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## **Russian Federation**

### **Fishery Products**

#### **Annual**

#### **2000**

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#### **Report Highlights:**

In 2000, Russian quotas for valuable fish species like caviar, cod, and pollack were significantly reduced. Consequently, Russian seafood output continues to decline, as fishing fleets attempt to obtain a greater percentage of their catch in international waters. U.S. fishermen exported over 630 MT of canned salmon to Russia, filling a void left by falling domestic production.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Moscow [RS1], RS

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## Executive Summary

Despite quota limitations and governmental efforts to conserve fishery resources, Russia's annual legally permissible catch is still estimated at about 9 million MT, 5 million tons of which is in the Russian economic zone. Some 3.6 million MT of Russia's fishery quota rights are in the economic zones of other countries. However, Russian fishing companies have been unable to fully respond to this opportunity because of underfinancing and worn fishing vessels. Thus while, the actual total catch in 1999 was 5.5 million MT, in 2000, the total catch in Russia is expected to be 7 percent less. As a result of dwindling output in Russia, significant niche market opportunities for imported seafood products are opening up. This year, U.S. exporters of canned salmon supplied over 630 MT to the Russian Far East, well above the 29 MT three-year commercial market average (1996 - 1998).

## Production

Post's 1999 estimate of Russia's total catch has been revised upward to 5.5 million MT, as major trading partners such as Norway and Japan are providing better import data in exchange for fishing quota rights. However, no one accurately knows how much of the total catch remains unreported. In 2000, the total Russian catch is estimated at 5.1 million MT, or about 7 percent less than the final 1999 estimate.

According to Russian statistics, from January to July 2000, domestic fishermen caught 2.7 million MT of seafood products, about 8 percent less than during the same period last year. This is partially the result of a 400,000 MT reduction in the annual quota for walleye pollack - the main catch in Far Eastern seas where the majority of Russia's seafood industry is concentrated. Reportedly, the Russian State Committee on Fisheries (Goskomrybolovstvo) is considering not issuing walleye pollack fishing licenses to fishermen from Japan, China, and South Korea next year.

During 1999, Russian fishing fleets fell far short of being able to fulfill of allowable catches in international waters. An aging, underfinanced fishing fleet continues to limit output. Quota allocations from Mauritania, Morocco, Angola, Japan, and other countries were only 40 percent fulfilled by Russian sea vessels.

A sharp fall in commercial fishing catches outside Russia's territorial waters resulted from privatization that broke-up large state owned fishing fleets into a number of tiny, poorly financed companies. These smaller companies are experiencing difficulty in organizing expeditionary flotillas in the open ocean and far-away coastal waters. Goskomrybolovstvo intends to organize several large ocean expeditions for commercial fishing outside Russian territorial waters, as it reduces fishing quotas within its own territorial waters, particularly for pollack, crab, sea urchins, and other types of bio-resources caught in the Far East basin. Production inefficiency and tighter regulation of seafood resources through a quota and licensing system will lead to declining catches in 2001 and beyond.

**Total Edible Fish Products**

PSD Table						
Country:	Russian Federation					
Commodity:	Total Edible Fishery Products					
		1999		2000		2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Landings/Comm'l Catch	4100000	5500000	4050000	5100000	0	5000000
Fresh/Frz Production	1300000	3500000	2000000	3250000	0	3200000
Canned Production	140,000	180,000	150000	185000	0	195000
Cured Production	340000	400000	350000	450000	0	500000
Total Production	1780000	4080000	1800000	3885000	0	3895000
Fresh/Frozen Imports	350000	600,000	350000	650000	0	650000
Canned Imports	40000	60000	45000	65000	0	65000
Cured Imports	50000	120000	50000	130000	0	140000
TOTAL Imports	440000	780000	445000	845000	0	855000
Fresh/Frozen Exports	2680000	3180000	2690000	3000000	0	3000000
Canned Exports	14000	14000	15000	15000	0	16000
Cured Exports	120000	120000	130000	130000	0	135000
TOTAL Exports	2814000	3314000	2835000	3145000	0	3151000
Domestic Consumption	1060000	1546000	1060000	1585000	0	1600000

**Groundfish**

PSD Table						
Country:	Russian Federation					
Commodity:	Groundfish, Whole/Eviscerated					
		1999		2000		2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	450000	450000	380000	500000	0	450000
Total Production	2530000	3500000	2350000	3200000	0	3000000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	60000	400000	60000	450000	0	600000
TOTAL Imports	60000	400000	60000	450000	0	600000
TOTAL SUPPLY	3040000	4350000	2790000	4150000	0	4050000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	1700000	2350000	1500000	2280000	0	2250000
TOTAL Exports	1700000	2350000	1500000	2280000	0	2250000
Domestic Consumption	834100	1350000	820000	1280000	0	1250000
Other Use/Loss	125900	150000	125000	140000	0	130000
TOTAL Utilization	960000	1500000	945000	1420000	0	1380000
Ending Stocks	380000	500000	345000	450000	0	420000
TOTAL DISTRIBUTION	3040000	4350000	2790000	4150000	0	4050000

## Salmon Production

In 2000, Russia increased its salmon quota in the Far East from 198,000 MT in 1999 to 230,000 MT, as spawning of Siberian, hunchback, red, and other types of salmon, reportedly, were greater than predicted. During July, more than 150,000 MT of salmon were caught in the Far Eastern and Khabarovsk regions. A large catch of red salmon was also reported. However, Goskomrybolovstvo shortened the fishing season for pink salmon to allow spawning numbers to increase.

PSD Table						
Country:	Russian Federation					
Commodity:	Salmon, Whole/Eviscerated					
		1999		2000		2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	11000	10000	9000	9000	0	10000
Total Production	170000	170000	150000	230000	0	180000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	3000	3000	2500	3000	0	3500
TOTAL Imports	3000	3000	2500	3000	0	3500
TOTAL SUPPLY	184000	183000	161500	242000	0	193500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	66000	66000	62000	100000	0	75000
TOTAL Exports	66000	66000	62000	100000	0	75000
Domestic Consumption	100000	100000	83500	120000	0	100000
Other Use/Loss	9000	9000	9000	12000	0	9500
TOTAL Utilization	109000	109000	92500	132000	0	109500
Ending Stocks	9000	9000	7000	10000	0	9000
TOTAL DISTRIBUTION	184000	184000	161500	242000	0	193500

**Table 1: Russian Production of Fish and Fish Products, 1995 - 99, MT**

Product	1995	1996	1997	1998	1999
Fish and other fish products:					
Total catch	3,942,027	4,137,169	4,106,825	4,011,948	4,050,535
including:					
catch in internal basins	219,149	226,337	197,486	243,196	203,421
including in					
fresh basins	150,138	158,440	145,107	150,263	165,706
catch in Russian economic zones	2,961,671	3,235,597	3,253,578	2,776,481	2,615,187
catch in 200 mile zones of foreign countries	5,522,573	551,370	558,002	523,295	682,308
catch in open ocean areas outside of 200-mile zones	90,301	92,575	63,617	373,214	286,166
Catch by fish varieties:					
Herring	194,286	260,217	360,200	491,933	474,831
Sardine	24,425	32,895	16,058	16,202	15,733
Sprat	64,703	87,384	112,464	113,898	157,961
Saury	25,096	10,399	3,786	3,752	4,608
Lancet fish	n.d.	n.d.	n.d.	21,742	10,165
Pike-perch					4,365
Mackerel	61,029	50,828	70,441	84,511	73,726
Sea perch	34,665	31,964	26,119	27,626	21,752
Tagmackerel	105,039	90,126	n.d.	51,024	38,981
Plaice	54,458	57,062	61,979	75,406	85,154
Halibut	n.d.	n.d.	n.d.	17,979	204,504
Sturgeon, total	2,961	1,754	1,857	1,423	836
Coregonus, total	7,826	9,982	9,815	7,038	7,735
Salmon, total	116,888	112,849	160,935	167,725	170,382

Cod fish, total	2,699,666	2,921,547	2,759,292	2,374,074	1,972,093
including: cod (theragra)	356,675	419,520	423,640	340,002	316,153
chalcogramma (lat.)	2,178,160	2,312,837	2,115,385	1,877,404	1,425,485
merlin	61,791	n.d.	37,120	21,549	32,675
Total sea products and crayfish	109,105	142,137	128,152	125,290	151,935
including crayfishes and molluscs	97,776	137,638	123,784	120,500	149,084
including crabs	39,252	64,497	47,684	44,548	49,872
shrimp	6,667	12,811	3,157	6,100	13,501
molluscs	n.d.	60,330	73,920	69,852	85,709
Commodity food products					
canned products	1,811,139	2,229,639	2,429,198	2,519,664	2,628,282
Commodity food products					
non-canned products	1,657,239	2,072,140	2,251,346	2,375,208	2,468,873
Fish frozen	1,416,127	1,555,022	1,625,835	1,598,722	1,762,261
Fillet frozen	70,851	132,569	168,716	153,171	133,884
Salted herrings	28,543	23,735	22,704	33,667	26,442
Smocked fish	57,495	409	34,943	34,672	24,808
Fish dries and dry-cure	9,498	9,850	9,354	9,210	6,741
Spicy and marinade products	1,881	198	1,766	2,789	3,059
Culinary products	5,965	4,457	3,842	8,664	7,551
Fast frozen fish products	127	189	207	88	119
Balyk products	1,830	1,350	1,025	1,145	942
Food ground fish meat	52,064	78,869	56,741	51,290	46,400
Caviar , total	46,362	53,284	51,198	39,108	27,759
sturgeon	106	99	114	51	28
Salmon	3,266	752	2,823	2,827	6,358

Non food products	139,009	314,061	243,519	211,983	229,663
Fish and sea animals fat	8,224	6,381	3,283	2,668	2,522
Fish meal	n.d.	194,486	171,811	155,812	136,394

Source: Russian State Statistical Committee

### **Sturgeon and Caviar Production**

During 1999, Russia produced about 1,000 tons of sturgeon and exported about 100 tons of black caviar. That year, Russia's sturgeon quota in the Caspian basin stood at 560 MT. In 2000, Russia is expected to produce only about 400MT of sturgeon in the North Caspian Sea, partially because of a significant reduction in the sturgeon fishing quota. Consequently, black caviar production is expected to decrease to 40 MT. Reportedly, a governmental order to ban sturgeon fishing in the North Caspian Sea in 2002 is being prepared.

According to Russian environmentalists, one of the main reasons for reduced sturgeon numbers is the construction of several cascade hydro-electric stations on the Volga, and industrial pollution. They fear that the offshore oil and gas developments in the area could completely destroy sturgeon production. Similarly, in the Ural River 100 MT of sturgeon were caught, compared with a 360 MT quota. In the Azov sea basin, the sturgeon catch is expected to reach last year's levels, about 400 - 450 MT. If governmental proposals to ban sturgeon fishing in the Caspian Sea for ten years are adopted, black caviar exports will further decline, as sturgeon production in the Sea of Azov are insufficient to cover the market demand.

Although the Russian government is pursuing measures to control trading and plundering of its bio-resources, illegal sturgeon catches are estimated to be at least two times higher than official numbers. Many young sturgeon are caught, negatively affecting stocks. State measures to curb poaching are ineffective because prices for black caviar on foreign markets (e.g. \$600 per kilo in France) make illegal trading very profitable.

PSD Table						
Country:	Russian Federation					
Commodity:	Fish,Urchin Roe/Caviar,Livers					
		1999		2000		2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	11500	11500	10500	10000	0	9500
Total Production	52000	52000	51000	51000	0	51500
Intra-EC Imports	0	0	0	0	0	0
Other Imports	350	1000	350	1000	0	1200
TOTAL Imports	350	1000	350	1000	0	1200
TOTAL SUPPLY	63850	64500	61850	62000	0	62200
Intra-EC Exports	0	0	0	0	0	0
Other Exports	10500	12000	10000	12150	0	12100
TOTAL Exports	10500	12000	10000	12150	0	12100
Domestic Consumption	28350	28500	26850	26850	0	27000
Other Use/Loss	14500	14000	14500	13500	0	13100
TOTAL Utilization	42850	42500	41350	40350	0	40100
Ending Stocks	10500	10000	10500	9500	0	10000
TOTAL DISTRIBUTION	63850	64500	61850	62000	0	62200

PSD Table						
Country:	Russian Federation					
Commodity:	Crab and Crabmeat					
		1999		2000		2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	2000	2000	2000	2000	0	1800
Total Production	48000	90000	47000	90000	0	90000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	500	500	400	400	0	500
TOTAL Imports	500	500	400	400	0	500
TOTAL SUPPLY	50500	92500	49400	92400	0	92300
Intra-EC Exports	0	0	0	0	0	0
Other Exports	27000	70000	27300	70000	0	70000
TOTAL Exports	27000	70000	27300	70000	0	70000
Domestic Consumption	19500	19000	18500	19100	0	19200
Other Use/Loss	2000	1500	2000	1500	0	1500
TOTAL Utilization	21500	20500	20500	20600	0	20700
Ending Stocks	2000	2000	1600	1800	0	1600
TOTAL DISTRIBUTION	50500	92500	49400	92400	0	92300

## Fry Fish

Russian fish farms are playing a decisive role in preserving fish stocks. In 2000, experts predict that Russia will raise and release almost 2 billion fry fish into domestic waters. There are some 140 fish farms in Russia today, including 78 that raise hunchback and red salmon, calico, sturgeon, sevruga, and beluga fry. Russian studies indicate that from 1990 to 1999, an average of 30 percent of salmon and sturgeon in the Far East and Caspian Sea basins originated on fish farms. (In 1999, they released about 600 million salmon fry into the Far East Sea basin, and over 60 million sturgeon fry into the Caspian Sea.) However, researchers predict that this year fish farms will release 40 percent less beluga, sevruga, and sturgeon fry as a result of insufficient stocks.

Other countries are also assisting in the development of Russia's sea resources. In the Far East, for example, Japan is investing \$50 - \$60 million in salmon projects annually. In 2000, Russia and the United States signed a protocol to introduce joint measures to replenish the Bering Sea's salmon, pollack, and crab stocks. The two sides agreed to conduct joint scientific research to determine the region's total bio-resources, as well as guidelines for exchanging information and monitoring.

## **Fishing in the Economic Sea Zones of Other Nations**

At present, an estimated 72 percent of the annual Russian sea catch comes from its economic zones. However, research indicates that Russia's territorial waters are over-fished. In the Far East, for example, a sharp decrease in stocks of Alaskan pollack and Kamchatka king crab have been observed. As the Russian government pursues policies to limit domestic catches, Russian fishing fleets are developing their activities in international waters. Reportedly, they expect to quadruple their catch in the open oceans and within the economic zones of other nations. Experts predict that the value of these catches could reach more than \$3.5 billion. Simultaneously, the European Union is putting pressure on Norway, Russia, and non-member nations to decrease their cod catch in the Barents Sea from 500,000 MT to 100,000 MT. Since the Northern Russian regions of Murmansk and Arkhangelsk would suffer great economic loss from such a measure, negotiations between Russia and Norway only resulted in an agreement to restrict Russia's national cod catch to 460,000 MT.

## **Consumption**

In 2000, total domestic consumption of seafood products in Russia is expected to increase by five percent, compared with 1999. An improving Russian economy is positively affecting demand. Semi-ready products like fillets, fish sticks, canned fish, and vacuum packed fish are gaining in popularity. This trend will continue as the economy grows.

According to a recent Russian survey looking at cross regional seafood consumption patterns between 1995 and 1999, fresh, frozen, marinated, salted, and smoked fish are the most popularly consumed items. Somewhat paradoxically, household consumption of these products is significantly higher in large industrial centers compared with costal areas. Canned fish products were also popular among Russian consumers because of their easy storage. However, they are consumed by less than 5 percent of Russian households more than several times a week. More than 50 percent of families utilize canned fish less than once a month. Although households with higher incomes tend to consume canned seafood products more often than families with lower incomes, some 60 percent of consumers of canned fish products have incomes of less than 1000 rubles (\$40) per month. Suppliers of inexpensive canned seafood products stand to benefit in the Russian market. More expensive items like fillets, caviar, fish sticks and cutlets are the most popular in Moscow, Saint Petersburg, and the North Caucasus.

**Table 2: Percentages of Households Consuming Various Types of Seafood Products Across Regions**

Region	Fresh and frozen fish	Canned	Fillets/ Expensive varieties	Caviar	Crabs/ shrimp	Surimi	Semi prepared cuts, fish sticks	Salted/ marinated	Smoked fish
Central	9.5	10.3	5.9	5.8	6.0	7.6	8.0	9.6	7.4
Central Black Soil	4.6	4.2	1.5	2.5	1.6	5.2	2.3	4.6	3.6
Eastern Siberia	4.7	4.4	4.8	2.6	2.9	4.6	3.1	5.8	4.9
Far East	5.3	4.5	9.2	6.5	6.6	3.0	2.8	5.7	7.0
Moscow	17.3	15.6	25.8	32.9	29.9	12.3	26.8	16.5	18.4
North Caucasus	6.8	6.3	11.7	10.7	11.4	10.2	7.2	8.0	8.1
North, North-East	4.6	3.8	3.9	2.0	3.1	3.3	6.9	3.7	3.2
St-Petersburg	8.2	8.8	10.9	9.5	9.0	9.1	13.6	8.4	8.6
Urals	12.8	14.3	8.4	10.8	11.2	14.0	10.1	11.2	13.7
Volga	11.3	12.3	7.9	7.7	9.3	13.4	10.6	11.8	10.0
Volga Vyatka	5.8	6.4	2.6	2.3	3.0	3.8	3.2	6.0	5.2
West-Siberia	9.3	9.2	7.6	6.9	7.1	13.6	5.4	8.5	10.1
Russia	80	38	10	14	8.0	5.8	14	52	32

Source: Russian Survey Group R-TGI

## Trade

During CY 1999, U.S. exports of surimi to Russia grew 135 percent, reflecting increased demand for inexpensive seafood protein. Similarly, U.S. fishermen found a market niche for canned salmon, as they exported some 630 MT to Russia following the 1999 food assistance package that introduced U.S. product to the market.

**Table 3: Russian Seafood Exports by Country 1999**

Country	Value
Australia	\$2,806,000
Austria	\$1,555,000
Anthill Islands	\$5,311,000
Bahamas Islands	\$575,000
Bulgaria	\$4,903,000
Great Britain	\$19,230,000
Virgin Islands	\$9,358,000
Germany	\$105,232,000
Gibraltar	\$4,803,000
Greenland	\$465,000
Greece	\$134,000
Denmark	\$14,450,000
Ireland	\$8,879,000
Island	\$9,699,000
Spain	\$7,448,000
Canada	\$14,815,000
Cyprus	\$15,932,000
China	\$14,278,000
Latvia	\$118,000
Netherlands	\$1,149,000
Norway	\$151,046,000
Panama	\$3,127,000
Poland	\$3,373,000
Portugal	\$10,384,000
Korea, republic of	\$65,463,000
Seashell Islands	\$2,855,000
Singapore	\$18,733,000
USA	\$327,077,000
Hong-Kong	\$9,174,000
Tierces and Kayaks (Brit.)	\$765,000
Chilly	\$177,000
Switzerland	\$15,137,000
Sweden	\$15,137,000
Estonia	\$862,000
Japan	\$168,230,000
Total	\$1,018,571,00

Source: Russian State Statistics Committee

**Table 4: Tons of U.S. Exports of Fishery Products to the Russian Federation, by Commodity (1995 - June 2000)**

Commodity	January -- June						
	1995	1996	1997	1998	1999	1999	2000
Caviar	2	2	0	0	20	20	16
Cod	24	67	113	41	0	0	0
Crab	1	322	434	384	0	0	0
Cuttlefish	14	23	0	0	0	0	0
Fish Meal	178	100	0	0	20	0	0
Halibut	2	0	0	0	0	0	0
Herring	782	4,095	278	0	0	0	18
Lobster	1	0	0	7	2	1	0
Mackerel	0	93	0	0	23	23	0
Oysters	2	0	0	0	0	0	0
Salmon*	25	167	326	666	236	181	1
Canned Salmon	0	74	80	12	2,365	0	637
Sardines	19	0	0	0	0	0	0
Scallops	40	0	0	0	1	1	0
Shrimp	83	47	94	55	4	2	0
Squid	42	194	19	0	0	0	0
Surimi	137	198	778	255	600	84	42
Tilapia	0	0	26	0	0	0	0
Trout	0	0	0	0	0	0	0
Tuna	37	2	17	4	0	0	0
Whiting	0	216	18	86	0	0	114
Other	NA	NA	NA	NA	NA	NA	NA

Source: The Foreign Agricultural Service and the Census Bureau

NA: Not Available

c Includes all salmon products (including roe) except canned salmon

Export Trade Matrix	Total Edible Fishery Products		
Country:	Russian Federation	Units:	1,000MT
Commodity:			
Time period:	CY		
Exports for	1999		2000
U.S.	450	U.S.	455
Others		Others	
Japan	450		455
China	480		410
Rep.of Korea	350		300
Germany	250		250
Singapore	200		180
Denmark	120		90
Norway	450		450
Great Britain	80		70
Island	50		45
Canada	40		40
Cyprus	28		25
Sweden	65		35
Total for Others	2470		2290
Others not listed	394		400
Grand Total	3314		3145

Export Trade Matrix	Ground fish, Whole/ Eviscerated		
Country:	Russian Federation	Units:	1,000MT
Commodity:			
Time period:	CY		
Exports for	1999	2000	
U.S.	400	440	
Others			
Japan	380	382	
China	280	283	
Korea	235	220	
Germany	190	192	
Singapore	110	112	
Denmark	70	46	
Norway	250	260	
Great Britain	55	49	
Island	35	16	
Canada	30	32	
Cyprus	23	25	
Sweden	50	23	
Total for Others	1708	1640	
Others not listed	242	200	
Grand Total	2350	2280	

Export Trade Matrix	Fish,Urchin Roe/Caviar,Livers	
Country:	Russian Federation	Units: MT
Commodity:		
Time period:	CY	
Exports for	1999	2000
U.S.	100	100
Others		
Japan	10500	10600
Korea	930	980
Switzerland	130	140
China	45	40
Total for Others	11605	11760
Others not listed	295	290
Grand Total	12000	12150

Export Trade Matrix	Salmon, Whole/ Eviscerated		
Country:	Russian Federation	Units:	MT
Commodity:			
Time period:	CY		
Exports for	1999		2000
U.S.	1500	U.S.	1500
Others			
Japan	57500		57500
Korea	8000		8000
Total for Others	65500		65500
Others not listed	3000		3000
Grand Total	70000		70000

Import Trade Matrix	Total Edible Fishery Products		
Country:	Russian Federation	Units:	1,000MT
Commodity:			
Time period:	CY		
Imports for	1999		2000
U.S.	8	U.S.	20
Others		Others	
Norway	350		390
Latvia	20		25
Island	65		77
Great Britain	54		55
Estonia	50		55
Germany	43		46
Finland	20		25
Ireland	18		20
Ukraine	26		28
Mauritania	28		30
Netherlands	30		35
Total for Others	704		786
Others not listed	68		39
Grand Total	780		845

Import Trade Matrix	Groundfish, Whole/ Eviscerated		
Country:		Units:	
Commodity:			
Time period:	CY		
Imports for	1999		2000
U.S.	4	U.S.	12
Others		Others	
Norway	180		200
Latvia	12		14
Island	35		39
Great Britain	30		30
Estonia	29		30
Germany	22		25
Finland	14		14
Ireland	10		12
Ukraine	14		16
Mauritania	16		16
Netherlands	16		18
Total for Others	378		414
Others not listed	18		24
Grand Total	400		450

Import Trade Matrix	Fish, Urchin Roe/Caviar, Livers		
Country:	Russian Federation	Units:	MT
Commodity:			
Time period:	CY		
Imports for	1999		2000
U.S.	100	U.S.	100
Others		Others	
Norway	800		800
Island	99		99
Total for Others	899		899
Others not listed	1		1
Grand Total	1000		1000

## **Stocks**

According to the Russian State Fishing Committee, there will be an overall decrease in the sturgeon harvest this year. Russian experts attribute this decrease to the continuing operation of numerous hydraulic power stations on the Volga and an increase in industrial waste.

Since Russian and Norwegian research indicates that reserves of cod have fallen significantly, firm quotas are being set according to a bilateral agreement between Russia and Norway. Last year, Russian fishing authorities warned companies operating in the Barents basin to redirect part of their fleets toward other types of fish such as herring and shrimp.

## **Policy**

### **Sturgeon and Caviar Quotas**

In an effort to conserve bio-resources, Russia has imposed an 85 MT quota on the export of sturgeon caviar during 2000. In addition, a quota of 220 MT on the export of other products made from sturgeon is in effect. The quota includes fish caught in the Volga or raised there. However, the sturgeon/caviar quota does not apply to farmed fish and sturgeon products. Russian fishermen may catch 560 MT of sturgeon in the Caspian sea this year, which is 62 tons below last year's quota and about one-half of the 1998 quota.

### **Cod Quotas**

In 2000, the total quota for cod caught in the Barents Sea (including a Russian limit of 224,000 MT) was reduced by 60,000 MT to 520,000 MT.

## **Marketing**

### **Prices**

Table 5 indicates that in comparison with December 1999, average prices for seafood products as a commodity group have risen as a result of inflation. Since the latter part of June 2000, prices on most frozen fish began increasing as a result of short supplies.

**Table 5: Average Prices for Seafood Products as a Group Category, December 1999 - August 2000**

	Rubles/Kg	Dollars/Kg
December 1999	23.83	1.05
January 2000	23.93	0.84
February	24.05	0.84
March	24.24	0.85
April	24.37	0.85
May	25.25	0.89
June	26.20	0.93
July	36582	0.97
August	27.55	0.99