USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.09

Voluntary Report - Public distribution

Date: 7/15/2008

GAIN Report Number: RS8054

Russian Federation

Fishery Products

Sturgeon Population Outlook

2008

Approved by:
Erik Hansen
U.S. Embassy

Prepared by:
Marina Muran, Erik Hansen, Cynthia Barmore

Report Highlights:
The illegal global trade of caviar, overfishing, growing habitat loss and pollution have decimated sturgeon populations around the world. Despite efforts to improve legislation to protect sturgeon and regulate trade, the Russian government faces serious hurdles in effectively stopping poaching. Scientists have stated that the most effective way to protect remaining sturgeon populations is through enforcement of current laws and application of stiffer penalties to those that ignore them. Government and foreign investment to modernize Russia's sturgeon hatcheries are sorely lacking.

Includes PSD Changes: No
Includes Trade Matrix: No
Trade Report
Moscow [RS1]
[RS]

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Executive Summary

The illegal global trade of caviar, overfishing, habitat loss, and pollution have decimated sturgeon populations around the world. Sturgeon depopulation is occurring in the Caspian Sea - a natural and primary source of the world's caviar. Researchers are especially concerned about beluga sturgeon as the worldwide population has declined by more than 90 percent over the last 20 years.

Despite efforts to improve legislation for sturgeon reproduction and trade, the Russian government has not succeeded in deterring poachers. Scientists have stated that enforcing criminal liability for violating the State's monopoly would curb poaching and restock the sturgeon population. Government investment to modernize sturgeon hatcheries is also crucial to stimulate production and trade.

Outlook for the Sturgeon Population

During the Soviet era experts estimated the annual sturgeon catch at 20,000 metric tons (MT) and caviar production at 2,000 MT. Current caviar production is an estimated 9 MT.

According to the Federal Fishery Agency (Rosrybolovstvo), poaching has reduced the sturgeon population by 90 percent since 1970. From 2001-02, the sturgeon stock decreased 40 percent. In 2002, Russia declared the situation critical and banned commercial fishing of sturgeon.

In the late 1990's the sturgeon population in the Azov Sea was estimated at 17 million. According to the Azov Fishery Scientific Research Institute, there are now only 100 female sturgeon in the Azov Sea capable of reproducing, of which 15 are the stellate species.[1] The beluga species is on the brink of extinction. In 2007, a Donsk sturgeon facility in Rostov oblast caught only 3 beluga sturgeon for reproduction. The situation is even worse in the Caspian Sea. Today, the sturgeon population is 40 times less than it was 15 years ago. According to CITES, the number of sturgeon in the Caspian Sea has decreased from 200 million in 2000 to 60 million in 2008. 19 out of 27 sturgeon species in the Caspian Sea have entirely disappeared.

Numerous surveys from the last decade contain evidence that sturgeon is moving at a high speed towards extinction. Some scientists predict that the entire stock of Caspian sturgeon will be wiped out within 15 years. The Russian government has not coped well with the scale of poaching and as a result sturgeon stocks continue to plummet. Scientists estimate that even if the government were able to completely halt poaching today, it would take at least 10 years to restock the sturgeon population.

Poaching

Poachers currently earn a 1,500 percent profit from illegally trading sturgeon and caviar. Poachers are better equipped than most coast guard inspectors. They have faster boats, state of the art satellite navigation tools and elaborate communications equipment. On average, poachers catch an estimated 0.5 MT of sturgeon per raid. Each raid costs between $2,500 and $3,000, including bribes to local officials, depreciation of equipment, fuel expenses, fishing gear, and salaries. It is being reported that the rising costs of fuel and equipment is force poachers to keep all sturgeon caught, regardless of size.

[1] The Azov Fishery Scientific Research Institute gathered this information through aerial monitoring.

Russian police recently detected one of the largest shipments in history of unregistered sturgeon. The police detained a truck in Astrakhan Oblast containing 15 MT of sturgeon valued at 9 million rubles. In contrast, police confiscated only 3 MT of illegal sturgeon in all of 2007. Illegal sturgeon shipments are usually accompanied by forged documents and government officials are often behind this lucrative business.

Most experts blame the constant reorganization of the Coastal Security Safeguard Service for the government's failure to confront poachers. Over the last 70 years, the government has reorganized fishery protection groups more than 20 times. The latest reorganization has created 10 separate agencies responsible for fish protection. The lack of interagency coordination, non-transparent legislation and criminal incentives propagate the illegal sturgeon and caviar trade. Most experts believe that the government should place only 1 agency in charge of fish protection.

Sturgeon-Breeding Facilities

Russia produced almost 4,000 tons of farmed sturgeon in 2006. Experts expect this number to grow in the near future as the number of hatcheries is increasing in Russia and local fishermen begin to use better technology. A new company recently built a sturgeon-breeding facility with an initial capacity of 50 tons in the St. Petersburg region. It estimates that in a few years annual output will reach 100 million juvenile sturgeon that can be used for restocking and commercial purposes.

The Russian government hopes to modernize sturgeon hatcheries through financial support. Revitalizing sturgeon stocks is difficult, however, due to the amount of time sturgeon require to reach sexual maturity. In the hatcheries, it takes 8 to 14 years for sturgeon to be able to reproduce.

Russian scientists are attempting to speed up this process. A hybrid of beluga and stellate sturgeon called "Bester" gain on average 4 kilograms in 2 years without losing taste characteristics. In natural conditions, it is possible to harvest sturgeon caviar only once every 4 years, but Russian scientists are developing a method to harvest it once every 2 years.

Sturgeon-breeding facilities release about 500 million juveniles into the Caspian Sea every year. There are 6 sturgeon-breeding facilities in Krasnodar Kray, 8 in Astrakhan Oblast, and 1 in Volgograd Oblast. One of the largest sturgeon-breeding facilities is situated on 600 hectares of land in Donsk located in Rostov Oblast. The facility contains 28 ponds with broodstock from more than 10,500 sturgeon species, including stocks of beluga and stellate on 28 hectares. Scientists contend that if the facility works at full capacity, it will be possible to restore the sturgeon population for commercial fishing in 10 years. However, most sturgeon-breeding facilities are in poor condition and require major support both from government and foreign investment.

Restocking the sturgeon population is a collective action problem. Spawning locations are not permanent and sturgeon usually spawn outside of Russian territory. When Russian breeding facilities release millions of juvenile sturgeon into the Caspian Sea neighboring countries also benefit.

Policy

Andrey Krayniy, head of Rosrybolovstvo, recently called for a 5 year moratorium on sturgeon fishing in the Caspian Sea to restore the sturgeon population. Kazakhstan and Turkmenistan reportedly support the initiative.

In March 2008, Rosrybolovstvo proposed that the Russian government declare all wild sturgeon to be state property. Scientists and trade sources believe that this law, "On Preservation, Reproduction, and Rational Use of Sturgeon Species and Regulation of the Circulation of Sturgeon Products," is vital to addressing the decimation of sturgeon stocks. A State sturgeon monopoly would allow the government to control the processing and trade of sturgeon, including the export of black caviar. This law would also enable the government to monitor and forecast the condition of the sturgeon population. Unless the government can remove illegal caviar from the market sturgeon-breeding facilities will not be able to create a competitive product. The government is still debating this bill and has not yet passed a final resolution.

The sale of black caviar is a complicated issue. It is illegal to catch black caviar for commercial sale. Sturgeon can only be caught in the Caspian basin for scientific purposes and hatchery reproduction. In 2008, Russia issued quotas for 140 tons of Russian sturgeon, including 25 tons of stellate and 18 tons of beluga. For scientific purposes, Russia also permitted the harvesting of 14 tons of sturgeon caviar, including 2.5 tons from stellate and 1.8 tons from beluga. Caviar accounts for 10 percent of total sturgeon caught.

Some of the sturgeon caught are not suitable for scientific research. There are no official statistics on exactly how much caviar is produced from these sturgeon. Scientific and research institutions estimate that at most 9 tons of caviar will be taken in 2008 from sturgeon deemed unfit for research. Nevertheless, between 200 and 300 tons of black caviar are sold annually.

According to the Federal Fishery Agency, there is no ban on selling caviar. On May 31, 2007, the Russian government issued Resolution #367 regulating trade of black caviar. Resolution #367 regulates the sale and disposal of illegally procured aquatic biological resources and processed products including caviar that have been forfeited or confiscated. The new regulation aims to curb rampant poaching of biologically valuable marine life and to improve the ability of these species to reproduce in their natural habitats.

Sturgeon sold either by weight or by cuts is easily available in Moscow supermarkets. In the Perekryostok supermarket, 1 kilogram of sturgeon costs almost 2,000 rubles ($85). In the gourmet supermarket Azbuka Vkusa, the same product costs almost 4,000 rubles ($160). Azbuka Vkusa also carries black caviar in 50 gram jars, charging $100 for stellate caviar and up to $400 for beluga caviar.

Russia: Exports of Fish Liver & Roe (HTS 030520), Calendar Year 2005-07, in USD

Country	CY 2005	CY 2006	CY 2007
The World-	1,514,436	3,753,256	3,926,236
Ukraine	412,670	2,132,003	3,221,870
China	266,279	615,909	633,957
Japan	823,951	1,003,145	64,836
Germany	0	0	4,257
United States	5,003	0	509
Source: Federal Customs Service			

Other Relevant Reports

GAIN RS 6026 Fishery Products/CITES Bans Black Caviar Exports from Russia
http://www.fas.usda.gov/gainfiles/200605/146187630.pdf

GAIN RS 5038 Fishery Products/Resolution Announced Protecting Sturgeon
http://www.fas.usda.gov/gainfiles/200505/146129772.pdf

GAIN RS 7057 Fishery Products/Resolution on Rules for Disposal of Confiscated Valuable Fish and Products
http://www.fas.usda.gov/gainfiles/200708/146292063.pdf

GAIN RS8011 Fishery Products Policy Update
http://www.fas.usda.gov/gainfiles/200802/146293770.pdf

GAIN RS7066 Fishery Products Annual Report
http://www.fas.usda.gov/gainfiles/200710/146292593.pdf