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Report Highlights:

Russian commercial fishery catch is expected to decrease by five percent in 2003 due to a reduction in total allowable catch (TAC), depletion of certain fish stocks and the poor condition of the fishing fleet. However, fisheries production is forecast to rebound in 2004 due to the positive changes brought about by the new government plans to eliminate quota auctions and positive plans for modernizing the fishing industry. Russia remains a net exporter of fish and seafood products, but high-value imports are growing. Domestic consumption of seafood products is expected to decline slightly because of reduced supplies, higher prices, and competition from other animal proteins.

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Executive Summary

Total fisheries production is estimated to decrease by five percent in 2003 due to the depleted fish stocks in Russia's Exclusive Economic Zone (EEZ) and the poor condition of the fishing fleet. An estimated 70 percent of Russian fishing vessels are considered below standard and this is taking a toll on industry efficiency. However, fishery production is forecast to increase in 2004 due to positive moves to restructure the industry and increased activity in non-Russian fishing zones. The salmon catch exceeded expectations in 2003 due to unusual weather conditions but groundfish production was lower than forecast due to reduced cod landings.

Production

Wild Catch

According to the Russian Statistics Committee, the Russian catch in sea fisheries (wild catch) amounted to 3.3 million metric tons in 2002, down ten percent from 2001 (see Table 1). Sources at the State Fisheries Committee (Goskomrybolovstvo) also announced that wild catch during Jan-Jun 2003 reached 1.5 million metric tons, down six percent versus the same period of 2002. Official sources state that the main reason for the drop in wild catch was a reduction in quota for 2003 of more than 400,000 metric tons. Goskomrybolovstvo has not yet released the official allowable catch levels for 2004, but many experts believe that they will not deviate significantly from 2003.

Other reasons cited for the decrease in 2003 were the reduction of basic fish stocks in the Russian Exclusive Economic Zone (EEZ), combined with a drop in catches per unit, and the poor conditions of the Russian fishing fleet. According to trade sources, 70 percent of the fishing fleet, approximately 3,800 vessels, is below standard due to lack of maintenance. In addition, most of these vessels are specialized and not appropriate for catching far-eastern species such as herring, flounder, and other species from the Pacific Ocean. Foreign vessels play a major role in harvesting resources in the Russian Exclusive Economic Zone and are often blamed for contributing to reduced fish stocks. In the first half of 2003, licenses were granted to 864 foreign vessels, including those from Japan, China, Korea, Norway, Lithuania and Ukraine.

According to the scientific chief at the State Fisheries Committee, Russia is only catching 72 percent of the fish it is entitled to and could increase its fish catch by 25 percent (by 1 million tons) if the country's existing stocks were used more effectively. Such an increase could come from exploiting species currently not fully utilized and reducing the illegal catch.

(Note: Data provided in the Production, Supply, and Distribution Tables of this report may differ from official Russian statistics because they also include estimated data provided by trade sources on production and unreported exports. These additional data reflect more accurately the real situation and outlook of the fishing industry.)

Aquaculture

In the absence of reliable government data for aquaculture production in the Russian Federation, industry sources estimate total fish farm production in 2003 to be approximately 90,000 metric tons, up two percent from 2002. It is also estimated that nearly 80 percent of fish farming comprises common and silver carp species. Production of other species is insignificant. However, there are some new initiatives with varieties of salmon in northwest Russia and in the Russian Far East, where 100 natural basins are suitable for fish farming, but most of the projects lack financing. Moreover, there are 20 farms in the Far East that

cultivate high-value seafood products, like scallops, sea urchins and shellfish for export to Japan and China. Experts forecast a continued increase in production of around three percent per annum in the short term, reflecting optimistic prospects for economic growth.

The diversity of fishing reservoirs in the Russian Federation offers a strong opportunity for developing different production methods. Current development of aquaculture is concentrated in three main areas: ponds, industrial (artificial bodies of water), and ocean farming in pens. Government and private enterprises are developing new technologies to assist producers to improve production yields and reduce the cost of production. Some of these projects are joint ventures with foreign companies. However, output growth has been tempered by the following factors: a) demise of former agricultural support policies; b) difficulties of the farm-restructuring and enterprise-privatization, which creates an uncertain legal status of farm ownership; c) environmental degradation of inland waterways through industrial, urban, agrochemical pollution; d) occasional shortages of imported feedstuffs; e) shortage of investment capital for restructuring, maintenance, and for investment; and f) lack of new distribution and marketing channels, for both lower and higher priced aquaculture products.

Table 1: Fish Catches and Seafood Production in Metric Tons, 1999-2002

Product	1999	2000	2001	2002
Fish and other fish products:				
Total catch	4,050,535	3,776,362	3,620,522	3,257,632
including:				
inland catch	203,421	393,370	272,581	273,762
including in:				
fresh basins	165,706	263,073	210,284	218,636
catch in Russian economic zones	2,615,187	2,444,237	2,464,125	2,065,471
catch in 200 mile zones of foreign countries	682,308	633,307	666,508	663,939
catch in open ocean areas outside of 200 mile zones	286,166	230,591	217,677	254,460
Catch by fish varieties:				
Herring	474,831	499,363	402,839	314,602
Sardine	15,733	11,811	3,544	9,108
Sprat (kil'ka & salaka)	157,961	149,478	96,392	69,232
Saury	4,608	13,698	35,884	44,302
				23,705

Lancet fish	10,165	10,777	22,242	
Mackerel	73,726	75,031	62,519	82,144
Sea perch	21,752	32,948	46,620	47,609
Jack mackerel	38,981	50,296	25,118	41,695
Plaice	85,154	106,461	114,139	88,177
Halibut	204,504	N/A	28,722	27,625
Sturgeon, total	836	539	622	491
Coregonus, total	7,735	10,728	9,987	9,260
Salmon, total	170,382	206,194	224,458	191,694
Cod fish, total	1,972,093	1,685,916	1,729,274	1,386,922
including: cod (theragra)	316,153	299,650	322,112	283,453
chalcogramma (lat.)	1,425,485	1,140,896	1,120,889	831,179
haddock	32,675	28,642	40,060	40,598
Total sea products and crayfish	151,935	183,916	149,949	158,805
including crayfish and mollusks	149,084	177,397	144,249	147,479
Crabs	49,872	51,985	46,903	41,904
Shrimp	13,501	32,366	17,782	12,210
mollusks	85,709	93,045	79,560	93,361
Fish; food products, including canned products	2,628,282	2,994,830	3,056,642	2,961,362
Non-canned fish food products	2,468,873	2,808,621	2,843,303	2,740,699
Fish, live (excluding herring)	N/A	349,628	343,915	N/A
Fish frozen (excluding herring)	1,762,261	1,502,919	1,675,293	1,661,025
Fish chilled (excluding herring)	N/A	100,176	104,919	N/A
Fillet frozen (excluding	133,884	117,858	92,667	49,441

herring)				
Salted herrings	26,442	32,144	33,354	34,420
Herring, all types of processing	N/A	N/A	407,124	372,966
Smoked fish (excluding herring)	24,808	23,576	26,579	28,683
Fish dries and dry-cure	6,741	8,418	9,133	9,971
Spicy and marinade products	3,059	1,613	2,424	2,478
Culinary products	7,551	8,170	11,608	16,818
Balyk products	942	1,114	1,284	1,641
Food, feed, and technical products	N/A	N/A	187,895	163,807
Caviar, total	27,759	25,985	28,034	21,652
Including sturgeon	28	24	24	24,5
salmon	6,358	6,526	6,120	5,674
Fish and sea animals fat	2,522	3,248	2,801	2,472
Fish feed meal	136,394	116,187	98,399	66,636

Source: Russian State Statistics Committee

Note: Official data does not match FAS estimates as noted above and is provided for comparison purposes only. Some numbers in this table may not add due to rounding.

Groundfish

The groundfish catch is forecast to increase by six percent in 2004, reflecting a likely increase in the fishing quota, new investments in the fishing-fleet, and expected higher catches outside the Russian Exclusive Economic Zone due to the implementation of fisheries agreements. The groundfish category in Russia consists basically of the following species: cod, haddock, pollock, and ocean perch. Cod has traditionally held by far the largest share within this category with catches in both the Atlantic and Pacific regions.

The decline in groundfish catch in 2003 is mostly attributed to a sharp decline in cod and pollack catch due to problems with issuance of quotas, depletion of stocks, and other restrictions derived from international agreements on catch quotas, such as in the Baltic sea.

Salmon

Post forecasts salmon catch to increase by nearly seven percent in 2004 because of the expected higher catch of salmon from the Russian Far East (RFE), which is responsible for the largest share of total salmon landings.

Salmon catch in 2003 is estimated to increase over 13 percent due to an unusually hot summer in Russia's Far East, which prolonged the salmon season. In addition, there was a significant increase in the harvest of pink (humpback) salmon, mostly in the Sakhalin region. According to trade sources, the Sakhalin region received an industrial quota for 90,375 metric tons of salmon species this year, of which 85,531 metric tons was of the pink species (*Oncorhynchus gorbuscha*).

The salmon fishing industry in Russia's Far East has recorded stable growth over the past three years, but faces a major problem with poaching. According to trade sources, unreported fishing in the region remains significant and linked to organized criminal groups.

According to trade sources, in the first half of 2003 salmon breeders released into RFE waters about 500 million Pacific and Atlantic Salmon fingerlings and ten million silver salmon fingerlings, twice as many as expected. The breeding programs are already showing results and are expected to help to increase the fish stocks in the coming years.

Crab and Crabmeat

Government Resolution #1270-P of September 2002 increased the fishing quotas for rare types of crab by allowing an additional catch of 220 MT of blue crab, opilio crab, shellfish and trumpeter fish in the North of Okhotsk sub-area of the Far Eastern basin. This additional allocation was aimed for scientific research. However, most crab was harvested not by scientists, but by commercial companies and sold for about \$10 million dollars. The Resolution also raised by 40 percent (9,000 MT) the 2003 Total Allowable Catch (TAC) for crab.

In the North Okhotsk Sea, 100 percent of the TAC for crab was harvested in 2002 and 92 percent of the TAC was harvested in the West Kamchatka. However, only 76 percent of the total Russian TAC for crab was caught because of the poor conditions of fishing fleet, catch inefficiency, and unfavorable fishing conditions. Post forecasts crab catches to increase only by one percent in 2004, mostly driven by firm export demand.

Fish Roe

Russia is home of eleven species of sturgeon and among the most important are the Russian, Siberian, Amur, Beluga, Kaluga, stellate, and sterlet. These are economically important to the country because of the extremely high value of sturgeon caviar and have traditionally been the object of commercial fishing and exportation. It is estimated that 70 percent of the world's sturgeon stocks originates from the Caspian Sea. The resources of this basin are split among five countries.

Sources at the State Fisheries Committee (Goskomrybolovstvo) reported that scientific research organizations from Russia, Azerbaijan, Kazakhstan, Iran and Turkmenistan conducted joint investigative expeditions last year to study the status of sturgeon species and other biological resources in the Caspian. The results have noted positive changes in sturgeon stocks. The number of beluga sturgeon in the Northern Caspian increased by 2.3 million (23 percent), while Russian sturgeon increased by 16 percent and stellate sturgeon by 28 percent. In addition, the quantity of mature fish spawning at the Volga and Ural river mouths was up in mid-spring, indicating higher than expected populations. Scientists are recommending that the International Caspian Fishery Commission increase sturgeon species fishing quotas for the Sea's littoral states in 2004.

According to the Commission, Russia has the right to harvest 453 metric tons of sturgeon in the Volga delta. Russia exported more than 50 metric tons of black caviar in 2002, 10 MT more than expected.

Consumption

Overall consumption of fishery products in the Russian Federation is estimated to decline in 2003 as a result of higher market prices owing to reduced fish supplies, competition from other animal proteins (mostly from attractively priced poultry products), and higher prices for imported seafood products due to higher import costs. Local consumption trends are forecast to remain largely unchanged in 2004, unless an improvement in fish prices versus meat products increases the competitiveness of seafood products.

Market research indicates the majority of the population are consuming high fat food, although a growing number of Russian consumers are turning to fish for a health-conscious alternative. However, any major increase in consumption will largely depend on the strengthening of the Russian economy and increased consumer income.

Also, there is a growing niche for sales of further processed products, such as gourmet fish products, mostly in the HRI and catering sectors. This is largely due to economic growth, lower volatility of the exchange rate, higher consumer income, a booming tourism sector, and new marketing channels.

Trade

The Russian Federation became a net exporter of fish products after the devaluation of the ruble in 1998. The Russian State Customs Committee reported total Russian seafood exports passing through Russian customs was \$383.5 million in 2002, 1.5 percent less than in 2001. During Jan-Jun 2003, Russia exports of seafood products were valued at \$156 million, nearly eight percent above the same period last year. The main reason for the increase is attributed to higher exports of black caviar and other high value seafood products. Japan, China, Korea, and the United States continue to be the top markets for Russia seafood exports, while Norway and Finland are the major suppliers of fish products to Russia.

Unreported exports continue to be a difficult issue for the government and are estimated at almost thirty percent of the fish total exports. According to trade sources, underreporting is motivated by attempts to evade state and federal taxes, customs duties, and accounting for quota usage. A significant share of the unreported fish catch is in the Far East, where fishermen harvest in Russian territorial waters but ship the product directly to other countries (mainly to Japan, Korea and China) without registering the catch with Russian Customs.

Reduced domestic fish supplies have increased the share of imported seafood products in Russia. The Russian State Customs Committee reported total Russian seafood imports at \$311.7 million in 2002, 48 percent above 2001. It is estimated that during Jan-Jun 2003, imports of seafood products reached \$138 million, 70 percent more than the same period last year.

The United States is a major destination for a variety of edible fish and seafood from Russia. In 2002, the United States imported \$271 million of fish and seafood products from Russia,

up 26 percent from 2001, while Russia imported \$11 million of fish and seafood products from the United States, up 31 percent from 2001, the highest value for the past 30 years.

Russia imports of fish and seafood products from the United States represent only two percent of the total value of agricultural, fish, and forest products imported from the United States. However, Russian exports of fish and seafood products to the United States account for 62 percent of all Russian exports of agricultural, fish, and forest products to the United States.

Opportunities for U.S. Exporters

The Russian market for seafood products is evolving quickly and there is plenty of room for U.S. exporters despite the fact that Russia is a net exporter. The Russian HRI sector is now key for demand in many Russian cities, especially Moscow and St. Petersburg. Opportunities mainly exist in the marketing of very high-quality and high-value U.S. seafood products. This also reflects the main trends for U.S. products in supermarkets that target high-income consumers. U.S. suppliers have the best opportunity in these sectors with processed salmon products and fresh/frozen fish of species not native to Russia.

Policy

Russian officials are currently developing a long-term development plan for the fishing industry. The plan calls for increasing wild catch up to 5.5 million metric tons by 2020. Although an ambitious target, this volume represents only half of the Russian seafood production of 10-12 years ago. The plan calls for higher investments in revitalizing the over-fished Russian Exclusive Economic Zone (EEZ) and making new investments in the shipbuilding industry in Russia to gain access to the open ocean and the economic maritime zones of other countries. This is expected to materialize by increasing maritime cooperation agreements with other nations. According to Leonid Kholod, the Fisheries Committee Deputy Chairman, the committee encourages Russian trawlers to return to the waters of other countries, and to the open seas, particularly the central Pacific, where a Russian research vessel recently claimed to have discovered huge fish stocks. Currently, Russia has fisheries cooperation agreements with Morocco, Mauritania, Angola, Guinea-Bissau, Sierra-Leone, Mozambique, Madagascar, Korea, Japan, and Norway. Talks are underway for new agreements with the European Union, Vietnam, Chile, and Peru.

Issue on Quotas

According to a new Government Resolution prepared by the State Fisheries Committee, beginning in 2004 fishing companies will receive catch quotas according to a new system. The concept of the new regulation is that fishing quotas in the economic and coastal zones, which account for 70 percent of the Total Allowable Catch (TAC), will be granted to fishermen for five years for a fixed fee, that will be deducted from their taxes. The quota volume will be calculated based on average annual catch of each company between 2000-2002. The State Fisheries Committee will control quota distribution. Twenty percent of the quotas will be distributed by special commissions of regional authorities free of charge. The remaining ten percent will be distributed via international agreement and for scientific research.

This will be a significant change from the current system, where the free regional quotas are almost equal to the auctioned volume. The share given for scientific research would also decrease according to this plan. This change would mean a strengthening of the central

government authority and a weakening of regional authority in the distribution of marine resources.

According to Deputy Head of the State Fisheries Committee Leonid Kholod, the introduction of the new system will allow fishermen to receive quotas based on a mathematical model and avoid personal judging by government officials. He also announced that this mechanism would increase profitability of the fishing industry since quotas will be distributed for a longer term, allowing fishermen to borrow money more easily. The abolition of auctions will also restrain price increases for the right to catch marine resources and increase the “availability” of biological resources for local fishing companies.

See regional focus for additional information.

Caspian Sea Status

A longstanding dispute over the Caspian Sea has finally moved forward. On May 14, 2003, a tripartite agreement was signed defining the zones of responsibilities among Russia (19 percent), Kazakstan (29 percent), and Azerbaijan (19 percent). However, Iran and Turkey both insist on equal shares in the Caspian Sea and did not sign the agreement. Russia, Kazakstan, and Azerbaijan agreed that the Caspian Sea should be divided according to the coastal length of the five countries. Resolution of the legal status of the Caspian Sea is important to regulate fish catch, safe research, and exploitation of oil resources under the sea.

Regional Focus – Russian Far East (Primorskii Krai and Kamchatka)

Though total output of the fisheries sector in the Russian Far East has improved in the last two years, an insecure political environment has led to continued overall industry stagnation. Even more than in the agricultural sector, companies in the fisheries sector are becoming increasingly stratified between those that are modern and successful businesses and those that struggle to remain financially solvent. This process will be exacerbated by the new proposal that rewards companies for their catches over the past several years rather than through market competition. However flawed, the government proposal is probably better suited to strengthening the sector than the existing auction process. The repeal of the auctioning process and speculation regarding the nature of the policy replacing it are the most pressing issues in the industry in the fall of 2003. Though illegal fishing and export remain serious problems in the RFE, it appears that recent measures are a step in the right direction in terms of combating this menace that continues to undermine the entire Russian fishing sector.

Production and Policy Environment

The fisheries sector in every country is complicated by the fact that the government is continually involved in redistributing a valuable resource in order to maintain two competing but mutually dependent forces: long-term sustainability of fish stocks and industry. By most measures, Russia continues to struggle with both. In the last six years, the Russian Far East's total allowable catch (TAC) has decreased by over 25 percent and the industry continues to struggle. Moreover, government policy has fostered corruption in the distribution of fishery resources and not prevented illegal fishing (if not encouraging it).

Total Allowable Catch in the Russian Far East, 1997-2003 (1,000 Tons)

1997	1998	1999	2000	2001	2002	2003
4,409	4,630	4,537	4,240	3,921	3,145	3,257

The TAC of the Russian Federation is divided into four categories: foreign countries (5.5 percent in 2003), scientific quotas (8.1 percent), quotas to be sold at auction (42.1 percent), and industrial quotas (43.7 percent). Quotas to foreign countries are allocated in accordance with Russia's international agreements and form the only category that is not subject to change. Scientific quotas are allocated to regional institutes for the purposes of research and to ensure accurate evaluation of the marine ecosystem and resources. The largest category, industrial quotas, is distributed free through representational councils to companies in that region. In reality, the region's governor has significant influence in distributing these quotas, (though subject to approval by Goskomrybolovstvo) which has led to clear conflicts of interest and corruption. It is through this process that many see a distinction between companies that are "in" or "out" of favor. Last, quota auctions have taken place from 2001-2003, but are currently likely to be eliminated in 2004.

The Ministry of Agriculture (which includes Goskomrybolovstvo) and the Ministry of Economic Development and Trade (MEDT) have proposed to eliminate auctions in favor of a fixed distribution of these resources on the principal of historic usage. Essentially, this category plus some of the current industry quota would be distributed in proportion to the volume of quota a company bought over the period of the auctions (similarly to the meat import TRQs). There would be some cost, but payment would be based on actual catch rather than on the right to fish as is done under the auctions (which is a problem if the fish aren't caught). This system would be in place for five years. As the policy section notes, the rough structure of the proposed system would be the following: five-year historical allocation (70 percent of TAC), regional allocation (20 percent), scientific and foreign nations (ten percent).

While almost all RFE companies agree that auctions could not work due to the high cost and the up-front payment for resources that may not actually be there (caught), many complaints and worries are voiced about the proposal. The principal objection is that this new system would cast in concrete the status quo in terms of resource allocation as it was under the auctions. Large companies don't like this because they have money but can't grow bigger; small companies will not be able to purchase large shares under the auctions and essentially will be permanently locked out of the industry. Most feel that the auctions led to a quickening of the industry's demise, and locking in the results or distortions of this process seems inappropriate to most. Second, no one thinks that giving the central government even more power over fisheries, a sector they believe is poorly understood by Moscow bureaucrats, can lead to better decision making. Last, regional officials clearly see an opportunity to increase their influence slipping away and are in favor of administering this system at the local level.

While most seem resigned to following Moscow's dictates on the elimination of the auctions, the central government is universally a source of scorn for the RFE fishing industry. It is widely considered that the federal government (mainly Goskomrybolovstvo, but also the Ministry of Natural Resources) has repeatedly shown that the fishery industry is just another natural resource where budget implications outweigh industry management. This is clearest through the maintenance and increase of federal involvement in resource allocation and ensuring that proceeds of their distribution contribute to the federal budget. It is frustrating to industry and local government that hundreds of millions of dollars flowed to Moscow through auctions, or will under the new system via tax revenue, and almost none is returned through a coherent government policy toward industry development (programs to reform the deteriorating fishing infrastructure and fleet). For example, Kamchatka cannot realistically reform its own fishery sector if none of the quota rents go to the local level (e.g., industrial quotas are supposed to be free and the auction proceeds went to the federal budget) and the industry itself makes up almost all economic activity (57.3 percent of total industrial output and 48 percent of all jobs). In order to cope, Kamchatka has been requiring proof of

participation in social causes by fishing companies before distributing the free industrial quotas.

The political nature of the distribution of the resources has also helped to add confusion to the industry. As the industrial quotas are essentially set through a series of political battles (i.e., last year's battle between then Goskomrybolovstvo head Yevgeniy Nazdratenko and Primorskiy Krai Governor Sergey Darkin) and the auction policy has changed almost every year, hardly any business can plan more than one year in advance. Due to the cost of equipment, industry investment is seriously below what it would be under a long-term government fisheries policy.

Goskomrybolovstvo has also come under criticism for micromanagement. Any time the situation changes and the existing distribution for species or location is unsuitable, regional officials must appeal to Moscow for changes. Permission from Moscow often takes months, by which time the opportunity is missed. For example, last year an enormous salmon run greatly exceeded permissible catch levels and many fish were simply wasted when they perished in the rivers. Though the Governor of Kamchatka issued a special resolution to expand the catch, several crucial weeks were lost because Goskomrybolovstvo would not make a decision on the matter.

The last issue under discussion by the central government is privatization of the research centers, which provide the estimates of Russia's allowable catch. Many of these institutes are already partially privatized, yet they still receive the free scientific quotas as a way of financing the high costs of researching the fisheries. These institutes already sell the fish they are "researching" and are accused of researching the most profitable fish more often than the less profitable and inflating fish stocks as a way of preserving their own quota. While few question the scientific expertise of the researchers, privatizing these institutes would appear to only increase the already worrying conflict of interest and further increase one of the last fairly objective parts of Russian fishing policy, estimation of fish stocks.

While illegal fishing will remain a problem, there is a sense in the industry that recent measures are decreasing the scale somewhat. Actions include satellite tracking of fishing vessels and increasing the power of the enforcement agencies.

Table 2. Production, Supply, and Distribution of Groundfish, MT

Country	Russian Federation						UOM
	Groundfish, Whole/Eviscerated		(MT)				
Commodity	2002 USDA Official [Old]	Revised Post Estimate [New] 01/2002	2003 USDA Official [Old]	Estimate Post Estimate [New] 01/2003	2004 USDA Official [Old]	Forecast Post Estimate [New] 01/2004	MM/YYYY
Market Year Begin							
Beginning Stocks	440000	440000	447000	440000	0	305000	(MT)
Total Production	2500000	2300000		2180000	0	2310000	(MT)
Intra-EC Imports	0	0	0	0	0	0	(MT)
Other Imports	500000	620000		650000	0	650000	(MT)
TOTAL Imports	500000	620000	0	650000	0	650000	(MT)
TOTAL SUPPLY	3440000	3360000	447000	3270000	0	3265000	(MT)
Intra-EC Exports	0	0	0	0	0	0	(MT)
Other Exports	2070000	1960000		200000	0	206000	(MT)
TOTAL Exports	2070000	1960000	0	200000	0	206000	(MT)
Domestic Consumption	795000	840000		865000	0	890000	(MT)
Other Use/Loss	128000	120000		100000	0	100000	(MT)
TOTAL Utilization	923000	960000	0	960000	0	990000	(MT)
Ending Stocks	447000	440000		305000	0	215000	(MT)
TOTAL DISTRIBUTION	3440000	3360000	0	3270000	0	3265000	(MT)

Table 3. Production, Supply, and Distribution of Salmon, MT

PSD Table Country Commodity	Russian Federation Salmon, (MT)						UOM MM/YYYY
	Whole/Eviscerated	2002 USDA Official [Old]	Revised Post Estimate [New] 01/2002	2003 USDA Official [Old]	Estimate Post Estimate [New] 01/2003	2004 USDA Official [Old]	
Market Year Begin							
Beginning Stocks	9000	9000	9000	8015	9000	10000	(MT)
Total Production	210000	200000	210000	225000	0	240000	(MT)
Intra-EC Imports	0	0	0	0	0	0	(MT)
Other Imports	3500	4015	3500	4100	0	4500	(MT)
TOTAL Imports	3500	4015	3500	4100	0	4500	(MT)
TOTAL SUPPLY	222500	213015	222500	237115	9000	254500	(MT)
Intra-EC Exports	0	0	0	0	0	0	(MT)
Other Exports	100000	95000	100000	112000	0	125000	(MT)
TOTAL Exports	100000	95000	100000	112000	0	125000	(MT)
Domestic Consumption	104000	102000	104000	105115	0	109100	(MT)
Other Use/Loss	9500	8000	9500	10000	0	10000	(MT)
TOTAL Utilization	113500	110000	113500	115115	0	119500	(MT)
Ending Stocks	9000	8015	9000	10000	0	10000	(MT)
TOTAL DISTRIBUTION	222500	213015	222500	237115	0	254500	(MT)

Table 4. Production, Supply, and Distribution of Crab and Crab Meat, MT

Commodity	Russian Federation		(MT)				UOM
	2002 USDA Official [Old]	Revised Post Estimate [New]	2003 USDA Official [Old]	Estimate Post Estimate [New]	2004 USDA Official [Old]	Forecast Post Estimate [New]	
Market Year Begin	01/2002		01/2003				MM/YYYY
Beginning Stocks	1800	1800	1800	1800	0	1900	(MT)
Total Production	92000	92000	0	97000	0	99000	(MT)
Intra-EC Imports	0	0	0	0	0	0	(MT)
Other Imports	500	500	0	450	0	300	(MT)
TOTAL Imports	500	500	0	450	0	300	(MT)
TOTAL SUPPLY	94300	94300	1800	99250	0	101200	(MT)
Intra-EC Exports	0	0	0	0	0	0	(MT)
Other Exports	71000	71000	0	74700	0	76000	(MT)
TOTAL Exports	71000	71000	0	74700	0	76000	(MT)
Domestic Consumption	20000	20000	0	21150	0	22000	(MT)
Other Use/Loss	1500	1500	0	1500	0	1300	(MT)
TOTAL Utilization	21500	21500	0	22650	0	23000	(MT)
Ending Stocks	1800	1800	0	1900	0	1700	(MT)
TOTAL DISTRIBUTION	94300	94300	0	99250	0	101200	(MT)

Table 5. Production, Supply and Distribution of Fish Roe, MT

PSD Table Country Commodity	Russian Federation		(MT)				UOM
	Fish,Urchin Roe/Caviar,Livers		2002	2003	Estimate	2004	
Market Year Begin	USDA Official [Old]	Revised Post Estimate [New] 01/2002	USDA Official [Old]	Estimate Post Estimate [New] 01/2003	USDA Official [Old]	Forecast Post Estimate [New] 01/2004	MM/YYYY
Beginning Stocks	9000	9000	9000	9000	0	8900	(MT)
Total Production	51500	52500	0	53200	0	54265	(MT)
Intra-EC Imports	0	0	0	0	0	0	(MT)
Other Imports	1300	2300	0	2000	0	1800	(MT)
TOTAL Imports	1300	2300	0	2000	0	1800	(MT)
TOTAL SUPPLY	61800	63800	9000	64200	0	64965	(MT)
Intra-EC Exports	0	0	0	0	0	0	(MT)
Other Exports	16500	17400	0	17800	0	18520	(MT)
TOTAL Exports	16500	17400	0	17800	0	18520	(MT)
Domestic Consumption	23200	23700	0	23600	0	23650	(MT)
Other Use/Loss	13100	13700	0	13900	0	13900	(MT)
TOTAL Utilization	36300	37400	0	37500	0	37550	(MT)
Ending Stocks	9000	9000	0	8900	0	8895	(MT)
TOTAL DISTRIBUTION	61800	63800	0	64200	0	64965	(MT)