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Factors Influencing Consumer Markets for Yellow Perch

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Per-capita fish consumption in the United States continues to grow—up some 50 percent since the 1980s—and total fish consumption is now worth nearly \$1 billion. An aging population and increasing ethnic diversification in America are expected to further increase fish consumption 25.2 percent by 2020, according to USDA. As the world's natural fisheries decline in ability to meet demand, aquaculture production has grown rapidly. Much of that growth has come from outside the U.S., but interest in capturing more of the aquaculture industry in Ohio and other Midwest states has been increasing. This study is part of a larger project intended to identify the potential for further growth. The work reported here is being conducted in the second half of 2004 and focuses on the demand for yellow perch. A related study is defining the potential production capacity and interest by potential new entrants into the aquaculture industry in Ohio.

Objectives

Yellow perch production is believed to have considerable potential for expansion in Ohio. Research scientists and development specialists are assessing the technical aspects for enhancing production and processing. This research is consumer focused, with the overall objective of understanding market behavior and consumer preferences for farm-raised fish. We are evaluating consumer preferences regarding fish products, purchase and consumption patterns, product attributes that guide purchases, and the role of price in purchase decisions.

Methods

Two lines of inquiry are used to collect data. Key informant interviews of leading perch processors,

wholesalers, distributors and retailers provide anecdotal understanding of consumer preferences. These are structured interviews designed to understand supply-chain factors driving consumer preferences, and will guide collection of consumer preference information. Consumer-preference and product-attitude information will be elicited through two lines of inquiry: fish purchasers will be queried by surveyors in random customer-intercept interviews at representative retail locations, and fish consumers at restaurants and community fish-fry events will be given a short written questionnaire to respond to at the time of purchase. Core study questions include: Who eats yellow perch? Who buys yellow perch? Why do they buy and eat yellow perch? What product attributes are most important to buyers and consumers? Where are the price-point constraints? What are the substitutes for and compliments to yellow perch?

Preliminary Results

Preliminary findings indicate that health issues and U.S. demographic shifts in age and ethnicity may enhance demand potential for yellow perch. However, inconsistent quality and availability, erratic price behavior, and consumer knowledge are impediments to purchases of yellow perch. Results and discussion presented in this update will discuss consumer responses regarding specific attitudes and product attributes that influence purchases. These will be used to form recommendations for existing and potential producers and other firms in the supply chain. Interviews with key players in the fish-marketing sector will be used to identify opportunities and constraints to expanding perch production.

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