



GLOBEFISH

GLOBEFISH RESEARCH PROGRAMME



Fishery Industry Profile Russia

Fishery Industry Profile - Russia

by

Ms Ekaterina Tribiloustova
GLOBEFISH

(June 2005)

The GLOBEFISH Research Programme is an activity initiated by FAO's Fishery Industries Division, Rome, Italy and financed jointly by:

- NMFS (National Marine Fisheries Service), Washington, DC, **USA**
- FROM, Ministerio de Agricultura, Pesca y Alimentación, Madrid, **Spain**
- Ministry of Food, Agriculture and Fisheries, Copenhagen, **Denmark**
- European Commission, Directorate General for Fisheries, Brussels, **EU**
- Norwegian Seafood Export Council, Tromsø, **Norway**
- OFIMER (Office National Interprofessionnel des Produits de la Mer et de l'Aquaculture), Paris, **France**
- SHILAT, Iranian Fisheries, **Iran**
- VASEP, Viet Nam Association of Seafood Exporters and Producers, **Viet Nam**

Food and Agriculture Organization of the United Nations, GLOBEFISH, Fishery Industries Division
Viale delle Terme di Caracalla, 00100 Rome, Italy – Tel.: (39) 06570 56244/06570 54759 - E-mail: GLOBEFISH@fao.org
- Fax: (39) 0657055188 – <http://www.globefish.org>

The designation employed and the presentation of material in this publication do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Photograph on cover page by courtesy of Norwegian Seafood Export Council

GLOBEFISH

*FAO/GLOBEFISH Research Programme, Vol.80 . Rome, FAO. 2005.
p.70*

This GLOBEFISH study gives a comprehensive overview of the Russian fishery sector and highlights the latest trends in catches, production and trade. The first chapter briefly introduces basic characteristics of the country: geography, population and economics. The second chapter is dedicated to the national capture fisheries, the Russian fishing fleet, capture production trends, aquaculture and general policies in the fishery sector. Chapter three focuses on the fish processing industry describing production outputs and trends in the product range. The fourth chapter gives an overview of trade and marketing issues. Special attention is given to changes in the distribution system, current developments in the retail sector and major retail players. It also reflects trends and challenges in marketing and consumption of fish in Russia. The last part of the chapter describes dynamics of Russian seafood imports and exports with an overview of the main products and countries. The detailed contact information on seafood trade companies is also provided.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any means, electronic, mechanical, photocopying or otherwise, without the prior permission of the copyright owner. Applications for such permission, with a statement of the purpose and extent of the reproduction, should be addressed to the Director, Information Division, Food and Agriculture Organization of the United Nations, Viale delle Terme di Caracalla, 00100 Rome, Italy.

© FAO

Table of Contents

Table of Contents.....	iii
Executive Summary.....	iv
Acknowledgement.....	v
Acronyms.....	vi
1. Introduction.....	1
1.1 Geographic Situation.....	1
1.2 Population.....	1
1.3 Economic Situation.....	2
2. Capture Fisheries in Russia.....	3
2.1 Fishing Regions.....	3
2.1.1 The Far East Region.....	3
2.1.2 The North administrative region of the Russian Federation.....	5
2.1.3 The West administrative region of the Russian Federation.....	6
2.1.4 The Southern Region.....	7
2.2 Russian Fishing Fleet.....	8
2.3 Employment in Fisheries.....	10
2.4 Policies.....	11
2.5 Marine Capture Fisheries.....	13
2.5.1 The main species.....	13
2.6 Aquaculture in Russia.....	17
3. Seafood Processing Industry.....	21
4. Seafood Trade and Marketing.....	23
4.1 Consumption.....	23
4.2 Distribution.....	26
4.2.1 Importers.....	26
4.2.2 Wholesalers.....	26
4.2.3 Retail sector.....	27
4.2.4 Seafood market in Moscow.....	29
4.2.5 Modern retail chains.....	30
4.3 Imports & Exports.....	34
Annex A. Marine Capture Fisheries and Aquaculture.....	41
Annex B. Statistics Seafood Processing Industry.....	45
Annex C. Seafood Trade and Marketing.....	46
Annex D. Useful addresses.....	53
Annex E. Company directory.....	56

Executive Summary

Before the Soviet Union disintegrated, the Russian fishery industry was the world's third largest, behind Japan and China. It accounted for one-quarter of the world's production of fresh and frozen fish and about one-third of the world output of canned fish. Despite a significant fall in output after 1990 caused by economic, politic and climatic reasons, Russia is still in the top ten of the world's fishery producers. Moreover, due to high seafood exports, growing imports and a high population, Russia represents a very interesting market for the seafood industry.

The aim of this report is to give a comprehensive overview of the Russian fishery sector and to highlight the latest trends in catches, production and trade. The first chapter briefly introduces basic characteristics of the country: geography, population and economics. The second chapter is dedicated to the national capture fisheries; in particular the main fishing regions and the statement of the Russian fishing fleet. Capture production is represented by the main commercial species like Alaska Pollock, herring, cod, salmon, crab and other. The chapter also gives an overview of the most important farmed species (trout, carp, sturgeon, whitefish and scallop) and the latest trends in the national aquaculture sector.

Chapter three focuses on the fish processing industry describing production output and current tendencies in the product range. The moves towards value-added products, wider range of assortment and quality oriented production are some of the main directions on the agendas of fish producers today. The fourth chapter gives an overview of trade and marketing issues on the Russian fishery market. Although still being underdeveloped, the retail industry is booming in Russia and there is a section focusing on the changes in the distribution system and the top ten retail players. It also reflects challenges in marketing policy towards fishery products and trends in the consumption of fish in the country. Due to highly varied income, two different tendencies in the national consumption are observed with less expensive fish like herring, Alaska pollock, mackerel and sprat on one side and the more "luxury" products like salmon, shrimp, octopus, mussels and other seafood on the other side. Although the latter is small in average consumption, an increasing number of existing producers and new players have chosen to expand into this area of the market. However, demand for the very traditional species like herring is top among the Russian consumers.

The last part of the chapter describes dynamics of seafood imports and exports with an overview of the main products and countries. Both imports and exports have grown fast in the last five years. During this period, the volume of imports has grown by 30% with the increase in value by 64%. Norway remains the leading supplier of herring and salmon, followed by Denmark which exports shrimps. Volume and value of seafood exports have risen by 23% and 18% respectively. Export of the Russian fish goes mainly to Asia with the Republic of Korea, Japan and China as the main markets. The most important products for export are Alaska pollack, cod, Pacific salmon, flounders, halibut and crab. Annexes A, B and C provide statistics on the Russian fishery capture, aquaculture, production of processed fish, imports and exports, while annexes D and E contain detailed contact information on seafood trade companies, including exporters, importers and producers, research institutes and other related organizations. A list of the processing plants, approved by EU standards, is also provided.

Acknowledgement

This report was prepared by Ekaterina Tribilustova with the assistance of Jochen Nierentz, FAO GLOBEFISH. Information was collected in close collaboration with **EUROFISH**, Copenhagen, which also provided the annexes covering exporters and importers. Editing was done by Mr. Peter Flewwelling. The project is mainly based on statistics from FAO, Russian Federal Service of State Statistics and different material from public sources.

Acronyms

BIOS	The Federal Unitary Enterprise, BIOS Research and Production Center for Sturgeon Breeding
CEVMP	Centre d'Experimentation et de Valorisation des Produits de la Mer, Russia
CSU RF	Central Statistic Office of Russian Federation
EEZ	Exclusive Economic Zone
EU	European Union
FMCG	Fast Moving Consumer Goods
GfK Rus	Russian Office of Gesellschaft fur Konsumforschung (Society for Consumer Research), International Market Research Organization based in Nuremberg, Germany
GKS (GosKomStat)	Federal Service of the State Statistics
GosNIORKh	Russian State Fishery Institute
GOST	Russian Government Standards
Natsrybkachestvo	Russian National Center for the Quality and Safety of Fishery Products
VNIERKH	All-Russia Research and Design Institute for Economics, Information and Automated Control Systems of Fisheries
VNIRO	Russian Federal Research Institute of Fisheries and Oceanography

1. Introduction

Before the Soviet Union disintegrated, the Russian fishery industry was the world's fourth largest, behind Japan, the United States, and China. It accounted for one-quarter of the world's production of fresh and frozen fish and about one-third of the world output of canned fish. Despite a significant fall in output after 1990 caused by economic, politic and climatic reasons, Russia is still in the top ten of the world's fishery producers. High seafood exports, growing imports and a high population have transformed Russia into an attractive market for the seafood industry with growth potential in value-added products and applying new marketing strategies.

1.1 Geographic Situation¹

With nearly 17 million sq km, Russia is the largest country in the world, occupying more than one-ninth of the world's total land area. Russia has a coast of 37 653 km and is bordering 14 countries.

Russian territory extends from the Baltic to the Pacific and from the Arctic Ocean to the Black Sea. Russia has access to and borders 12 seas: Sea of Azov, Black Sea, Baltic, Barents Sea and the White Sea connecting to the Atlantic Ocean; Kara Sea, Laptev Sea, East Siberian Sea and Chuckchi Sea in the Arctic Ocean; Bering Sea, Sea of Okhotsk and Sea of Japan in the Pacific Ocean; the Pacific Ocean itself, and the Caspian Sea.

The country's three major geographic regions include European Russia, consisting of the territory west of the Ural mountains; Siberia, stretching east of the Ural close to the Pacific Ocean; and Far Eastern Russia, including the extreme southeast and Pacific coast. Russia's climate ranges from coolness of the steppes in the south through to the humid continental climate in European Russia, then to the sub-arctic climate of Siberia; and to the very cold tundra climate in the northern polar region. Winters vary from cool along the Black Sea coast to frigid in Siberia. Summers can be extremely hot in the steppes and cool along the Arctic coast.

1.2 Population

The population of the Russian Federation stood at 143.8 million in accordance with the national census of July 2004. In this census, the population was declining at an annual rate at of 0.45%. Russians are the predominant nationality at over 80%, with Tatars, Ukrainians and Chuvash the largest minorities. Almost three quarters of the Russian population live in the European part of the country. The urban share of the population stands at 73% and 14 cities have over 1 million inhabitants.

¹ Based on the facts from "The World Factbook" and FAO "Russian Country Profile"

1.3 Economic situation

The Russian national economy continues to enjoy high and stable growth rate. The post- 1990's crisis recovery has been faster than most observers believed possible in late 1998, with GDP growing by an average of 6.8 % per year during the period 1999-2004 as it is shown in the table below. At current market prices, GDP was 16.779 trillion rubles in 2004² (1 US\$ = 27, 8 RUB, May 2005)

Table 1: Dynamics of GDP over the period 1999-2004

	1999	2000	2001	2002	2003	2004
Real GDP growth (%)	6.4	10	5.1	4.7	7.3	7.1

Source: Interfax

The growth has been driven both by major industrial sectors and services, but primarily by the export-oriented oil and metal industry, which have made by far the most important contribution to the economic recovery of Russia. Rapidly growing oil exports have been the main factor for the current consumption boom, however, significant increases in productivity have also been crucial factors in this situation. Russia has also improved its international financial position as gold and foreign currency reserves stood at US\$ 120.1 billion and for the first time exceeded state foreign debt.

Following President Putin's statement that the main strategic objective is to double the country's GDP by 2010, the Russian government is determined to provide favorable internal conditions for steady overall economic development. This is to be achieved by reducing the corporate tax burden, carrying out economic reforms, and facilitating structural changes towards internal market-oriented industries in the national economy.

The crisis of 1998 with its rapid privatization of state-owned enterprises and collapse of the ruble caused some economical decline, which was also reflected in the national fishing industry. The fishery industry sector, as well as other sectors, was hit by the withdrawal of state subsidies and the reduction in fish supply. However, the economic growth of the past 6 years, restructuring of the overall management policies, distribution system and sales facilities has had a direct impact on the development of the national fishery industry.

Russia's planned accession to the WTO, which is one of the main foreign policy priorities, is a very important step towards stable and secure trade. By the end of 2004 Russia had completed negotiations and signed protocols with 13 countries on commodities market access and with 11 countries on services market access. It is estimated that Russia will resolve other remaining issues concerning additional obligations to enter WTO in the very near future. Thus Russia's accession to WTO can be a significant driving force for the domestic reform agenda in the fisheries sector, which includes reforms in legislation, customs administration and elimination of trade barriers.

² Interfax, "Russia's GDP grows 7.1% in 2004 – Rosstat", February 2, 2005

2. Capture Fisheries in Russia: Overview of Resources, Policies and Management Practices

Russian total allowable catch within the waters under national jurisdiction in 2003 was estimated to be 7.372 million tonnes of fish and seafood including 3.772 million tonnes in the Russian Economical Zone, 2.042 million tonnes in open ocean areas and 1.557 million tonnes in economical zones of foreign countries. Potential catch in inland waters was 464 thousand tonnes of fish, 248 thousand tonnes from the inland seas and 216 thousand tonnes from freshwater bodies.

The main part of the Russian catch in 2003 was based on ocean fishery (93%), which is closely connected with the world fishery situation, the external economic and foreign policy aspects development of water bioresources of the World Oceans.

During the last five years the national catch has decreased by 20% from 4.2 million tonnes of fish in 1999 to 3.3 million tonnes in 2003. The overall TAC in 2003 however, was 3% more than the year before with 1.6% more to be taken in the Russian Exclusive Economical Zone (EEZ).

2.1 Fishing regions

2.1.1 The Far East region

The Far East region is the most important territory for the Russian fishing industry accounting for ca. 60% of the total national catch. The Pacific Ocean is the main base for the marine resources, where almost 2 million tonnes of fish and seafood were caught in 2003 (43% of the TAC). Almost all the catch was taken exclusively in the Russian EEZ (98%).

Most of the catch in the Russian Far East was taken in the northwest part of the region in the Pacific Ocean. Major fish resources in Russian EEZ are located in the Okhotsk Sea (35.3%), the west part of the Bering Sea (14.6%) and from the East Kamchatka zone (9%).

During the period of 2000-2003 the overall catch in the Far East basin has declined by 15% which is reflected in the decreased catches of the following species: Alaska pollack by 13%, plaice by 20%, herring by 47% and cod by 24%. However in 2003, a positive growth trend in catches was observed for some species. Salmon catches increased by 37% over the catches of 2002, and the harvest of Pollack roe increased by 26%. Three regions in the Far East are essentially important for the Russian fishery industry: Primorye, Sakhalin and Kamchatka.

Primorye is situated in the southern part of the Far East and is washed by waters of the Japanese Sea. In the west and south it borders China and the Democratic People's Republic of Korea. The territory has an area of 166 000 sq km and is inhabited by 2.2 million people, 77% of whom reside in the cities. The capital of the territory is Vladivostok; other major cities are Nakhodka and Ussuriysk.

Figure 1: Russian Far East



The climate of the territory is highly influenced by the Pacific Ocean and is rather mild. The summer is rainy due to the large air masses coming from the Sea of Japan. The winter is frosty, windy and short in comparison to other Russian regions. Ussuri and Bikin, the main rivers, flow out of the area to the sea. Lake Khanka, a large lake, is situated in the west. The Primorye coastline has two major ports one in Vladivostok and the other in Nahodka, both being connected to the Trans Siberian railroad. This region specializes in catching and processing of finfish as well as crab, shrimp, mussels, trepang, scallop and seaweed.

The Sakhalin Region is formed by Sakhalin Island, together with the Kuril Islands and the islands of Maneron and Tyuleny. It is washed by the Okhotsk Sea, the Sea of Japan and the North Pacific Ocean. The area of the territory is 87 000 sq km and the population is 610 000. Yuzhno-Sakhalinsk is the center of the region.

The climate of Sakhalin is moderately monsoon-type with cold winters and cool summers. The main rivers of the territory are Tym and Poronai, while there are many other smaller rivers, lakes and bogs. Sakhalin is characterized by rich and varied fish resources, the main species being salmon. The highest concentration of the fish is found in the southern part of the Kuril region, followed by Sakhalin and Kamchatka. Other key catches include Pacific cod, Alaska pollack, crab, shrimp, sea urchin and seaweed.

The Kamchatka Region includes the Kamchatka Peninsula in the northwest, as well as the Komandorskie Islands and Karaginsky Island. In the west Kamchatka is washed by the waters of the Sea of Okhotsk and in the east by the Bering Sea and Pacific Ocean. The area covers 470 000 sq km and has a population of 400 000. The center of the region is the city of Petropavlovsk-Kamchatski.

The climate of the peninsula is sea monsoon type (in the north of the territory it is subarctic). Kamchatka is famous for its 160 volcanoes, of which 28 volcanoes are active. The main river is the Kamchatka, with the port of Ust-Kamchatsk situated on its estuary. The special position of the peninsula makes it the major fishing area of Russia with a wealth of fish resources. It is estimated that about two-thirds of the fish, crustaceans and molluscs resources of the Russian Far East are concentrated in this area. Six species of salmon, as well as rainbow trout and unique king crab are also found there.

2.1.2 The Northern region of the Russian Federation

The North administrative region of the Russian Federation is the second most important region for the national fishing industry with estimates of production of 20% of the total national catch. In 2003 the harvest of fish and seafood in the North administrative region of the Russian Federation decreased by 20%, down to 727 000 tonnes. The main part of the catch from the North administrative region of the Russian Federation came from the northeast part of the Atlantic Ocean.

Figure 2: The Russian North.



The Russian North consists of the Kola Peninsula, the northern European part of the country with the islands of Novaja Zemlja, Zemlja Franz-Yozefa, Kolguyev, Vaigach, and islands Solovetskiye, the northern part of the Eastern European plain and northeast Europe. The Murmansk, Archangelsk, Vologda regions and the Republic of Karelia are located in the North territory. Around 5 million people live in this region with 70%, residing in the cities.

The North region includes the Barents, White and Karsk seas. There are several thousand rivers and lakes. The main rivers of the Murmansk region are Tuloma and Ponoy, while the Kem, Vyg and Vodla rivers are situated in Karelia Republic. The rivers of the Archangelsk region are the Severnaja Dvina, the Pechora, the Mezen, the Onega and the Vaga. The largest lakes are the Lake Ladoga and the Lake Onega in Karelia along with Lake Imandra and Lake Lovozero on the Kola Peninsula.

The Murmansk region is the fourth most important in the Russian Federation and the most important one in the European part of Russia. The Murmansk Sea Commercial Port is the only non-freezing port in the North and northwest Russia. Other ports are located in Archangelsk and Kandalaksha. The main fish species of the region are herring, redfish, salmon, cod, haddock, capelin, blue whiting, arctic cod, flatfish and mackerel.

2.1.3 The Western Russian Federation, including Baltic Coast

The west administrative region of the Russian Federation, including Baltic coast made up 11% of the total Russian catch at 372 000 tonnes in 2003. The catch was 5% lower than the harvest of 2002. During the last three years however, catches have increased by 11%. The greater proportion of the catches came from the northwest part of the Atlantic Ocean (83%).

Figure 3: The Russian Northwest



The west area includes all of the western regions on Russia's borders with Finland, Estonia, Latvia and Belarus. The Kaliningrad region is separated from Russia proper, and this area borders Poland and Lithuania. The region is washed by the Baltic Sea in the west. Fishing vessels operate from here in the Baltic Sea, North Sea and Norwegian Sea, as well as in the equatorial and south Atlantic.

The population of the west is around 8 million with an additional 950 000 inhabitants in Kaliningrad. The largest cities are St.Petersburg, Pskov, Velikie Luki, Novgorod and Kaliningrad. The region has several large ports located in St.Petersburg, Kaliningrad and Vyborg.

The main rivers are Neva, Svir, Volkhov, Velikaya, Luga and Vuoksa and the largest lakes are Lake Ladoga, Lake Onega and Lake Chudsk. Commercial fish species of the Baltic Sea are herring, sprat, cod and salmon. In 2003 the catches of redfish increased by 65% over the catches of 2002, blue whiting and herring catches grew by 36% and 27% respectively. Mackerel catches decreased by 31% and Jack mackerel showed a sharp decline of 78%.

2.1.4 Southern Russian region

The catch from the Southern region (including the Caspian Sea) was 123 000 tonnes of fish in 2003. The region contributes ca 7% of the Russian total catch. One half of the catch came from the Caspian Sea, or 60 000 tonnes, catch from the Black Sea was estimated at 29 000 tonnes, and the Sea of Azov contributed 12 000 tonnes.

The main fishing regions in the southwest territory of Russia are Krasnodarsky Krai, Adygeia and Rostov region. The Krasnodarsky territory is situated in the western area of the Caucasus and is washed by two seas – the Black Sea in the southwest and the Azov Sea in the northwest. The Rostov region lies in the south of the East-European Plain and in the Caucasus and is washed by the Azov Sea in the west.

Figure 4: The Southern Russian region and the Caspian Basin



The largest area is occupied by the Rostov region, inhabited by about 4.4 million people over 100 000 sq km, whereas the smallest territory belongs to Adygeia. Its population is ca. 450 000 spread over a territory of 8 000 sq km. The Republic of Adygeia is almost in the very center of Krasnodar region. The climate of the region is ranging from moderate continental in Rostov region to the warm subtropics on the southern coast of the Black Sea. A few large rivers flow in the southern area: Volga, Kuban, Laba, Belaya and Don. The main seaports of the region are Novorossiysk, Tuapse, Astrakhan, Taganrog, Mahachkala and Sochi.

While the Black Sea and the Sea of Azov catches showed an increase of 16% in 2003 over 2002, the Caspian Sea harvest fell by 25%. This was caused by the decrease of the sprat catches which were 48% lower. Principal commercial fishing species of the Caspian Sea are sprat, pike-perch and sturgeons. The main species of the Azov Sea are the collection of sturgeon species, Azov sea anchovy, Azov kilka, sprat, pike-perch, bream and Black Sea roach.

2.2 Russian Fishing Fleet

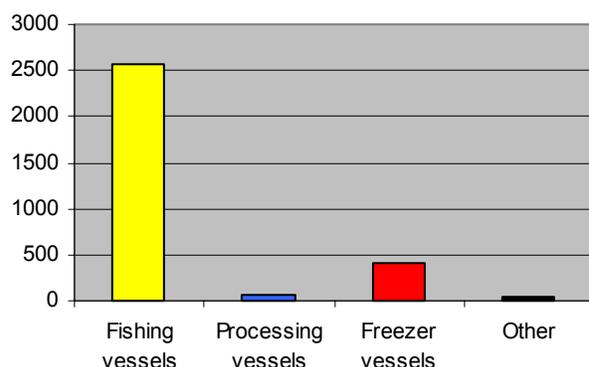
Fishing fleets are the basis of the capture fishery industry. In the period 1960-1980 the Russian fishing industry was extensively developed due to the significant state support. A solid infrastructure was established to catch over 7 million tonnes of fish and produce up to 4 million tonnes of fish products per year.

Transition to the market economy caused sharply reduced state financing with subsequent reduction in investments and fishing activities. Catch and production of fish decreased to less than 4 million tonnes in 1994, and since then fell to 3.2 million tonnes in 2002. In spite of the serious problems, the Russian fishing industry was able to reverse the downward catch trend of the last years. There has been a slight increase of 2 % of the harvest in 2003, and according to

the forecast of the social and economic development of Russian fishery industry, the catch is planned to increase by 100 000 tonnes every year.

In 2004, Russian fleet was comprised of 3 073 vessels, of which there were 2 574 fishing vessels, 54 processing vessels, 406 freezer vessels and 39 transport vessels.

Chart 1: The structure of the Russian fishing fleet in 2003



Source: GKS

Of fishing vessels, 17% were large vessels (over 64 m LOA), 51% were medium-sized (34-65 m LOA) and 32% were small vessels (24-34 m LOA). Smaller vessels are not registered on the State Marine Register, but are controlled by the State Inspection of the Small-size Fleet.

The large-scale class fishing vessels have been designed not only to catch, but also to process and produce a finished product. Their main output is comprised of frozen fish, frozen fillets, fish meal and fish oil. Medium-sized vessels are usually capable of freezing fish. Small vessels have no equipment for freezing fish, so they have to deliver fresh fish to the bigger ships or shore-based facilities immediately after catching to maintain the quality of the fish.

At present, the structure of the fishing fleet is characterized by a significant number of physically worn-out and obsolete vessels. It is estimated that about 63% of the total vessels are used well over the exploitation time norms for the vessel. Sixty five percent of the fishing fleet is worn down and needs renovation, 58% of the processing and transport fleet needs modernization and repairs, and 36% of all other types of fishing vessels need to be replaced.

The main problem concerns small and medium-sized vessels. The numbers of the vessels which have been used over their life expectancies in these categories are 90% and 77% respectively.

By the end of 2004, the following Russian fishing fleet vessels were meeting EU standards:

- Factory vessels: 129
- Freezer vessels: 276
- In addition, processing plants: 110

The problem can be resolved only with the replacement of the old vessels. New generation vessels can lead to a reduction of the fleet and thus create better efficiency and conditions for fishing. Vessel construction is being planned for both domestic and foreign factory vessels. Obviously, this will have an impact on the employment level and the number of companies which can survive this restructuring process.

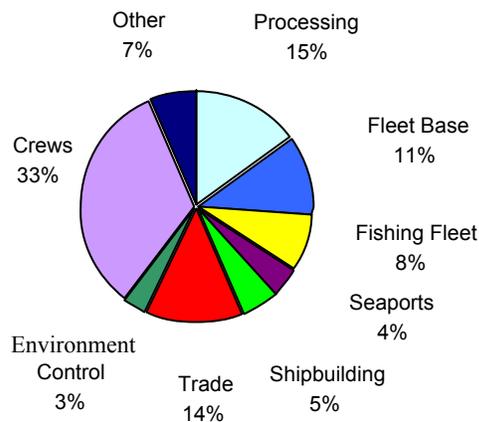
“Development Concept of the Fishery Industry in Russia” notes the government targets to boost the nation’s shipbuilding and modernization of fleet facilities in the periods 2003-2005 and also 2006-2010. The strategies are as follows:

- Evaluation and revision of the fishing and processing fleet focusing on its technical condition and capacity;
- Creation of incentives for design and construction of highly efficient fishing vessels;
- Monitoring of the fleet capacity;
- Consolidation of small fleet enterprises.

2.3 Employment in Fisheries

In 1991 the fishery industry provided employment to 556 000 people in Russia while in 2003 the total number of employees in fisheries was amounted to 370 000 persons. The drop in employment can be directly attributed to the national crisis of the 1990’s and the subsequent negative macro-economic factors that influenced the industry immediately thereafter.³

Chart 2: Employment structure in the Russian fisheries sector



³ VNIERKH “Fisheries Industry in Russia”, 2003 p. 61

Source: GKS

Thirty three percent of all employees in the Russian fishing industry, or 124 000 people are working as crew on the fleet. 15% percent of the total in the fishing industry or 56 000 persons are directly employed in the fish processing industry while 51 000 persons work in the fish trade/marketing sector. Fleet-based support employees, excluding crews, comprise 40 000 persons; 30 000 persons are engaged in the fish catching industry; 19 000 persons are engaged in the shipbuilding sector; and 15 000 work in Russian seaports.

The organizations of the Russian Fisheries complex involved in harvesting and processing of sea products are represented by the following forms of ownership: state unitary enterprises; noncommercial associations of organizations (unions, associations having coordinating functions); economic societies and fellowships; production cooperatives. The greatest numbers of organizations are registered in the following regions:

1. Sakhalin region – 6 associations and 583 enterprises having other formats of ownership;
2. Primorye – 8 associations and 331 enterprises having other formats of ownership;
3. Kamchatka region – 8 associations and 306 enterprises having other formats of ownership;
4. Murmansk region – 8 associations and 287 enterprises having other formats of ownership;
5. Krasnodar region – 46 enterprises having other formats of ownership;
6. Archangelsk region – 25 enterprises having other formats of ownership.

There are several large associations of inter-regional importance, for example, the Association of Fishing Entrepreneurs of Sakhalin, the Association of Fishing Entrepreneurs of Primorye and the Association “North-West”.

2.4 Policies

Overall

During the period 1995-2004, the State Fishery Committee was the main authority responsible for managing the overall Russian fishery sector. Its key functions were as follows:

- To distribute fish quotas
- To monitor the utilization of fish resources
- To license fishery and aquaculture activities
- To formulate the national strategy for the fishery sector
- To represent Russia at international events

On 10th March 2004, President Vladimir Putin issued an order changing the structure of his ministerial cabinet. By this order, the former Russian State Fisheries Committee was abolished and a new agency called Federal Agency for Fisheries was formed under the Ministry of Agriculture to manage the Russian fishing industry.

According to the decree, a Federal Agency is described as an organ of executive power carrying out within its specified spheres, the functions of law-enforcement, government services and control of properties except for the functions of inspection. The new ministerial structure is planned to provide more authority to the Ministry of Agriculture to effectively supervise the fishery sector.

Strategies

In order to optimize the complex fishery sector and implement a whole range of changes there, the government has developed a strategic plan for the period until the year 2020.

The “Concept of Development of the Fishery Industry in Russia” was approved on 2nd September 2003. The overall target is to develop a long-term mechanism in order to resolve current problems in the various aspects of the fishing industry including: legislation, management, resource utilization, and support facilities.

The plan describes three phases with the strategic directions as follows⁴:

2003-2005 Creating conditions for overcoming the current industry crisis:

- development of necessary legislation;
- introduction of a long-term, transparent quota allocation system;
- boosting of the nation’s shipbuilding capacity;
- encouragement for landing of Russian catches at the domestic facilities;
- introducing tougher measures against poachers and illegal activities.

2006-2010 Creating conditions for sustainable extended production in the fishing industry:

- improvement of the policy of stock exploitation;
- ensuring sustainable levels of fishing capacity and resource sustainability;
- decreasing fishing pressure on the resources via relocation of part of the fishing fleet to the EEZ of other states and to the high seas;
- encouragement of international cooperation;
- development of credit facilities;
- improvement in export controls and fisheries enforcement.

⁴ Based on “Strategic plan published” by Russian Fish Report, October 2003, p.3

○

2011-2020 Completing creation of conditions and mechanisms for sustainable development of the industry:

- modernization of fleet facilities and introduction of new technologies;
- development of industrial aquaculture and mariculture;
- discovery of new species and fishing areas;
- introduction of administrative reform of the institutions under the Federal Agency for Fisheries;
- enhancement of fishery research, training of specialists, increasing scientific capacity.

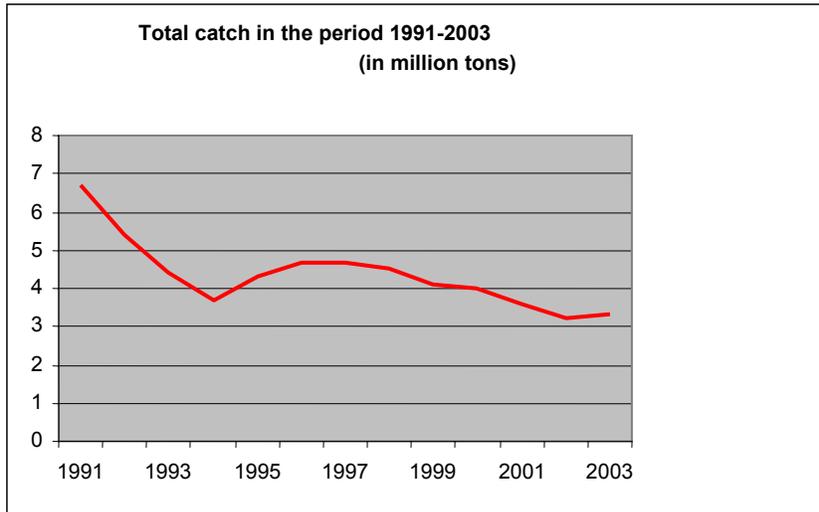
Moreover, Russian industry will seek to double its fish catch from the current 3.3 million tonnes by 2020. This target is expected to be achieved by increasing fish catches in Russian waters and signing agreements with other countries allowing Russian vessels to fish in their EEZs waters. Such agreements have recently been signed with Morocco and Mauritania, and similar agreements may be prepared with Peru.

2.5 Marine Capture Fisheries

The total Russian catch amounted to 3.3 million tonnes in 2003, about the same as in the previous year. Most of catch was in the Russian EEZ (ca. 64 %), catch in 200 mile zones of foreign countries estimates at 14%, in open ocean areas outside of 200 mile zones 10%, inland waters at 7% and freshwater basins at 5%.

The Russian fishery industry still remains the in the top ten of the world's fishery producers. However, the national harvest is well below historical levels when one notes catches of ca. 7 million tonnes in 1991. Several reasons have led to this significant decline during the 1990s and the beginning of 2000 as noted earlier. Restructuring of the overall fishery industry together with reduced fishing activity and the declining status of the fishing fleet has been reflected in the national production. Regardless of the difficulties in the industry, the decline of Russian catch now seems to be stopped, and according to the forecast of the social and economic development of Russia's fishing industry, the total national harvest in 2006 is likely to reach 3.5 million tonnes.

Chart 3: Total catch trends in Russia - 1991-2003 (in million tonnes)



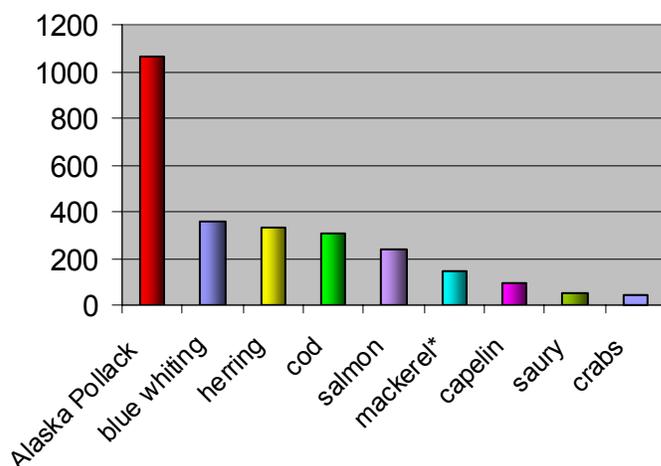
Source: FAO

2.5.1 The main species

The Russian fishery harvest includes about 170 species of finfish and invertebrates of more than 100 commercial species. Most of the catch comes from the Sea of Okhotsk (ca.50%), followed by the western part of Bering Sea (ca.30%) and the Pacific waters off the Kurils Island (ca. 5% each). The Sea of Azov, the Black Sea and the Caspian Sea estimated at 7% of the catch, while the Baltic Sea contributes about 1.5 3%.

In terms of volume (see Annex A), the largest part of the national harvest comes from Alaska pollack (30-40% of total catch). Blue whiting is second with 11%, followed by herring with 10%. Atlantic and Pacific cod accounts for 9%. Salmon catches contribute some 7%, but the species is very important in terms of its high value. Other important catches include mackerel, capelin, Pacific saury, halibuts, haddock and crabs (23%).

Chart 4: The main species of Russian fish catches in 2003 (in '000 tonnes)



* Mackerel catches: Atka mackerel included

Alaska pollack (*Theragra chalcogramma*) is the main commercial species for the Russian fishing fleet, accounting for more than 1 million tonnes, or 33% of the total catch in 2003. Russia has been the world's largest Alaska pollack producer for a long time. Climatic changes and overfishing, however, has reduced national annual Alaska pollack catches from 3.56 million tonnes in 1991 to 1.14 million tonnes in 2003. For the last five years (1998-2002) the national harvest of Alaska pollack has gradually declined, although in 2003 there was an increase of 19.7% compared to 2002. The main resources of Alaska pollack are situated in the Bering Sea and the Sea of Okhotsk. The main catching areas are the fishing grounds off Navarin Cape in the Bering Sea and West Kamchatka in the Okhotsk Sea.

The export of frozen Alaska pollack amounted to 431 000 tonnes, or 35% of total Russian exports, thus being the most important of commercial catches. Russia supplies Alaska pollack to Asian countries, mainly Korea and China, European countries, and the USA.

The resources of the species are all being fully utilized. A whole range of new processing methods and products have been developed in order to maximize the use of the catches and achieve waste-free production of Alaska pollack, and other species such as Pacific cod and herring.

Blue whiting (*Micromesistius poutassou*): Russia is the third leading country in production of Blue whiting. In 2003, the total international catch of 2.3 million tonnes of the species was divided as follows:

- Norway landed 834 000 tonnes (36%);

- Iceland 501 000 tonnes (22%);
- Russia 356 000 tonnes (15%);
- EU 297 000 tonnes (13%); and
- Faroes 330 000 tonnes (14%).

The Russian harvest of blue whiting is used both for human consumption and fishmeal. It is often replacement of other low-cost fish like Baltic sprat and Baltic herring.

Atlantic and Pacific herring (*Clupea harengus harengus* and *Clupea pallasii*): Herring, at 10% of the total catch, is the third largest Russian commercial target species in terms of volume. It has seen a significant decline from 530 000 tonnes in 1999 to 335 000 tonnes in 2003. Catches of Pacific herring were 191 000 tonnes and Atlantic herring were 144 000 tonnes. The most abundant stocks of Pacific herring can be found in the Okhotsk Sea, Korfo-Karaginsk and Gyzhigin-Kamchatka regions.

Herring forms the most abundant stocks in the northern part of the Okhotsk Sea, off the Magadan coast and off South Sakhalin-Hokkaido. Other herring stocks are found in Karaginsky and Olyutorsky Bays in the Bering Sea, off De Castri and Peter the Great Bay in Japan Sea and Cheshskaja Bay in the Barents Sea.

Cod fish (Atlantic cod, Pacific cod, Polar cod and Navaga): The total annual catch of cod fish has been stable during the past years at over 300 000 tonnes. The main species include Atlantic cod (186 000 tonnes) and Pacific cod (52 000 tonnes), Polar cod account for 65 000 tonnes. Cod shows high abundance levels in the Bering Sea and the Seas of Okhotsk and Japan. The main resources of Pacific cod are concentrated in the western part of the Bering Sea, off West and East Kamchatka.

Salmon (Pink salmon, keta and sockeye salmon): Salmon is one of the most popular species in Russia. In 2003 the national salmon catch increased by 20% over the catches of 2002, reaching 237 000 tonnes. Pink salmon, the main commercial species, accounted for 80% of the total salmon catch. The main fishing grounds for Pink salmon are the northern part of the Okhotsk Sea, East and West Kamchatka, and the waters of Kurils islands and south part of Sakhalin Islands. Keta salmon and sockeye salmon are other important salmon species with estimated catches of 28 000 tonnes and 19 000 tonnes respectively. Atlantic salmon is not caught regularly in Russia; consequently Norway is the main supplier of farmed Atlantic salmon to Russia with another significant increase noted in 2003.

Mackerel (Atlantic mackerel, Chub mackerel, Jack and Horse mackerel): The catch of mackerel amounted to 81 000 tonnes in 2003, showing a constant decline from 227 000 tonnes in 1999. In addition, to mackerel family, Okhotsk Atka mackerel catch was 61 000 tonnes in 2003. Atka mackerel is distributed from the east coast of the Kamchatka throughout the Komandorskie and Aleutian Islands, north to the Pribilov Island. Other main mackerel species are Atlantic mackerel at 40 000 tonnes, and Chub mackerel at 21 000 tonnes. All species of mackerel family,

as well as herring, Blue whiting and capelin mostly come from operations in international waters and foreign zones. Russia has just limited resources of these species.

Pacific saury (*Cololabis saira*): This species has shown a significant increase in catch during the last few years, reaching 57 000 tonnes in 2003 from less than 5 000 tonnes in 1999. The South Kurils are the main fishing grounds for Pacific saury. In accordance with a bilateral agreement, Far Eastern fishermen are permitted to catch Pacific Saury in Japan's exclusive economic zone.

Crab (Red king crab, Blue king crab, Hair crab): The catch of crab has fluctuated widely in Russia, as the general harvest of crab is highly unpredictable and variable. During the 1980s the production level was zero and gradually grew from the middle of the 1990s as the national harvest approached 23 000 tonnes in 1997. During the last five years the total catch of crab has declined significantly from 46 000 tonnes in 1999 to 14 000 tonnes in 2003. The main reasons for the decrease have been illegal fishing, overfishing and poaching.

Crab products are described like "other Russian caviar" and considered as luxury products. Russia is the third largest crab export country after Thailand and China. Japan remains the main importing country for Russian crab, importing fresh, frozen and chilled crab species.

The most valuable commercial species is Red king crab, which is found in West Kamchatka and Primorye. The catch of Red king crab has dramatically declined from 37 000 tonnes in 1999 to 8 000 tonnes in 2003 due to illegal fishing. Generally the Red king crab stocks of 180 000 tonnes in West Kamchatka are stable and provided catches of 35 000 tonnes annually, but as a result of heavy harvesting, the stocks have been considerably reduced.

Blue king crab is found all over the Far East basin, and the biomass of the species is estimated at 30 000 tonnes. The harvest of Blue king crab in 2003 was 3 500 tonnes and according to forecasts, there is little chance for an upward trend. In 2005 quotas in the Barents Sea for the mentioned fishery were allocated. The region became the principal area for the king crab fishery due to drastic fall of the resources in the Far East.

Another very valuable species is Hair crab with the main abundance in South Sakhalin. The catch of the Hair crab in 2003 was 134 tonnes and the total biomass was estimated at approximately 15 000 tonnes.

Other important species

Apart from the main commercial species, there are many other important species of finfish. They include flatfish, halibut, capelin, freshwater bream, haddock, redfish, European perch, tunas, anchovy, sprat, squids and scallops.

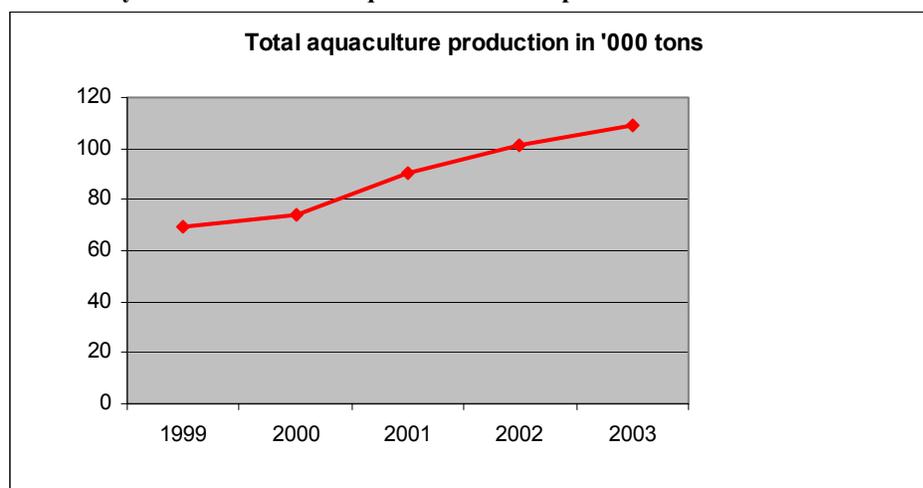
2.6 Aquaculture in Russia

The territory of Russia is characterized by a wide variety of soil and climatic conditions. It includes the nation's lakes occupying 22.5 million hectares, man-made reservoirs at 8.9 million

hectares, rivers at 523 400 square kilometers, multi-purpose water bodies occupying 1 million hectares, and ponds at 141 600 hectares⁵.

Aquacultural production in Russia has been growing steadily over the last 7 years in spite of the decline observed in the 1990s (see Annex A). The national aquaculture production reached almost 108 751 tonnes in 2003. The majority of the output is represented by carp (Common carp, Silver carp and Grass carp), trout and whitefish. Sturgeon farming is a Russian specialty and scallop aquaculture is a new trend in national farming.

Chart 5: Dynamics of Russian aquaculture in the period 1993-2003



Source: FAO

Trout farming

Trout farming has a long history in Russia, however before 1990 the country cultured only 500-600 tonnes of trout per year.

In 2003 the total production of trout was more than 6 080 tonnes resulting in 5.5 tonnes of trout caviar for human consumption. The total amount of the product has almost doubled in a few years from 3 193 tonnes of trout in 1999, and in addition, more than 30 million eggs were sold on the domestic and international market.

This significant difference in trout production was caused by a strong demand for the species under the transition to a market economy. The industry has started to develop quickly to benefit from the high margins in value-added production. Trout farming has been developing very rapidly, and on a massive scale in the Republic of Karelia where many state and private farms are engaged in the sector. Two examples include: the Black Sea based Adler trout farm, one of the largest producers with 1 000 tonnes of trout, 20-30 tonnes of trout caviar and 30 million eggs

⁵ Russian Fish Report No 10 (85) October 2003 p. 24

being produced in 2002 for human consumption. Another trout farm in Khakasia, in the south, grows 450-500 tonnes of trout per year.

Sturgeon

Sturgeon aquaculture was attempted from 1880 to 1920 in Europe and North America, but with little success. Only in the Soviet Union was breeding successful, when hatcheries began operating about 1930⁶.

According to an independent study published by the Russian magazine “Ryba i Moreprodukty”, national sturgeon culture got a boost in 1994, when the first respected high profile program was developed by the State Fisheries Committee. The Scientific and Production Center “BIOS” was established in Astrakhan for selective breeding of sturgeons and technological development. Astrakhan is regarded as the heart of the Russian sturgeon industry, and there are now 4 sturgeon farms in Astrakhan province: BIOS center, Raskat fish farm, Ikryaninsk farm and Yanminsky hatchery. Additional sturgeon farms are operating in several other Russian provinces: Volgograd, Novocherkassk, Baikal, West Siberia, Kemerovo and Moscow region. Krasnodarski Krai is planning to open 4 new sturgeon farms in the period from now to 2010. The farmers of the St.Petersburg region are constructing a new aquaculture facility⁷.

In 2003 the total farmed sturgeon production reached 2 208 tonnes. However, despite the emergence of the new farms, there have not been any significant changes in sturgeon production and technology over the last few years. The main reason behind the slow progress is a lack of coordination and technological information sharing, together with insufficient financing.

Nevertheless, Russian scientists continue to work on reproduction issues. Many water reservoirs have been used for supplementary ponds for brood stocks of sturgeon, sterlet, and paddle-fish, as well as three bester breeds: Aksaisk, VNIRO’s and Burtsevsk (bester is a hybrid between beluga sturgeon and sterlet). In addition, many Russian fish farmers have been switching from carp breeding to commercial culture of more delicatessen and expensive species such as sturgeon.

“Ryba i Moreprodukty” claims that the country has all the resources to develop commodity sturgeon culture. “Today Russia’s brood stock has reached more than 40 000 sturgeons versus an estimated 10 000 individuals in all other foreign countries put together”, says the report.

⁶ Roe to Ruin: The Decline of Sturgeon in the Caspian Sea and the Road to Recovery prepared by Lisa Spier (NRDC), Liz Lauk, Elen Pikitch (WCS), Susan Boa, Lisa Dropkin, Vikki Spruill (SeaWeb). December 2000.\

⁷ Russian Fish Report No 10 (85), October 2003, p.24

Whitefish

Commercial farming of whitefish (*Coregonus*) has become a new trend in the last few years. The annual production of farmed whitefish has doubled over this period and reached 4 530 metric tonnes in 2003.

The target for whitefish aquaculture has focused primarily on the production materials for inland fisheries. For that purpose the State Fishery Institute GosNIORKh developed the biological technology of growing the stocking material of *Coregonus peled*, *Coregonus muksun*, *chir* *Coregonus nasus*, *ludoga whitefish* *Coregonus lavaretus baeri* and inconnu *Stenodus leucichthus nelma*.

In later years the technologies were used for growing the brood stocks of various whitefish species. Taking into account the scientific developments and potential capacities of commercial fish farming, the annual production could reach 10 000 -15 000 metric tonnes of valuable whitefish.⁸

Scallop

The national cultivation of scallops is based in Primorye, and the number of scallop farms has tripled since 2003, reaching 40 farms in 2004.

The history of mariculture and scallop cultivation in Russia began in 1971, when the first scallop farm was organized in South Primorye. Now, the farming of molluscs is seen as a potentially lucrative business for the region. Being a very valuable species, Yesso scallop is enjoying a high demand on the export markets. It is now protected in the area by a fishing ban on harvesting practices.

The national cultivation of Yesso scallop has increased significantly during the last few years. Despite the decline down to 41 tonnes in 2002, the production of farmed scallop reached 334 metric tonnes in 2003 (FAO). In 2004 the output increased further to 450 tonnes. The major part of the output (375 tonnes) comes from the largest Primorye-based farm Nereida Aquaculture JSC. Unlike other scallop farms traditionally practicing dispersal of the fry by divers, Nereida has pioneered cage breeding of the scallops in a closed two-three year cycle. Almost all the output of the year 2004 was exported to the Republic of Korea as the Russian market for the product is still weak. According to Nereida, the firm could boost the harvest to 10 000 tonnes should the market demand become stronger.⁹

Nereida has begun mass production of scallops due to a new technology designed and implemented by The Institute of Marine Biology of the Far East, a branch of the Russian Academy of Sciences. This know-how is based on technological principles and practices of both the scallop and the Japanese kelp cultivation. According to scientists, the potential for growth of scallop production in the Russian Far East is very large. Estimates place this potential up to 80,000 tonnes of scallop species in the Bay of Peter the Great alone, using existing technologies.

⁸ Russian Fish Report No 10 (85) October 2003, p.23

⁹ Dr. V. Ivin, Institute of Marine Biology

Carp farming

Carp was one of the first species to be cultured in Russian fish farming and it dominates the sector (73% of the total national aquaculture output). The production of carp has been steadily increasing and is presently about 80 000 metric tonnes per year. The two dominant carp species are common carp and silver carp. Common carp production contributed 57% of the total aquaculture output in 2003 and the share of silver carp was estimated at 41 %. Grass carp, or White Amur contributed about 1% of the total aquaculture production.

Lotoshinski farm is a leader of carp production in the Moscow region. It has a history of 62 years in the business and produces approximately 1 000 tonnes of carp per year from its 1 380 hectares, which it ships to Moscow.

Biserovsky's Rybokombinat is another example of a large farm specializing in carp production. It has 40 years of experience in carp farming and its carp production is estimated at 500 metric tonnes per year. According to the company's management, its products have acquired a good reputation on the market thanks to the absence of preservatives and coloring agents. In particular, such popular retail chains as Auchan, Metro, Sedmoy Continent, Ramstor and Perekryostok have been buying Biserovsky's fish products.

Prospects of ranching and trends

Russia has got a considerable potential in the fish farming sector. A significant increase in commodity farmed fish production can be achieved with the help of new ranching technologies. The country has approximately 30 million hectares of lakes, water reservoirs, estuaries, pools used for cooling the power stations and multipurpose water bodies. It has also a stock of natural feeds in the inland waters which are much underexploited.

In addition, Russia has considerable experience in fish ranching in various types of water bodies. In particular, the reproduction of valuable fish species and further release into the natural environment has been a practice in Russia over many years. This experience, combined with the efficient use of new technologies can lead to a significant increase in Russia's aquaculture production. The right use of technologies can be achieved with the utilization of a complex set of measures such as reconstruction of the ichthyofauna, polyfauna, mass stocking and effective fishery management.

The development of aquaculture in Russia has also been encouraged by the government's order "On the development of commodity aquaculture and fishery in the inland waters of the Russian Federation". The order established a particular state system aimed at developing the nation's freshwater aquaculture industry and provided the financial support to fish farms. According to this order, it is expected that the production of inland fish will rise to 600 000 tonnes by the year 2006¹⁰.

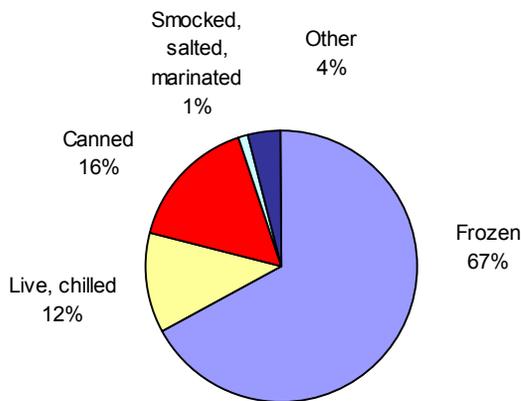
¹⁰ Russian Fish report, October 2003

3. Seafood Processing Industry

Over the last decade, significant changes have occurred in the Russian food processing sector. Large fish processing combines and plants which functioned effectively in the Soviet times were left in a difficult position as sharply reduced state financing together with the reduced supply of raw fish forced them to adjust to new market realities. Some of those fish processing combines closed down, others survived by implementing new techniques, and also changing their overall management structure. In addition, many smaller private companies emerged on the market investing in modernization and providing a new range of fish products.

In 2003, output from the processing industry amounted to more than 3.1 million tonnes, including 2.9 million tonnes for human consumption (see Annex B). For several years, the production growth has been relatively stable with an annual increase of 4-6 %.

Chart 6: The national seafood production structure in 2003.



Source: VNIERKH

The major output of the Russian seafood processing sector included frozen fish. It comprised some 67% of the total production, or 1.8 million tonnes in 2003. Canned products comprised 464 000 tonnes in 2003, or 16 % of the production. This primarily consisted of herring, mackerel, sprat and some high value fish like salmon. The Russian canned sector also moved forward towards an increasing range of products. Poor labeling and packaging is still one of the main obstacles for national and international acceptance of these products.

Salted, smoked, marinated and dried fish products have a very small part in the overall Russian seafood production. It was estimated at only 1%, or 14 000 tonnes in 2003, but this product sector has been developing rapidly, primarily in terms of variety. In the last few years Russian producers have been offering an increasing range of vacuum-packed products such as cold and hot smoked cuts and slices of mackerel, salmon and trout, salted herring and marinated fish with different spices. These are only a few examples of new products on the traditional list of

processed fish. Crustaceans, molluscs, eels and even exotic sharks can also be found among other new products.

Production of salmon roe or “red Russian caviar” has increased by 12%, now reaching 25 000 tonnes annually. “Caviar” is also produced as a “ready-to-eat” roe from such species as Alaska pollack, capelin, pike and wild carp. In 2003 the production of those products increased by 23% over the production of 2002, reaching 147 000 tonnes.

General trends observed in the Russian fish processing sector include:

- The move by the national processors towards more value-added products. Fish processors are trying to resolve the situation of a reduced fish supply through modernization of processing facilities and methods, and production of value-added fish items.
- The ongoing trend of local processors to compete for quality oriented customers, rather than for price-oriented ones. Though the majority of the consumers are still price-sensitive, quality issues are becoming a much more important factor when a purchase is made. At present there are 110 Russian fish processing plants approved as being up to EU standards.
- An increasing number of Russian consumers prefer “easy-to-cook” seafood products such as fish fillets, fish cakes, ready to use seafood salads and other convenient products.
- Domestic processors and marketing specialists now offer a wider range of seafood products due to the increased competition in the marketplace. The combination of increased disposable incomes and competition has brought prices of fish within local economic ranges, and hence increased seafood product availability for the people, resulting in a higher demand for various fish products, molluscs, crustaceans and other seafood delicacies.
- Better labeling and packaging of local products is a challenge and has become the demand of many Russian consumers. This applies particularly to canned fish as many consumers find it difficult to recognize one company’s production from another. As the result, an item of poor quality from one processor can negatively influence the consumer to avoid buying that product in the future regardless of the producer. According to a market study conducted by Price Waterhouse Coopers, 44% of the population takes into consideration whether or not a product is a brand name when making a purchase decision. Price and recommendations from friends and relatives also remain very important factors in the selection decision.

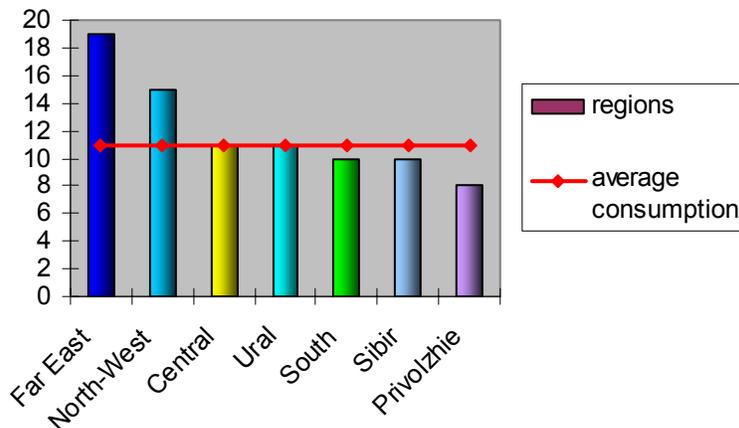
4. Seafood Trade and Marketing

4. 1 Consumption

Domestic consumption of fish and seafood products declined sharply after the fall of the Soviet Union as the overall seafood industry was compelled to change its structure due to the resulting economic crisis. In 1978, the USSR State Planning Committee had approved projected levels for the consumption of basic food products for the next decade, whereby each citizen of the USSR was expected to eat a minimum of 18.2 kg of fish (product weight) per annum. The average level of fish consumption fell from more than 20 kg per capita in the 1980s to less than 10 kg in the 1990s.

Although it is now difficult to estimate the exact figures for national seafood consumption due to unrecorded landings and the rapid changes in food and fish marketing strategies, the Central Statistics University has estimated annual per capita consumption on the rise at 11 kg (product weight) in 2003. The new product forms and food marketing strategies that enhance the convenience, quality and choices as well as increasing incomes have undoubtedly been a factor in this increase. Some market analysts are more optimistic and have estimated that the real consumption figures are 3-4 kg higher than that noted above. They base this estimate on the fact that the official projections do not take into account the significant proportion of marine catches taken by numerous small fishermen in the inland fisheries that is poorly monitored and landed unrecorded. Naturally, the greatest per capita consumption figures are observed in the fishing regions of the Far East (19 kg) and in Moscow and St.Petersburg (16-20 kg) due to higher average incomes and better availability.

Chart 7: Consumption of fish per capita in Russia divided by regions.



Source: CSU RF

Muscovites consumed 205 000 tonnes of fish products in 2002, which is about 22 kg fish per capita for the city. The lowest level of fish consumption is observed in Privolzhie due to the lack of new distribution and fish sales technologies, combined with the lower income levels. According to the forecasts from the Bureau for Regional Economic Development, fish

consumption in Russia as a whole is expected to grow in the near future, with projections being that the annual fish consumption will rise to 17.5 kg per person.

Research done by the VNIERKH Institute noted the highest demand was observed for frozen fish products, then prepared and preserved fish and seafood products. Of particular interest were salted and smoked fish, as well as different kinds of preserved fish. It has been noted that the wide variation in incomes has resulted in the majority of consumers still preferring the less expensive fish like herring, Alaska pollack, mackerel and sardines, but the growing incomes in some sectors has led to the demand for valuable fish species. The latter includes the salmon species which has become very popular among higher income Russian consumers. Pacific salmon, Atlantic salmon and chum salmon are now enjoying high demand both in frozen and fresh forms. Freshwater species popular among the Russian consumers are carp, bream, pike and catfish.

The increased purchasing power has also been reflected in the consumption of seafood delicacies, e.g., crab, shrimp, mussels, octopus, lobster, red caviar (salmon roe) and black caviar (sturgeon caviar). According to the market research agency Konsult Market, the largest share of the domestic market for these delicacy sea products falls on shrimps as the favorite Russian seafood product. This niche market is dominated by frozen cold-water shrimp in the low-price market segment and by warm-water shrimp occupying the premium segment.¹¹ In addition, the Russian market for imitation crab sticks and seafood snacks are other fast developing sectors. The largest share in this market niche is for dried salted squid snacks and salted fish sets for the male dominated, beer snack market.

Trends in consumption

Again, according to Konsult Market, consumer demand for seafood is growing by 15-20% per year in Russia. Konsult Market further predicts that the national fish consumption has a high growth potential due to the following factors:

- 1) Ongoing modernization of the overall distribution and retail structure has enhanced the availability of fish and seafood goods in the market place. This change is especially noticeable when reviewing the facilities for storing fresh fish. Formerly, many shops had to refuse fresh fish due to the lack of appropriate storage capacity. The establishment of numerous hyper and supermarket chains has now allowed more fresh fish to be available on the market. For an example of this trend, the present ratio of fresh and frozen Norwegian salmon is 50:50 on the market that previously bought only frozen salmon.¹² Further, this restructuring of the distribution system has also facilitated the supply of more fish to remote rural regions though the active expansion of the retail chains.
- 2) The diversity of fish species, product forms, and seafood specialties has played a major role to explain the increased seafood consumption. Products such as mussels, oysters, shrimp, octopus, squid and sea scallops were not familiar to the regular Russian

¹¹ Vitrina/Restoranny biznes, March 2005, p.34

¹² IntraFish News Desk, "Russia emerging as major export market for Norwegian fish", 08.02.2005

consumer and now if they are reasonably priced, many people are eager to try them. In other price segments, the increased range of fish species and processed forms encourages c to forget the previous image of fish as being a boring meal.

It is difficult to describe a typical Russian fish consumer, as noted earlier due to geographic and economic factors. The changing trend in the increase of fish demand has been due to consumers with relatively high or increased disposable incomes. It is noted however, that Russian consumers are becoming more sophisticated and quality oriented when purchasing fish, and this has been verified by market research. Russians are becoming more interested in more variety and quality rather than costs. Many people have also started to eat fish more frequently, due to health concerns. Although this situation is typical for large cities with more or less noticeable share of middle class population. Even in these prosperous regions up to 30% of the population indicate price as an essential point. The most popular fish species for that category are Blue whiting, polar cod, Baltic sprat and herring, anchovy from the Sea of Azov and the Black Sea, wachna cod and freshwater species of carp family.

Presumably, the consumption of fish and seafood products could be further increased by better generic advertising and distinguished labeling or packaging. One can still find poor labeling for frozen and canned products. There is strong evidence that Russian consumers react positively to the inclusion of information regarding the product's origin, quality, and other promotional efforts.

4.2 Distribution

At present there are more than 2 000 companies in Russia engaged in the fish and seafood trade. Most fish and seafood importers and distributors are located in Moscow, making this the main transshipment point for the outer regions. More than 300 wholesalers, traders and distributors supply fish and seafood products to the Moscow region alone.

For the Russian Far East, Vladivostok is home to most major importers/distributors and serves the same focal point function as Moscow for eastern traders.

4.2.1 Importers

Russian importing companies are highly fragmented. Moscow and St.Petersburg-based importers and wholesalers are the major fish and seafood suppliers to the local retail outlets. Mostly large-scale wholesalers and some retail chains import processed fish and seafood products, delicacies, live and chilled fish. A list of the major Russian seafood importers can be found in the Annex E.

4.2.2 Wholesalers

The wholesale trade in Russia has traditionally been outside the focus of public attention. However, since the middle of the 1990s, significant transformation in distribution management, sales techniques and product quality choices have been introduced. Before the 1990s, the overall wholesale structure was not efficient and trading techniques were out of date. Due to increased competition in the marketplace and in the export business trade with enhanced standards being applied, the fish and seafood wholesalers have had to adapt to today's buyers who now demand quality, and brand-name goods.

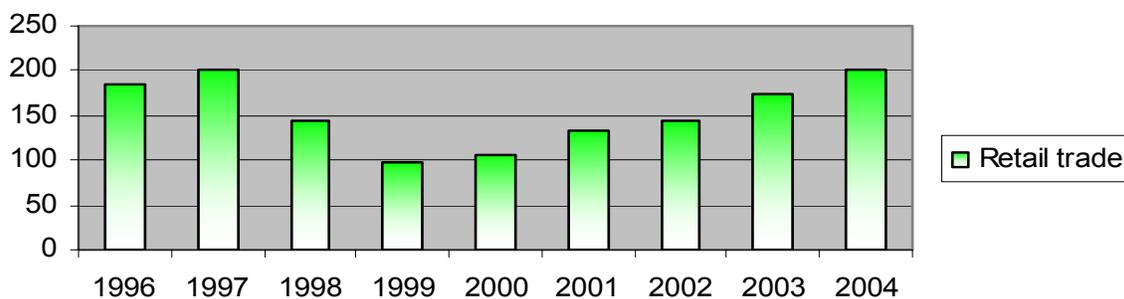
The overall wholesale structure in Russia can be divided into large-scale wholesale and medium/small scale wholesale sectors. As noted before, there are more than 2000 companies engaged in seafood wholesale trade and distribution, e.g. large wholesale organizations of fishery industry basins like Dalrybsbyt, Sevrybsbyt, Kaliningradrybsbyt, Kasrybprom, Lenryba, Novorossiyskrybprom, TPO Russia (the main district trade-production organizations in Russia). The Annexes give detailed information on seafood wholesale companies in Russia.

4.2.3 Retail sector

The rapid boost of the Russian retail system started after the crisis of 1998 and today the country is the world's fastest growing retail food market with potential to double its size again by 2008 as it did in the period 2001-2004.

The retail sector has been one of the top performer industries of the national economy due to growing disposable incomes, economic recovery, new product decisions and investment in numerous new shopping centers. In 2004, the retail trade turnover increased by 12 percent reaching US\$ 200 billion. The food retail sector is also growing at an impressive rate with food products representing 45.6 percent of overall retail trade accounting for US\$ 91 billion¹³.

Chart 8: Turnover in the retail trade in Russia (in billion US\$)



Source: Cushman & Wakefield

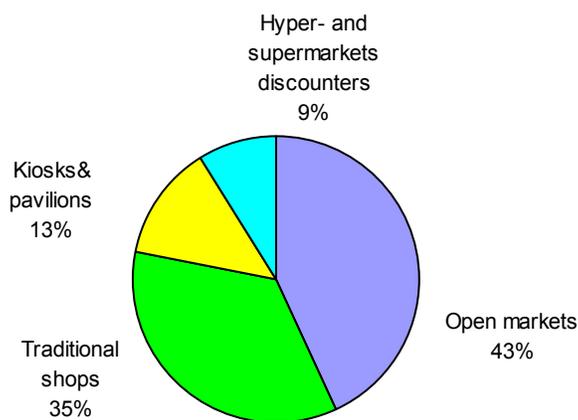
¹³ Commercial Real Estate Services, Cushman & Wakefield: "Retail Market Profile: Russia, Moscow" 2005

In 2004, A. T. Kearney placed Russia in first place in its annual Global Retail Development Index for the second year in a row. This indicates the overall attractiveness of emerging markets for investments in retail.

“Its country risk decreased slightly as it took steps to improve economic and political stability, and moved closer to entering the WTO. Retailers also continue to be attracted by not only the size of the Russian market, which is home to 143 million people and an estimated US\$ 280 billion in annual consumer spending, but also by its potential growth”, stated the report.

At present, the Russian food retail structure consists of about 340 000 food and beverage retail outlets¹⁴. Open markets account for about 43 % of total sales; traditional grocery shops for 35%; kiosks and specialty shops for 13% and hypermarkets, supermarkets and discounters took the remaining 9% of the total.

Chart 9: Retail Structure in the Russian market in 2003



Source: *AC Nielsen*

While modern retail chains currently account for less than 10% of total retail sales for the country and about 28% in Moscow, these chains are expanding rapidly and should be considered as prime targets for sales of fish and seafood products in the future.

According to market experts, the share of new retail outlets in Russia has the potential to take control of 35-50% of the total retail sales by the year 2015. For Moscow the figures could be even higher, 50-70%.¹⁵ Currently however, as noted above, despite the rapid growth of the supermarket/hypermarket chains, traditional open markets still account for 43% of total retail sales in Russia, and thus remain an important channel for fish and seafood products distribution.

¹⁴ USDA Foreign Agricultural Service “Russia: Retail Food Sector Report” 2004

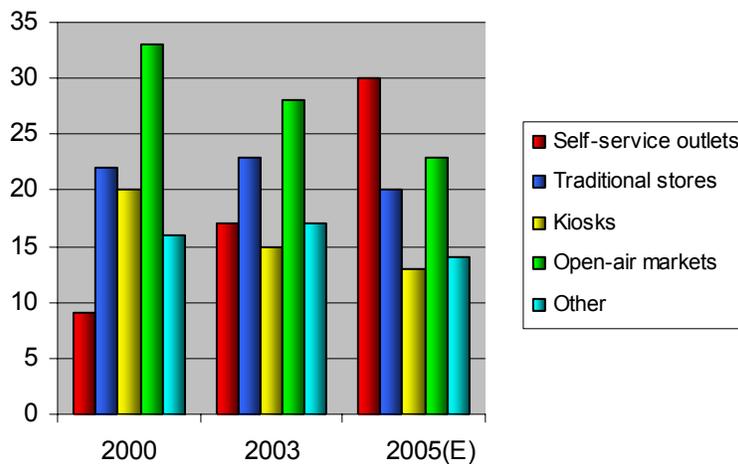
¹⁵ “Business Analytica “

4.2.4 Seafood market in Moscow

The Moscow retail market accounts for 28% of the total national retail sales. This represents the most developed market in the country in terms of strategic retail developments, consumer incomes and distribution infrastructure.

It is difficult to present exact figures for the development of sales channels for fish in Moscow. According to research conducted by Price Waterhouse Coopers, many Muscovites still prefer open air markets for buying fish as some cheap species can't be found in the supermarkets.¹⁶ However, the market share of this traditional outlet has gradually declined during the last five years from 33% to 23%. Considerable increases can be observed in the market share gained by modern retail shops. It accounts for 30%, an increase from 9%, and forecasts are that it will reach 50-70% by the end of the next decade. Rapid expansion of supermarket and hypermarket chains makes them a prime channel for increasing sales of fish products, particularly for fresh fish and seafood.

Chart 10: Retail sales by channels in Moscow



Source: IRG (*E = estimated*)

Another source, GfK Rus, puts the share of modern retail chains much higher, noting: “the latest wave of Muscovites shopping habits studies show that townfolks get a taste of civilized trade formats: in the year of 2004, 64% of the shoppers preferred to buy FMCG (Fast Moving Consumer Goods) categories in hypermarkets (8%), supermarkets (29%) and discounters (28%) compared to 53% in the previous year”.¹⁷ The GfK study further states that open markets and small self-service independent shops are the two main losers as their share has been reduced by 10% and 8% respectively in 2004.

¹⁶ PricewaterhouseCoopers 2003/2004 “Global Retail and Consumer Study from Beijing to Budapest”

¹⁷ GfK Rus – Institute for marketing research “Moscow, Russia: A taste of comfortable shopping”, April 2004

The leading retailers for Muscovites are as follows:

1. Russian discounter **Pyaterochka**
2. Russian hyper and supermarkets chain **Perekryostok**
3. Turkish hyper and supermarkets chain **Ramstore**
4. Russian hyper and supermarkets chain **7th Continent**

The main criteria for the change in preference of the choice for food procurement included: (i) proximity to home or to work; (ii) the wider assortment of products; and (iii) best prices.

It should also be noted that half of all fish products in the Moscow market are imported from outside the region with about 25% coming from Murmansk, 8% from Primorye, 6% from St. Petersburg, and the rest from the Moscow region and other districts¹⁸.

Moscow, being the largest single market for seafood in Russia, consequently sets the trend for the widest range of fish and seafood goods in fish sales. This national capital has more than 50 specialized stores, offering 75-77 different fish and seafood items daily, normally comprised of: 1-2 live fish items; 18-20 frozen fish products; 25-27 salted and smoked fish items; 8-9 types of fish fillets; 15-17 canned fish items and 7-8 kinds of crustacean and molluscs. The city's average grocery stores offer 60-62 fish items, while fish wholesalers deal in 64-65 fish items. These figures do not include the growing variety of the "ready-to-eat" products and convenience fish products available.¹⁹

4.2.5 Modern retail chains

Since year 2000, the Russian retail trade has experienced a real boom in its development. Over the past six years, the retail turnover rate has surpassed the country's GDP growth, and forecasts indicate that this trend should continue for the foreseeable future.

The major impact on Russia's food retail market occurred when several foreign chains like Ramstore, Auchan, Spar and Metro entered the market. Initially, the new construction by these investors focused on Russia's two largest cities – Moscow and St.Petersburg, however, to increase their market shares these investors are now moving into other cities with populations greater than one million.

¹⁸ Russian Food Market Magazine N6, "Moscow fish and seafood market", 2003

¹⁹ Seafood International, January 2004, p.34

The ten top retail investors included:

Foreign



1. **Ramstore** of the Ramenka chain was the first supermarket format launched in the Russian market in 1997. This Turkish chain now operates six hypermarkets and seventeen supermarkets in Moscow, including supermarkets in Nizhniy Novgorod, Kazan and Krasnoyarsk. The Ramenka chain also plans to open new stores in St.Petersburg, Rostov-on Don, and Novosibirsk. The turnover in 2004 was US\$ 560 million and it is expected to reach US\$ 970 million by year 2007.



2. German retailer **Metro Group**, the largest foreign investor in Russia, introduced a new “Cash & Carry format” which is still underdeveloped in the country. Metro operates six outlets in Moscow and two in St. Petersburg. The company has recently opened another six stores in Kazan, Yaroslavl, Volgograd, Samara, Rostov on Don and Krasnodar. Metro remains the only foreign chain using this marketing strategy in Russia. Total sales in 2004 were over US\$ 1 billion.



3. The French retail network **Auchan** owns three hypermarkets in Moscow and three in the Moscow region, and with its comparatively low prices and wide range of products, has become the major competitor for domestic retail chains and open markets. According to Auchan’s management, prices in domestic retail chains have fallen by 10-15% since it started operating. In 2004 Auchan had estimated sales of US\$ 260 million, 56 % above the 2003 level.



4. The **Spar** supermarket chain operates four stores in Moscow, three in the Moscow region and another three in Nizhniy Novgorod. The company has an expansion strategy to open at least eight additional supermarkets in the Moscow region.

Domestic

Those foreign retailers have fundamentally changed the food retail sector in Russia by implementing new management philosophies, and introduced modern technologies and principles and practices to improve customer service. They have been able to offer customers lower prices, higher quality, more efficient distribution, and volume purchasing power. Large Russian holding companies have thus been placed under significant pressure by these foreign investors. Faced with growing competition, they have started to form strategic alliances.

Most of them found competitive advantages in the following strategies:

- consolidation of smaller food retail chains;
- development of several formats and marketing strategies simultaneously;
- implementation of franchising systems; and
- construction of new outlets, warehouses and distribution centers.

Almost all Moscow and St. Petersburg-based companies developed expansion strategies into the regions building new stores and buying up local companies. The most popular targets were for 14 major cities with the population of more than one million inhabitants. A few networks however, did decide to also expand to smaller cities.



5. **Pyaterochka** of the Agrotorg Group is the largest Russian food retailer in terms of sales. It opened the first store in 1999. From the beginning this chain has targeted the rapidly emerging middle class as well as low-income customers. It has positioned itself as a discount food retailer offering competitive prices, a well-chosen range of quality products and convenient store locations in residential areas. The development of the chain had been incredibly rapid. In the first five years, the Agrotorg Group opened 425 stores in Moscow, St. Petersburg and other regions. In the opinion of foreign and Russian experts, Pyaterochka's development and growth have surpassed comparable parameters of a lot of foreign networks. The company opens 3-4 new stores monthly and turnover for the last two and a half years has increased by more than 800%. The total sales for 2004 were US\$ 1.6 billion.

6. **Magnit**, originally from Stavropol, is the largest retail network in the market in terms of numbers of retail outlets and stores. The company operates 1019 stores in Russian regions with US\$ 997 million being the turnover in 2004. Magnit is planning to open other 2 500 stores by the year 2008.

7. **Perekryostok** is another domestic retail leader with 100 stores in Moscow and another 40 in St.Petersburg, Samara, Togliatti, Volgograd, Nizhniy Novgorod, Lipetsk, Voronezh and Rostov-on Don. The chain is considering further expansion to Krasnodar, Kazan, Ufa, Saratov, Penza and Tumen. Perekryostok, which is supported by the Alfa Group and Templeton reported total sales of US\$ 750 million in 2004. The entire chain had estimated sales of more than one billion in 2005. The company initiated “private label” production selling a wide range of goods under their own brands.



8. **Seventh Continent Group** opened its first three stores in Moscow in 1994. The stores positions were chosen in the exclusive historical center of Moscow: Lubjanka Street, Arbat and Ohotny Rjad square. The target clients of the company were upper –middle class customers who required extra high quality and service. The group continued its strategy and focus until 1998, and after the crisis in the Russian economical system, the second stage of Seventh Continent’s development started. Growing competition forced the company to change its philosophy to a strategy of developing supermarket chains. Seventh Continent now operates 88 stores in Moscow using three different strategies:

- “7th Continent – five stars” (luxury supermarkets)
- “7th Continent – Universam”
- “7th Continent – five steps”(close to customers)

Using a multi-marketing strategy allows the company to satisfy the different needs of its customers, each in an efficient manner while preserving product quality and customer service. The company estimated sales of US\$ 615 million in 2004 versus US\$ 420 million the year before.

9. **Kopeika** is another large discount chain established in 2002 by Felma Group. In contrast with other retail networks operating in the cities with a population of more than one million, the company chose to address the middle-size cities in Central Russia. As of 2003 the company had 52 discount outlets, and a turnover was US\$ 265 million. Kopeika is now planning to invest US\$ 140 million in expansion of trade centers with its economical supermarkets in 15 regions: Kaluga, Voskresenks, Vladimir, Brjansk, Noginsk, Voskresensk, Rjazan, Tula, Yaroslavl and Smolensk.



10. **Paterson's** first supermarket was opened in Moscow in 1998 and by the end of 2004 the chain had 45 outlets located in Russia's two main cities as well as in other large regions. The company's growth plan for 2004-2005 includes 30 new outlets both in Russia and neighboring countries. Due to the expansion in the regions the company's turnover increased by 60% from US\$ 150 million in 2003 to US\$ 250 million in 2004.

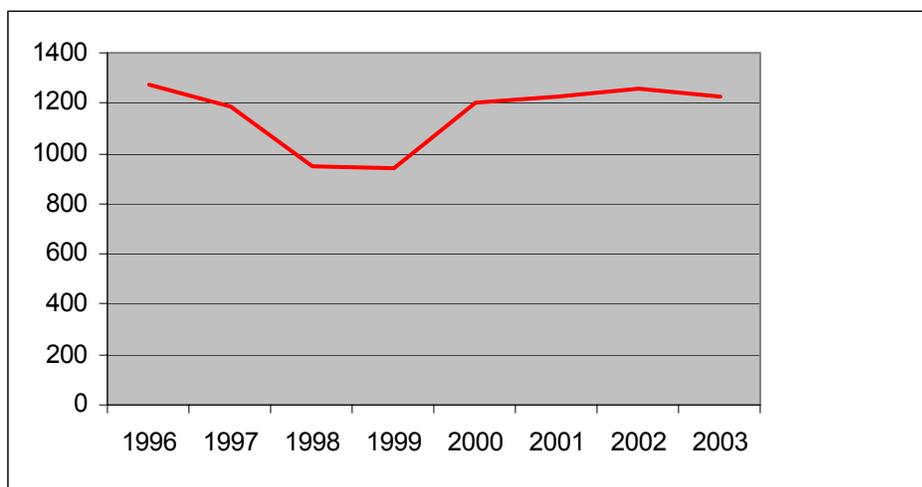
Despite the aggressive competition and rapid expansion of both foreign and local chains, the Russian retail market is still far from saturated. Even in Moscow there is only 65 sq. meters of shop floor per 1 000 customers, compared to the EU average of 140 sq meters per 1 000 inhabitants. Throughout other parts of Russia this figure is even lower, averaging some 35 sq meters.

4.3 Imports & Exports

Export

The Russian fishery industry is strongly export orientated. In 2003, the total Russian export of seafood products amounted to 1.2 million tonnes, which is more than one third of the annual national production (see Annex C). After the crisis of 1998, the exports of fish products did not reach the pre-crisis level (1.2 million tonnes) again until 2000. Since then the exports have been relatively stable with the slight increase in value to US\$ 1.5 billion from US\$ 1.1 billion in 1998.

Chart 11: Dynamics of the Russian exports of seafood in the period 1996-2003 (in '000 tonnes)



Source: FAO

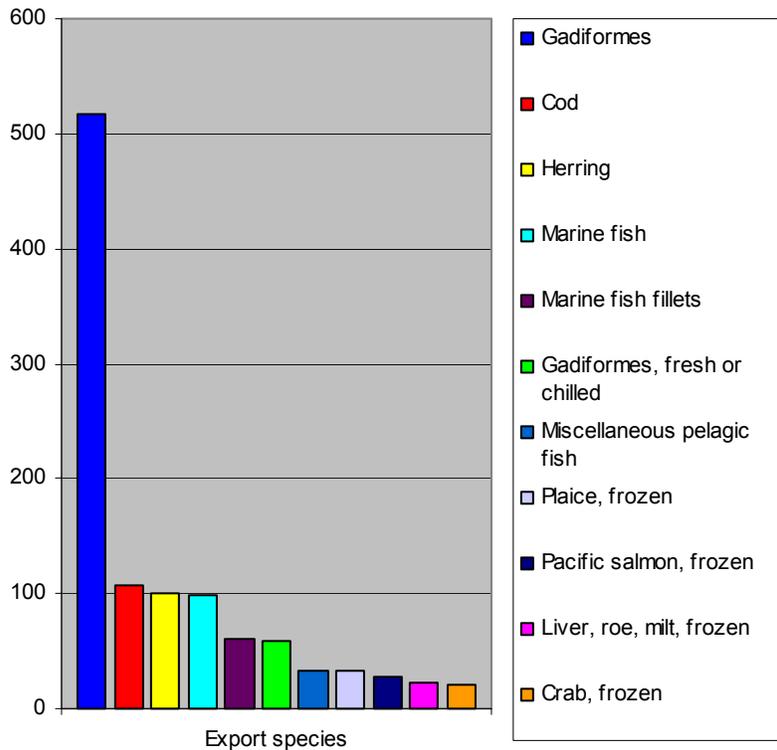
Most of the exported fish comes from the Russian Far East region and the Barents Sea. The major commodities of the Russian seafood exports include various kinds of frozen, chilled and fresh fish (93%). Crustaceans and molluscs are estimated at 4% of the total seafood exports, canned fish accounted for 2%, while dried, salted and smoked fish contributed less than one percent. It is noted that statistics for fisheries have a variable validity as not all sales from the fishing grounds are reported.

The Russian National Center for the Quality and Safety of Fishery Products (Natsrybkachestvo) is an organization mandated to address state policy in the field of seafood quality and safety in support of domestic producers and the Russian fishing industry. The Center has made an arrangement with the French research laboratory CEVMP (Centre d'Experimentation et de la Valorisation des Produits de la Mer) to control and enhance the quality of the seafood products exported to the EU from the Russian Federation. The fish products which are approved for export that meet all EU health and sanitary specifications are marked with a quality label guaranteeing product quality and traceability. Currently there are 515 Russian vessels and onshore processing plants which have been approved for export to the EU countries.

Exported products and markets

Almost half or 517 000 tonnes of the total Russian seafood exports is frozen Gadiformes, which includes such species as Alaska pollack, whiting, haddock, saithe, ling, tusk and hake, except cod. Export of this large group of fish products was worth US\$ 320 000 or approximately one fifth of the total value of Russian seafood exports. The exports of frozen cod were second both in terms of volume and value estimated at 108 000 tonnes for US\$ 189 000. The exports of frozen herring and marine fish attributed each some 100 000 tonnes. Russian exports of frozen marine fish fillets nei and fresh and chilled Gadiformes amounted 61 000 tonnes and 58 000 tonnes respectively. Frozen miscellaneous pelagic fish and plaice accounted 32 000 tonnes each. Frozen Pacific salmon was estimated at 28,000 tonnes, while livers and roes accounted for 22 000 tonnes. The exports of various types of Russian crab accounted for a further 20 000 tonnes, but in terms of value this latter group was valued US\$ 186 000.

Chart 12: The main exported seafood species from Russia in 2003 (in '000 tonnes).



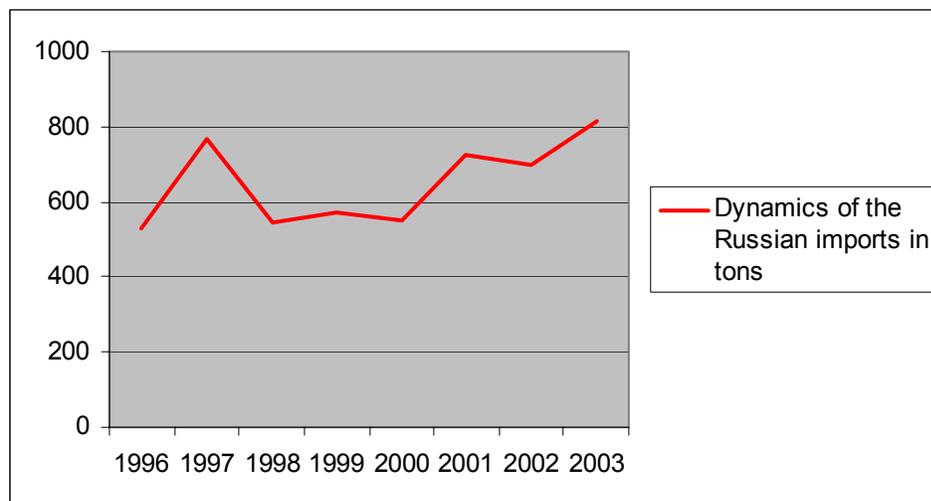
The main markets for the Russian seafood exports are the Republic of Korea, Japan, China, the EU and the USA. The Republic of Korea and Japan have respective market shares of 29% and 30% of the total Russian seafood export market. China takes approximately 17%, while the EU countries and the USA have 12% each of the total Russian fish exports.

The Republic of Korea, Japan and China import mainly Alaska pollack and cod, pollack roe, surimi, frozen Pacific salmon, herring, flounders and halibut from Russia. Frozen shrimp and crab, particularly, Kamchatka hair crab, are very important products for those countries. The EU countries (Denmark, Germany, the UK and Sweden) import mainly high valued frozen processed pollack and cod fillets, followed by crustaceans.

Imports

Russia has an increased demand for imports of seafood because the country's own supply is not sufficient, and trends have changed with increased levels in disposable income. Russia imported more than 800 000 tonnes of seafood at a cost of some US\$ 547 million in 2003, this being the highest seafood imports both in terms of volume and value in the last two decades.

Chart 13: Dynamics of the Russian imports of seafood in the period 1996-2003 (in '000 tonnes)



Source:FAO

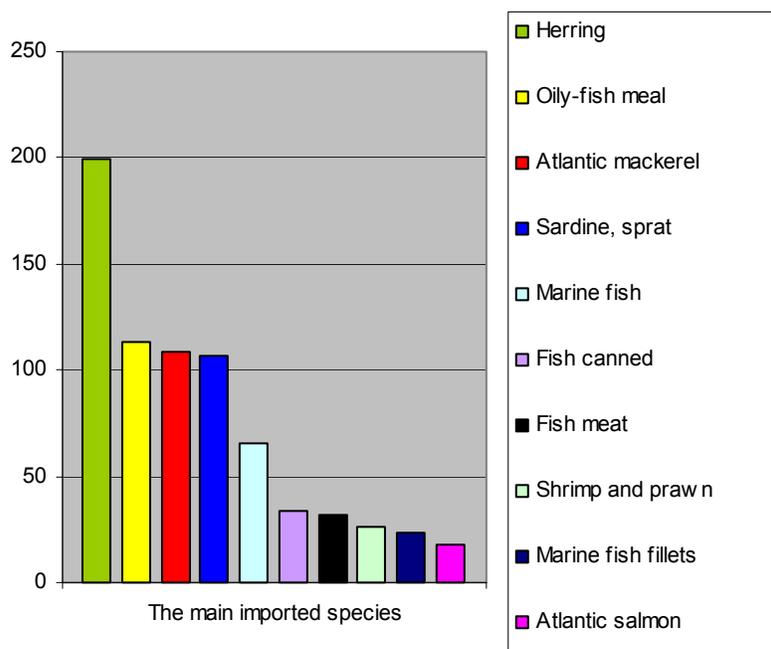
70% of seafood imports were frozen, chilled and fresh fish products. A significant part of imports was represented by oily-fish meal at 14% of the total (113 000 tonnes valued at US\$ 60 million in 2003) for non-alimentary consumption. This was followed by canned fish at 10% of the total seafood imports. Crustaceans and molluscs accounted for 4%, while dried, salted and smoked fish estimated about one-two percent.

Imported products and markets

Frozen herring is the main species imported by Russia both in terms of volume and value. In 2003 Russia imported 200 000 tonnes of herring valued at some US\$ 84 million. Almost all the herring supply comes from Norway, which regards Russia as its “main market for herring exports”. The demand for this “very Russian species” is continuously increasing due in part to being a traditional product for consumption and the higher quality available on the market.

Canada has recently become another important herring exporter to the Russian market, joining the import list to make up for the shortfall in Norwegian supplies in 2004. According to traders the quality of Canadian herring is as high as their famous Norwegian counterparts.

Chart 14: The main imported seafood species to Russia in 2003 in '000 tonnes.



Russian imports of frozen Atlantic mackerel were estimated at 109 000 tonnes for a value of US\$59 million. The imports of sardines, sardinellas, brisling and sprat in frozen and canned category amounted to 68 000 tonnes and 39 000 tonnes respectively. Those species are mainly imported from EU countries. Other important fish categories for the Russian seafood imports are frozen marine fish at 66 000 tonnes and canned fish at 36 000 tonnes.

The Russian market for shrimp and prawn is growing very fast. In 2003 there were 26 000 tonnes of frozen shrimps and prawns imported, mainly from Denmark and Canada. The increase of those commodities on the Russian market has been impressive. The volume of shrimp and prawn imports has increased by more than 3 times from 7 680 tonnes in 2000 to 26 000 tonnes in 2003. The value rose by more than 12 times from US\$ 238 000 to US\$ 2.8 million over the same period.

Salmon has emerged as a new and growing product imported mainly from Norway. The imports of frozen Atlantic salmon in 2003 were 18 000 tonnes, while the imports of fresh and chilled salmon were 10 425 tonnes. Canned salmon is relatively small part of the import market for Russia with only 122 tonnes imported in 2003.

Russia imported some 35-40% of its total seafood imports from Norway in 2003, the largest supplier to Russia. Moreover, on a reciprocal basis Russia is the third most important market for Norway, after Denmark and Japan, and this arrangement is developing fast. In 2003, Norway supplied almost 287 000 tonnes of seafood compared to 200 000 tonnes in 2000. The Russian market is Norway's largest market for herring and trout, while Russia has doubled its imports of fresh salmon from Norway.

Other important fish suppliers to Russia include Denmark, Latvia and the UK, with growing imports from China and Lithuania in recent years.

It is estimated that one third of the national fish imports are from catches by Russian fishermen, landed in third party waters. For example, a significant part of the Russian-caught cod landed in Norwegian ports is processed and then returns to Russia as an imported commodity. Alaska pollack, delivered to the Republic of Korea, is also imported to Russia as surimi or surimi-based products.

Imports requirements and certification²⁰

The following are current certificates required for the importation of fish to Russia:

- **Certificate of Origin** (in English). Certificate of Origin is required by Russian authorities as a proof of the country of origin for all imported food products. It is also used to determine duties and tariffs;
- **Health Certificate** (in English and Russian). A Health Certificate or Veterinary Attestation must accompany all fish and seafood products as a confirmation that the products meet all specified health and sanitary specifications;
- **Packing List** (this document is especially important for mixed cargo and must include the quantity of fish and/or seafood products, plus pallets and other containers). The Packing List is to identify the content of the package of fish imports;

The following certificates are not required but may be requested by the importer/end user:

- **Certificate of Conformity/Hygiene** (in Russian). A Certificate of Conformity is issued when a product is found to conform to Russian Government Standards or GOST;
- **Quality Certificate** from the country of origin. In some cases, GOST recognizes other countries certifications. Certifications issued previously may exempt products from testing and may speed up the application procedure for the Certificate of Conformity.

²⁰ USDA Gain Report “Russian Federation FAIRS Product Specific Fish and Seafood Products 2005”, p.9

Annexes

Annex A	Marine Capture Fisheries and Acquaculture
Annex B	Statistics Seafood Processing Industry
Annex C	Seafood Trade and Marketing
Annex D	Useful addresses
Annex E	Company Directory

Annex A

Capture Fisheries

Table 1: Russian Catches in 1999-2003 in tonnes

	1999	2000	2001	2002	2003
Total catch	4 141 157	3 973 535	3 528 459	3 232 295	3 281 248
Alaska pollack	1 500 450	1 215 065	1 145 016	826 706	1 055 886
Blue whiting	182 637	241 905	315 586	298 367	360 160
Herring total	529 795	535 441	404 267	331 540	335 010
Atlantic herring	170 601	174 200	125 756	128 129	144 224
Pacific herring	359 194	361 241	278 511	203 411	190 786
Cod fish total	395 555	300 088	317 375	320 217	309 606
Atlantic cod	215 616	171 018	188 884	188 213	186 162
Pacific cod	101 929	68 415	59 783	60 625	51 577
Haddock	30 978	24 892	34 937	38 788	45 507
Saffron cod	47 032	35 763	33 753	32 591	26 360
Salmon total	232 830	216 090	223 863	185 594	235 220
Pink salmon	187 181	157 138	167 566	117 584	188 104
Keta salmon	28 162	36 490	32 067	36 562	27 621
Red salmon	14 889	19 548	22 475	28 372	17 702
Mackerel total	266 898	270 795	206 892	181 958	139 614
Horse mackerel	55 642	50 456	28 215	1 738	5 636
Mackerel	71 260	70 947	56 229	41 338	12 339
Chub mackerel	48 365	45 836	31 709	37 501	20 826
Atlantic mackerel	51 348	50 772	41 568	45 811	40 026
Okhotsk Atka mackerel	40 283	52 784	49 171	55 570	60 787
Capelin	32 555	94 984	181 566	250 921	96 024
Flatfish	97 014	103 077	95 106	79 814	81 742
Various squid	54 756	69 835	44 249	72 537	58 094
Pacific saury	4 808	17 390	40 407	51 709	57 104
Tanner crab	21 234	21 848	24 493	23 759	27 987
Freshwater bream	25 687	25 473	28 753	29 144	26 011
Roach	10 433	14 547	15 312	16 957	15 757

Northern prawn	16 964	32 235	20 057	12 629	10 694
European perch	3 655	4 026	3 986	6 719	7 944
Crab total	45 969	36 207	23 671	19 120	14 139
Hair crab	440	198	162	117	134
Marine crab	0	0	194	856	50
Red king crab	37 072	28 632	16 316	10 908	8 413
Blue king crab	5 455	5 233	4 500	4 598	3 504
Brown king crab	256	347	254	350	249
Golden king crab	2 746	1 797	2 245	2 291	1 789
Pike-perch	5 320	6 128	5 711	6 041	5 716
Scallop	11 948	12 717	13 598	5 751	3 818
Yesso scallop	5 764	5 728	2 236	3 612	2 852
Argentine shortfin squid	0	3 404	2 578	5 453	2 848
Sturgeon total	933	648	615	473	391
Danube sturgeon	359	250	251	219	189
Sterlet sturgeon	1	0	1	2	1
Starry sturgeon	234	176	172	136	113
Beluga	40	44	40	32	24
Sturgeons nei	299	178	151	84	64

Source: FAO

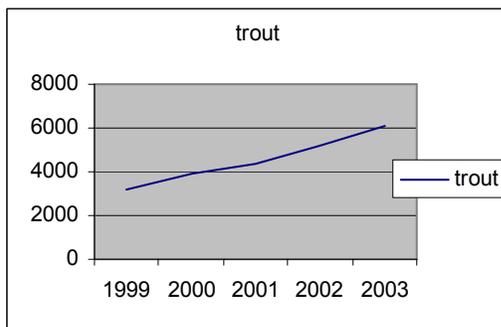
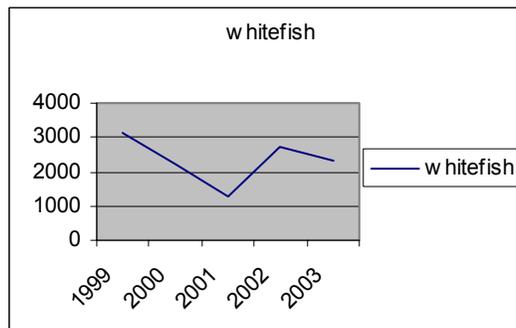
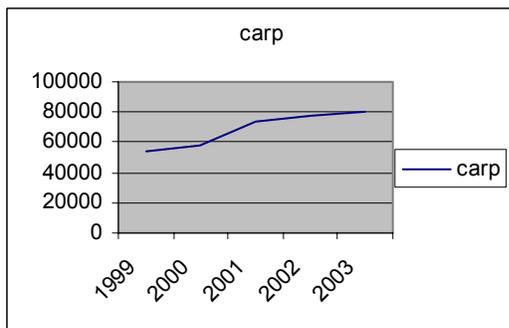
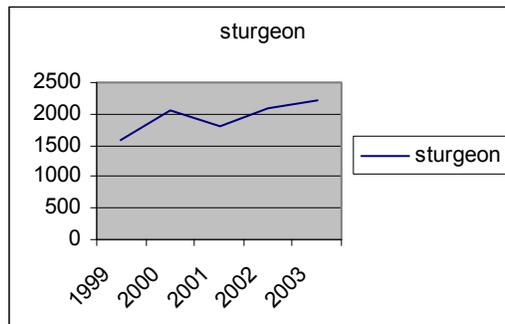
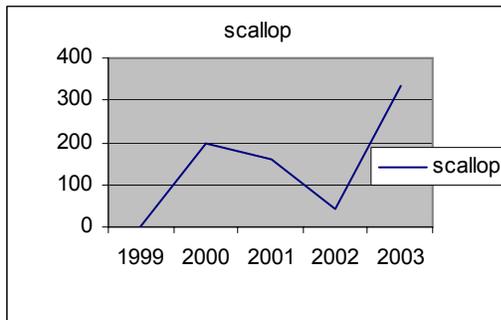
Table 2: Russian aquaculture production in 1999-2003 in tonnes

	1999	2000	2001	2002	2003
Total aquaculture	68 615	74 124	89 945	101 340	108 751
Freshwater fish	61 165	65 448	80 532	89 500	95 122
Diadromous fish	6 918	8 160	9 094	11 510	13 120
Marine fish	7	7	0	0	0
Crustaceans	25	12	14	9	10
Molluscs	500	497	305	321	368
Aquatic animals	0	0	0	0	0
Aquatic plants	3 000	3 008	504	143	67
By species					
Common carp	33 325	34 210	42 293	46 714	45 776
Grass carp (White amur)	80	100	503	480	1050
Silver carp	20 720	24 100	31 501	31 020	32 832
Freshwater bream	8	18	20	80	80
Cyprinids	3 750	4700	4 703	8 250	12 934
Northern pike	2	4	8	7	5
Channel catfish	90	65	180	156	100
European perch	19	18	17	36	43
Pike perch	1	0	1	0	0
Freshwater fish	3 152	2 207	1 280	2 711	2 302
Sturgeon	1 570	2 050	1 800	2 100	2 208
Atlantic salmon	5	0	0	0	300
Trout	3 193	3 908	4 389	5 210	6 080
Chun (keta) salmon	0	0	4	0	2
Whitefish	2 150	2 200	2 901	4 200	4 530
Flatfish	3	3	0	0	0
Marine fish	4	4	0	0	0
Freshwater crustaceans	25	12	14	9	10
Mediterranean mussels	0	202	0	0	0

Sea mussels	500	98	143	280	34
Yesso scallop	0	197	162	41	334
Brown seaweed	N/A	N/A	N/A	N/A	140

Source: FAO yearbook, Fishery Statistics, Aquaculture production 2003

Figure 1: Dynamics of some aquaculture species over the period 1999-2003



Annex B

Seafood Processing Industry

Table 3: Dynamics of the Russian seafood production (in thousand tonnes)

	1999	2000	2001	2002	2003
Fish food products	3 261	3 396	3 195	2 997	3 107
Output for commodity seafood for human consumption, canned inclusive	2 970	3 132	3 004	2 837	2 949
Output for commodity seafood for human consumption, canned exclusive	2 842	2 987	2 837	2 660	2 787
of which:					
Frozen	1 755	1 734	1 651	1 612	1 789
Fillet and forcemeat	199	150	110	62	79
Smoked and dried	15	17	18	16	8
Salted, marinated	20	11	11	9	6
Herring, all types		222	382	332	367
Culinary	6	5	8	12	14
Salmon roe	27	27	30	22	25
Other roe	103	128	106	114	147
Live, chilled fish	717	693	523	482	351
Canned fish	365	424	476	507	464
Non-alimentary products	292	264	191	160	158
including fish meal	155	127	98	64	70

Source: VNIERKH

Table 4: Fish consumption per capita divided by regions (in kg)

	1999	2000	2001	2002	2003
Russia	10	10	11	11	11
Far East	18	19	19	19	19
North-West	13	14	15	16	15
Central	10	10	11	11	11
Ural	10	10	11	12	11
South	10	10	10	10	10
Sibir	10	10	10	10	10
Privolzhie	7	8	8	8	8

Source: CSU RF

Annex C

Seafood Trade and Marketing

Table 5: A.T. Kearney's 2004 Global Retail Development Index (an example of top 10 emerging markets)

	Country	Geographic area	Country risk 25%	Market attractiveness* 25%	Market Saturation 30%	Time pressure 20%	Score
1	Russia	Eastern Europe	56	56	77	100	100
2	India	Asia	62	34	92	72	88
3	China	Asia	71	42	62	90	86
4	Slovenia	Eastern Europe	83	60	43	76	84
5	Croatia	Eastern Europe	61	53	55	93	83
6	Latvia	Eastern Europe	64	55	54	89	82
7	Vietnam	Asia	52	29	90	66	76
8	Turkey	Mediterranean	50	58	67	65	75
9	Slovakia	Eastern Europe	69	48	35	100	74
10	Thailand	Asia	68	38	60	76	73

0= high risk	0=low attractiveness	0=saturated	0=no time pressure
100=low risk	100=high attractiveness	100=not saturated	100=urgency to go

* Notes:

- 1) Market attractiveness is weighted as follows: law and regulation (5%), population (5%), urban population (5%) and retail sales per capita (10%)
- 2) Market saturation is weighted as follows: shape of modern retailing (10%), modern retail sales area per inhabitant (5%), number of international retailers (10%) and market shape of leading retailers (5%)
- 3) Total weighed score has been recalculated based on maximum score of 71 for Russia to equal 100.

Source: AT Kearney, "The 2004 Global Retail Development Index: Emerging Market Priorities for Global Retailers"

Table 6: Top ten retail chains on the Russian market

Group	Retailer name	Ownership	Location	No of outlets per 1.1.2005	Sales 2003 (US\$ mill)	Sales 2004 (US\$ mill)
Metro AG	Metro	German		14	624	1,1 billion
			Moscow	6		
			St.Petersburg	2		
			Kazan	1		
			Samara	1		
			Yaroslavl	1		
			Rostov-na-Donu	1		
			Krasnodar	1		
Auchan	Auchan	French	Moscow	6	145	260
Ramenka	Ramstore	Turkish		25	374	560
			Moscow	22		
			Kazan	1		
			N. Novgorod	1		
			Krasnoyarsk	1		
Spar	Spar	Dutch		10	75	125
			Moscow	7		
			N. Novgorod	3		
Pyaterochka Holding	Pyaterochka	Russian		425	933	1, 6 billion
			Moscow	124		
			St.Petersburg	107		
			Volgograd	38		
			Ufa	27		

Group	Retailer name	Ownership	Location	No of outlets per 1.1.2005	Sales 2003 (US\$ mill)	Sales 2004 (US\$ mill)
			Uljanovsk	25		
			Cheljabinks	23		
			Samara	4		
			Perm	20		
			Saratov	13		
			Ekaterinburg	17		
			Omsk	10		
			Kazakhstan	13		
			Ukraine	2		
7th Continent	7th Continent	Russian	Moscow	78	342	615
Perekrestok	Perekrestok	Russian	Moscow	100	450	750
			St. Petersburg and other regions			
Paterson		Russian	Moscow	46	250	N / A
			St.Petersburg	22		
			Tver			
			Kazan			
			Togliatti			
			Samara			
			Ufa			
			Stavropol			
			Krasnodar			
			Cheljabinks			
Felma	Kopeika	Russian	Moscow	52	201	265
			St.Petersburg			
			other regions			
Tander CJSC	Magnit	Russian	Moscow and other regions	1019	570	997
Lenta	Lenta cash & carry	Russian	St.Petersburg	6	300	N/A

Table 7: Volume of Russian Seafood Exports and Imports in tonnes

GROUP	FLOW	1999	2000	2001	2002	2003
Total	Export	943 768	1 201 035	1 223 270	1 256 394	1 226 688
Fish, fresh, chilled or frozen	Export	820 320	1 060 431	1 116 977	1 144,029	1 140,380
Fish, dried, salted, or smoked	Export	55 840	45 803	24 897	15 979	9 610
Crustaceans and molluscs	Export	46 529	67 967	50 889	71 050	45 093
Fish, canned	Export	9 461	15 827	16 000	17 728	23 169
Crustaceans and molluscs, canned	Export	1 487	3 066	5 000	4 452	3 558
Oils	Export	1 336	1410	501	255	264
Meals	Export	8 795	6 531	9 006	2 901	4 614
Total	Import	571 518	550 985	724 164	698 521	814 087
Fish, fresh, chilled or frozen	Import	321 221	328 167	417 338	462 155	571 259
Fish, dried, salted, or smoked	Import	8 757	10 687	14 388	14 017	11 412
Crustaceans and molluscs	Import	7 120	8 451	16 034	24 185	34 699
Fish, canned	Import	116 787	126 427	143 804	94 180	77 160
Crustaceans and molluscs, canned	Import	400	907	1 497	2 096	5 419
Oils	Import	48	932	994	857	1 259
Meals	Import	117 185	75 414	130 109	101 031	112 879

Source: FAO

Table 8: Value of Russian Seafood Exports and Imports in '000 US\$

GROUP	FLOW	1999	2000	2001	2002	2003
Total	Export	1 217 684	1 522 918	1 551 441	1 421 289	1 483 410
Fish, fresh, chilled or frozen	Export	930 505	1 148 436	1 212 497	1 075 132	1 129 904
Fish, dried, salted, or smoked	Export	42 754	38 505	25 411	17 312	19 272
Crustaceans and molluscs	Export	196 790	270 740	226 325	246 988	271 362
Fish, canned	Export	30 540	42 208	39 064	39 723	35 850
Crustaceans and molluscs, canned	Export	12 314	18 964	43 181	39 932	24 017
Oils	Export	347	849	313	371	284
Meals	Export	4 434	3 216	4 650	1 831	2 721
Total	Import	199 065	193 874	340 917	431 605	547 394
Fish, fresh, chilled or frozen	Import	127 235	128 178	185 825	275 059	357 982
Fish, dried, salted, or smoked	Import	5 915	5 210	6 121	5 881	8 491
Crustaceans and molluscs	Import	4 290	4 675	14 368	30 778	44 016
Fish, canned	Import	42 215	37 909	80 422	66 255	67 384
Crustaceans and molluscs, canned	Import	872	1 066	2 456	3 585	8 940
Oils	Import	64	287	396	511	571
Meals	Import	18 474	16 549	51 329	49 536	60 010

Source: FAO

Table 9: Russian Export of Seafood by Species (in tonnes)

Commodity Name	1999	2000	2001	2002	2003
Gadiformes, frozen	128 693	275 261	406 080	388 999	517 026
Gadiformes, fresh or chilled	0	22 584	2 277	54 305	58 430
Cod, frozen	0	131 452	129 091	132 843	108 252
Cod, fresh or chilled	33 332	21 694	11 143	16 490	2 987
Herring, frozen	0	137 787	82 060	92 878	100 692
Herring, fresh or chilled	0	18 670	11 637	4 090	3 333
Marine fish, frozen	223 845	53 560	112 539	132 155	98 288
Marine fish fillets, frozen	136 005	121 092	93 077	52 005	61 288
Miscellaneous pelagic fish, frozen	0	17 387	27 831	37 729	31 999
Plaice, frozen	0	58 012	52 768	40 120	31 692
Pacific salmon, frozen	24 659	63 989	46,896	39 455	28 178
Liver, roe, milt, frozen	22 318	25 782	28 765	20 653	22 374
Crab, frozen	0	17 708	18 471	16 998	19 901
Crab, peeled or not, fresh or chilled	0	5 200	5 158	6 044	4 213
Crab meat, canned	1 487	1 863	4 517	4 039	3 259
Halibut, frozen	0	25 140	22 893	18 866	15 731
Haddock, frozen	0	10 394	18 340	15 082	15 072
Clupeoids, frozen	93 937	4 431	4 368	10 067	9 810
Shrimp and prawn, frozen	12 868	23 973	14 109	11 186	8 835
Pilchard, sardinelas, frozen	0	7 412	4 069	8 119	5 044
Flatfish, frozen	34 454	2 701	7 169	4 198	2 943
Tuna, frozen	0	1 528	2 378	4 865	1 662
Salmonoids, frozen	1 000	2 000	951	1 434	1 218
Caviar	13	79	49	43	15
Caviar and caviar substitutes	0	515	455	574	467

Source: FAO

Table 10: Russian Import of Seafood by Species (in tonnes)

Commodity Name	1999	2000	2001	2002	2003
Herring, frozen	104 203	159 868	143 796	162 850	199 084
Herring, smoked	0	0	122	42	1 472
Oily-fish meal	117 185	75 414	130 109	101 031	112 879
Atlantic mackerel, frozen	46 406	50 052	85 949	86 693	108 650
Mackerel, canned	90	6 678	5 496	2 749	2 220
Sardine, sardinelas, sprat, frozen	52 516	51 590	74 291	66 570	67 791
Sardine, sardinelas, sprat, canned	0	0	0	50 611	38 537
Marine fish, frozen,	67 454	36 351	59 328	54 850	66 185
Marine fish fillets, frozen	1 340	4 858	8 267	14 129	23 117
Fish canned	50 805	43 099	57 845	38 432	33 882
Shrimp and prawn, frozen	22	7 680	12 777	17 836	26 263
Atlantic salmon, frozen	3 189	5 243	6 962	11 653	18 335
Salmon, fresh or chilled,	0	0	1 185	4 015	10 463
Trout and chars, frozen	0	1 075	3 804	12 180	13 204
Trout and chars, fresh or chilled	0	0	212	1 210	3 315
Hake, frozen	0	279	2 889	4 730	8 705
Cuttlefish, frozen	0	0	0	4 877	6 236
Fish, dried, unsalted	123	1 529	1 133	1 904	5 037
Marine fish, fresh or chilled	7 655	802	2 907	1 983	4 291
Molluscs, canned	390	714	1 211	1 715	4 290
Fish, salted	122	7 692	11 754	10 818	3 634
Liver, roe, milt, frozen	963	1 101	2 068	1 805	2 247
Mussel meat, frozen	0	207	431	434	490
Octopus, frozen	0	60	95	166	394
Oysters, fresh or chilled	0	84	144	231	287
Scallop meat, frozen	0	39	35	42	78

Source: FAO

Annex D

Useful Addresses

List of Government Institutions

Federal Agency for Fisheries
Rozhdestvensky Boulvar 12, 107996 Moscow
Tel: +7 (095)921 40 05/ 928-23-20
Fax: +7 (095)928-19-04
www.fishagency.ru

List of fishery Associations, Organizations and Research Institutions

VARPE
All-Russia Association of Fisheries Enterprises, Entrepreneurs and Exporters
Rozhdestvensky Boulvar 9, 107996 Moscow
Tel: +7 (095) 929 40 47
Fax: +7 (095) 928 27 47
E-mail: info@varpe.ru
www.varpe.ru

GYPRORYBFLOT
Scientific Research Institute for the Development and Exploitation
Malaya Morskaya Str. 18-20, 190000, St.Petersburg
Tel: +7 (812) 312 76 21/ 314-60-36
Fax: +7 (812) 312 04 15
E-mail: romanov@grf.spb.ru
www.grf.spb.ru

VNIERKH
Spasoglinishevsky pereulok 4/2, 101990 Moscow
Tel: +7 (095) 928 00 88
Fax: +7 (095) 925 47 31
www.vnierkh.ru

VNIRO
Russian Federal Research Institute of Fisheries and Oceanography
17, V. Krasnoselskaya Str., Moscow, 107140, Russia
Tel: +7 (095) 264-93-87
Fax: +7 (095) 264-91-87, 264-91-67
E-mail: vniro@vniro.ru
www.vniro.ru

TINRO CENTER

Shevchenko pereulok 4, GSP 690950, Vladivostok

Tel: +7 (8-4232) 40-09-21

Fax: +7 (8-4232) 300751

E-mail: tinro@tinro.ru

www.tinro-center.ru

SAkhNIRO

Komsomolskaya Str. 196, Yuzhno-Sakhalinsk 693023

Tel: +7 (4242) 45-67-77

Fax: +7 (4242) 45-67-78

E-mail: ylrad@sakhniro.ru

KamchatNIRO

Kamchatsky Research Institute of Fisheries

Naberezhnaya Str. 18, Petropavlovsk-Kamchatsky, 683002

Tel: +7 (4152) 112 738

Fax: +7 (4152) 112 701

E-mail: main@kamniro.ru

www.kamniro.ru

MoTINRO

Magadansky branch of the Pacific Research Institute of Fisheries and Oceanography

Nagaevskaya Str. 51, Magadan, 685024

Tel: +7 (41322) 264 13

Fax: +7 (41322) 264 13

ChukotTINRO

Chukotsky branch of the Pacific Research Institute of Fisheries and Oceanography

Otke Str. 56 box 29, Anadyr, 689000

Tel: (42722) 26762

Fax: (42722) 26761

E-mail: tinro@piton-asc.ru

KhooTINRO

Khabarovsk branch of the Pacific Research Institute of Fisheries and Oceanography

Sevchenko Str. 9, Khabarovsk, 680000

Tel: (4212) 31 54 47

Fax: (4212) 30 20 80

E-mail: tinro@tinto.khv.ru

PINRO

Polar Research Institute of Fisheries and Oceanography

Knipovicha Str. 6, Murmansk, 183763

Tel: (8152) 47 36 66

Fax: (8152) 47 33 31

E-mail: larisa@pinro.ru

AtlantNIRO
Atlantic Research Institute of Fisheries and Oceanography
Dmitry Donskoy Str.5, Kaliningrad, 236000
Tel: (0112) 215 645
Fax: (0112) 219 997
atlant@balnet.ru

AzNIRkh
Azov Research Institute of Fisheries
Beregovaja Str. 21/2, Rostov-na-Donu, 344007
Tel: (8632) 624 850
Fax: (8632) 620 505
riasfp@icomm.ru

KaspNIRKh
Kaspian Research Institute of Fisheries
Savushkina Str. 1, Astrakhan, 414056
Tel: (8512) 25 86 36
Fax: (8512) 25 25 81
kaspiv@astranet.ru

MURMANSK MARINE BIOLOGICAL INSTITUTE
Vladimirskaya Str. 17, Murmansk, 183010
Tel: +7 (8152) 56 52 32
Tel/fax: +47 (789) 10-288
E-mail: mmbi@mmbi.info
<http://www.mmbi.murman.ru/>

ARCTIC AND ANTARCTIC RESEARCH INSTITUTE
Bering Str. 38, St.Petersburg, Russia, 199397
Tel: +7 (812)352 1520
Fax: +7 (812)352 2688
E-mail: aaricoop@aari.nw.ru
<http://www.aari.nw.ru/>

Annex E

Company Directory

Seafood Exporters

Company	FirstName	Street	PC	City	Telephone	Fax	E-mail/webpage
Akros Fishing Co Ltd	Valery Vorobyov	Shturmana Elagina Str. 43	683013	Petropavlovsk-Kamchatsky	+7 4152 243711	+7 4152 2 437 17	root@akros.kamchatka.su www.akros.ru
Arkhangelsk Base of Trawl Fleet	Andrey Ageev	Rozhdestvensky Blvd 9 off.211, 213	103045	Moscow	+7 095 929 4039	+7 095 929 4157	aobtf-dvina@mtu-net.ru ; www.abtf.arh.ru
Atlantrybflot (OAO, NPO)	Gennadiy Karabanov	Chernyakhovskogo St. 6	236040	Kaliningrad	+7 0112 434461	+7 0112 433766	postmaster@gazinter.net www.atlantrybflot.com
BaltForum Ltd.	Olga Gudinskaya	Chernyakhovskogo 15A, 15	236006	Kaliningrad	+7 0112 991877; +7 9022 375530	+7 0112 991866	baltforum@mail.ru
Binom Company	Yuri Kucherenko	Militseiskaya Street 7	693000	Yuzhno Sakhalinsk	+7 4242235622	+7 4242 726031	binom@sakhmarine.ru
Binom Center	Alexander Popov	Ulitsa Militseiskaja Str 7	693000	Yuzhno-Sakhalinsk, Sakhalin	+7 4242 421981	+7 4242 2726031	email@binom.info www.binom.com
Boldinsky Fishery	Pavel Chernyshov	Sytova 4A	414029	Astrakhan	+7 8512 325576	+7 8512 328097	brp@astranet.ru www.boldinsky.ru
Dais - II Ltd	Fedor Danilov	Aviatorov shosse 13a	400075	Volgograd	+7 8442 934218	+7 8442 934187	dais2@rol.ru ; www.dais2.com
Dais - II Ltd	Oleg Suchrev	Aviatorov shosse 13a	400075	Volgograd	+7 8442 934218	+7 8442 934187	dais2@rol.ru www.dais2.com
Dalryba	Anatoly Vetrov	Svetlanskaya Str 51 a	690600	Vladivostok	+7 4232 224 640	+7 4232 220 219	dalryba@fastmail.vladivostok.ru
Far East Fisheries and Processing Seafood base	Alexander Sukach	Khersonskaya Str 5	690012	Vladivostok	+7 4232 271 877	+7 4232 272 409	
Fisheries collective farm Vostok -1	Alexander Perednya	Krasnogo znameni Str. 32	690106	Vladivostok	+7 4232 256270	+7 4232 420 577	Vostok1@mail.primorye.ru

F. Uhrenholt Seafood ApS	George Pevunov	Mjasnitskaja Str 24 stroenie 1, room 102	101000	Moscow	+7 095 925 9653 / 974 1578	+7 095 913 7080	uhren@dol.ru www.uhrenholt.com
Fisheries Committee (Karelia)	Alexander Klimov	Varkaus nab. 3,	185650	Petrozavodsk, Karelia	+7 8142 772135	+7 8142 773177	fishcom@karelia.ru
FOR Group	Dmitry Petrov	Nevsky Prospect. 20	191186	St. Petersburg	+7 812 346 8200/ 8234	+7 812 314 33 48	for@for-group.ru www.for-group.ru
Gigante Murmansk	Alexander Kovalev	Severny Prichal, Murmansk Fishing Port	183001	Murmansk	+7 095 250 4021/250 3653	+7 095 458326	gigmm@polarnet.ru www.gigantememo.ru/murmansk_eng.htm
Greentrust Fish Company	Elena Trunova	Zvezdny Boulevard, 19	129085	Moscow	+7 095 232 04 53	+7 095 232 04 53	greentrust_company@mtu-net.ru www.greentrust.ru
Gulfstream Fish Ltd	Alexander Dvinin	Tri Ruchja Str	183038	Murmansk	+7 902 281 73 03	+7 8152 479 271	sales@gulfstreamfish.com www.gulfstreamfish.com
Icelandic Freezing Plants Corp	Rafik Aliullof	Karmanitsky per. 9, off. 301	121002	Moscow	+7 095 937 16 11/ 937 16 19	+7 095 937 16 12	rafik@icelandic.ru www.icelandic.ru
Kaliningradskie Moreprodukty	Yuriy Vasser	Kaliningradskaya 9-47 (Druzhby 1)	238340	Svetly Settlement, Kaliningrad Reg.	+7 01152 22663/ 30554	+7 01152 30808	kfs@baltnet.ru
Lenrybflot	Alexey Lavrentyev	Obukhovskoy Oborony av. 76a, of. 215, 216	192029	St. Petersburg	+7 812 973 1549		bt4you@yandex.ru; alex812@rol.ru
Meridian Co	Aleksei Volkov	Izhorskaya St. 7	127599	Moscow		+7 095 4864747	a.volkov@mail.ru
Morskaya Zvezda	Irina Mudarissova	Suvorova Str 57	236039	Kaliningrad	+7 0112 576555	+7 0112 474778	aira@star.koenig.ru www.maritime-star.ru
Murman SeaFood Company	Vladimir Khizhnyakov	Karl Marks Str. 28	183038	Murmansk	+7 8152 263 910/ 923	+7 8152 263910	murseaf@commels.ru www.tcfb.com/murmanseafood/
Murmansk Trawler Fleet	Igor Grekov	Shmidta St 43	183788	Murmansk	+7 8152 288279	+7 8152 288070; +47 789 10405	grek@mtf.ru www.mtf.ru
Nord West F.C.	Alexander Slivko	Rogozerskaya Str 15	183039	Murmansk	+7 8152 451237; +47 789 10112	+7 8152 458642	slivko@nordwest-fc.ru www.nordwest-fc.ru

Nakhodnindkaya Base of Active Marine Fishery	Yuri Somov	Makarova Str. 5	692900	Nakhodka	+7 4236 622 502	+7 4236 692 664	
NordEast Company Ltd.	Eduard Martynov	Saltykovskaya 8	11673	Moscow	+7 095 700 60 10	+7 095 700 5991	go@tsr.ru www.redgold.ru
Ocean Product Holding Company	Alexey Orlov	Tosina Str 9-1	197374	St. Petersburg	+7 812 331 2210	+7 812 331 2210	orlov@oceanproduct.spb.ru
Okeanrybflot OAO	Budionnyi	Leningradskaya Str.27	683000	Petropavlovsk-Kamchatsky	+7 4152 225610	+7 415 2 112740	product@bor.kamchatka.ru
Orghim Ecology	Alexander Gratch	Elisarova Prospect 38a	193148	St. Petersburg	+7 812 325 11 95/ 325 3030	+7 812 325 10 18+7 812 325 1194	a.gr@orghim.ru www.orghim.ru
Ost-Areal Ltd	Petruk	Kamtshatskaya 6		Moscow	+7 095 4673881	+7 095 4668810	srnd@mail.sitek.ru
Pacific office fisheries exploring and research vessels fleet	Alexander Ryabchenko	Svetlansky lane 11/2	690600	Vladivostok	+7 4232 265 236	+7 4232 269 621	sea@turnif.com
Pionerskaya Baza Okean. Ryb. Flota	Alexander Fomenko	Portovaya Str 1	238540	Pionerskiy, Kaliningradsky Region	+7 01155 21257	+7 01155 22550	pborf@kaliningrad.ru www.pborf.kaliningrad.ru
Polluks OOO	Vladimir Gonchar	Leninskaya 26	683000	Petropavlovsk-Kamchatsky, Kamchatka reg.	+7 4152 12 11 88/ 12 11 91	+7 4152 12 11 83	polluks2@mail.kamchatka.ru www.npacific.ru/np/polluks
Port Vladimir	Ludmila Yarish	Prichal 28, Fishing Port	183001	Murmansk	+7 8152 451981/ 6286428	+7 8152 47 66 72	severnoe@com.mels.ru
Poseidon and Co	Irina Kataeva	Svobody Str. 48, s.1	123364	Moscow	+7 095 497 0180/ 497 0198	+7 095 961 2648	IKataeva@poseidon-fish.ru www.Poseidon-fish.ru
Preobrazhensky Fish Processing Plant	V Surkont	Portovaya Str 1	692899	Preobrazheniye, Primorsky Kray	+7 42377 91286		btprk@mail.primorye.ru
Raptika Fish Processing Plant	Oksana Akhromova	Prevedenovskiy per. 17 / 1. No. 59	105082	Moscow	+7 095 926 47 83/ 926 47 84	+7 095 926 47 86	info@prodko.ru ; raptika@raptika.ru www.raptika.com
Raptika Fish Processing Plant	Nikolay Ovchinnikov	Kommunalny pereulok; 7	127572	Dubna; Moscow region	+7 095 926 41 42/46 83	+7 095 926 47 84	ovchinnikov@prodko.ru www.raptika.com

Roliz	Vladimir Kovalskiy	Nekrasovskaya str., 50A	690014	Vladivostok	+7 4232 222 514/ 251 351	+7 4232 222514	fishtrader@roliz.vtc.ru www.roliz.vtc.ru
Sakhalin Leasing Flot JSC	Victor Slivin	Lenina pl. 5, 3rd floor	694620	Kholmsk, Sakhalin	+7 42433 5 20 95	+7 42433 5 22 95	lizingm@kholmsk.sakhalin.ru
Severny Mir	Igor Mostyayev	Smolnaya Str 34A	125493	Moscow	+7 095 906 8045;457 7637;457 0903	+7 095 458 4865	worldnord@degunino.net www.inforus.ru/severnymir
Sevmoreproduct Ltd	Olga Gryazeva	Izhorskaya Str 7, Hladokombinat AO Meridian	127599	Moscow	+7 095 7924749	+7 095 9783209	
Shalanda M, Ltd		Admirala Makarova str, k.2, 23	125212	Moscow	+7 095 926 5277	+7 095 933 4522	logus@ru.ru
SP-Holod ZAO	Leonid Martynov	Malaya Polianka 5, Of. 3	109180	Moscow	+7 095 238 3861; 238 40 18	+7 095 238 3861	sirius-sales@mail.ru www.gulfish.ru
Trade-Industrial Alliance	Yury Petrik	Communisticheskyi Av. 21	693010	Yuzhno-Sakhalinsk	+7 4242 73 18 62	+7 4242 73 14 50	petrick@sakhfish.com ; tps@sakhalin.ru
UTRF (Office of trawler and refrigerator fleet) Holding Joint Stock Co.	Alexander Abramov	Leninskaya St. 38	683000	Petropavlovsk-Kamchatsky	+7 4152 112476	+7 4152 112281	holding@utrif.kamchatka.su
VEGA Ltd	Boris Koudrin	Teatralniy Boulevard 9-1	183038	Murmansk	+7 815 24 72751/47 3539	+7 815 2231279	vega@vega-murmansk.ru www.vega-murmansk.ru
ZA RODINY Fish Cooperative	Nikolay Shametko	Zalivnaya Str 2a	238320	Vzmoyrie town, Kaliningrad Region	+7 01152 28404	+7 01152 28404	postmaster@zarodiny.koenig.su www.enet.ru/~zarodiny

Seafood Importers

Company	FirstName	Street	PC	Cit	Telephone	Fax	E-mail/webpage
Arsintek Ltd.	Pavel Roussakov	Otkrytoe st., 1/3		Moscow	+7 095 167 3405	+7 095 167 3405	info@arsintek.ru www.arsintek.ru
Atlantrybflot JSC	Gennadiy Karabanov	Chernyakhovskogo St. 6	236040	Kaliningrad	+7 0112 434461	+7 0112 433766	postmaster@gazinter.net www.atlantrybflot.com
BaltForum Ltd.	Olga Gudinskaya	Chernyakhovskogo 15A, 15	236006	Kaliningrad	+7 0112 991877; +7 9022 375530	+7 0112 991866	baltforum@mail.ru
C & C	Aleksei Nagaitsev	Vladenie 1	142715	Leninsky Distr, Moscow Region	+7 095 111 55 77; +7 095 111 34 11	+7 095 399 33 90	sis@mail.compnet.ru
Cyros LLC		Onezhskaya 8/10	125438	Moscow	+7 095 797 49 90	+7 095 797 49 90	office@cyros-m.ru www.cyros.ru
DEFA Trading Group	Denis Repinskiy	Novoselkovskaja, 24	191014	St. Petersburg	+7 812 303 94 03; 327 35 28	+7 812 3039403	defafish@home.ru www.fishtrading.spb.ru
DOVOD ZAO, Ltd.	Alexander Koulitschenko	Ryabinovaya Str 53, 5th floor	121471	Moscow	+7 095 443 2105, 095 446 4544	+7 095 4475365	dovod@rol.ru www.dovod.no
Fisheries Committee (Karelia)	Alexander Klimov	Varkaus nab. 3,	185650	Petrozavodsk, Karelia	+7 8142 772135	+7 8142 773177	fishcom@karelia.ru
Gigante Murmansk	Alexander Klimov	Severny Prichal, Murmansk Fishing Port	183001	Murmansk	+7 095 2504021; +7 095 2503653	+7 095 458326	gigmrn@polarnet.ru www.gigantememo.ru/murmansk_eng.htm
Global Trading Resource Corporation	Vladimir Rebrov			Moscow	+7 095 7786 69 20	+7 095 786 69 22	rebrov@global-m.ru www.global-m.ru
Hladoprodukt Import-Export	Mikhail Ozerov	Priorova Str 24, bdg 2	125130	Moscow	+ 7 095 926 52 74	+ 7 095 564 82 06	Info@fffood.ru; omv@aha.ru www.fffood.ru
Interatlantic	Vladimir	Antona Valeka Str.	620014	Ekaterinburg	+7 3432	+7 3432	breeze@etel.ru

Breeze	Makhov	15, office 514			658 398	777 337	
Norge Fish Company		B. Pochtovaya str. Build 12,		Moscow	+7 095 267 9422/ 263 0389	+7 095 263 0389	norfish@online.ru
Norge Fish Ltd	Sergei Gudkov	Vavilova ul. Dom 83, Room 8	117335	Moscow	+7 095 937 5731	+7 095 134 4041	info@norgefish.com www.norgefish.com
Pacific office fisheries exploring and research vessels fleet	Alexander Ryabchenko	Svetlansky lane 11/2	690600	Vladivostok	+7 4232 265 236	+7 4232 269 621	sea@turnif.com
Sevmoreproduct Ltd	Olga Gryazeva	Izhorskaya Str 7, Hladokombinat AO Meridian	127599	Moscow	+7 095 7924749	+7 095 9783209	
Trade-Industrial Alliance	Yury Petrik	Communisticheskiy Av. 21	693010	Yuzhno-Sakhalinsk	+7 4242 73 18 62	+7 4242 73 14 50	petrick@sakhfish.com
UTRF (Office of trawler and refrigerator fleet) Holding Joint Stock Co.	Alexander Abramov	Leninskaya St. 38	683000	Petropavlovsk-Kamchatsky	+7 4152 112 476	+7 4152 112281	holding@utr.f.kamchatka.su
V.E.K.K.	Oleg Ajdin	Eniseyskaya Ul 2	129344	Moscow	+7 095 1891930	+7 095 1891930	ab9446@mail.sitek.ru
Westrybflot JSC	Vladimir Gorbachev	Komsomolskaya Str 27a	236000	Kaliningrad	+7 0112 219703	+7 0112 219703	wflot@baltnet.ru www.westrybflot.ru
Zaprybsbyt Ltd	Alexander Galkov	Suvorova Str. 57	236035	Kaliningrad	+7 0112 717 017/ 556427	+7 0112 556427	postmaster@zrs1.koenig.su www.zrs.ru

Seafood Processing Companies

Company	FirstName	Street	PC	City	Telephone	Fax	E-mail/webpage
Nakhodkinskaya Base of Active Marine Fishery (NBAMR)	Yuri Somov	Makarova Str. 5	692900	Nakhodka	+7 4236 622 502	+7 4236 692 664	info@bamr.ru www.bamr.ru
Akros Fishing Co Ltd	Valery Vorobyov	Shturmana Elagina Str. 43	683013	Petropavlovsk-Kamchatsky	+7 4152 243711	+7 4152 2 437 17	root@akros.kamchatka.su www.akros.ru
Albatros Seafood Moscow	Elena Petukhovskaya	Aparinky vil., Promzona, Kratinskiy s/o	142715	Moskovskaya oblast, Leninskiy r-n	+7 095 3993255/ 399 3390;	+7 095 399 3266	elena@albatrosseafood.ru www.albatrosseafood.ru
Argus-Universal		Deguninskaya St. 1; building 2	127486	Moscow	+7 095 487 52 60	+7 095 487 96 10	arp_2002@mailru.com
Dalryba	Anatoly Vetrov	Svetlanskaya Str 51 a	690600	Vladivostok	+7 4232 224 640	+7 4232 220 219	dalryba@fastmail.vladivostok.ru
Dais - II Ltd	Fedor Danilov	Aviatorov shosse 13a	400075	Volgograd	+7 8442 934218	+7 8442 934187	ldg81@mail.ru; dais2@rol.ru www.dais2.com
DEFA Trading Group	Denis Repinskiy	Novoselkovskaja, 24	191014	St. Petersburg	+7 812 303 94 03; 327 35 28	+7 812 3039403	defafish@home.ru www.fishtrading.spb.ru
Delsy		Shcherbakova str.12	660003	Krasnoyarsk, Krasnoyarsky Kray	+7 3912 606 440;+7 095 505 19 05	+7 3912 644 660;+7 3912 644 640	delsy@delsy.ru www.delsy.ru
Derzhava-Shipping, ZAO	Vladimir Zhulovski	Karla Marksa Pl. 33	414040	Astrakhan	+7 8512 252067 / 253816 / 253812	+7 8512 252049	state@mail.astrakhan.ru
EST, ZAO	Aleksander Ermakov	Kievsky Pr. 3	307170	Zheleznogorsk-5, Kursk Region	+7 07148 92002 / 91505 / 24657	+7 07148 76532	est@kursknet.ru www.estcom.ru
Evromorprodukt		Pod'ezdnoy per 19	190000	St. Petersburg	+7 812 324 46 26	+7 812 324 46 24	emp@bcltele.com
F. Uhrenholt Seafood ApS	George Pevunov	Mjasnitzkaja Str 24 stroenie 1, room	101000	Moscow	+7 095 925 9653 / 974	+7 095 913 7080	uhren@dol.ru www.uhrenholt.com

		102			1578		
Far East Fisheries and Processing Seafood base	Alexander Sukach	Khersonskaya Str 5	690012	Vladivostok	+7 4232 271 877	+7 4232 272 409	
Fisheries collective farm Vostok -1	Alexander Perednya	Krasnogo znameni Str. 32	690106	Vladivostok	+7 4232 256270	+7 4232 420 577	Vostok1@mail.primorye.ru
Fisheries Committee (Karelia)	Alexander Klimov	Varkaus nab. 3,	185650	Petrozavodsk, Karelia	+7 8142 772135	+7 8142 773177	fishcom@karelia.ru
FOR Group	Dmitry Petrov	Nevsky Prospect. 20	191186	St. Petersburg	+7 812 346 82 00 /82 34	+7 812 314 33 48	for@for-group.ru www.for-group.ru
Gidrostroy	Nikolaev Ivanovitch	Novo-Nikitinskaya Str 5	197349	St. Petersburg	+7 812 303 16 83	+7 812 303 16 83	hydrostroy@rambler.ru www.hydrostroy.narod.ru
Gigante Murmansk	Alexander Kovalev	Severny Prichal, Murmansk Fishing Port	183001	Murmansk	+7 095 2504021/ 2503653	+7 095 458326	gigmm@polarnet.ru www.gigantememo.ru/murmansk_eng.htm
Greentrust Fish Company	Elena Trunova	Zvezdny Boulevard, 19	129085	Moscow	+7 095 232 04 53	+7 095 232 04 53	greentrust@mtu-net.ru www.greentrust.ru
Gulfish - Homyakovsky Hladokombinat.Ltd	Leonid Martynov	M.Polyanka str., 5, office 3	119180	Moscow	+7 095 238 4018/ 238 3861	+7 095 238 3861	martynov@ru.ru www.gulfish.ru
Gulfstream Fish Ltd	Alexander Dvinin	Tri Ruchja Str	183038	Murmansk	+7 902 281 73 03	+7 8152 479 271	sales@gulfstreamfish.com www.gulfstreamfish.com
GUP FAPK Yakutia		Dzerzhinskogo 68	677000	Yakutsk	+7 4112 459152	+7 4112 459058	faps@saha.ru
Hladoprodukt Import-Export	Mikhail Ozerov	Priorova Str 24, bdg 2	125130	Moscow	+ 7 095 926 52 74	+ 7 095 564 82 06	Info@fffood.ru www.fffood.ru
Interatlantic Breeze	Vladimir Makhov	Antona Valeka Str. 15, office 514	620014	Ekaterinburg	+7 3432 658 398	+7 3432 777 337	breeze@etel.ru
Izobiliye TD (Skat LLC)		Khimikov Str, no 26		St. Petersburg	+7 812 527 6192; 527 6137	+7 812 527 6192	seafood@cityline.spb.ru
Kaliningradskie Moreprodukty	Yuriy Vasser	Kaliningradskaya 9-47 (Druzhby 1)	238340	Svetly Settlement, Kaliningrad Reg.	+7 01152 22663; 30554	+7 01152 30808	ksf@baltnet.ru

Kreon Ltd		Kommunisticheskaia Str 2-14	238340	Svelty, Kaliningrad Region	+7 095 534 0284	+7 095 534 0284	kreon-moscow@yandex.ru
Lamatin OAO		Leninsky Ave, 37A	117334	Moscow	+7 095 967 9637/ 095 782 9786	+7 095 782 9786	maxmax@mailandnews.com
Marina	Aleksei Smirnov	Vneshnih Vod Str. 6, korp.2	141135	Moskva	+7 095 182 95 16/ 183 02 65	+7 095 742 8048	info@marinafish.ru www.marinafish.ru
Meridian Co	Aleksei Volkov	Izhorskaya St. 7	127599	Moscow	+7 095 486 4733/ 486 4793	+7 095 4864747	a.volkov@mail.ru
Moscow Technological Centre		Izhorskaya 7	125559	Moscow	+7 095 486 47 19 / 744 0394	+7 095 485 4779	botsman@botsman.ru www.botsman.ru
Murman SeaFood Company Ltd.	Vladimir Khizhnyakov	Karl Marks Str. 28	183038	Murmansk	+7 8152 263 910 / 923	+7 8152 263910	murseaf@commels.ru www.tcfb.com/murmenseafood
Murmansk Trawler Fleet	Igor Grekov	Shmidta St 43	183788	Murmansk	+7 8152 288279	+7 8152 288070; +47 789 10405	grek@mtf.ru www.mtf.ru
Nord West F.C.	Alexander Slivko	Rogozerskaya Str 15	183039	Murmansk	+7 8152 451237; +47 789 10112	+7 8152 458642	slivko@nordwest-fc.ru www.nordwest-fc.ru
NordEast Company Ltd.	Eduard Martynov	Saltykovskaya 8	11673	Moscow	+7 095 700 60 10/ 700 60 30	+7 095 700 5991	go@tsr.ru www.redgold.ru
NORTON Company		Korovinskoe Shosse 35, bldg 8	127412	Moscow	+7 095 783 6044 / 785 6527		info@norton.su www.norton.su
NortVerde OOO	Sergei Vinogradov	Profsoyuzov Str. 17/12 - 51	183038	Murmansk	+7 8152 454435	+7 8152 453010	ibercod@online.ru
Ocean Product Holding Company	Alexey Orlov	Tosina Str 9-1	197374	St. Petersburg	+7 812 331 2210	+7 812 331 2210	orlov@oceanproduct.spb.ru
Ocean Trading Company	Yuri Chinakin	Podbelskogo 5	196608	Pushkin, St. Petersburg	+7 812 466 66 26/ 476 5408	+7 812 466 66 24	info@seafood.ru www.seafood.ru
Okeanrybflot OAO	Budionnyi	Leningradskaya Str.27	683000	Petropavlovsk-Kamchatsky	+7 4152 225610	+7 415 2 112740	product@bor.kamchatka.ru; telegraf@bor.kamchatka.ru

Orghim Ecology	Alexander Gratch	Elisarova Prospect 38a	193148	St. Petersburg	+7 812 325 11 95; +7 812 325 3030	+7 812 325 10 18+7 812 325 1194	a.gr@orghim.ru www.orghim.ru
Osminog, ZAO	Mihail Danilov	Entuziastov Sh. 30	143900	Balashikha, Moscow Reg	+7 095 521 3480/ 529 3252; 529 34 57	+7 095 529 3252; 529 34 57	osminogg@km.ru www.osminogg.ru
Pacific office fisheries exploring and research vessels fleet	Alexander Ryabchenko	Svetlansky lane 11/2	690600	Vladivostok	+7 4232 265 236	+7 4232 269 621	sea@turnif.com
Pischevik	Nikolai Kazunin	Ligovsky pr, 289	186006	St. Petersburg	+7 812 2986074	+7 812 2987366	fishplant@pischevik.ru www.pischevik.ru
Polluks OOO	Vladimir Gonchar	Leninskaya 26	683000	Petropavlovsk-Kamchatsky, Kamchatka reg.	+7 4152 12 11 88 / 12 11 91	+7 4152 12 11 83	polluks2@mail.kamchatka.ru http://www.npacific.ru/np/polluks/
Port Vladimir	Ludmila Yarish	Prichal 28, Fishing Port	183001	Murmansk	+7 8152 451981; +7 8152 6286428	+7 8152 47 66 72	severnoe@com.mels.ru
Poseidon and Co	Irina Kataeva	Svobody Str. 48, s.1	123364	Moscow	+7 095 497 0180; 497 0198; 497 0796	+7 095 961 2648	IKataeva@poseidon-fish.ru www.Poseidon-fish.ru
Poseydon JSC	Natalya Orlova	Postysheva Str 22	692900	Nakhodka	+7 42366 640 991	+7 42366 640 991	poseidon@nhk.infosys.ru
Preobrazhensky Fish Processing Plant	Surkont	Portovaya Str 1	692899	Preobrazheniye, Primorsky Kray	+7 42377 91286		btfrk@mail.primorye.ru
Protein	Andrei Chen	Rybnyi Port, Yuznhye Prichaly	183001	Murmansk	+7 8152 28 66 89 /28 44 20 /45 15 62	+7 8152 28 62 24	protein@online.ru http://www.crabsticks.ru/
Raptika Fish Processing Plant	Oksana Akhromova	Prevedenovskiy per. 17 / 1. No. 59	105082	Moscow	+7 095 926 47 83/ 926 47 84	+7 095 926 47 86	info@prodko.ru www.raptika.com
Raptika Fish Processing Plant	Nikolay Ovchinnikov	Kommunalny pereulok; 7	127572	Dubna; Moscow region	+7 095 926 41 42/ 46 83	+7 095 926 47 84	ovchinnikov@prodko.ru www.raptika.com
ROK 1	Alexander	Elevatornaya	198096	St. Petersburg	+7 812	+7 812	admin@rok1.spb.ru

	Starobinskiy	ploschadka 16, Korp 7			1850489/ 183 91 74/ 183 3300	183 3335	www.nwfish.ru
Roliz	Vladimir Kovalskiy	Nekrasovskaya str., 50A	690014	Vladivostok	+7 4232 222514/ 251351	+7 4232 222514	fishtrader@roliz.vtc.ru www.roliz.vtc.ru
Russian Caviar JSC	Vyacheslav Mironov	Avgustovskaya Str 5	414052	Astrakhan	+7 8512 259375/ 251601	+7 8512 259473	rus@caviar.ru www.rus.caviar.ru
Russian Fish Company	Svetlana Vorobyova	Nikoloyamskaya st 19 stor 1	109240	Moscow	+7 095 7880993/ 788 09 88	+7 095 788 09 92	rs@russiansea.ru www.fishimport.ru ; www.russiansea.ru
Severnaya Kompaniya	Vitaliy Kornev	Leningradskoe shosse 69	121099	Moscow	+7 095 2413704	+7 095 2414567	ikrasale@mail.ru
Severny Mir	Igor Mostyayev	Smolnaya Str 34A	125493	Moscow	+7 095 906 8045;457 7637	+7 095 458 4865	worldnord@degunino.net http://www.inforus.ru/ severnymir/
Severny Mir	Andrei Rodionov	Lunacharskogo prosp.80	194295	St. Petersburg	+7 812 559 73 91/5598368	+7 812 5597391	severnymir@mail.ru http://www.inforus.ru/ severnymir/
Shalanda M, Ltd		Admirala Makarova str, k.2, 23	125212	Moscow	+7 095 926 5277	+7 095 933 4522	logus@ru.ru
SP-Holod ZAO	Leonid Martynov	Malaya Polianka 5, Of. 3	109180	Moscow	+7 095 238 3861; 238 40 18	+7 095 238 3861	sirius-sales@mail.ru www.gulfish.ru
Trade-Industrial Alliance	Yury Petrik	Communisticheskiy Av. 21	693010	Yuzhno- Sakhalinsk	+7 4242 73 18 62	+7 4242 73 14 50	petrick@sakhfish.com
Udarnik Fishing Kolkhoz	Andrey Roman	Kola District	184376	Minkino	+7 8152 567060	+7 8152 567626	udarnik@com.mels.ru
UstKamchatRyba OOO	Tamara Gouchtchina	Komsomolskaya Str. 1	684400	Ust-Kamchatsk, Kamchatskoy obl	+7 3412 307811	+7 3412 307322	
UTRF (Office of trawler and refrigerator fleet) Holding Joint Stock Co.	Alexander Abramov	Leninskaya St. 38	683000	Petropavlovsk- Kamchatsky	+7 4152 112476	+7 4152 112281	holding@utr.f.kamchatka.su
Vostok-1 ZAO	Sergey Sklianov	Krasnogo Znameni prosp. 42	690106	Vladivostok	+7 4232 256270	+7 4232 420577	vostok1@mail.primorye.ru ;
Vostokrybprom	Oksana	Khoroshevskoe	123007	Moscow	+7 095 789	+7 095	office@vostokrybprom.ru

	Zadrozhnaya	shosse st. 32a			36 16 / 789 39 10 / 789 30 11	789 36 15	www.vostokrybprom.ru
Westrybflot JSC	Vladimir Gorbachev	Komsomolskaya Str 27a	236000	Kaliningrad	+7 0112 219703	+7 0112 219703	wflot@baltnet.ru www.westrybflot.ru

Wholesale companies

	Contact person	Address	PC	City	Telephone	Fax	E-mail/webpage
Arctic Salmon JSC	Kosher	Sofij Perovskoy Str. 2	183016	Murmansk	+7 8152 472482	+7 815 2472482	salmon@com.mels.ru
Arsintek Ltd.	Roussakov	Otkrytoe st., 1/3		Moscow	+7 095 167 3405	+7 095 167 3405	info@arsintek.ru; arsintek@mtu-net.ru www.arsintek.ru
BaltForum Ltd.	Gudinskaya	Chernyakhovskogo 15A, 15	236006	Kaliningrad	+7 0112 991877; +7 9022 375530	+7 0112 991866	baltforum@mail.ru
C & C	Nagaitsev	Vladienie 1	142715	Leninsky Distr, Moscow Region	+7 095 111 55 77; +7 095 111 34 11	+7 095 399 33 90	sis@mail.compnet.ru
DEFA Trading Group	Repinskiy	Novoselkovskaja, 24	191014	St. Petersburg	+7 812 303 94 03; 327 35 28	+7 812 3039403	defafish@home.ru www.fishtrading.spb.ru
Dalryba	Anatoly Vetrov	Svetlanskaya Str 51 a	690600	Vladivostok	+7 4232 224 640	+7 4232 220 219	dalryba@fastmail.vladivostok.ru
Delsy		Shcherbakova str.12	660003	Krasnoyarsk, Krasnoyarsky Kray	+7 3912 606 440;+7 095 505 19 05	+7 3912 644 660;+7 3912 644 640	delsy@delsy.ru www.delsy.ru
DOVOD ZAO, Ltd.	Koulitschenko	Ryabinovaya Str 53, 5th floor	121471	Moscow	+7 095 443 2105, 095 446 4544	+7 095 4475365	dovod@rol.ru www.dovod.no
East West Co Ltd		Leninskiy prosp., off. 1203	119049	Moscow	+7 095 780 30 20; +7 095 237 7714	+7 095 959 9271	chingiz@atardo.com; olga@atardo.com; www.vostokzapad.ru
EST, ZAO	Ermakov	Kievsky Pr. 3	307170	Zheleznogorsk- 5, Kursk Region	+7 07148 92002 / 91505 / 24657	+7 07148 76532	est@kursknet.ru; mail@estcom.ru www.estcom.ru
Far East Fisheries and Processing	Alexander Sukach	Khersonskaya Str 5	690012	Vladivostok	+7 4232 271 877	+7 4232 272 409	

Seafood base							
Fisheries collective farm Vostok -1	Alexander Perednya	Krasnogo znameni Str. 32	690106	Vladivostok	+7 4232 256270	+7 4232 420 577	
Evromorprodukt Ltd		Pod'ezdnoy per 19	190000	St. Petersburg	+7 812 324 46 26	+7 812 324 46 24	emp@bcltele.com; pitskl@nm.ru
Fishing Fleet FOR	Borovskaya	Nevsky Prospect 20	191186	St. Petersburg	+7 812 346 82 00	+7 812 312 33 48	for@for.spb.ru; for@for-group.ru www.for-group.ru
FOR Group	Petrov	Nevsky Prospect. 20	191186	St. Petersburg	+7 812 346 82 00 / 82 34	+7 812 314 33 48	for@for-group.ru www.for-group.ru
Greentrust Fish Company	Trunova	Zvezdny Boulevard, 19	129085	Moscow	+7 095 232 04 53	+7 095 232 04 53	greentrust@mtu-net.ru; greentrust_company@mtu-net.ru www.greentrust.ru
Gulfstream Fish Ltd	Dvinin	Tri Ruchja Str	183038	Murmansk	+7 902 281 73 03	+7 8152 479 271	sales@gulfstreamfish.com www.gulfstreamfish.com
GUP FAPK Yakutia		Dzerzhinskogo 68	677000	Yakutsk	+7 4112 459152	+7 4112 459058	faps@saha.ru
Hladoprodukt Import-Export	Ozerov	Priorova Str 24, bdg 2	125130	Moscow	+ 7 095 926 52 74	+ 7 095 564 82 06	Info@fffood.ru; omv@aha.ru www.fffood.ru
Ice-Fish	Vitjazev	Malisheva str. 145-a	620049	Ekaterinburg	+7 343 217 63 52; +7 3432 658285	+7 343 217 63 52	fish@epn.ru
Icelandic Freezing Plants Corp. Ltd.	Aliullov	Karmanitsky per. 9, off. 301	121002	Moscow	+7 095 937 16 11; +7 095 937 16 19	+7 095 937 16 12	rafik@icelandic.ru www.icelandic.ru
Interatlantic Breeze	Makhov	Antona Valeka Str. 15, office 514	620014	Ekaterinburg	+7 3432 658 398	+7 3432 777 337	breeze@etel.ru
Kaliningradskie Moreprodukty (KSF)	Vasser	Kaliningradskaya 9-47 (Druzhby 1)	238340	Svetly Settlement, Kaliningrad Reg.	+7 01152 22663; 30554	+7 01152 30808	ksf@baltnet.ru
Linia 5	Martinov	Malaya Polianka 5	109180	Moscow	+7 095 238 3861	+7 095 362 47 42	sirius-secretar@ru.ru www.polyanka.net/sirius
Marina	Smirnov	Vneshnih Vod Str. 6, korp.2	141135	Moskva	+7 095 182 95 16; 183 02 65	+7 095 742 8048	trade@marinafish.ru www.marinafish.ru
Moscow Technological Centre		Izhorskaya 7	125559	Moscow	+7 095 486 47 19 / 744 0394	+7 095 485 4779	botsman@botsman.ru http://www.botsman.ru/
Murman	Khizhnyakov	Karl Marks Str. 28	183038	Murmansk	+7 8152 263 910 /	+7 8152	nurseaf@commels.ru

SeaFood Company Ltd.					923	263910	www.tcfb.com/murmanseafood/
Nord West F.C.	Slivko	Rogozerskaya Str 15	183039	Murmansk	+7 8152 451237; +47 789 10112	+7 8152 458642	slivko@nordwest-fc.ru www.nordwest-fc.ru
Norge Fish Ltd	Gudkov	Vavilova ul. Dom 83, Room 8	117335	Moscow	+7 095 937 5731	+7 095 134 4041	info@norgefish.com www.norgefish.com
Ocean Trading Company	Chinakin	Podbelskogo 5	196608	Pushkin, St. Petersburg	+7 812 466 66 26 +7 812 476 5408	+7 812 466 66 24	info@seafood.ru www.seafood.ru
Orghim Ecology	Gratch	Elisarova Prospect 38a	193148	St. Petersburg	+7 812 325 11 95; +7 812 325 3030	+7 812 325 10 18; +7 812 325 1194	kuzmina@orghim.ru ; orghim@mail.wplus.net www.orghim.ru
Osminog, ZAO	Danilov	Entuziastov Sh. 30	143900	Balashikha, Moscow Reg	+7 095 521 3480/ 529 3252; 529 34 57	+7 095 529 3252; 529 34 57	osminogg@km.ru www.osminogg.ru
Pacific office fisheries exploring and research vessels fleet	Alexander Ryabchenko	Svetlansky lane 11/2	690600	Vladivostok	+7 4232 265 236	+7 4232 269 621	sea@turnif.com
Pischevik	Kazunin	Ligovsky pr, 289	186006	St. Petersburg	+7 812 2986074	+7 812 2987366	fishplant@pischevik.ru www.pischevik.ru
Port Vladimir	Yarish	Prichal 28, Fishing Port	183001	Murmansk	+7 8152 451981; +7 8152 6286428	+7 8152 47 66 72	severnoe@com.mels.ru
Poseidon and Co	Kataeva	Svobody Str. 48, s.1	123364	Moscow	+7 095 497 0180; 497 0198; 497 0796	+7 095 961 2648	opt@poseidon-fish.ru www.Poseidon-fish.ru
Raptika Fish Processing Plant	Ovchinnikov	Kommunalny pereulok; 7	127572	Dubna; Moscow region	+7 095 926 41 42; +7 095 46 83	+7 095 926 47 84	ovchinnikov@prodko.ru www.raptika.com
ROK 1	Starobinskiy	Elevatornaya ploschadka 16, Korp 7	198096	St. Petersburg	+7 812 185 0489; 183 91 74; 183 3300	+7 812 183 3335	sales@rok1.spb.ru www.nwfish.ru
Roliz	Kovalskiy	Nekrasovskaya str., 50A	690014	Vladivostok	+7 4232 222514; 251351	+7 4232 222514	anatoly@roliz.vtc.ru www.roliz.vtc.ru
Russian Fish Company	Vorobyova	Nikoloyamskaya st 19 stor 1	109240	Moscow	+7 095 7880993; +7 095 788 09 88	+7 095 788 09 92	rs@russiansea.ru ; intldep@bartmedia.ru www.fishimport.ru ; www.russiansea.ru
Severnaya Kompaniya	Kornev	Leningradskoe shosse 69	121099	Moscow	+7 095 2413704	+7 095 2414567	ikrasale@mail.ru
Severny Mir	Rodionov	Lunacharskogo prosp.80	194295	St. Petersburg	+7 812 559 73 91; +7 812 5598368;	+7 812 5597391	severnymir@mail.ru ww.inforus.ru/severnymir

					+7 812 558 64 15		
SP-Holod ZAO	Martynov	Malaya Polianka 5, Of. 3	109180	Moscow	+7 095 238 3861; 238 40 18	+7 095 238 3861	sirius-sales@mail.ru; martynov@ru.ru www.gulfish.ru
Udarnik Fishing Kolkhoz	Roman	Kola District	184376	Minkino	+7 8152 567060	+7 8152 567626	udarnik@com.mels.ru
UstKamchatRyba OOO	Gouchtchina	Komsomolskaya Str. 1	684400	Ust- Kamchatsk, Kamchatskoy obl	+7 3412 307811	+7 3412 307322	
Westrybflot JSC	Gorbachev	Komsomolskaya Str 27a	236000	Kaliningrad	+7 0112 219703	+7 0112 219703	wflot@baltnet.ru www.westrybflot.ru
Zaprybsbyt Ltd	Galkov	Suvorova Str. 57	236035	Kaliningrad	+7 0112 717 017; +7 0112 556427;	+7 0112 556427	postmaster@zrs1.koenig.su; postmaster@zrs.ru www.zrs.ru



GLOBEFISH MARKET RESEARCH PROGRAMME

This activity is part of the services provided by the Fish Marketing and Utilization Service (FIU) of the Fisheries Department of the Food and Agriculture Organization of the United Nations.

	Issued	Language	€	No. of copies	
Vol.63	The World Market for Herring (96p.).....	Mar 2000	Eng	30	—
Vol.64	World Trade in Mackerel and Horse Mackerel (98p.).....	April 2000	Eng	30	—
Vol.65	Effect of World Trade Organization's Regulation on World Fish Trade (87p.).....	Mar 2000	Eng	30	—
Vol.66	European Union Standards for Fishery Products (including EU duties) (248p.).....	June 2000	Eng	30	—
Vol.67	The Ornamental Fish Market (91p.).....	Oct 2000	Eng	30	—
Vol.68	The World Market for Frog Legs (44p.).....	June 2001	Eng	30	—
Vol.69	Fishery Industry Profile – Thailand (76p.).....	Nov 2001	Eng	30	—
Vol.70	The Fishery Industry in Greece (59p.).....	Nov 2001	Eng	30	—
Vol.71	The German Market for Fish and Seafood (116p.).....	Jan 2002	Eng	30	—
Vol.72	Fish Roe in Europe: Supply and Demand Conditions (47p.).....	Nov 2002	Eng	30	—
Vol.73	Salmon – A Study of Global Supply and Demand (151p.).....	July 2003	Eng	30	—
Vol.74	World Tuna markets (135p.).....	May 2004	Eng	30	—
Vol.75	Fishery Industry Profile – Viet Nam (57p.).....	July 2004	Eng	30	—
Vol.76	Fishery Industry in China (74p.).....	Sept 2004	Eng	30	—
Vol.77	Overview of Organic Markets: an Opportunity for Aquaculture Products? (98p.).....	Jan 2005	Eng	30	—
Vol.78	Seafood Price Indices (44p.).....	Apr 2005	Eng	30	—
Vol.79	World Market of Tilapia (28p.).....	Apr 2005	Eng	20	—
Vol.80	Fishery Industry Profile – Russia (70p.).....	June 2005	Eng	30	—

1) Prices include air mail delivery

ORDER FORM

COPIES ARE AVAILABLE FROM:

FAO GLOBEFISH - Fish Utilization and Marketing Service, Fishery Industries Division
Viale delle Terme di Caracalla, 00100 Rome, Italy

Tel.: (39-06)570 55074 - Fax: (39-06) 570 55188 - E-mail: GLOBEFISH@fao.org – <http://www.globefish.org>

20% DISCOUNT IS OFFERED ON ORDERS FOR MORE THAN TWO COPIES

I should like to order _____ copy(ies) of those volume number(s) as indicated above for a total of € _____

By credit card:

Card No.: _____ Diners/Visa Euro/Master Card American Express

Expiry date: _____

Signature: _____

Bank transfer to: FAO/UN Trust Fund US\$ Account 490650/67/72 with the IntesaBCI, FAO Branch (Swift Code BCIT IT MM 700), ABI: 03069, CAB: 03356; IBAN IT24N03693356004906507681; Viale delle Terme di Caracalla – 00100 Rome, making reference to FAO Account Code TFAA970089102 (GLOBEFISH) for € _____

Name: _____ Company: _____

Street Address: _____

City and Postcode: _____ Country: _____

Tel: _____ Fax: _____ E-mail: _____



GLOBEFISH

Food and Agriculture Organization of the United Nations
Fishery Industries Division
Viale delle Terme di Caracalla
00100 Rome, Italy
Tel.: +39 06 5705 5074
Fax: +39 06 5705 5188
www.globefish.org