

**Results of the questionnaire  
survey „Marketing of aquaculture  
products in Central and Eastern  
Europe”**

**Laszlo Varadi  
HAKI**

# Marketing Questionnaire

First draft prepared by FCFGS (Dr. Andrei Bogeruk), that was discussed in Hungary on 3rd of May 2010

Questionnaire revised by HAKI (Mr. Gergo Gyalog) and University of Debrecen (Dr. Istvan Szucs)

Request letters sent to NACEE countries (selected institutes) on 9th of June 2010 (deadline July 15)

Total 5 responses received by 23rd of August 2010

# **Questionnaire**

„Marketing of aquaculture products in Central and Eastern Europe”

## **Structure of the questionnaire**

Theme 0. General Information (4 questions)

Theme 1. Consumption (6 questions)

Theme 2. Production (8 questions)

Theme 3. Processing (5 questions)

Theme 4. Market situation (10 questions)

# Responses to the Marketing Questionnaire

Country	Response
Armenia	Red
Belarus	Red
Bulgaria	Red
Croatia	Red
Czech R.	Green
Estonia	Red
Hungary	Red
Latvia	Red
Lithuania	Green
Moldova	Green
Montenegro	Red
Poland	Green
Romania	Red
Russia	Red
Ukraine	Green

# Proposal

Ask the non-respondents again to complete questionnaire  
by a reasonable deadline

Process the questionnaires and write a report by HAKI

Publish the report on NACEE website

Complete the report with the results of other relevant studies and publish it in professional journals after editing

**FAO-NACEE Workshop on Current Issues and Challenges  
in the Marketing of Aquaculture Products**

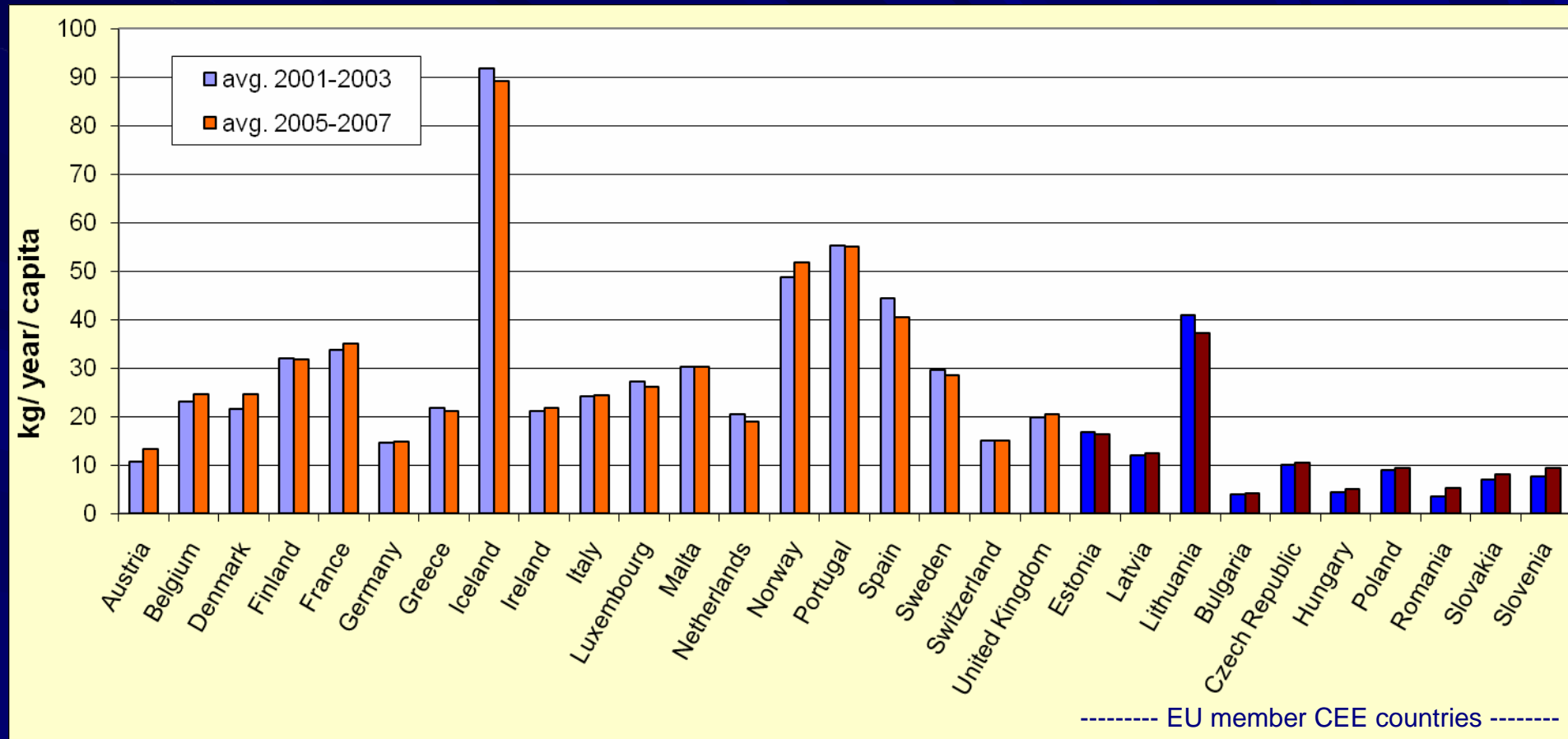
Tyumen, Russia, August 26, 2010

# Fish consumption in Central and Eastern Europe

**Gergő Gyalog - László Váradi**

Research Institute for Fisheries, Aquaculture and Irrigation (HAKI),  
Hungary

# Fish consumption in EEA

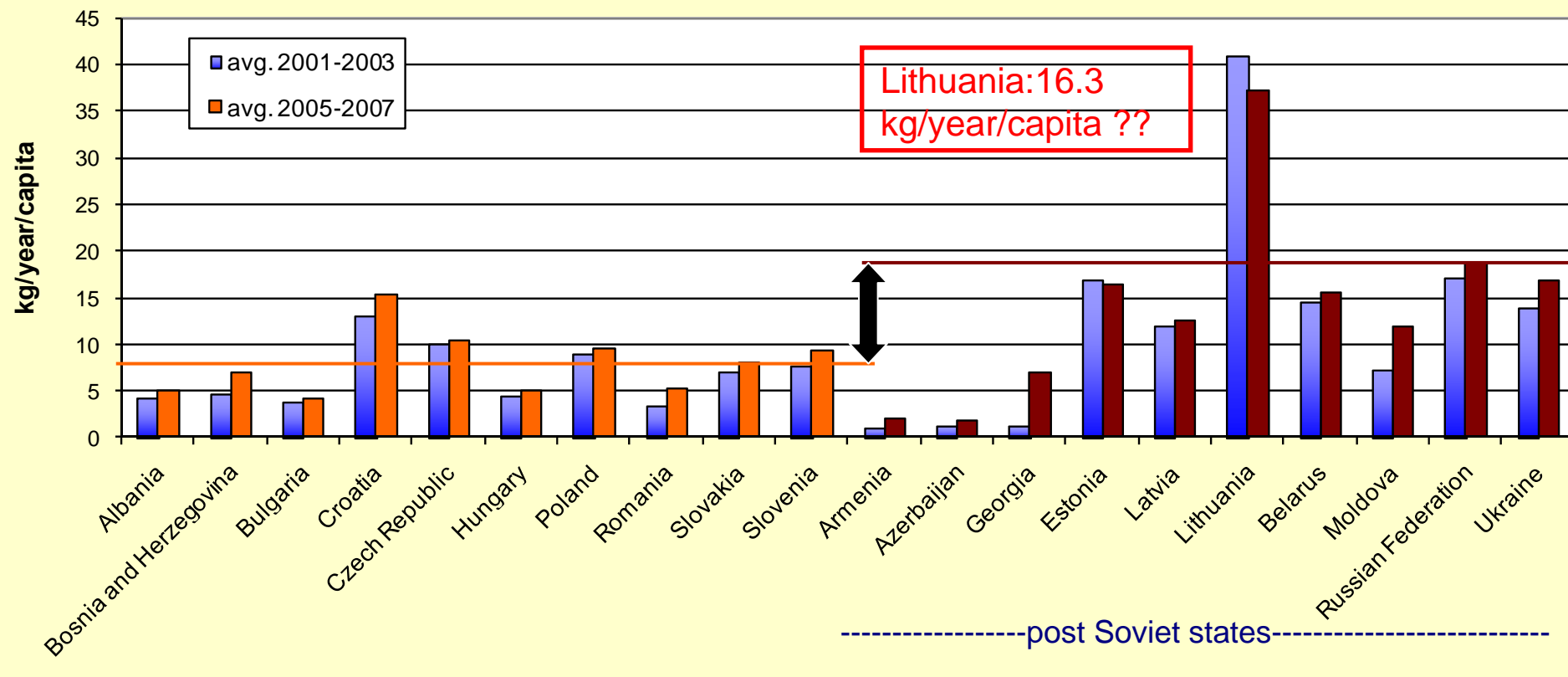


## o Factors affecting fish consumption:

- o Share of coastal population
- o Share of urban population
- o GDP/capita

o Decreasing fish consumption in some Mediterranean and Northern countries (incl. Baltic states)

# Fish consumption in CEE



## o Factors affecting fish consumption:

- o „Soviet factor“ (post Soviet states: 17.2 kg/cap., other: 7.9 kg/cap.)
- o GDP/capita
- o Share of urban population
- o **Share of coastal population is not relevant !!!**



# Reasons for „soviet factor” ?

- High share of population in megapolises, large cities (over 300,000 people)
  - Soviet era: big industrialized centers in Russia, Ukraine, Belarus etc.
  - High purchasing power of city dwellers (High difference in post-soviet countries between avg. urban and rural income)
  - Retail chain's dominance, supply is increasingly based on imported seafood
  - „Imported” consumption patterns
    - Keywords: *healthy life style, raising importance of quality and taste, expensive seafood delicacies, value added products*
  - City dwellers: engine of seafood consumption boom in many states
    - Russia: Moscow represents 25% of total seafood consumption
    - Ukraine: Megapolises represent 70% of total seafood consumption

# Reasons for „soviet factor” ?

## ○ Traditions

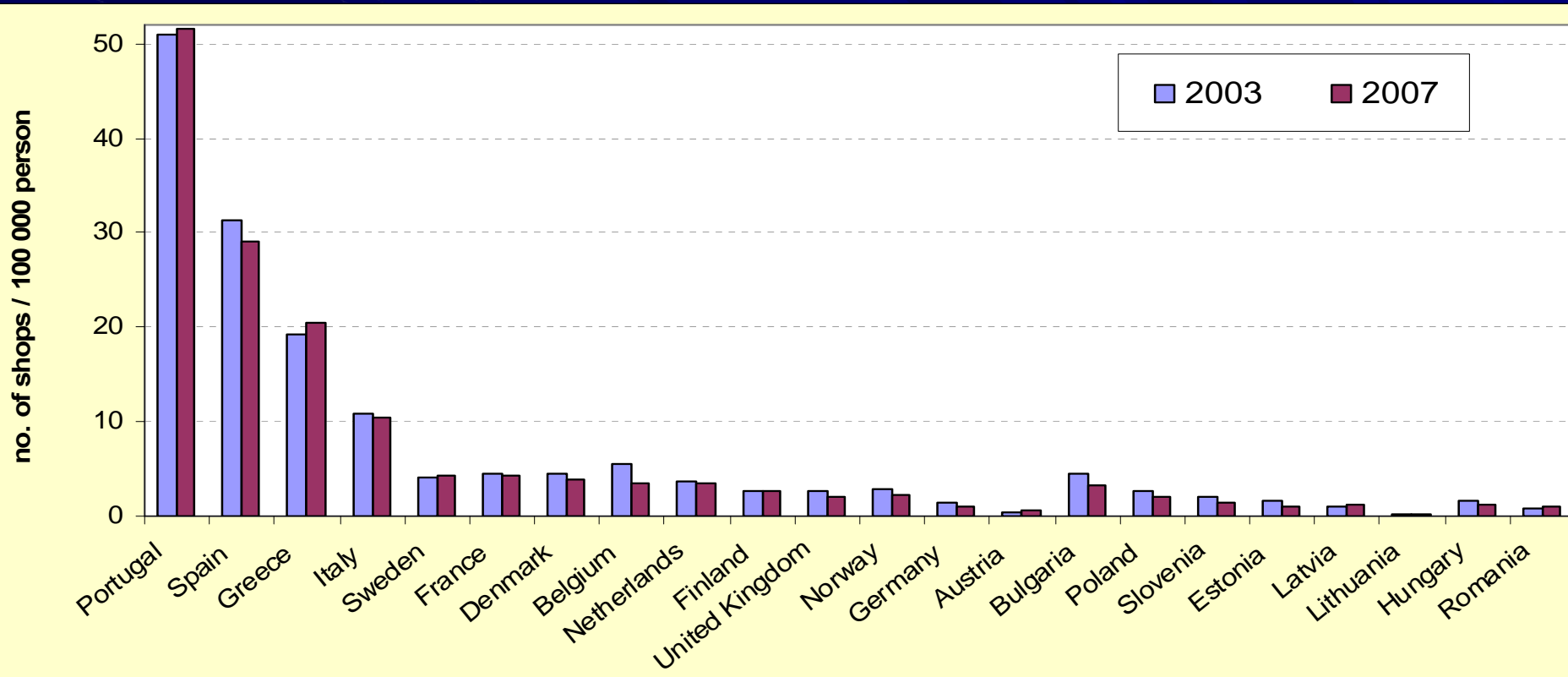
- Orthodox population in some areas: over 160 fast days when meat must not be eaten
- Coastal or riverside population in poor areas (e.g. Moldova): fish is easily accessible source of protein
- In post-soviet countries meat consumption is low compared to EU-member CEE countries, while fish consumption is higher
- In Western Europe there is no statistical relationship between meat and fish consumption

# Reasons for „soviet factor” ?

- Lower prices
  - Retail price of common carp (info. from the questionnaires):
    - Poland: 3.8 EUR/kg
    - Hungary: 3.4 EUR/kg
    - Czech Rep.: 3.4 EUR/kg
    - Moldova: 2.8 EUR/kg
    - Lithuania: 2 EUR/kg
    - Ukraine: 1.9 EUR/kg
- Developed supply in the past: fish shops in the larger cities of the former Soviet Union offered a wide variety of fish (these chains are still exist)

# Change in the structure of retail sector

Number of specialised fish shops (kiosks) per 100 000 person in EEA (source: EUROSTAT)



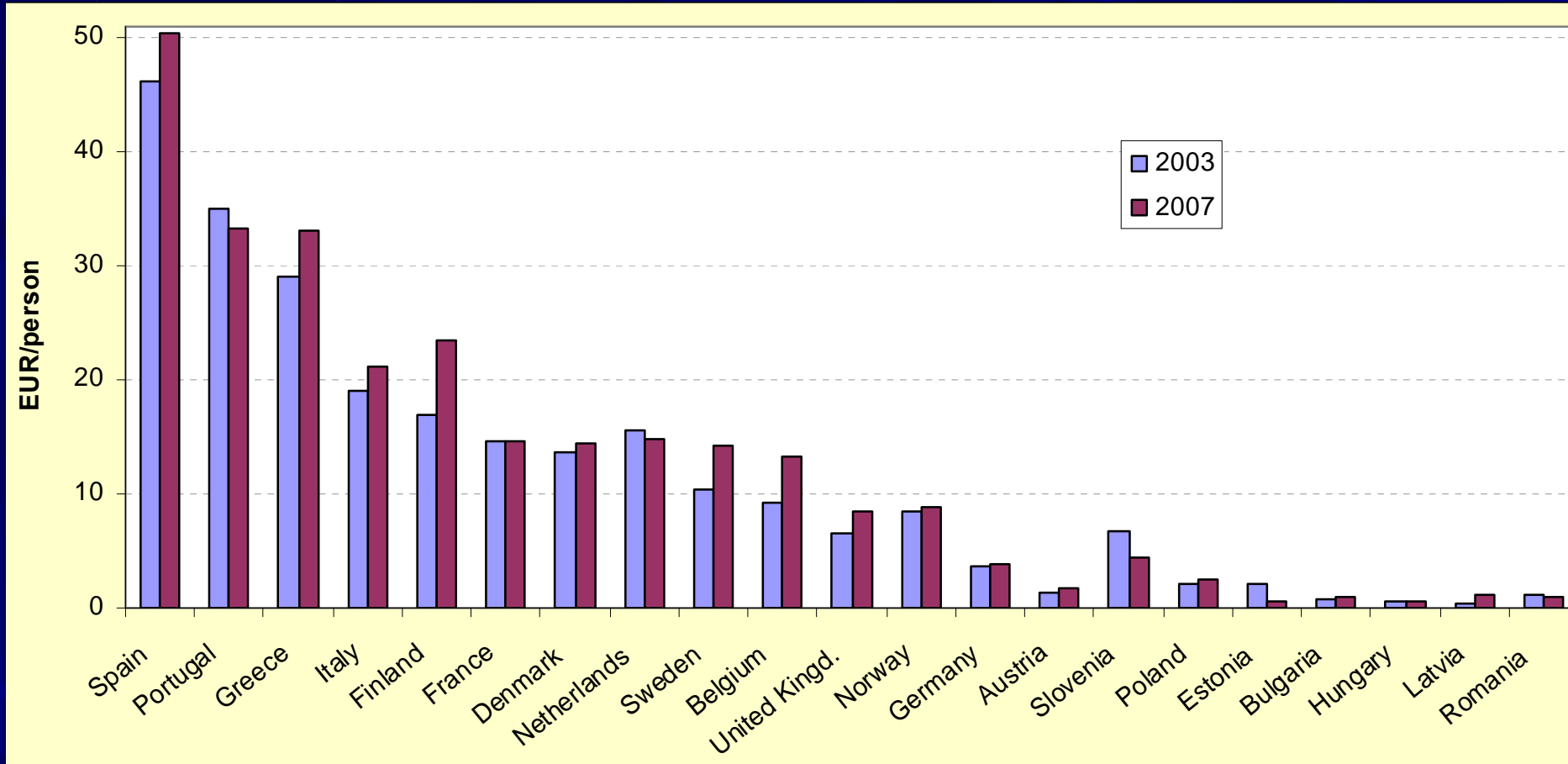
- o Specialised fish shops losing ground in CEE

- o This is not so obvious in Western Europe

- o Few number of specialised fish shops in CEE, inadequate supply for rural population

# Change in the structure of retail sector

Turnover of specialised fish shops (kiosks) per person in EEA (source: EUROSTAT)



o In Western European countries turnover of fish shops is increasing

o In CEE (EU-members) fish sales are getting more and more dominated by retail chains at fish shops' expense

# Structure of trade and consumption

- Share of freshwater fish in total seafood consumption is 20-30% in CEE
- Share of import is around 50-60% in total seafood consumption
- Low share of fish of local aquaculture origin (mainly carp and trout): 5-20%
- Still no significant presence in consumption of locally cultured emerging fish species (eel, sturgeon)
- Strong seasonality in carp consumption still exists (70% percent in December)
- Urban people tend to consume fish (high value added processed products) all the year