

## POST OBSERVATIONS

In the past, when prices in Russia were determined by the administration, fish and seafood represented the most economical source of protein available to Russian consumers (1.5--2.0 times cheaper than meat and poultry). At the present time, prices have increased significantly such that many fish and seafood species have become more expensive than poultry.

In 1990-91, the annual per capita consumption of fish and seafood in Russia was more than 20 kilograms; by 1992 the figure had dropped to 13.3 kilograms; and in 1993 per capita consumption had fallen to 9.0 kilograms. In accordance with the Russian fishery development program, the target number for 1995 has been set at 16.0 kilograms per capita.

The bulk of fish and seafood products from the oceans are processed on-board Russian vessels. Frozen fish and seafood is used as a raw material by the on-shore operations to produce smoked, salted or dry-cured fish, as well as preserves and canned food. Fish products obtained from freshwater reservoirs is usually sold live, with the main species found throughout the Russian Federation being *Cyprinidae* (carp).

Because it is no longer profitable to transport live fish over long distances due to increases in fuel prices, deliveries of live freshwater fish to the markets have been reduced. Deliveries of chilled and dressed products (gutted, fillet, etc.) are expected to increase. Most processing of freshwater fish is carried out near the breeding operations, and waste products from processing is being used in the manufacture of fish and cattle feed.

Many on-shore canneries have been drastically affected by shortages of raw materials (due to the decline in domestic Russian catches). Some canneries have started using more freshwater fish for processing and manufacturing. The most commonly used species for this type of transfer is the silver carp obtained from aquaculture enterprises.

### Wholesale and Retail

Apart from the deliveries required to fulfil national state requirements through the "Fish Market" Joint Stock Company, the Fisheries Committee also carries out the free sale of fish and seafood products on the basis of contracts and long-term agreements. Such contracts are concluded between fish and seafood producers and the wholesale trade and production enterprises located in the larger cities across Russia.

At the present time, trade and production enterprises are being reformed into joint-stock companies. These companies receive and handle large quantities of fish and seafood, hold the product in cold storage, and then distribute the goods to the Russian retail trade network. The retail trade network consists of the specialized shops and outlets which handle fish and seafood products. It is through Russian retail networks that the large volumes of fish and seafood are offered to the general population for consumption. Retail outlets of this type as a rule are not state enterprises, have been privatised under the liberalised Russian economy.