one campaign - “Eat fish daily and live healthy”)
- A private campaign aimed at increasing knowledge and diversification of fishery and aquaculture product recipes (one campaign – “Don Mariano’s recipes”)

In the EU, Romania had a relatively low fish consumption of about 4 kg/capita in 2014, according to the Ministry of Agriculture and Rural Development of Romania. In 2011, per capita consumption fell as low as 3,11 kg from 4,44 kg in 2008, owing to declining consumer purchasing power. The recovery started in 2012 when consumption reached 3,46 kg and continued in 2014 with 4,09 kg. It is noteworthy that no national campaigns in Romania were implemented for a long time before 2010. The last campaign (“No meal without fish”) was conducted in 1989. During the 2010–2014 period, eight campaigns were carried out in the country.

Funding of campaigns: All the campaigns carried out in Romania were co-financed by the EFF, except one campaign. The total costs amounted to EUR 2.902.260, of which 59% (EUR 1.725.000) was co-funded by the EFF, 21% (EUR 595.000) was co-funded by the national public funds and 20% (EUR 580.000) was co-funded by private funds.

One private campaign (“Don Mariano’s recipes”) was carried out without support from the EFF.

Geographical scope: Most of the campaigns were carried out on the national level, while one campaign was implemented on the regional level. The campaign was carried out in the cities of Bucharest, Brasov and Timisoara among others.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Romania are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

All the campaigns targeted Romanian consumers in general, or a selected group of possible decision-making consumers (women as responsible for purchases). One campaign had a focus on younger potential consumers targeting pupils of kindergartens and primary schools.

Products covered: Several national campaigns focused on local freshwater fish species, such as carp, European catfish, sander and trout, but also marine species, such as mackerel and salmon.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products,
- Raising consumer awareness about the health/nutritional benefits of fishery and aquaculture products.

Effects of the campaigns on consumption: Some of the campaigns included pre- and post-campaign evaluations. In one of the national campaigns (“Healthy, Tasty, Delicious”), the pre-campaign measurement revealed a low level of information on the benefits of consuming fishery and aquaculture products, a price-oriented market approach and a low level of knowledge of how to vary the preparation of fish dishes. The post-campaign findings emphasised an increase in the knowledge of benefits for human health related to fish consumption. Consumer attitudes showed an increasing interest in fresh fishery and aquaculture products, interest in new recipes and ways of serving fish and a growing demand for environmentally friendly farmed fish. Recognition of the health/nutritional benefits of fishery and aquaculture products also resulted in a decrease in price-driven buying decisions.

During another national campaign (“No meal without fish”), a survey was conducted to identify the buying habits of Romanian consumers and the need for additional services at selling points. The survey revealed that 73% of the respondents bought fishery and aquaculture products because they knew that it was good for their health, and they should eat it regularly. Lower priced fishery and aquaculture products and new recipes proved to be crucial in increased purchases. Price and shelf life were the most important buying criteria. 75% of the respondents stated that they would like to have gutting and scaling-off services when they purchase fish, and 35% of the respondents would like to have a service of cutting fish in parts or portions.

Latvia

The national public campaigns in Latvia (6 campaigns) can be grouped as follows:



- One national public campaign, aimed at promoting fishery and aquaculture sectors and its products in schools
- Four national/regional public information campaigns, aimed at promoting fish nutrition to various consumer groups and diversification of fish cooking methods
- One private national campaign by the retail chain aimed at inspiring consumers to use more fishery and aquaculture products in their cooking.

Latvia is a well-developed fishing and fish processing nation; however, the country's average annual fish consumption amounted to 10,8 kg in 2014, according to the National Statistics Bureau, barely 50% of the average EU per capita fish consumption. In 2010–2015, six campaigns were carried out in Latvia, promoting fishery and aquaculture products among Latvian consumers.

Funding of campaigns: Nearly all the campaigns were co-funded by the EFF. The costs of the campaigns have not been made available.

One campaign was conducted by the retail chain ("Rimi Gourmet") without support from the EFF.

Geographical scope: Four of the campaigns (three public and one private) were carried out on the national level by the National Fisheries Network. Two public campaigns were carried out on the regional level in the Riga and Liepaja regions.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Latvia are as follows:

- (i) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products through **advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

Some of the campaigns were generically targeting present and future Latvian consumers of fishery and aquaculture products. The campaign, aiming at informing consumers of the benefits of health/nutritional benefits of fishery and aquaculture products, targeted pregnant women and school children. Three of the campaigns were medium-term (from 1 to 6 months) and two of the campaigns were short-term (less than 1 month).

Products covered: Local fishery and aquaculture products were in the main focus of the public campaigns. The species included salmon, lamprey, carp, trout and sturgeon. The products covered in the private campaign included both local and imported fishery and aquaculture products, comprising salmon, trout, herring, hake, tuna, flounder, pangasius, tiger prawns and scallops.

Main objectives: The main objectives of the campaigns are the following:

- Promoting fishery and aquaculture products in schools,
- Raising consumer awareness of health/nutritional aspects of fishery and aquaculture products,
- Encouraging consumers to diversify their methods of cooking fishery and aquaculture products. The aim was to discover long-forgotten recipes and suggest innovative recipes to inspire consumers to use more fishery and aquaculture products in their cooking.

Effects of the campaigns on consumption: Impacts of the campaigns on consumption of fishery and aquaculture products have not been made available.

Lithuania

Five campaigns were conducted in the country, which can be grouped as follows:



- A national public/private promotional campaigns for fishery products and development of the market (two campaigns – “Promoting aquaculture products from closed aquaculture systems” and “Promotional campaign for fishery and aquaculture products and development of the market”)
- Promotion of fishery and aquaculture products from small enterprises (two campaigns – “Shaping the positive image of the fisheries sector and its products and promotion of fishery and aquaculture products” and “Promotional campaign for fishery and aquaculture products”)
- Public campaign to promote environmental protection and products from sustainable fisheries (one campaign – “Do you know what fish you will eat today?”)

Lithuania has a large fish-processing sector, processing local and imported species. Most fish exports from the country are directed to other EU countries. According to the National Statistics, average annual per capita fish consumption in the country was 18 kg in 2014, which is below the EU average.

Funding of campaigns: All but one campaign were 100% funded by the EFF. Their total costs were EUR 574.503.

One campaign (“Do you know what fish you will eat today?”) was carried out by the Lithuanian Fund for Nature without support from the EFF.

Geographical scope: All the campaigns were conducted on the national level.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Lithuania are as follows:

- (i) Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns were generically addressed to all Lithuanian consumers. All the campaigns were long-term (over 6 months).

Products covered: The campaigns focused on local fishery and aquaculture species, including tench, pike, carp and sturgeon.

Main objectives: The main objectives of the campaigns are the following:

- Promoting local fishery and aquaculture products,
- Promoting positive image of fishery and aquaculture products,
- Promoting consumption of sustainable fishery and aquaculture products.

Effects of the campaigns on consumption: In the evaluation of one campaign (“Shaping the positive image of the fisheries sector and its products and promotion of fishery and aquaculture products”), 61 surveys were conducted reflecting consumers’ opinion about fishery and aquaculture products. It was concluded that there is a need to improve the quality, variety of recipes, and presentation of fishery and aquaculture products as crucial factors that influence consumer demand and purchasing behaviour.

Estonia

Two campaigns were conducted, which can be grouped as follows:



- A national public campaign “Fish does well” (2006-2007), aimed at increasing consumption of fishery and aquaculture products
- A national public campaign “So, who does not eat fish?” (2014), aimed at introducing local fish species and increasing awareness of fishery and aquaculture products as a part of the healthy diet

According to the Statistical Office of Estonia (2012), Estonians consume 9.6 kg of fish per capita annually. Herring and mackerel are the most popular marine species, whereas trout and carp are the most common freshwater species. Two national campaigns were carried out in Estonia in 2006-2014 with the overall objective of increasing consumption of fishery and aquaculture products in the country.

Funding of campaigns: The campaigns were co-funded by the EFF. The total cost of the public national campaign “Fish does well” was EUR 511.300, where the share of the EFF co-funding was 87% (EUR 447.382) and the share of the national co-funding was 13% (EUR 63.912). The cost of the second campaign has not been made available.

No national/regional campaigns for promotion of fishery and aquaculture products carried out without support from the EFF have been identified.

Geographical scope: The campaigns were conducted on the national level.

Type of campaigns: The types of the campaigns on promotion of fishery and aquaculture products in Estonia are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of local fishery and aquaculture products through **advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

One of the campaigns targeted housewives, women who focus their attention on nutrition, children and men with monotonous dietary habits, while another campaign was oriented towards Estonian consumers in general. One of the campaigns (“Fish does well”) was long-term (over 6 months), while the second campaign (“So, who does not eat fish?”) was medium-term (less than 6 months).

Products covered: The campaigns covered fishery and aquaculture products in general.

Main objectives: The main objectives of the campaigns include the following:

- Increasing the consumption of fishery and aquaculture products. One of the aims of the campaign “Fish does well” was to increase the annual consumption of fishery and aquaculture products by 2–3 kg per person. The main message of the campaign “Fish does well” conveyed that eating fish makes people stronger, smarter and more beautiful,
- Improving image and combating prejudices against fishery and aquaculture products by raising public awareness of their positive impact on human health,
- Raising consumer awareness about local fishery and aquaculture products.

Effects of the campaigns on consumption: Before the public campaign began, a survey was taken revealing that Estonian consumption of fish products was low. This low consumption was linked to the negative perception of fish. The campaign led to an increase in the country’s fish consumption. The perception of fish among Estonians became more positive. Fish became a topical subject in the media, and prejudices about fish decreased. People’s awareness of fish as a healthy food that enriches the diet increased.

3.4 Major findings – Northern EU countries

A special attribute of the promotional campaigns carried out in the Northern EU countries is that the main objective of increasing national fish consumption was achieved by increasing market opportunities for local fish species through the food-service sector. In 2007–2015, several promotional campaigns were conducted in Denmark, Finland and Sweden with the following objectives:

- Aiming at **increasing the country's consumption of fishery and aquaculture products**, promotional campaigns in Denmark put a special focus on **the food-service sector** and promotion of fishery and aquaculture products in canteens.
- Promotional campaigns in Sweden emphasised collaboration with the local industry and food-service sector, **increasing market opportunities for local fishery products**.
- In Finland, **encouraging consumer interest and knowledge** of fishery and aquaculture products was the campaigns' key, where innovative products made of local species were offered in the food-service sector.

| | DK | FI | SE |
|-----------------------------|---|--|---|
| Number of campaigns | 3 | 5 | 7 |
| Geographical factors | National | National/regional | National/regional |
| Focus areas | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products - Improving the image of fishery and aquaculture products - Increasing awareness of fishery and aquaculture products - Improving consumption of fishery and aquaculture products in the food-service sector - Increasing consumption of fishery and aquaculture products by children | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products - Increasing consumer interest and knowledge of fishery and aquaculture products | <ul style="list-style-type: none"> - Increasing fish consumption in general - Strengthening market opportunities for local fish species |
| Types of products | Fishery and aquaculture products | Herring, pike, crayfish, ide, roach | Northern pike, burbot, vendace, walley, European perch, flounder, halibut, herring, lobster, oyster |
| Product trends | Registered sales of fishery and aquaculture products | n/a | n/a |
| Consumer trends | Increased tendency towards fresh consumption of fishery and aquaculture products, whereas sales of frozen and canned fishery and aquaculture products decreased | n/a | n/a |

| | DK | FI | SE |
|---|---|-----|-----|
| Factors influencing consumer demand and purchasing behaviour | Increased availability of fishery and aquaculture products in the retail sector Increased consumer awareness of local fishery and aquaculture products | n/a | n/a |

Sweden

The national campaigns in Sweden (7 campaigns) can be grouped as follows:



- Six national/regional public campaigns “Ready, Set, Fish” (2008), “Fish from Vanern Lake on the plate” (2012-2013), “Fish is nothing strange” (2012), “Food of the midnight sun” (2012-2014), “High school project for sustainable fisheries” (2010) and “Passion for food” (2011-2012)
- One private regional campaign “Easy-to-prepare fish as a part of Matlandet Gotland” (2013)

According to the CFP “Facts and Figures” (2016), the apparent fish consumption in Sweden, based on total supply of fishery and aquaculture products, was 30.1 kg/capita in 2011. Seven campaigns were conducted in 2008–2014. The focus of the campaigns was on promotion of consumption of local fishery and aquaculture products.

Funding of campaigns: The level of the EFF co-funding was EUR 400.130. The total costs of the campaigns have not been made available.

No national/regional campaigns promoting fishery and aquaculture products carried out without support from the EFF have been identified.

Geographical scope: Nearly all the campaigns were carried out on the regional level in the Tornedalen, Haparanda, Gotland and Gothenburg regions, while only one campaign was implemented on the national level.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Sweden are as follows:

- Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products by **diversification of products and marketing activities**;
- Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The majority of the campaigns targeted consumers in various regions of Sweden. Several campaigns also targeted representatives of restaurants and fast-food chains and the retail and food industries. One campaign had a focus on training students in the catering high-school as future chefs working with fishery and aquaculture products. All the campaigns were long-term (over 6 months).

Products covered: The common feature of the campaigns carried out in Sweden is that they concentrated on local species, including northern pike, European perch, vendace, flounder, halibut, herring, and shellfish species.

Main objectives: The main objectives of the campaigns include the following:

- Increasing consumption of local fishery products by promoting it as nutritious, quick, and easy-to-prepare food,
- Increase consumer awareness and knowledge of fish species.

Effects of the campaigns on consumption: In one of the campaign (“High school project for sustainable fisheries”), the measurement of the results before and after the campaign demonstrated increasing consumer demand for fishery and aquaculture products. The diversity and quantity of fish dishes in the restaurant doubled, surpassing meat dishes.

Finland

Promotional campaigns (5 campaigns) implemented in Finland can be classified as follows:



- A large-scale public regional campaign aimed at increasing consumer knowledge of fish (one campaign)
- Small-scale public regional campaigns aimed at increasing consumer interest in fish products, focusing on underutilized species (two campaigns)
- A smaller-scale private regional campaigns promoting Baltic herring and encouraging consumer interest for sushi (two campaigns)

Fish consumption in Finland was estimated at 14,8 kg/capita in 2014, according to the Natural Resources Centre. Of this, 10,8 kg were imported fish and 4 kg were domestic fish. The main objective of the campaigns carried out in Finland was to increase consumer knowledge and interest in fishery and aquaculture products.

Funding of campaigns: The level of the EFF co-funding was EUR 656.310. The total costs of the campaigns have not been made available.

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: All the campaigns were carried out on the regional level (the regions of Southwestern and Northeastern Finland: Uusimaa and Kainuu Koillismaa).

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Finland are as follows:

- (i) Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products **by diversification of products and marketing activities**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns targeted Finnish consumers in general. Some activities of the campaigns also targeted representatives of the food-service sector and potential consumers. All the campaigns were long-term (over 6 months).

Products covered: The main focus of the campaigns was placed on local fish species. In one of the campaign, local fish species such as herring, pike, crayfish and ide were used as innovative ingredients in sushi in raw and processed form.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumer awareness and knowledge about local species,
- Promoting consumption of fishery and aquaculture products highlighting their role in nutrition and diet,
- Increasing the use of underutilised fish species by diversifying the ways to use them and offering innovative products of local fish species.

Effects of the campaigns on consumption: The impact of the campaigns on consumption of fishery and aquaculture products has not been made available.

Denmark

Three nation-wide public campaigns were carried out in 2009-2013, which can be classified as follows.



- Large-scale public national campaigns “Gunnar and Minna” (2009-2010) and “What to prepare for dinner tonight” (2010-2013) aimed at increasing fish consumption in the country
- A large-scale public national campaign “Try fish” (2012-2013) focused on increasing fish consumption in the national food service sector

Although Denmark is one of the largest fishing nations in the world, fish is not a frequent item on the dinner table in Danish homes. In 2014, Danish per capita fish consumption was 13,3 kg, according to the Danish Fiskebranchen. This is a significant increase over 2008, when average annual per capita fish

consumption was 8 kg. In order to increase fish consumption throughout the country, several national campaigns were implemented. Compared with other western countries, Denmark had relatively few, but influential national campaigns directed both at business and consumers. The following three campaigns were carried out: “Gunnar and Minna” (2009–2010), “What to prepare for dinner tonight” (2010–2013), and “Try fish” (2012–2013). The campaigns ran as follow-ons of each other or simultaneously.

Funding of campaigns: The costs of the campaigns amounted to EUR 4,7 million. The share of the EFF co-funding has not been made available.

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: All the campaigns were public and carried out on the national level.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Denmark are as follows:

- (i) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products through **advertising, media communication and PR**;
- (ii) Campaigns encouraging and promoting consumption of fishery and aquaculture products with **focus on collaboration with the food-service sector**;
- (iii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns were mostly generally targeting all Danish consumers. A part of one campaign had a specific objective to focus on families with children that do not eat enough fish. All the campaigns were long-term (over 6 months).

Products covered: Fishery and aquaculture products in general were covered by the campaigns.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products. The main message of the campaigns was “Eat fish twice a week”,
- Creating a more positive image of the fishery and aquaculture products,
- Facilitating consumption of fishery and aquaculture products in the food-service sector (public canteens).

Effects of the campaigns on consumption: The campaigns’ results revealed an increase in consumption of fresh fishery and aquaculture products, although the sales of frozen and canned fishery and aquaculture products decreased. During the campaign, the following trends were observed: (i) increased consumption of fishery and aquaculture products in general; (ii) increased knowledge of fishery and aquaculture products among Danish consumers, and (iii) increased knowledge of the campaign. As a result of these campaigns, it was concluded by Fiskebranchen that it is possible to increase consumption of fishery and aquaculture products to the level recommended by the Danish authorities, 18,3 kg/capita.

3.5 Major findings – Western EU countries

Several promotional campaigns were carried out in the UK, Ireland, the Netherlands, Belgium and Germany to improve the image of fishery and aquaculture products, enhance quality and value of fishery and aquaculture products and develop new markets. Compared with the campaigns in Central and Eastern EU countries, promotional campaigns in Western EU countries focused strongly on sustainable fishery and aquaculture products by raising consumer awareness of quality and environmental issues:

- **Generating consumer demand for sustainable fishery and aquaculture products** and focusing on **local species** were the campaigns' key objectives in most of the Western EU countries. A strong focus on the sustainability of local fishery and aquaculture products was accomplished through the dissemination of information to consumers through the retail and business sector.
- **A great emphasis** in the promotional campaigns in the Western countries was placed **on educational activities for younger consumers**, including school children as present and future consumers of fishery and aquaculture products, and students, as future chefs.

| | IE | UK | NL | BE | DE |
|----------------------------|--|--|---|--|--|
| Number of campaigns | 3 | 3 | 1 | 1 | 3 |
| Geographical area | National | Regional | Regional | National | National/regional |
| Main objectives | <ul style="list-style-type: none"> - Increasing consumption of local fishery and aquaculture products - Raising consumer awareness of the health/nutritional benefits of the fishery and aquaculture products - Promoting local fishery and aquaculture products focusing on sustainability | <ul style="list-style-type: none"> - Increasing consumer demand for sustainable fishery and aquaculture products - Facilitating development of new value-added products from local fishery and aquaculture species | <ul style="list-style-type: none"> - Increasing consumption of fishery and aquaculture products in general | <ul style="list-style-type: none"> - Increasing consumer awareness and demand for selected fish products offered by local companies | <ul style="list-style-type: none"> - Promoting a positive image of the fishery and aquaculture products - Raising consumer awareness of the health/nutritional benefits of fishery and aquaculture products - Increasing awareness of fishery and aquaculture products among young consumers by developing educational programmes for schools |
| Types of products | Mussels, hake | Herring, salmon, haddock, sea trout, cod, scampi prawn, brown crab, velvet crab, lobster, scallop | Plaice, hake | Fishery and aquaculture products in general | Fishery and aquaculture products in general |
| Product trends | Certain species (hake) became some of the fastest growing species in local fish consumption | n/a | Registered increase in sales of fishery and aquaculture products | n/a | n/a |

| | IE | UK | NL | BE | DE |
|---|---|-----|---|-----|-----|
| Consumer trends | Awareness of the healthy benefits of fishery and aquaculture products has increased | n/a | n/a | n/a | n/a |
| Factors influencing consumer demand and purchasing behaviour | Increased attention to sustainability and quality of fishery products | n/a | Increased availability of fishery and aquaculture products and increased consumer awareness of local fishery and aquaculture products | n/a | n/a |

Ireland

The national public campaigns in Ireland (3 campaigns) can be grouped as follows:



- A national public campaign to promote sustainability and quality aspects of fishery and aquaculture products (one campaign – “Just ask!”)
- A national public campaign to promote Irish mussels (one campaign – “Passion for mussels”)
- A national public campaign to promote hake (one campaign – “Promotion of hake consumption to Irish consumers”)

Fish consumption in Ireland has been following a positive trend in recent years, exceeding 20 kg/capita, which is close to the EU average. Growing demand for fishery products by Irish consumers is the result of a growing concern with health issues and a broadened range of fishery products on offer. Three national public campaigns were conducted in Ireland. The campaigns’ focus areas were increasing consumption of sustainable fish and seafood and raising consumer awareness of the origin of the species they consume as well as promotion of local species.

Funding of campaigns: Information about the funding of the campaigns has not been made available.

Geographical scope: All the campaigns were public and carried out on the national level.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Ireland are as follows:

- Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products through **dissemination of information about sustainability and environmental aspects**;
- Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns targeted Irish consumers in general. Two of the campaigns were long-term (over 6 months), whereas one of the campaigns was short-term (1 month).

Products covered: One of the campaigns focused on local fishery and aquaculture products in general, mainly in fresh form, while two of the campaigns focused on mussels and hake.

Main objectives: The main objectives of the campaigns are the following:

- Raising consumer awareness about the origin and supplier of the fishery and aquaculture products focusing on quality and sustainability aspects,
- Promoting Irish mussels as a nutritious, healthy and sustainable consumption choice, in light of their minimal impact on the environment and low carbon footprint,
- Promoting hake consumption to Irish consumers.

Effects of the campaigns on consumption: The evaluation in one of the campaign (“Promotion of hake consumption to Irish consumers”) revealed that hake became one of the fastest growing species in fish consumption, and it is seen by Irish consumers as an alternative to cod.

United Kingdom

The campaigns in the UK (3 campaigns) can be classified as follows:



- A public regional campaign promoting local fish and seafood (one campaign – “Connecting the fisheries sector”)
- A public regional campaign promoting healthy eating and the development of new fishery products from local species (one campaign – “Seafood - see here!”)
- A public regional campaign promoting demand for sustainable fish products (one campaign – “The alliance for better food and farming”)

Although fishery and aquaculture products are regular food choices for many British consumers, national fish consumption has still not recovered after the 2007–2008 economic recession. Average UK fish consumption exceeds 20 kg/capita, which is lower than the average EU fish consumption level. Three public regional campaigns were carried out in the UK in the period 2007–2013. The campaigns’ objectives were increasing consumer demand for sustainable fishery and aquaculture products and facilitating development of new value-added products from local fishery and aquaculture products.

Funding of campaigns: The share of the EFF co-funding was EUR 111.582, representing 4% of the total costs of the campaigns (EUR 2.7 million).

No identified national/regional campaigns have been carried out without support from the EFF.

Geographical scope: All the campaigns were carried out on the regional level, including the Southwest and South coasts of England and the North and East coasts of Scotland.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in the UK are as follows:

- (i) Campaigns **encouraging and promoting consumption** of local fishery and aquaculture products through **dissemination of information about sustainability and environmental aspects**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns were oriented at the UK consumers in general. An important segment of the activities included pilot hubs linking consumers with fish-supply networks, including fish mobile stores to build up consumer awareness and demand for fishery and aquaculture products. The campaigns were long-term (over 6 months).

Products covered: Local fishery and aquaculture products, mostly in fresh and chilled forms, were in the focus of the campaigns.

Main objectives: The main objectives of the campaigns are the following:

- Promoting consumption of local fishery and aquaculture products.
- Facilitating a greater use of local fishery and aquaculture products, reducing food miles, encouraging a year-round tourism, and promoting healthier eating habits.
- Generating increase in demand of sustainable fishery and aquaculture products.

Effects of the campaigns on consumption: Impacts of the campaigns on consumption have not been made available.

Germany

The campaigns carried out in Germany can be grouped as follows:



- National public campaign promoting sustainability and the image of the fishery industry and its products
- Regional private campaigns promoting awareness of fish and seafood products as part of a healthy diet (two campaigns – “School of fish” and “Fish theme park during the German Green Week”)

Fish consumption in Germany was estimated at 14 kg/capita in 2014, according to the National Statistics, placing Germany well below the EU average. In order to increase national fish consumption, three campaigns were carried out in 2008-2015.

Funding of campaigns: All the campaigns were co-founded by the EFF and private funds, including by the German Fisheries Association. The budget of the “Communication campaign on sustainability and promoting the image of the fishery industry and its products” was EUR 300.000, whereas the budgets of other campaigns have not been made available.

Geographical scope: One of the campaigns was public and carried out on the national level, whereas two other campaigns were private and carried out on the regional level (the Berlin-Brandenburg capital region).

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Germany are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) Campaigns promoting consumption of fishery and aquaculture products through **dissemination of information about sustainability and environmental aspects**;
- (iii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

School children and students, as present and future consumers of fishery and aquaculture products, were the target group in one campaign. Two campaigns were long-term (over 6 months), while one campaign was short-term (less than 1 month).

Products covered: The campaigns covered fishery and aquaculture products in general.

Main objectives: The main objectives of the campaigns are the following:

- Raising consumer awareness of fishery and aquaculture products as a part of a healthy diet,

- Promoting consumption of sustainable fishery products,
- Promoting a positive image of the fishery and aquaculture products.

Effects of the campaigns on consumption: Impacts of the campaigns on consumption have not been made available.

The Netherlands

One public campaign promoting fishery and aquaculture products was carried out in the Netherlands.



- A regional public campaign “Promoting fish markets and fish culture” in 2010-2012 (one campaign)

The Netherlands is an essential processing and logistics centre for fishery and aquaculture products, ranking among the largest European fish-importing countries. However, the local market is characterised by the dominant meat-culture, and only 20% of the Dutch eat the recommended weekly amount of fishery and aquaculture products (2–3 times a week), according to the Dutch Ministry of Infrastructure and Environment (2014). One regional public campaign, “Promoting fish markets and a fish culture”, was carried out in 2010–2012 in order to increase consumption of fishery and aquaculture products and encourage diversification of the activities of the fishery industry in the country’s northern region.

Funding of campaign: The share of the EFF co-funding was EUR 61.374, representing 19% of the total cost of the campaign (EUR 318.000).

No national/regional campaigns carried out without the support from the EFF have been identified.

Geographical scope: The public regional campaign was carried out in the Northern Holland.

Type of campaigns: The type of the campaign is as follows:

- (i) Campaign **encouraging and promoting consumption** of local fishery and aquaculture products by **diversification of products and marketing activities**.

The campaign was long-term (over 6 months) and targeted local consumers in general.

Products covered: Fresh plaice, hake and other local species were in the focus of the campaign.

Main objective: The main objective of the campaign included the following:

- Increasing consumption of local fishery products.

Effects of the campaigns on consumption: Both pre-campaign and post-campaign measurements were carried out as a part of the campaign. Increased sales and consumption of fishery products in the region was observed. *Den Oever* fish market started with annual fish sales of EUR 125.000 (15 tonnes of fish) in 2010. After the campaign, in 2011, its sales rose to EUR 135.000 (18 tonnes of fish) with the market attracting 10.000 visitors in just 40 Saturdays. In *Den Helder* fish market, the fishmongers sold 50 tonnes of fish in 2010 for a value of EUR 225.000, which was maintained in 2011. In Texel, the fish market was relocated to *Oude vismarkt*, selling more than 200 tonnes of fish in 2011 at a value in excess of EUR 1 million.

Belgium

One public/private national campaign was carried out in Belgium.



The campaign included the following parts:

- “Fish of the year” – public national campaign has been running for 30 years,
- “Fish of the month” – public national campaign has been running for 4 years,
- “Cook of the year” – is a recent public national campaign.

97% of Belgian households regularly buy fishery and aquaculture products for consumption. A public/private national campaign was implemented in Belgium, which included various sub-campaigns such as “Fish of the Year”, “Fish of the Month”, and “Cook of the Year”.

Funding of campaigns: All the campaigns were co-funded by the EFF. The total costs of the campaign were EUR 480.000 EUR/per year, including co-funding of EUR 200.000 by the EFF.

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: The campaigns were carried out on the national level.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in Belgium are as follows:

- (ii) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products **through advertising, media communication and PR**;
- (iii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products;
- (iv) Campaigns **encouraging and promoting consumption** of fishery and aquaculture products through **diversification of products and marketing activities**.

The campaigns were long-term (over 6 months) and addressed to Belgian consumers in general.

Products covered: The campaigns targeted fishery and aquaculture products in general. A special focus was placed on the selection of available species offered by local fishing and wholesale companies.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products,
- Increasing consumer awareness of fishery and aquaculture products,
- Facilitating adaptation of consumer choices to availability of fishery and aquaculture products offered by local suppliers.

Effects of the campaigns on consumption: Impacts of the campaigns on consumption have not been made available.

3.6 Major findings – Central EU countries

Annual consumption of fishery and aquaculture products in the landlocked Central EU countries is significantly below average EU consumption, ranging from 3,75 kg to 4,5 kg/capita. Local fish species make up most of the national fish consumption; carp and trout are most consumed species. The campaigns' findings in the Central EU countries included the following features:

- The key intention of the campaigns carried out in the Czech Republic, Slovakia, Slovenia and Hungary was to increase the **overall level of fish consumption** focusing on **increasing popularity of local freshwater fishery and aquaculture products**.
- **Strengthening the image of local fishery and aquaculture products** was one of the campaigns' main focus in this subregion. Most promotional activities focused on **communication** and included advertising and distribution of promotional material.

| | CZ | SK | HU | SL |
|----------------------------|---|--|---|---|
| Number of campaigns | 3 | 1 | 2 | 1 |
| Geographical area | National/regional | National | National/regional | National |
| Main objectives | <ul style="list-style-type: none"> - Increasing national consumption of fishery and aquaculture products - Increasing consumption of local fish species | <ul style="list-style-type: none"> - Increasing consumption of local fishery and aquaculture products - Raising consumer awareness of the health/nutritional benefits of freshwater fishery and aquaculture products | <ul style="list-style-type: none"> - Increasing national consumption of fishery and aquaculture products - Increasing consumption of local fish species | <ul style="list-style-type: none"> - Increasing national consumption of fishery and aquaculture products - Increasing consumption of local fish species |
| Types of products | Carp | Carp, trout, sander, pike | Carp | Fishery and aquaculture products in general |
| Product trends | Registered increase in fish consumption | Registered increase in fish consumption | Registered increase in fish consumption | Registered increase in fish consumption |

| | CZ | SK | HU | SL |
|--|--|---|---|---|
| | | | | |
| Consumer trends | Awareness of the health/nutritional benefits of fishery and aquaculture products has increased | n/a | n/a | Consumer awareness and interest for consumption of fishery and aquaculture products has increased |
| Factors influencing consumer demand and purchasing behavior | Increased availability of local fishery and aquaculture products, and diversification of sales channels for local fishery and aquaculture products | Growing consumer interest in fishery and aquaculture products | Increased knowledge and awareness of the health/nutritional benefits related to consumption of fishery and aquaculture products | n/a |

The Czech Republic

Three national campaigns were carried out in the Czech Republic.



- An extensive national public campaign “Domestic fish”
- A regional private public campaign “Promotion of Pohorelicky carp”
- A regional private campaign “Creation of internet portal Trebonsky carp”

Czechs do not have a strong historical tradition of eating fish. Owing to the geographical, historical and climatic conditions, the country’s fish consumption is lower than in other European countries. In recent years, the relatively low national fish consumption continued to decline. According to the National Statistics, the annual national average per capita fish consumption was 5,12 kg in 2010, and it declined to 3,75 kg in 2014. Of this, consumption of marine fish amounted to 2,04 kg, and the rest was freshwater fish. Carp is the most important species farmed in the country. In general, there have been fewer promotional campaigns in the Czech Republic than in other EU countries. During the past eight years (2008-2015), one large-scale promotional campaign and two small-scale campaigns were carried out.

Funding of campaigns: The campaigns were co-funded by the EFF and the total costs of the campaigns amounted to EUR 5.7 million (EUR 4.3 million from the EFF).

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: One public campaign was carried out on the national level. Two campaigns were carried out in the South Bohemia and Zlin regions. One campaign was public, while the two other were private.

Type of campaigns: The types of the campaigns for the promotion of fishery and aquaculture products in the Czech Republic are as follows:

- (i) Campaigns **promoting consumption** and **improving the image** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products;
- (iii) Campaigns promoting fishery and aquaculture products supporting the **creation of denomination of origin** for fishery and aquaculture products **through recognized Protected Geographical Indication (PGI)**.

The campaigns were long-term (over 6 months) and oriented towards Czech consumers in general.

Products covered: The campaigns focused on traditional Czech carp species, such as common carp, glass carp and silver carp. “Pohorelicky carp” starred as a local product with the Protected Designation of Origin (PDO).

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products,
- Increasing consumption of local freshwater fishery and aquaculture products,
- Strengthening the image of local carp species,
- Raising consumer awareness about the health/nutritional benefits of fishery and aquaculture products.

Effects of the campaigns on consumption: Increased consumption of freshwater fishery and aquaculture products was registered after the implementation of the nation-wide campaign (“Domestic fish”). The pre-campaign test measured the annual average consumption of freshwater fishery and aquaculture products in the country at 1,29 kg per capita. After the campaign, the level of consumption of freshwater fishery and aquaculture products increased to 1,43 kg per capita.

Hungary

Two promotional campaigns were carried out in Hungary.



- A national public campaign promoting consumption of fishery and aquaculture products (one campaign - “Several fish species on the plate”)
- A regional private campaign promoting local aquaculture products (one campaign “Golden Carp Fishery Company”)

As a landlocked country, Hungary is among the lowest fish-consuming EU countries. In 2014, Hungarians consumed 3,9 kg of fish per capita, according to the Community Fish Marketing Program in Hungary. In order to increase consumption of fishery and aquaculture products in the country, two promotional campaigns were carried out in Hungary, one private “Golden Carp Fishery Company” (2007) and one public “Several fish species on the plate” (2014).

Funding of campaigns: The cost of the private campaign “Golden Carp Fishery Company” funded by the EFF amounted to EUR 74.576. The costs of the campaign “Several fish on the plate” has not been made available.

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: One of the campaigns was carried out on the national level, while the second was carried out on the regional level (the Pest region).

Type of campaigns: The types of the campaigns on promotion of fishery and aquaculture products in Hungary are as follows:

- (i) Campaigns **promoting consumption** and **improving the overall image** of local fishery and aquaculture products **through advertising, media communication and PR**;
- (ii) **Educational** campaigns increasing **consumer awareness of health/nutritional benefits** of fishery and aquaculture products.

The campaigns were targeting Hungarian consumers in general. One of the campaigns also focused on younger consumers (school children). All the campaigns were long-term (over 6 months).

Products covered: Local fish species such as bighead and silver carp, grass carp, pike, trout, African catfish, pike-perch and tench were covered by the campaigns.

Main objectives: The main objectives of the campaigns are the following:

- Increasing consumption of fishery and aquaculture products,
- Increasing consumption of local fishery and aquaculture products,
- Raising consumer awareness about safety and quality of fishery and aquaculture products.

Effects of the campaigns on consumption: At the beginning of the campaign (“Several fish species on the plate”), the aim of the campaign was to increase domestic consumption of fishery and aquaculture products by at least 30% by 2015. The campaign’s results were very positive: the increase in fish consumption measured after the campaign was 25%.

Slovakia

There was only one national campaign carried out in Slovakia.



- A national public campaign “Promotion of freshwater aquaculture products” (one campaign)

The Slovak Republic is among the European countries with very low consumption of fishery and aquaculture products. The national average annual fish consumption is 5,9 kg per capita (2014), according to the National Statistics, where the major part of the volume is represented by marine species. In order to boost consumption of freshwater aquaculture products, one extensive national public campaign was carried out in 2012–2013.

Funding of campaign: The total costs of the campaign were EUR 570.000. The co-funding by the EFF was 50% (EUR 286.649), while the rest was co-funded by public funds.

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: The campaign was implemented on the national level.

Type of campaigns: The type of the campaign for the promotion of fishery and aquaculture products in the Slovak Republic is as follows:

- (i) Campaign **promoting consumption** of local freshwater fishery and aquaculture products **through advertising, media communication and PR.**

The campaign was long-term (over 6 months) and oriented towards Slovak consumers in general.

Products covered: Local freshwater aquaculture species, such as carp, trout, zander and pike, were the focus of the campaign.

Main objectives: The main objectives of the campaign include the following:

- Increasing consumer awareness of the benefits of freshwater aquaculture products,
- Promoting consumption of local freshwater aquaculture products.

Effects of the campaigns on consumption: It was concluded that the campaign had led to better consumer awareness and understanding of the main benefits related to consumption of freshwater aquaculture products. After the campaign, official statistics recorded a growing consumer interest in fishery and aquaculture products. Per capita consumption of fishery and aquaculture products increased from 4,7 kg to 5,9 kg in 2011-2014.

Slovenia

There was one national campaign carried out in Slovenia.



- A national public campaign promoting fishery and aquaculture products (one campaign - “I like to eat fish”)

The average fish consumption in Slovenia is estimated at 7.5 kg per capita according to the Ministry of Health of the Republic of Slovenia (2012). In order to increase the national consumption of fishery and aquaculture products, the campaign “Rad jem ribe” (I like to eat fish) was carried out in February – November 2012.

Funding of campaign: The total costs of the campaign were EUR 700.000, financed by the EFF (EUR 525.000) and by national co-funding (EUR 175.000).

No national/regional campaigns carried out without support from the EFF have been identified.

Geographical scope: The campaign was implemented on the national level.

Type of campaigns: The type of the campaign for the promotion of fishery and aquaculture products in Slovenia is as follows:

- (i) Campaign **promoting consumption** of fishery and aquaculture products **through advertising, media communication and PR.**

The campaign was long-term (over 6 months) and addressed to Slovenian consumers in general.

Products covered: The campaign included fishery and aquaculture products in general.

Main objectives: The main objectives of the campaign include the following:

- Increasing per capita consumption of fishery and aquaculture products,
- Promoting local fishery and aquaculture products.

Effects of the campaigns on consumption: Upon the request of the Ministry of Agriculture and Environment of Slovenia, two surveys were carried out to investigate the visibility of the campaign and its impact on the frequency of the consumption of fishery and aquaculture products. According to the post-campaign evaluation, 12,9% of the respondents reported that they were encouraged to eat more fish and that the campaign pragmatically affected their habits, increasing their consumption of fishery and aquaculture products.

4 Annex – Inventory of the promotional campaigns

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--------------------------------|--|--------------------|--|
| Promotional campaign “Poisson du mois” | VLAM | All fishery and aquaculture products | Began 30 years ago | Belgium |
| Promotional campaign aimed at improving the prestige of fisheries and aquaculture in the municipality of Veliko Tarnovo | Municipality of Veliko Tarnovo | Promotion of fishery and aquaculture products | 2014-2015 | Bulgaria NUTS 2 region Severen Centralen |
| Promotional campaign aiming to improve the prestige of fishery and aquaculture products in the municipality of Pomorie | Municipality of Pomorie | Improving the overall image of fishery and aquaculture products Increasing domestic consumption of fishery and aquaculture products | 2014-2015 | Bulgaria NUTS 2 region Yugoiztochen |
| Promotional campaign for fishery and aquaculture products in the municipality of Vratza | Municipality of Vratza | Increasing consumption of fishery and aquaculture products Increasing the prestige of the fishery sector | 2013-2015 | Bulgaria NUTS 2 region Severozapaden |
| Promotional campaign for fishery and aquaculture products in Municipality of Valchi Dol | Municipality of Valchi Dol | Promoting consumption of fishery and aquaculture products | 2013-2015 | Bulgaria NUTS 2 region Severoiztochen |
| Regional campaign in the Northwestern Bulgaria aiming to increase consumer awareness of fishery and aquaculture products | Foundation „Montana tomorrow“ | Increasing information of the healthy benefits of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Severozapaden |
| Promotional campaign for fishery and aquaculture products in the Municipality of Smiadovo | Municipality of Smiadovo | Increasing consumption of fishery and aquaculture products; Carp, trout | 2013-2014 | Bulgaria NUTS 2 region Severoiztochen |
| Promotion of fishery and aquaculture products in the Municipality of Zlatarica | Municipality of Zlatarica | Promoting consumption of fishery products | 2013-2014 | Bulgaria NUTS 2 region Severen Centralen |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|---------------------------|--|-------------|---|
| Promotional campaign for fishery and aquaculture products in the Municipality of Pazardjik | Municipality of Pazardjik | Increasing consumption of fishery and aquaculture products | 2014-2015 | Bulgaria NUTS 2 region Yujen Centralen |
| Promotional campaign aiming at increase the prestige for fishery and aquaculture products in the Municipality of Banite | Municipality of Banite | Increasing information on health benefits of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yujen Centralen |
| Promotional campaign, aiming at improving the prestige of fishery and aquaculture products in the Municipality of Maglij | Municipality of Maglij | Increasing consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yugoiztochen |
| Promotional campaign, aiming at increasing prestige of fishery and aquaculture products in Municipality of Svoqe | Municipality of Svoqe | Promoting health benefits of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yugozapaden |
| Promotional campaign, aiming at increasing prestige of the fishery and aquaculture in the Municipality of Tutranakn | Municipality of Tutranakn | Promoting local fish biodiversity Promoting consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Severen Centralen |
| Promotional campaign, aiming at increasing prestige of fishery and aquaculture products in Municipality of Popovo | Municipality of Popovo | Increasing consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Severoiztochen |
| Promotional campaign, aiming at improvement of prestige of fishery and aquaculture products in Municipality of Sliven | Municipality of Sliven | Promoting consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yugoiztochen |
| Promotional campaign, aiming at improvement of prestige of fishery and aquaculture products in Municipality of Tvardica | Municipality of Tvardica | Promoting consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yugoiztochen |
| Promotional campaign, aiming at improvement of prestige of fishery and aquaculture products in Municipality of Maritza | Municipality of Maritza | Increasing consumption of fishery and aquaculture products | 2013-2014 | Bulgaria NUTS 2 region Yujen Centralen |
| Promotional campaign for fish and fishery products | Municipality of Beloslav | Promoting consumption of fish and fishery products | 2013-2014 | Bulgaria NUTS 2 region Severoiztochen |
| Promotional campaign, aiming at improvement of prestige of fishery and aquaculture products in Municipality of Suhin dol | Municipality of Suhin dol | Promoting consumption of fishery and aquaculture products | 2013-2014 | Bulgaria |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--|---|----------------|---------------------------------------|
| | | | | NUTS 2 region Severen Centralen |
| Promotional campaign “Fish of Croatia – Eat what is worth eating” | Croatian Chamber of Economy | Promoting consumption of fishery and aquaculture products Focus on fresh fish (mainly species from the Adriatic Sea) | 2011-2012 | Croatia |
| Promotional campaign “Šime has returned and brought with him fresh fish from heart of the sea” | Podravka D.D. | Increasing consumption of canned and pre-packed fish products | 2013 – ongoing | Croatia |
| Promotional campaign “Frozen but fresh” | Ledo D.D | Increasing of fish products by educating consumers about health benefits of fish products | 2014 – ongoing | Croatia |
| Improving the Image of Fisheries – Fresh Sea Food Promotion | Larnaca District Development Agency (ANETEL) | Increasing consumption of fishery and aquaculture [products | 2013 | Cyprus |
| Promotional campaign for domestic fish | public | Increasing consumption of fishery products focusing on local fish species | 2008-2012 | Czech Republic |
| Promotion of Pohorelicky carp | private | Increasing consumption of local carp species | 2008-2011 | Czech Republic |
| Creation of internet portal Trebonsky carp | private | Increasing consumption of local carp species | 2008-2011 | Bohemia region, Czech Republic |
| Promotional campaign “Gunnar and Minna” | Fiskebransjen | Promoting consumption of fishery and aquaculture products | 2009-2010 | Denmark |
| Promotional campaign “What to prepare for dinner tonight” | Fiskebransjen | Promoting consumption of fishery and aquaculture products | 2010-2013 | Denmark |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--|---|-------------|----------------------|
| Promotional campaign “Try fish” | Fiskebransjen | Increasing consumption of fish products in the food service focusing on public canteens | 2012-2013 | Denmark |
| Promotional campaign “Fish does good” | Estonian Fish Association (coordinator), implemented by various partners | Promoting consumption of fishery and aquaculture products | 2006-2007 | Estonia |
| Promotional campaign “So, who does not eat fish?” | Fisheries Information Centre | All areas and species | 2014 | Estonia |
| Baltic Herring Fair 2008 | Rantarieha Ry | Herring | 2008 | Southwestern Finland |
| Generic campaign promoting fish products | Pro Kala Ry | Local species | 2010-2013 | Uusimaa, Finland |
| Promotional campaign “Highly requested sushi” | KALATUKKU E. ERIKSSON OY | Herring, pike, crayfish and ide | 2011 - 2012 | Uusimaa, Finland |
| Promotion of under-utilized fish | TUTKIMUSLAI | Roach | 2010 | Southwestern Finland |
| Promotional campaign for sustainable fish | KESTÄVÄLLÄ KALALLA | Local species | 2013 | Uusimaa, Finland |
| Pavillon France | France Filière Pêche | Products from wild fisheries caught by French vessels | Since 2012 | France |
| Generic campaign on fishery and aquaculture products | FranceAgriMer | Promoting fishery and aquaculture products | 2009-2014 | France |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--|---|----------------------|---------------------|
| Promotion campaigns on specific types of products | Professional organisations | Quality schemes Shellfish Farmed fish Processed products | 2007-2013 | France |
| Promotional campaign “School of Fish” | Fish Informaiton Center with Zeitbild (Berliner publisher) | Promoting consumption of sustainable fish products in schools | 2012-2015 | Germany |
| Promotional campaign Internationale Grüne Woche | Fish Informaiton Center | Raising awareness about health benefits of fish and seafood | Since 2004 | Germany (Berlin) |
| Communication campaign on sustainability of fishery products | German Fisheries Association | Promoting image of the fishing industry and its products | 03-2012 till 09-2015 | Germany |
| Fishermans Restaurant | Public | Diversifying sales channels for fish products in the restaurant business | 2007-2013 | Greece |
| Selected frozen fisheries with the freshness of the sea | Greek Foreign Trade Organization (HEPO) | Increasing consumer awareness about local fishery products | 2013-present | Greece |
| Promotional campaign “LOVE FISH” | KALLIMANIS AQUACULTURES S.A. | Redfish, mussels, octopus, mullet, pagkasious, anchovy, sea bass, perch, cod, bream, shrimps, squid, cuttlefish | 2013 | Greece |
| Kallisti Food Gallery | KALLONI S.A. | Sprat, herring, mackerel, anchovy | 2010 | Greece |
| Kontoveros seafood | KONTOVEROS S.A. | Cod, octopus, shrimps, salmon, squid, tope, redfish, anchovy, perch, mackerel | 2015 | Greece |
| Promotional campaign “Love Your Local Market” | Central Market and Fishery Organizations S.A. | Local fish and seafood | 2015 | Greece |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|---|---|--|-------------|---------------------|
| Children's painting competition 2011 | NIREUS S.A. | Seabass and seabream | 2011 | Greece |
| Promotional campaign "Nireus Select" | NIREUS S.A. | Seabass and seabream | 2013 | Greece |
| Promotional campaign "Nireus Bio" | NIREUS S.A. | Bio seabass and bio seabream | 2013 | Greece |
| Promotional campaign "Golden Carp Fishery Company" | Aranypony Halászati Zrt | Carp, bighead and silver carp, grass carp, pike, trout, African catfish, pikeperch, tench | 2007 | Budapest, Hungary |
| Promotional campaign "Several fish on the plate!" | Napolo | Domestic fish species, focus on carp | 2014 | Budapest, Hungary |
| Promotional campaign "Just ask!" | Bord Bia – Irish Food Board | Fresh fishery and aquaculture products | 2014 | Ireland |
| Promotional campaign "Passion for Mussels" | Bord Bia – Irish Food Board | Mussels | n/a | Ireland |
| Promoting consumption of hake to Irish consumers | Bord Bia – Irish Food Board | Hake | 2012 - 2014 | Ireland |
| Promotional campaign "M.I.TTI.CO! – Azzurro principe del nostro mare" | Districts of: Lecce, Bari, Brindisi, Foggia and Taranto (Apulia region) | Valorisation of the "pesce azzurro" fish in the schools' canteens | 2015 | Italy Apulia |
| Promotional campaign "PESCATO DI QUALITA" | Camera di Commercio di Oristano | Promoting and developing new markets for the some Sardinian fish species, promoting quality of local fish products | 2015 | Italy Sardinia |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|---|--|---|----------------------------------|--------------------------|
| Promotional campaign “FISH&CHEAP – tasty, economic and local” | Asinara Marine Protected Area | Promoting local, seasonal and “neglected” fish species, Increasing consumption of fish products | 2015 | Italy Sardinia |
| Promotional campaign “HELLO FISH – the culture of aquaculture” | MIPAAF, Unioncamere | Promoting consumption of aquaculture products | 2015 (during the summer holiday) | Italy Various regions |
| Promotional campaign “PESCA PRONTA” | PESCA PRONTA spa | Promoting consumption of sustainable fish products in processed form | Ongoing | Italy |
| Promotional campaign “OCEAN47 – catching by thinking about future” | Agras1947 | Promoting consumption of sustainable fish products in processed form | Ongoing | Italy |
| Promotional campaign “CONSUMARE GIUSTO – consume in the right way” | CONSUMARE GIUSTO (NGO) | Online platform used for disseminating information about sustainable fisheries | From 2007 | Italy |
| Promotional campaign “MR GOODFISH – good for the sea, good for you” | World Ocean Network + Acquario di Genova + Aquarium Finisterrae + Nausicaà la Mèr est sur Terre | Promoting consumption of fish | 2010-2016 | Italy |
| Promotional campaign “SLOW FISH – good, tasty and clean fish” | Slow Food | Valorisation of artisanal and local fisheries and increasing consumption of “neglected” fish species | From 2009 | Italy |
| Promotional campaign “FISHBOX – sustainable nutrition” | FISHBOX | Improving the quality of fish consumed through a shorter distribution chain (ethical purchasing groups) | From 2013 | Italy |
| Promotional campaign “PESCE RITROVATO Rediscovered Fish” | Acquario di Genova, Legambiente, COOP Liguria, Lega Pesca, Sosfteco Sismat, AGCI AGRITAL, Liguria Region + | Encouraging consumers to change their food habits towards underutilized fish and promoting the “neglected” fish species | 2010 - 2013 | Italy Liguria |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|---|---|---------------------------------------|---------------------------|
| | European Project LIFE+ | | | |
| Promotional campaign “FISHEAT – cibo del mare, cibo da amare” “Food from the sea, food to love” | Fedecoopesca, Legapesca, AGCI Agrital, MIPAAF | Promoting Italian fishery quality along all value chain | 2015 | Italy |
| Promotional project “UN MARE DI qualità della Provincia di Salerno” | Legambiente + Salerno District | Promoting efficient purchases and consumption of fish products in the Salerno District | 2012 | Italy Salerno District |
| Promotional project “GUIDA AL CONSUMO DI PESCE AZZURRO” | ULSS 6 Vicenza – Dipartimento di prevenzione: servizio di promozione e educazione alla salute | It is a report for promoting the awareness and the appreciation of the most important “local” fish species (“pesce azzurro” and mollusks and crustaceans) | N/A | Italy |
| Promotional campaign “PAPPAFISH” | Marche Region + EFF 2007-2013 | Promoting consumption of “Pesce azzurro” species in selected school canteens | 2014-2015 | Italy Marche Region |
| Radio campaign “MIPAAF Mare Nostrum” | MIPAAF (national level) | Dissemination of information about fishery and aquaculture products and promotion of the image of fishery and aquaculture products | 12 weeks: 23. 12. 2009 – 19. 03. 2010 | Italy |
| Promotional campaign aiming at improving the image of fishery and aquaculture products | Italian Ministry of Agriculture and Fishery and the EFF 2007-2013 | Promotion of the Italian fishery and aquaculture products among consumers and strengthening the image of Italian fishery and aquaculture products | September 2011 – April 2012 | Italy |
| Promotion of fish products in schools | Latvian Rural Advisory Training Centre, National Fisheries Network | Promote fishery and aquaculture sectors in schools, Salmon, lamprey, carp, trout, sturgeon | 2014 – 2015 | Latvia |
| “Fish page” | Latvian Rural Advisory Training Centre, National Fisheries Network | Promoting fishery and aquaculture products, “The big catch” award in the fishery sector | 2010 – 2015 | Latvia |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|---|--|--|-------------------------|---------------------|
| | | | | |
| Food and Veterinary Office recommendations on fish consumption | Food and Veterinary Office (in cooperation with Riga Stradiņš University, Nutrition academic School) | Providing recommendations on fish consumption, fish nutrition aspects and warning about fish contamination | n/a | Latvia |
| Learning to diversify the barbecue season preparing grilled fish dishes | Latvian Rural Advisory Training Centre, National Fisheries Network | Promoting fish consumption and a diversity of cooking methods | 2014 | Latvia |
| Practical seminar "Diverse fish cooking" | National Fisheries Network | Promoting cooking methods of fish | 2013 | Latvia |
| Promotional campaign for fish and seafood at Rimi gourmet | National Fisheries Network | Promoting cooking methods of fish | Ongoing | Latvia |
| Promotional campaign for fisheries and aquaculture products | The Society for Sustainable Development | Local species | 2010-2011 | Lithuania |
| Promotional campaign for fishery products and development of the market | National Association of Aquaculture and Fish Products Producers | Local species Carp, tench, pike, lichen, sturgeon. | 2011-2012 and 2013-2014 | Lithuania |
| "Do You Know What Fish You Will Eat Today?" | The Lithuanian Fund for Nature | Raising consumer awareness about sustainable fishery products | 2010 | Lithuania |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|---|---|---|-------------|--------------------------------|
| Promotion of aquaculture products from closed aquaculture systems | The Association „Alternative aquaculture“ | Catfish, trout, salmon | 2013-2014 | Lithuania |
| Creation of the competitive fishery sector, shaping the positive image of the fisheries sector, promotion of the aquaculture and fisheries products | Tauragė Fisheries Local Action Group | Local species | 2013-2015 | Lithuania |
| Promotional campaign “EAT FRESH FISH it’s a healthy dish!” | Department of Fisheries and Aquaculture + EFF 2007-2013 | Increasing consumption of local species focusing on fresh fish | 2015 | Malta |
| Promoting fish markets & fish culture | Public | Encouraging competitiveness and diversification of activities for fishing organisations | 2010-2012 | Noord Holland, The Netherlands |
| Promotion of rainbow trout “Now Trout” | Polish Trout Breeders Association | Domestic rainbow trout | 2011-2014 | Poland |
| Promotion of carp „Mr. Carp” | Society for Fish Promotion | Common carp Socio-economic and environmental values of ponds | 2004-2016 | Poland |
| Promotional campaign „Fish Win!” | Fish Market Development Association | Sprat, herring, carp, trout Processed products | 2011-2016 | Poland |
| Promotional campaign „Healthy as fish” | Borowiacka Rybka | Carp, trout | 2012-2013 | Poland (Kujawsko-pomorskie) |
| Promotional campaign “Healthy fish” | Dorzecze Zgłowiączki | Carp, pike, pike-perch, cod, herring, halibut, trout | 2011-2015 | Poland (Kujawsko-pomorskie) |
| Healthy fish from childhood. Invite sea for you dinner. | Kołobrzeg Fish Producers Group Ltd. | Baltic cod, flounder, herring | 2012-2013 | Poland (Western Pommerania) |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--|--|--------------|--|
| Promotional campaign „Tasty cod. Tasty flounder” | Organization of Boat Fishermen - Fish Producers Ltd. | Cod, flounder | 2012-2014 | Poland (Western Pommerania) |
| Promotional campaign "Eat fish, you will be healthy" | Association "Sieja" | Carp, herring, sturgeon | 2011-2014 | Poland (Western Pommerania) |
| Shaping a healthy model of nutrition among school children | Western Pomerania Technical University | High-school children | 2012-2014 | Poland (Western Pommerania) |
| Promotional campaign “Tasty flounder” | Association “Armatorów Łódziowych” | Flounder | 2012-2013 | Poland (Western Pommerania) |
| Regional promotional campaigns | Various projects | Mostly freshwater fish and Baltic fish | 2010-2013 | Poland – Western Pommerania and Warmia and Mazuria |
| Promotional campaign for fish in Lidl chain | Lidl | Fresh packed products - Lidl | 2010-2015 | Poland |
| Lisner brand promotional campaign | Lisner | Chilled fish products - Lisner | 2010-2015 | Poland |
| Valorização do Pescado (Enhancing the Value of Fish Products) | DOCAPESCA | Umbrella brand for all Portuguese fish products (CCL). Particular focus on Atlantic Chub mackerel and octopus | 2009 to 2012 | Portugal’s Mainland |
| Desenvolvimento de Novos Mercados e Campanhas Promocionais (New markets and promotional campaigns) | DOCAPESCA | Follow-up to previous campaign – all species with particular focus on Atlantic Chub mackerel and octopus | 2009-2011 | Portugal |
| Fish Products communication and promotion campaign | DOCAPESCA | Focus on CCL label, with particular focus on Atlantic Chub mackerel and octopus and, in some specific location, cuttlefish | 2013-2015 | Portugal’s Mainland and Spain (small action) |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|---|------------|---|-------------|---------------------|
| Innovative fish products recipes | DOCAPESCA | Development of a Atlantic Chub mackerel hamburger | 2014-2015 | Portugal |
| Promotional campaign “Consume fish for a better living” | ACOPE | Promoting fish consumption for children at the 3 rd and 4 th grade of primary school | 2011-2012 | Portugal |
| Empresário Esclarecido, Sector Protegido I (Informed Businessman, Protected Sector I) | ACOPE | Informing food operators about the importance of good hygiene practices | 2012-2013 | Portugal |
| Empresário Esclarecido, Sector Protegido II (Informed Businessman, Protected Sector II) | ACOPE | Informing food operators about the importance of good hygiene practices | 2014-2015 | Portugal |
| Vamos à loja e ao mercado aprender como se compra e vende pescado (Let’s go to the auction houses and markets to learn how to buy and sell fish products) | ACOPE | Promoting fish consumption for children of primary school | 2015 | Portugal |
| Pescado Controlado I (Controlled Fish Products I) | ALIF | Promoting the umbrella brand of Portuguese fish products as quality and sustainable products | 2010-2011 | Portugal |
| Pescado Controlado II (Controlled Fish Products II) | ALIF | Promoting the umbrella brand of Portuguese fish products as quality and sustainable products | 2012-2013 | Portugal |
| Pescado Controlado III (Controlled Fish Products III) | ALIF | Promoting the umbrella brand of Portuguese fish products as quality and sustainable products | 2014-2015 | Portugal |
| Peixe é Fixe I (Fish is Cool I) | ALIF | Promoting consumption offish for children of the 3 rd and 4 th grade | 2012-2014 | Portugal |
| Peixe é Fixe II (Fish is Cool II) | ALIF | Promoting consumption of fish for children of the 3 rd and 4 th grade | 2013-2015 | Portugal |
| Peixe é Fixe III (Fish is Cool III) | ALIF | Promote consumption of fish for children of the kinder garden and 1 st and 2 nd grade | 2015 | Portugal |
| Promotional campaign “O nosso bacalhau” (Our codfish) | AIB | Information and awareness strategy with the goal of | 2011-2012 | Portugal |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--------------------------|---|-------------|--------------------------------------|
| | | enhancing the value of codfish | | |
| Actions for markets and people | Frijobel | Enhancing the company's presence in external markets. Promoting and divulging fish products | 2013-2015 | Portugal Centro region and abroad |
| Enhancing the value of Portuguese fish products discards and by-products | DGRM | Organisation/participation in the international event BioMarine 2014 | 2014-2016 | Lisbon (Portugal) |
| Promotional campaign "Healthy-Tasty-Delicious" | SC DORIPESCO SA | -Fairs/exhibitions -Fish and fish products | 2013 - 2014 | Romania/Center |
| Promotional campaign "Consume fish daily and live healthy" | SC SEA-BELL Trading SRL | Promoting consumption of fish products | 2013 – 2014 | Romania Bucharest |
| Promotional campaign "Eat Fish!" | Bacău County Council | Promoting consumption of fish products | 2013 | Romania |
| Promotional campaign "Health and Fish" | SC COMPLEX GRUP AGRO SRL | Promoting health benefits from consumption of fish products | 2014 | Romania |
| Promotional campaign for fishery products | SC COMPLEX GRUP SRL | Fish and seafood products | 2015 | Romania Bucharest |
| Promotional campaign "No meal without fish!" | SC MATBEN CONCEPT SRL | Fish and seafood products | 2014 | Romania Bucharest |
| Promotional campaign "Little and strong" | SC Bio Aquafish SRL | Fish and seafood products | 2012 | Romania Bucharest |
| Promotional campaign "Don Mariano's recipes" | Private | Promoting knowledge about fishery and aquaculture products | 2010-2016 | Romania |
| Promotion of freshwater aquaculture products | Public | Focused on different species of domestic freshwater fish | 2012-2013 | Slovakia |

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|------------|--|-------------|---------------------|
| Promotional campaign “I like to eat fish” | Public | Promoting local fishery and aquaculture products | 2012 | Slovenia |
| Promotion of 30 main fish species of commercial interest | MAGRAMA | Applying the correct labelling of fish in the retail and helping consumers to get correct information | 2012 | Spain |
| Promotional campaign “Maximal freshness all the year” | MAGRAMA | Promoting the image of the aquaculture sector which respects the biological cycles and species growth. | 2011 | Spain |
| Promotional campaign “Spanish aquaculture: freshness and guarantee all the yearlong” | MAGRAMA | Promoting the image of the aquaculture sector which respects the biological cycles and species growth. | 2013 | Spain |
| Promotional; campaign for Albacore tuna “Healthy for you, healthy for the sea” | MAGRAMA | Promoting the sustainable capture method for Albacore tuna | 2007 | Spain |
| Recovery plan of Bluefin “Now or never” | MAGRAMA | Informing about the critical situation of Bluefin | 2011 | Spain |
| Promocional campaign “Fish today: the value of fish in a healthy diet” | MAGRAMA | Increasing consumption of fish products focusing on their nutritional properties | 2013 | Spain |
| Promocional campaign “Mussel: real luxury of taste” | MAGRAMA | Promoting consumption of mussels | 2011-2014 | Spain |
| Promocional campaign “The Cantabrian treasure has now come: anchovy, it is the season” | MAGRAMA | Promoting consumption of anchovy. | 2011 | Spain |
| Promocional campaign ““Omega 3. Fishery products naturally” | MAGRAMA | Promoting healthy properties of Omega 3 in fishery products | 2013 | Spain |
| Minimum sizes: each time, we are more to respect the minimum sizes, and you? | MAGRAMA | Raising consumer awareness of the minimum catch sizes of fish | 2007-2011 | Spain |

ANNEX 3 - MAPPING OF NATIONAL CAMPAIGNS

| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|---------------------------------|---|-------------|---------------------|
| Promotional campaign: “Frozen fish: the sea of windows” | MAGRAMA | Promoting freezing process which preserves nutrients and quality of fish products | 2013-2014 | Spain |
| Promotional campaign “Trout: Does a food product richer, complete and with a good price exists?” | MAGRAMA | Promoting nutritional value s of rainbow trout | 2010 | Spain |
| Promotional campaign for canned fish and seafood products | MAGRAMA | Promoting nutritional value of the canned fish and seafood sector | 2005 - 2014 | Spain |
| Promotional; campaign “Fish labelling tells everything: from sea or from aquaculture? From Mediterranean or from Atlantic? Fresh or unfrozen?” | MAGRAMA | Informing consumers about the mandatory information the labels should give | 2011 - 2014 | Spain |
| Promotional campaign for the valorisation of fish and seafood products | MAGRAMA | Promoting consumption of fish and seafood products | 2013 | Spain |
| Numerous promotional campaigns focused on valorisation of regional fish and seafood products, | Varios profesional organisation | Mussels, seabass, seabream, turbot and rainbow trout | 2007-2013 | Spain |
| Promotional campaign “Fish from Vanern Lake on the plate” | Götene commune | Northern pike, Vendace, walley and European perch | 2012-2013 | Sweden |
| Promotional campaign “Ready, Set, Fish!” | Swedish Seafood Council | Easy-to-prepare fishery and aquaculture products | 2008 | Sweden |
| Promotional campaign “Fish is nothing strange” | Swedish Seafood Council | Fish and shellfish | 2012 | Sweden |

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| Title of the campaign | Organizers | Focus areas/focus species | Time period | Member State/region |
|--|--|--|--------------------|--|
| Promotional campaign “Passion for food” | Swedish Seafood Council | Fresh fish, lobster and oyster | 2011-2012 | Sweden |
| Promotional campaign “Easy-to-prepare fish as a part of Matlandet Gotland» | Regional Agricultural Society | Fresh fish, mainly flounder, halibut and herring | 2013 | Sweden |
| High school project for sustainable fisheries | De La Gardie High School, Lidköping | Fresh burbot and vendace | 2010 | Sweden |
| Promotional campaign “Food of the midnight sun” | FOG Tornedalen-Haparanda Skärgård | Local fresh fish species | 2012 - 2014 | Sweden |
| Promotional campaign “Connecting the Fisheries Sector” | North Devon+ | Promotion of local seafood | 2007 - 2013 | Devon, United Kingdom |
| Promotional campaign “Seafood See Here!” | Moray Firth Partnership | Promotion of locally landed fish | 2014 | Moray Firth, North and East coasts of Scotland United Kingdom |
| Promotional campaign for Sustainable Fish Universities | Sustain - The Alliance for better food and farming | Promotion of sustainable seafood production | 2012 – 2013 | London, Brighton, Bournemouth, Newcastle United Kingdom |

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