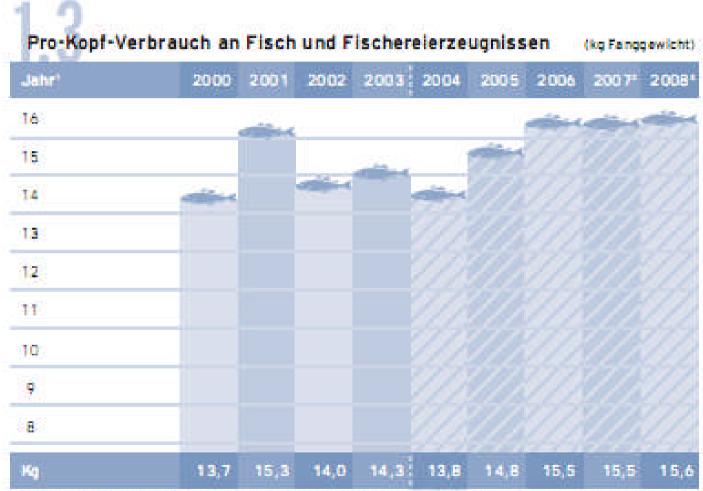
Customers opinion



Where do people buy fish in Germany?



Fish consumption "per head" in Germany 2000-2008



¹ Angaben ab 2004 sind aufgrund der EU-Erweiterung nicht vergleichbar mit Daten vor 2004. ² Berichtigt. ² Vorläufig.

The most popular fish product groups



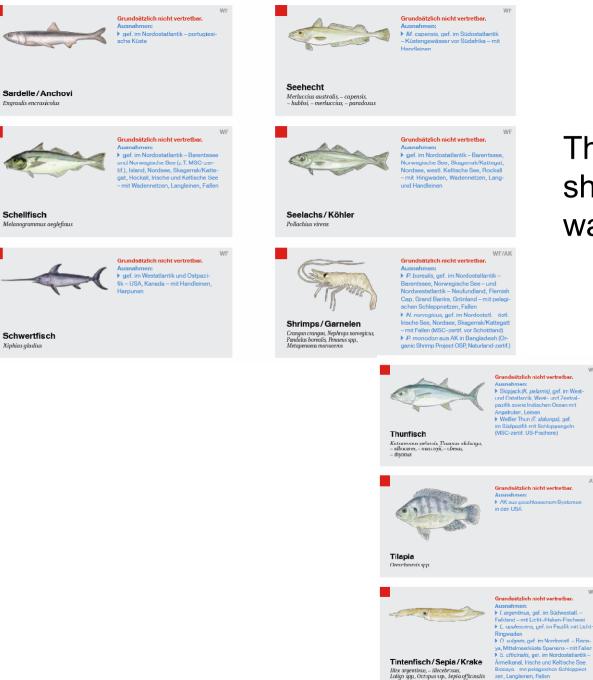


Greenpeace and WWF

Shopping Guidelines







The first Greenpeace shopping guidebook was published in 2005



Grundsätzlich nicht vertretber. Ausnehmen: gef. m Nordostalantik – Irische urd Kaltsche See. Östl Ärmelizanal – mit Langleinen, Angel-Tischerei aus ak. Kin Legunen und mit Ienks an Land, Griechenland

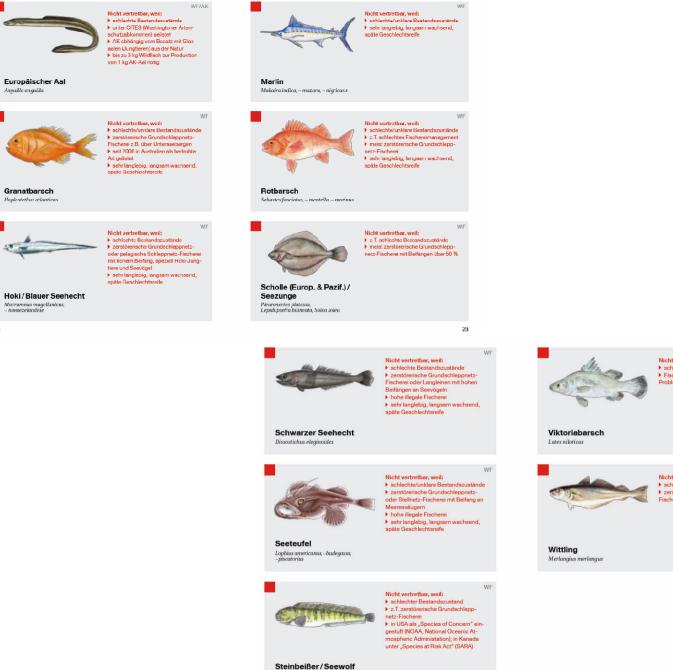
WF/AK

Wolfsbarsch / Loup de mer Dicentrarchus labrax

Alaska-Seelachs/-Pollack



Dornhai/Seeaal/ Schillerlocke



Anarhichas lupus



22

WWF fish shopping guidebook 2009



Treffen Sie eine qute Wahl!

Nutzen Sie Ihren Einfluss als Verbraucher, um das Fischangebot zu verändern. So helfen Sie, die Meere und unsere Ressourcen zu schützen

Z = Zucht, W = Wild, 🛷 steht für eine nachhaltige Fischerel.

Gute Wahl

Nicht überfischt; gute Zucht; minimaler Umwelteinfluss

Zweite Wahl

Fanzmethoden belasten die Natur. Zucht ist kritisch. Lieber grünmarkierte Arten wählen.

Lieber nicht

Diese Arten werden stark befischt. Die Art der Zucht oder des Fangs greift stark in die Natur ein.

Aal Europe		W/Z
Alaska Seelachs	/NO-Pazitk	w

w

Z

7

w

w

Z

w

w

w

w

_w

- 147

w

W

W

- Alaska Seelachs NW-Pazifk
- Dorade Mittelmeer_
- Dorade, Bio Mittelmeer Dornhal/Schillerlocke NO-/NW-Atlantik __W
- Dorsch Ostsee
- Flunder Ostsee
- Forele Chie, Europa

Forele, Blb Europa Garnele, Elsmeer/Kaltwasser

- 🥟 / NÓ- / NW-Atlantik 💷 Garnele/Nord seekrabbe
- Garnele /Shrimp tropisch
- W/7 Garnele/Shrimp, Blo
- Granatbarsch Hal weltweit
- Hellbutt 🔗 _
- Hellbutt, Schwarzer/WelßerNO-Atlantik __W
- Hering 🖉 / NO-Atlantik
- Herling nördliche, zentrale Ostsee... Hering westliche Ostsee_
- Kabeljau Island ____
- Kabellau NO-Arktis Kabeljau NO-Atantik, Ostsee
- 🔲 Kabeljau, Pazifilscher 🌮 Karpfen Deutschland Kliesche Nordsee Klesche, Pazhlsche Lachs Chile Lachs Norwegen, Schotland Lachs, Bio Irland, Schottland, Norwegen Z Lachs NO-Atlantik w Lachs, Pazifischer Ost-Pazifik. 104 Lachs, Pazifischer West-Pazifik w 🔲 Lachs, Alaska Wild 🧷 w Leng NO-/NW-Atlantik W Makrele NO-Atlantik w Marlin, Blauer Indopazifk w Pangasius Vietnan 7 Pangasius, Elo Vietnam Retbarsch NO-Atlantik w Sardelle NO-Atlantik Samiling Mittelmoor Samiline NO-Atlantik Schellfisch NO-Atlantik w Schellfisch Nordsee, Now. See, NO-Arktis_JV Scholle Nordsee w Scholle Ostsee W

Kabeljau, Pazifischer.

Scholle, Pazifische Schwertfisch weltweit Seehecht NO-Atlantik. Seehecht SW-Atlantik Seehecht 🛷 💼 Seelachs/Köhler 💋 /Nordsee Secteurel NO-/90-Atlantik Seezunge ND-Atlantik Shapper weitweit Sprotte NO-Atlantk_ Steinbeißer NO-Atlantik Tilapia Asier, Afrika, Lateinanerika. Tilapia, Bio Honduras, Israel . Tunfisch, Benito/Skiplack Tunfisch, Gelbflossen Tunfisch, Großaugen Tunfisch, Rcter/Elauflossen W/Z Tunfisch, Welßer Tuntisch, Weißer 🔗 Victoriabarsch Wolfsbarsch Mitteimeer Wolfsbarsch, Blo Mittelmeer. Zander Osteuropa_ Zander Ø/Westeuropa.

Rückantwort

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Diesen Abschnitt bitte ansfüllen, abtrennen und in einem frankierten Umschlag senden an:
WWF Deutschland Frau Saudra Martia Rebetörker Straße 55
60326 Frankfurt an Main
oder einfach per Fax an 069/79144112
Meine Anschrift:

Name	Vomane	
Strafe/Nr.		
PLZOrt		Y0125

Supermarket ranking Germany 2009 (Greenpeace)



Abbildung 2: Supermarktranking 2009, Ø Giraffentoast/Greenpeace

Changes and develoment in the seafood range of German supermarkets

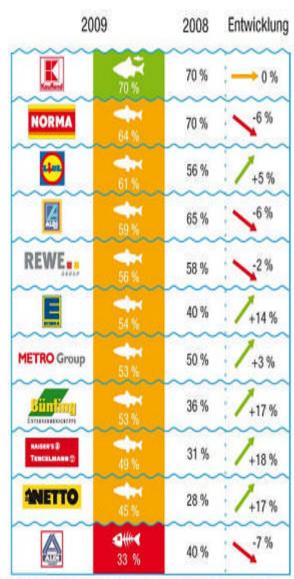


Abb. 3 Rankingvergleich 2008-2009, © Giraffentoast/Greenpeace

10 of 11 companies developed a buying policy for fish and seafood

9 of 11 companies published the buying policy on their homepage

10 of 11 companies are publishing the issue "Seafood and Sustainability" on their website, magazines and advertising.

Range optimization due to the Greenpeace supermarket ranking:

Delisting of:

•<u>Redfish</u>: 8 of 11 companies

- •Plaice: 5 of 11 companies
- •Blue Fin Tuna: 10 of 11 companies

•<u>Yellow Fin Tuna</u>: 11 of 11 companies

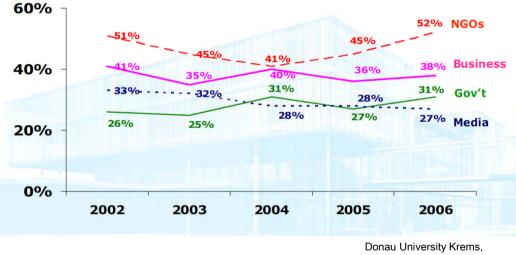
•Monkfish: 8 of 11 companies

People's confidence in NGO's in Europe

NGO's: 52%

Gouvernment: 31%





2006

Germany: NGO's: 57% Gouvernment: 47% NGO's are 2010 the most trustful organisation in Germany

(Edelmann Trust Barometer 2010)





Ethnical products, including Fairtrade, organic and sustainability labels are one of the four <u>MEGATRENDS</u> in the food retail sector identified by Nielsen Media Research company.





All of the major retailers in Europe have sustainable sourcing policies and publish seafood information as a part of their corporate social responsibility commitments.

Examples:

Wal-Mart announced in 2006 that they would supply 100% MSC-certified seafood by 2011. WAL-MART

Edeka collaborates with WWF and supports MSC. They publish the partnership on their website.

Redfish does not belong to the assortement of Aldi and Lidl anymore due to recommendations of Greenpeace.

Norma has implemented a traceability system on their homepage where the consumer can follow up the catching day, the ship, the catching **NORMA** method and area with an internet code which is printed on the product.

Kaufland is labelling seafood products with their own green logo and publishes their fish buying policy on their website.

Tesco promised to buy all of their Seafood from from responsibly-manages fisheries. **TESCO**

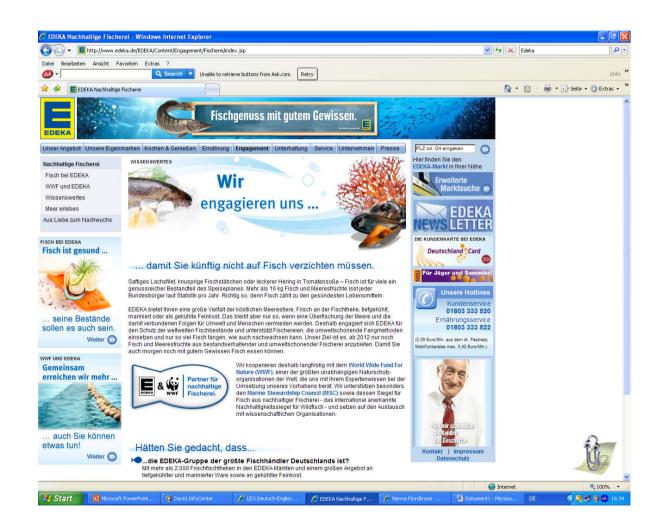
Supermarkets' fish sustainability information



Website Lidl Germany

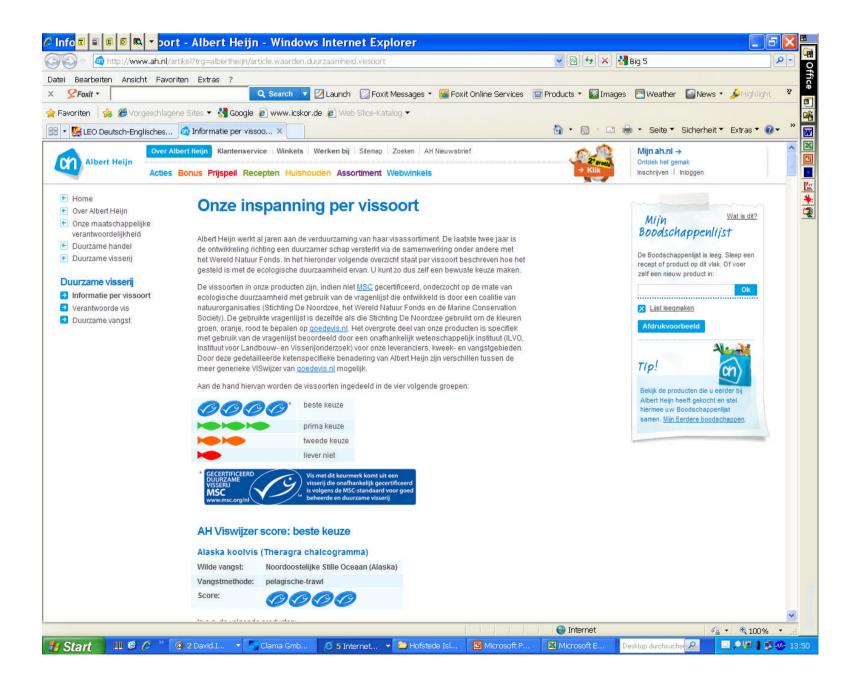


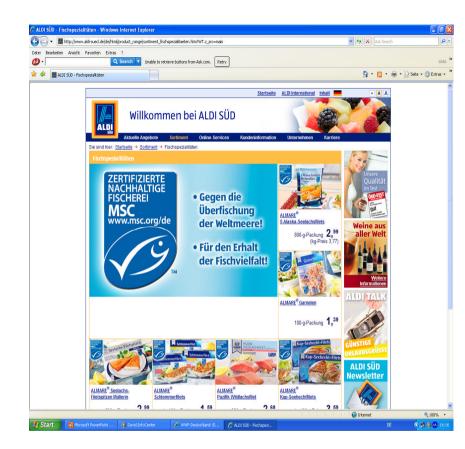
Website Edeka Germany



Edeka corporates with WWF and MSC

Website Albert Heijn Netherlands





Website Aldi South Germany



Website Aldi North Germany



17 Products with MSC Logo.

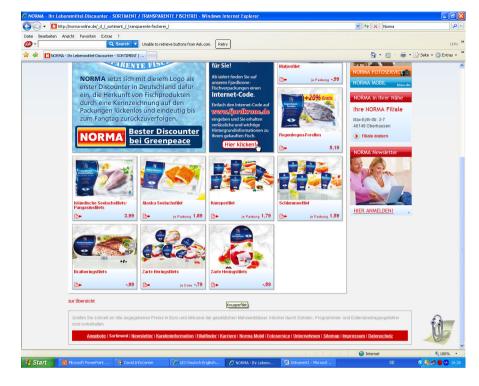


Website Norma Germany



Traceability System Norma

Every fish product can be traced back to the origin with the product code.





Website Kaufland Germany

Kaufland explains every label the consumers find on their products





Kaufland publishes their fish buying policy

Fish sustainability information schemes are generally of two main types.

Certification schemes which lead to an ecolabel to confirm that the product has come from a sustainable source.



Recommondation lists which are prepared by environmental NGO's provide customers with a system (traffic light) to indicate the sustainability.

Greenpeace GREEN WWF

Development MSC

Products with MSC certificate in 2008

Erzeugnisse mit MSC-Logo zum Ende des Geschäftsjahres (31. März 2008) 1.421 Companies with MSC certificate in Unternehmen mit einem MSC Produktketten-Zertifikat zum Ende des Geschäftsjahres (31. März 2008) 2007 2008

WWF Ecolabel Ranking

(against criteria established by WWF)

6.2.1 Ecolabel Ranking

Below is a simplified visualisation of the ranking of each ecolabel put through this assessment. Each of these labels claim to improve fishery and marine ecosystem health and sustainability.

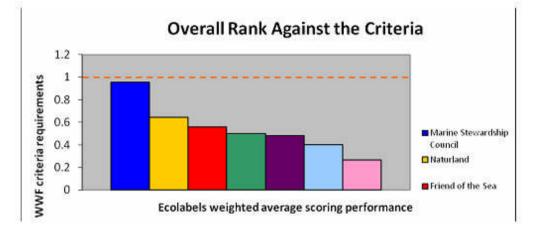


Table xlix. Weighted average scores of individual ecolabels

The Table below summarises weighted average scores of individual ecolabels for all topics in total.

tanking Ecolabel name				
		Weighted average score	in % to Assessment criteria score requirements	Appraisal indicator
1	Marine Stewardship Council	1.91	95.63%	Compliant
2	Naturland	1.29	64.56%	Semi-compliant
3	Friend of the Sea	1.12	55.83%	Semi-compliant
4	Krav	1.00	50.00%	Semi-compliant
5	AIDCP	0.96	48.06%	Non-compliant
6	MEL-Japan	0.81	40.29%	Non-compliant
7	Southern Rocklobster	0.53	26.70%	Non-compliant



Result of a Study of MRAG Itd. UK*, Jan. 2010:

*Marine Resources and Fishery Consultants

Box 1 Monitoring data on seafood campaigns from WWF NL and WWF Germany

WWF Netherlands

During the campaign period (2006–2008), 3 million seafood guides were distributed, and 35,000 online guides were downloaded (as pdf). A further 1.8 million seafood guides were printed in May 2009.

The surveys showed that the percentage of people who knew about the existence of the Dutch seafood guide rose from 31% in 2006 to 36% in 2008. Usage of the guide was highest in the over-49 year-old age category (34% in 2008, up from 27% in 2006). However, the largest increase was in the 18–34 year-old age group which rose 12 percentage points, from only 11% using the guide to inform their purchasing decisions in 2006, to 23% using it in 2008. In the 35–49 year-old age category, there was a slight increase from 23% to 25% using it.

WWF Germany

WWF Germany distributed a print run of 1.5 million seafood guides for the previous version of the guide, and a further 2 million are planned to be distributed in 2009. This shows a significant increase in circulation from the first edition of the guide in 2001 which began with a print run of 10,000, followed by 20,000 in 2003. The WWF 'fish card' has also been used since 2006 as a magazine insert (e.g. National Geographic Deutschland as an insert for their subscription issue).

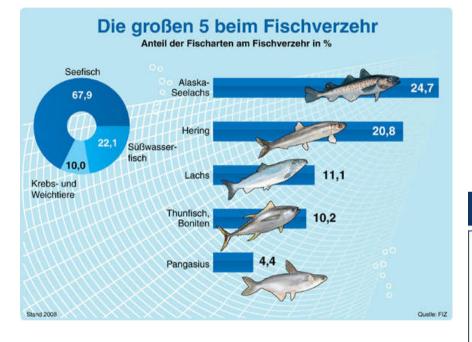
Source: Internal evaluation document 'Evaluatie Leven in Zee2', May 2008 (after active seafood campaigns in 2006-2008). Highlights only, full evaluation report = 12 pages. Translation from Dutch by Miriam van Gool, WWF.

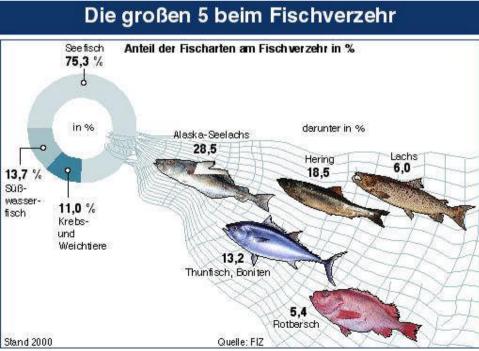
Most important fish species in Germany 2006-2008

Alaska-Seelachs Hering Lachs Thunfisch, Boniten Pangasius*	26,5 17,7 11,7 10,7	24,9 17,3 12,4 10,7	24,7 20,8 11,1	
Lachs Thunfisch, Boniten Pangasius*	11.7 10.7	12.4		
Thunfisch, Boniten Rengesius*	10,7		11,1	
Pangaslus ^a	10,7	10.7		
			10,2	
	2.4	3,0	4.4	
Forellen	4.0	4,8	4.4	
Seelachs (Köhler)	4.0	3.4	3.6	
Rotbarsch	4.0	3,1,	2,7	
Kabeljau	2,4 3,4	4.0	.2.7	
Se ehe cht	3.4	3,4 3,1 4,0 2,7	2,4	
Makrele	7,7	1,2 1,1	1,4	
Karptein	1,1	1.1	1.0	
Victoriasee-Barsch ⁴	1.0	1.0	0,9	
Scholle	1.0	1.0	0.8	
Zander*	1.1	1.0	0.7	
Sardina	0.6	0.5	0.7	
Schellfisch	0,3	0.5	0.6	
Se et eufe i	0,5	0,6	0.6	
Sonstige	6,5	6,8	6,3	
Gesamt	100	100	100	

Rangfolge der bedeutendsten See- und Süßwasserfische in Prozent

Consumption of fish in Germany – BIG 5





Consumer awareness and priorities

Consumer awareness about fish sustainability issues is increasing.

WWF consumer surveys conducted in the Netherlands and Germany indicated an increase in understanding of the term "sustainable" fisheries amongst consumers from 28% in 2006 to 51% in 2008. (MRAG, Jan. 2010)

The consumer survey carried out by WWF Germany indicated that 'no overfishing' and 'fishing does not harm the environment' were fourth and fifth on a list of nine priorities for consumers seafood purchasing decisions over the period 2006–2008, influencing the purchasing decisions of 40-45% of people interviewed (Table 14).

	Oct '08	Apr '07	Feb '07	Sept '06
Product freshness	83	84	82	81
Price	76	73	77	71
Fewer fish bones	58	61	59	62
No overfishing	45	49	45	39
Fishery does not harm environment	41	41	43	41
Product caries environmental label	22	30	31	23
Brand	34	28	28	30
Product from wild catches	12	14	15	16
Product from aquaculture	11	12	11	11

Table 14 Percentage of consumers for whom various factors are important in fish purchasing decisions

Source: Summary of FORSA opinion poll results 2007 to 2008 on sustainable fisheries for WWF Germany³⁸.

New items which found its way back into the German market with/because of the MSC-Label

•Cape Hake





•Pacific Cod

Pacific Salmon



•North Sea flounder



Thank you for your attention!