

**FISHERIES AND AQUACULTURE IN THE REPUBLIC OF KAZAKHSTAN:
A REVIEW**



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**FISHERIES AND AQUACULTURE IN THE REPUBLIC OF
KAZAKHSTAN: A REVIEW**

by

Serik Timirkhanov

Deputy Director

LLP Kazakh Fisheries Scientific Research Institute

Almaty, Kazakhstan

Boris Chaikin

Senior Fisheries Adviser, Kazakhstan Agency of Applied Ecology

Director, the Environment Consulting Centre

Zhannat Makhambetova

Microeconomist

NGO "Aral Tenizi" (the Aral Sea)

Aralsk, Kazakhstan

Andy Thorpe

University of Portsmouth

Portsmouth, United Kingdom of Great Britain and Northern Ireland

Raymon van Anrooy

Fishery and Aquaculture Officer

FAO Subregional Office for Central Asia

Ankara, Turkey

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FAO, Viale delle Terme di Caracalla, 00153 Rome, Italy

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PREPARATION OF THIS DOCUMENT

This circular contains a historical overview and a review of the current status of fisheries and aquaculture in Kazakhstan. The document was prepared by the Food and Agriculture Organization of the United Nations (FAO) in collaboration with the Fisheries Committee of the Ministry of Agriculture of the Republic of Kazakhstan and many stakeholders of the sector in Kazakhstan.

The authors of this circular are Mr Serik Timirkhanov (LLP Kazakh Fisheries Scientific Research Institute), Mr Boris Chaikin (LLP Kazakhstan Agency of Applied Ecology), Ms Zhannat Makhambetova (non-governmental organization “Aral Tenizi”), Mr Andy Thorpe (University of Portsmouth), and Mr Raymon van Anrooy (FAO). Former Chairman of the Fisheries Committee, Mr Suleimenov Kanat Bostanovich supervised the preparation of the review study. Mr Mirgaliy Baimukanov (Institute of Hydrobiology and Ecology) assisted with ensuring the consistency of data and information presented in this review study. Many other experts have provided their views and opinions on the various draft versions of this document.

This circular is the third document in a FAO Fisheries and Aquaculture Circular series concerning the fisheries sector in Central Asia. Other publications in the same series are the following: “Capture fisheries and aquaculture in the Kyrgyz Republic: Current status and planning” (Sarieva *et al.*, 2008); and “Inland capture fisheries and aquaculture in the Republic of Uzbekistan: Current status and planning” (Karimov *et al.*, 2009). In 2010, a sectoral review of the Republic of Tajikistan also will be published in this series.

This circular was prepared over the period 2007–2009 by FAO to increase general understanding and awareness of the current status of the fisheries and aquaculture sectors in Kazakhstan. Although changes in the sector occur rapidly, it is intended to provide an accurate picture of the situation in 2008/2009. The preparation of the document was hampered however by the limited availability of official statistical data and information. Over many years fishery information was hardly collected in Kazakhstan, which means that there are large gaps in historical information on basic sector indicators such as production volume and value of capture fisheries and aquaculture, employment, per capita fish consumption, fleet sizes, and imports and exports of fish. Aggregated information that is available is generally of limited use for policy-makers. Often the quality of the aggregated data is bad and the information does not reflect the current situation. In Kazakhstan, as in other Central Asian countries, major improvements in data and information collection and analysis are required, if the data collected are to be used by fisheries policy-makers and managers.

Moreover, FAO aims with this document to increase the awareness among small-scale fishers and aquaculturists in Kazakhstan and the Central Asian region in general, on the status, regulations, policies, plans, problems and opportunities of the sector. This information can be important to them to develop their businesses. Other aims of the circular are to inform decision-makers at national government levels, non-governmental organizations (NGOs), fishers’ organizations as well as international agencies about the role of fisheries and aquaculture in terms of their current contribution to employment, food security, poverty alleviation, and on the opportunities for increasing the contribution of the sector to sustainable growth and development of the country.

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ABSTRACT

The inland capture fisheries and aquaculture sectors in the Republic of Kazakhstan have gone through a dramatic decline in production, which lasted until 2001 for capture fisheries and continues until today for aquaculture production. While in 1989 some 89 000 tonnes of fish were produced within the Kazakh Soviet Socialist Republic (SSR), the production in 2007 was around 43 000 tonnes. The upward trend in capture fisheries production is remarkable, as in 2001 production amounted to just 21 000 tonnes. Aquaculture production is almost insignificant, with production accounting for less than 400 tonnes of marketable fish in 2007. In recent years, the contribution of the fisheries sector (including capture and culture) to the gross domestic product (GDP) was less than 0.8 percent. Imports of fishery products in 2006 were some 44 000 tonnes, while exports added up to 32 000 tonnes. Per capita consumption of fish is estimated at just over 3 kg, which makes fishery products a small contributor to the diet of the Kazakh people. The employment provided by the sector may be over 17 000 jobs. In recent years, the Ministry of Agriculture of Kazakhstan, with support from its Fisheries Committee, has made many improvements to the legal framework for the fisheries sector. It is however recognized that there are still many gaps in the policy and legal framework for the sector and that enforcement of rules and regulations needs more attention. International collaboration with the Kazakh fisheries sector has increased in recent years, particularly on sturgeon issues and at regional level. This FAO Fisheries and Aquaculture Circular aims to increase general understanding and awareness of the current status of the fisheries and aquaculture sectors in Kazakhstan. The document presented in this Fisheries and Aquaculture Circular was cleared for publication by the Fisheries Committee of Kazakhstan in February 2009.

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LIST OF ACRONYMS

CAB	Commission on Aquatic Bioresources
CaspEco	The Caspian Sea: Restoring Depleted Fisheries and Consolidation of a Permanent Regional Environmental Governance Programme
CIS	Commonwealth of Independent States
CITES	Convention on International Trade and Endangered Species
DSLS	Danish Society for a Living Sea
EC	European Commission
EIU	Economist Intelligence Unit
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FC	Fisheries Committee under the Ministry of Agriculture of Kazakhstan
GDP	Gross Domestic Product
GEF	Global Environment Fund
HACCP	Hazard Analysis and Critical Control Points
ISO	International Organization for Standardization
IUCN	International Union for Conservation of Nature
IUU	Illegal, Unreported and Unregulated
JSC	Joint Stock Company
MARA	Ministry of Agriculture and Rural Affairs of Turkey
MCS	Monitoring, Control and Surveillance
NAS	North Aral Sea
NGO	Non-Governmental Organization
NPOA	National Plan of Action
POL	Petroleum, Oil and Lubricants
RFB	Regional Fishery Body
RK	Republic of Kazakhstan
RPOA	Regional Plan of Action
SEC	Subregional Office for Central Asia (FAO)
SINAS	Syr Darya Control and Northern Aral Sea Project
SSR	Soviet Socialist Republic
STM	Special Tax Mode
SWOT	Strengths, Weaknesses, Opportunities, Threats
TAC	Total Allowable Catch
TCP	Technical Cooperation Programme (FAO)
TICA	Turkish International Cooperation Agency
UNDP	United Nations Development Programme
USSR	Union of Socialist Soviet Republics
VAT	Value Added Tax
WTO	World Trade Organization

Exchange rate:

The average exchange rate applied throughout this document is: US\$1 = tenge148.