USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

Date: 5/23/2006

GAIN Report Number: UP6011

Ukraine

Fishery Products

Market Growth Creates New Opportunities

2006

Approved by:
Garth Thorburn, Agricultural Attaché
Office of Agricultural Affairs

Prepared by:
Oleksandr Tarassevych, Agricultural Specialist

Report Highlights:
The Ukrainian market has witnessed a significant increase in demand for fish and seafood, fuelling impressive growth in imports. This increase in demand for seafood is being driven by strong income growth. Also, import duties for fishery products dropped significantly in August 2005. Consumption patterns are shifting from herring, which was the traditional product of choice, towards more expensive, higher quality seafood products, opening a new niche market for U.S. suppliers of hake, salmon, and sardines. The rapidly developing domestic processing industry has restructured in recent years and is currently demanding more frozen fish. The recent growth in the HRI sector will also help to develop the chilled fish market resulting in increased demand for squid, scalps and crabmeat in the next few years.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Kiev [UP1]
[UP]

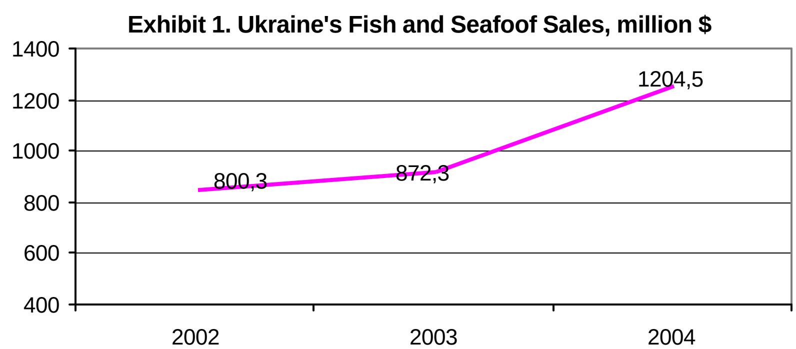
Section I. Fish and Seafood Market Overview

Ukrainian consumers' rapidly growing personal incomes has driven the significant increase in demand for higher quality fish and seafood. With total consumption of fish and processed products at over 672,000 tons in 2005, Ukrainians still consume less fish then was consumed in 1990. The huge 114% jump in import growth (HS 03) recorded in 2005 is also an indication that the local industry has been able to develop in order to meet future growth prospects. A rapidly growing seafood market in Ukraine will allow U.S. exporters to secure a solid position in order to compete effectively with European and South American suppliers. Growing demand for Alaskan salmon, hake, whitening and Pacific sardines drove the significant (56 percent) increase of U.S. exports to Ukraine in 2005. The U.S. now captures 6% of the import market share and ranks third after traditional suppliers – Norway and Russia.

Section II. Market Sector Opportunities and Threats

Market Size, Structure, Trends

Imports of almost 600,000 tons of fish and fish filet, and 35,500 tones of seafood products in 2005 account for 61% of the market. Domestic supplies of fish are generally caught with-in the 200-mile economic zone of other countries (66%), in the economic zone of Ukraine (27%), from fresh water (8%) or produced locally.



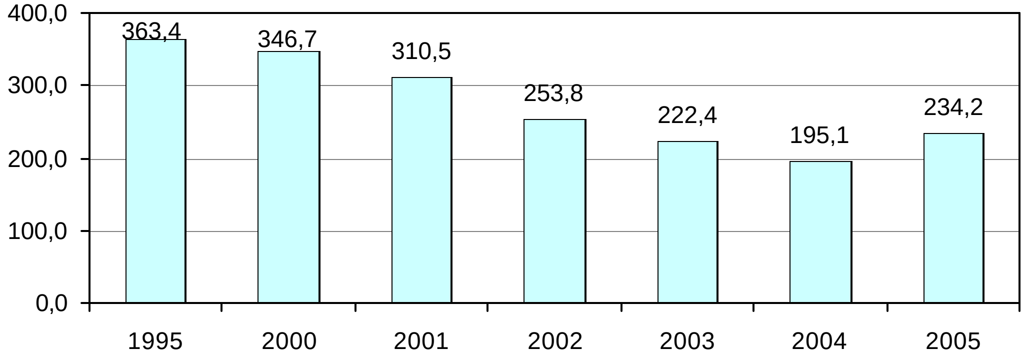
Source: FAS/Kiev estimates

Ukraine only has access to the Black and Azov seas with a very limited number of fish species that are suitable for industrial fishing. Local species are well known to Ukrainian consumers, but they are of low quality and often not suitable for processing (Please refer to tables 8, 9, and 10 at the end of the report). These factors along with the decreasing fish and seafood catch (Exhibit 2) make the Ukrainian fish market more and more dependent on imported fish and seafood products.

Almost one half of the 234,000 tons of total catch is sold close to the fishing zones (i.e. exported) to Mauritania, New Zeeland and Argentina. Locally caught freshwater fish are sold mostly live through open-air markets or through fish departments of supermarkets and grocery stores. There are a few specialized seafood stores in major urban centers, but this retail market segment is not the norm. Imported fish are sold mostly frozen (99% of all imports). The market for chilled imported fish is developing rapidly. Currently, most of the fish that is marketed as "chilled" premium quality and displayed on ice in supermarkets and specialty stores are imported frozen and defrosted prior to display. The main reasons for this practice is due to lengthy veterinary clearance procedures and an unwillingness of Ukrainian consumers to pay significantly higher prices for only marginally higher quality fish.

Nevertheless, the market is expected to demand more and higher quality fish in 1-to-2 years, as more upper class consumers are willing to pay more for these products.

Exhibit 2. Total Fish and Seafood Catch in Ukraine*, 1000 MT

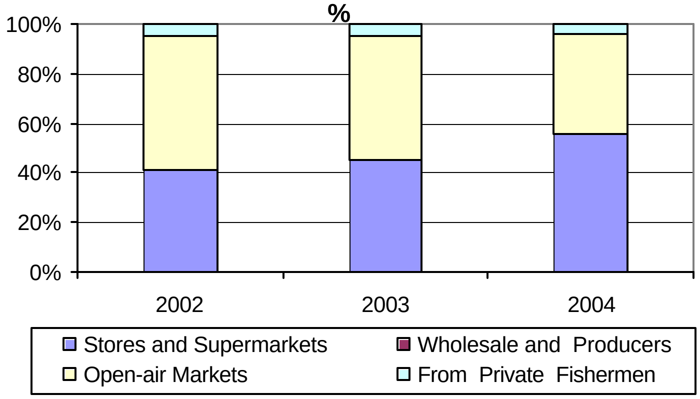


Source: State Statistics Committee of Ukraine
** Includes freshwater and sea species, seafood and water weeds*

The main reasons for this practice is due to lengthy veterinary clearance procedures and an unwillingness of Ukrainian consumers to pay significantly higher prices for only marginally higher quality fish. Nevertheless, the market is expected to demand more and higher quality fish in 1-to-2 years, as more upper class consumers are willing to pay more for these products.

Ukraine's seafood market is subject to significant seasonal fluctuations, although these fluctuations are less evident today then was the case just two or three years ago. Many of the seafood cold storage facilities that remain from the Soviet era are in bad condition, have outdated technologies with ammonia-based refrigerating equipment. The main reason for seasonal fluctuations is the lack of retail cold storage facilities. A significant share of fish sales is made through open-air retail outlets (See Exhibit 3). Most are not equipped with modern refrigerated showcases and supply fish of acceptable quality only from September through April. Supermarkets have not yet changed the structure because they account for only 5-8% of the retail market share (in urban areas this number is much higher and growing quickly). The aggregated share of grocery store and supermarket growth increased from 41% in 2002 to 56% in 2004, mostly at the expense of products sold through open-air markets.

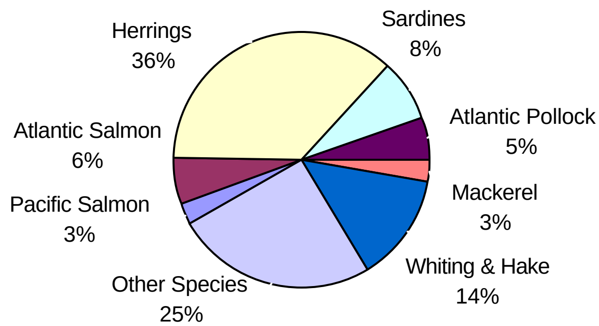
Exhibit 3. Fish Sales by Marketing Channels, %



Source: FAS/Kiev own estimates

All the factors outlined above explain why seafood imports decrease significantly during summer months. Major importing companies are investing in upgrading and expanding their cold storage facilities, so fish sales in large urban areas are expected to stabilize in the next few years. The choices of fish species available to Ukrainian consumers are also expanding. The fish market in 2005 is drastically different than the fish market of 5 years ago. At that time herring accounted for over 60% of fish sold. Today, the biggest share (75% of the Ukrainian market) is held by imports of pelagic fish that is used for further industrial processing (mostly herring, mackerel, capelin and sardines). Approximately 15% of imports are so-called “table fish” for cooking at home (mostly pollock, hake and cod species) and 10% of the market is “high-end fish” (salmon species, sturgeon and roe). The structure of Ukraine’s import market is found in Exhibit 4 (please also refer to tables 4 & 5 at the end of the report). Ukraine is one of the largest producers and consumers of Antarctic Krill and the popularity of this product has grown quickly over the past 2 years.

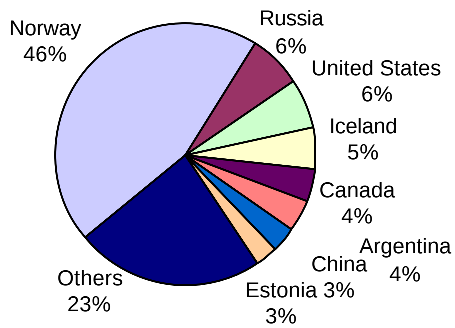
Exhibit 4. Ukrainian Frozen Fish Import in 2005, in Value



Source: State Customs Committee of Ukraine

The seafood market in Ukraine is in transition. Consumers still prefer fish species that were available during the Soviet era, but more consumers are experimenting with other products and purchasing more expensive cold-water and premium fish. The CIF value of imported fish increased 50% from 2004 and 2005. Imports of relatively more expensive table fish and high-end species grew significantly with hake and different salmon species leading the way. Other changes also occurred during the past 3 years. Fish suppliers from all around the world drove Russian suppliers from the Ukrainian market. Once a major fish supplier, Russia’s importance as a supplier has diminished significantly. Also, the dominance of Norway as a major supplier continues to decrease. In 2001-2002, Norway’s share reached its all time high of 80-85% of the market. Currently, Ukrainian importers are attempting to diversify supply sources and looking for new, higher quality and more expensive products. Every year the Ukrainian fish market becomes more diversified with more suppliers entering the market. (See Table 6 for more detailed information on supplying countries).

Exhibit 5. Market Share of Major Seafood Suppliers in 2005 (value)



Source: State Customs Committee of Ukraine

Trade in Seafood Products

Trade with the United States in seafood has grown rapidly in recent years. Between 2002 and 2003, U.S. frozen fish exports more than tripled, and last year recorded a strong 56% increase.

Table 1. Ukrainian Imports of U.S. Frozen Fish (millions dollars)

HS	Description	2004	2005	% Change 2004/2005
030378	Whiting & Hake	5,67	6,58	16
030310	Pacific Salmon	0,69	3,07	345
030379	Other 0303	0,07	1,26	1721
030371	Sardines	0,71	0,67	-5
030339	Other Flat Fish	0,00	0,09	0
030374	Mackerel	0,32	0,07	-77
030380	Fish Livers, Roes	0,12	0,07	-40
0303	**Total Fish and Seafood**	**7,65**	**11,96**	**56,32**

Source: State Customs Committee of Ukraine

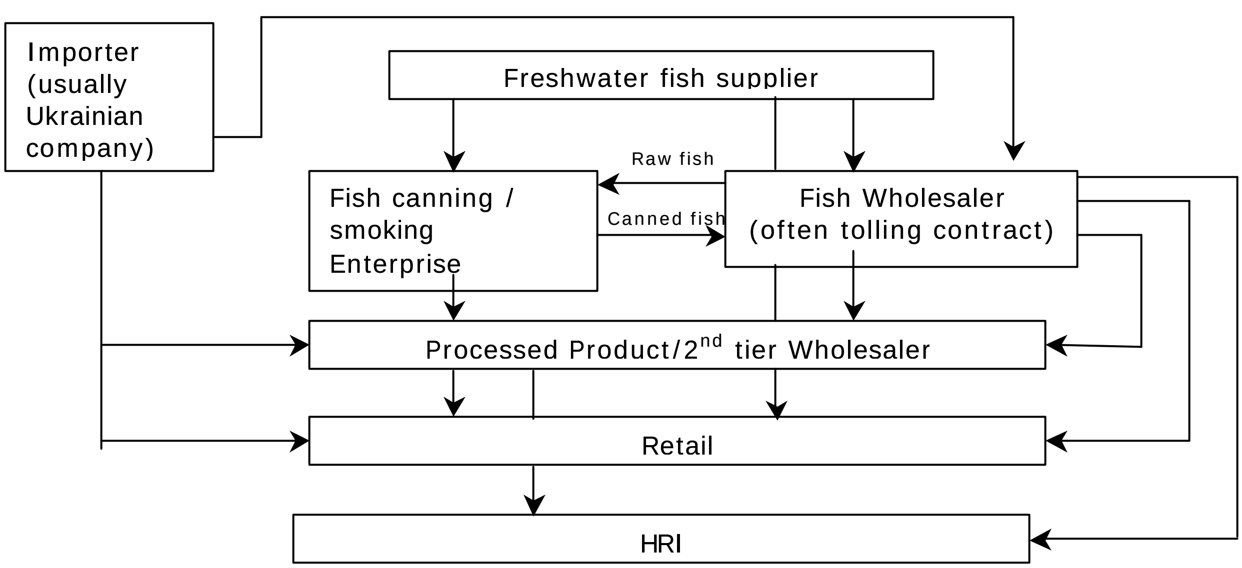
In supplying more expensive higher quality fish, many U.S. exporters have benefited from recent market developments in Ukraine. The U.S. position looks especially good for high end products such as salmon. Pink salmon was perceived as a luxurious product in the former Soviet Union and Ukrainian consumers generally consumed fish from the Far East. After Russian Siberian and chum salmon deliveries stopped, Ukrainians switched to Norwegian farm salmon that was sold at very high margins ensuring the product was out of reach to most consumers. U.S. Alaskan wild pink and chum salmon was highly competitive with Norwegian product because of its higher quality and lower price. The appearance of U.S. product is also preferred to Norwegian farm salmon, which is very important in the premium quality market segment where salmon and sturgeon are positioned.

U.S. suppliers may also benefit from selling other higher quality products to many niche markets, which are not being supplied by Norwegian or Russian suppliers. Among multiple mass-market segments, U.S. exporters may be successful in selling hake, sardines, squid and crabmeat. The markets for fish roe and liver also look very promising, while the prospects of mackerel and herring markets are somewhat dubious. U.S. exporters may have the following advantages and face the following challenges in Ukraine.

Advantages	Challenges
Quickly growing market is familiar with seafood products similar to U.S. products and is more ready to pay for high quality fish.	Market is not stable yet. It is subject to both seasonal and year-to-year fluctuations.
Ukraine has a well developed internal transportation system. Black sea ports can be used to deliver fish to Ukraine.	Cold storage chain is underdeveloped with retail outlets being the bottleneck for trade in frozen fish and seafood.
Ukraine has a large fish processing industry servicing 47 million hungry consumers.	Many importers use shadow schemes to import fish products to decrease taxes and reduce the import duty burden.
Some U.S. products are of better quality and lower priced than those imported from other sources.	State policy governing the fish market is not yet clear. Arbitrary use of standards and certificates is possible.
U.S. products is often viewed as luxurious and of the high quality.	

Entry Strategy

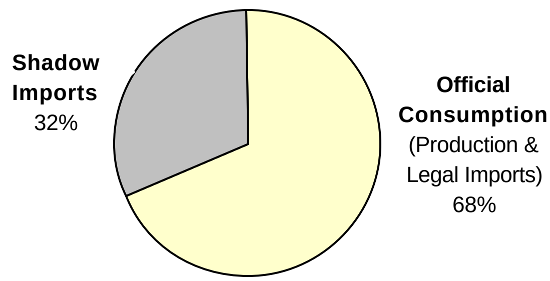
The only market entry strategy that is recommended for first time suppliers is to work through an established local importer. This strategy is used by all American and European seafood suppliers. Ukraine is a country where personal relationships take precedence and import operations are highly bureaucratic and time consuming (See diagram below describing the import distribution process). Due to frequent changes in Ukrainian legislation, non-transparent custom clearance rules, SPS and veterinary procedures, it is recommended to work through a local importer who knows how to maneuver within the system. Ukrainian importers are also responsible for the entire logistic chain, inland transportation and distribution.



Currently, there are 20 large fish importers (importing over 10,000 tons of fish annually), slightly over a dozen mid-sized companies (1,000-1,500 tons a year) as well as hundreds of smaller importing companies (10-100 tons).

Throughout the 1990's, the fish market was one of the most criminalized due to high import duties, abnormally high trade margins and widespread corruption. Many large, mid-sized and small companies did not hesitate to use "shadow" import schemes in competitive fights for market share. Smugglers used both inland routes and small Black sea and Azov ports. The lowering of import duties in August 2005 (see Import Duties Table) resulted in a significant decrease in illegal trade of fish products, but a sizable portion of the seafood market remains in the "shadow economy".

Exhibit 6. Fish Consumption in Ukraine in 2004, in volume

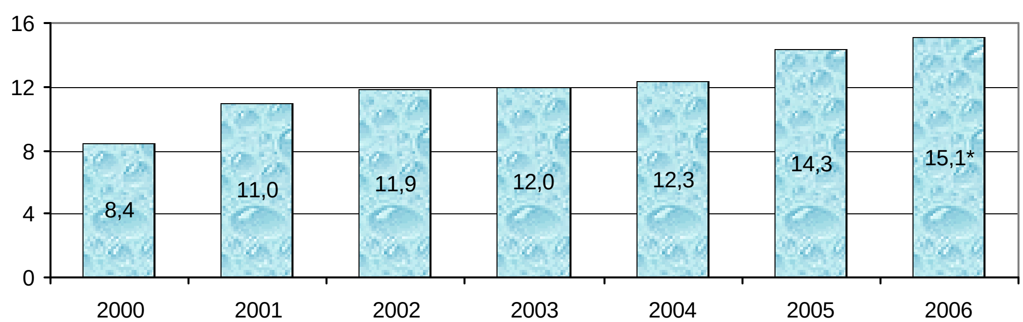


Source: FAS/Kiev - Illegal trade for 2004 was estimated as a residual between domestic consumption and official production and imports.

Section III. Consumption, Costs and Prices

The Ukrainian seafood market used to be one of the most price-sensitive in the region. Only cheap herring and mackerel were imported during the mid 1990's to satisfy demand for cheap fish. Consumption of seafood fell from 18 kilograms per capita in late 1980's to 3.5 kilograms in 1994. Presently, consumption of seafood is increasing significantly, with good prospects for the immediate future.

Exhibit 7. Annual per capita fish consumption in Ukraine, kilograms



** - Forecast*
Source: State Customs Committee of the Ukraine

Despite the shift towards higher quality fish products, Ukraine still imports cheap herring, surimi and similar products. Business trading in cheaper fish face very high competition and very small trade margins. Product quality in this niche is relatively minor because of the abundance of cheap imported fish and simple processing technologies. The same is true for some mid-range table fish (pollock, hake). Prices for canned fish are moderate due to heavy competition with imports from Russia and Baltic countries. In the premium segment, domestic retail prices in Ukraine often exceed declared CIF import prices by 100-200%. Ukrainian wholesale prices are provided in the table below, while CIF prices are provided at the end of the report.

Table 2. Wholesale Domestic Prices of Seafood Products in Ukraine (May 2005)

Fish Species	Country of Origin / Production	Weight / Packaging / Processing	Price, UAH
Herring	Norway	Frozen, whole, kilogram	8.00 – 9.40
Pink Salmon	Norway	Frozen, Filet, kilogram	27.50
Salmon Caviar	Russia	Frozen, kilogram	210 - 240
Sprat	Estonia	Frozen, whole, kilogram	2.90
Mackerel	Norway	Frozen, Whole, kilogram	12.00 – 14.00
Pollock	Norway	Frozen, whole, kilogram	10.50
Surimi	China	Frozen, whole, kilogram	8.00 – 9.00
Hake	Ukraine	Frozen, whole, kilogram	8.70-10.00
Shrimp	Russia	Frozen, whole, kilogram	14.50-16.00
Catfish	Ukraine	Frozen, filet, kilogram	8.00
Pike-Perch	Ukraine	Froze, Stake or Filet, kilogram	8.00 –12.00
Sardines	Ukraine	Canned, 250 grams	2.35
Conversion rate – UAH 5.09 per $1 US			

Source: Own market research

Numerous small processing companies producing smoked and salted fish purchase small fish lots. Many establishments in the Ukrainian HRI sector often buy only 1 box of fish a day (2-9 kilograms of high-end fish or 20 kilograms of ordinary "table fish"). There is no minimal amount of fish that can be purchased buy HRI establishments or a small processor, although larger buyers (10 tons of fish or more) can get 3-7% discount and/or a 5-10 day payment deferment.

Section IV. Trade Regime and Market Access

In August 2005, Ukraine dropped the fixed minimum per kilogram duty rate after import duties were reduced. Charged in euros, fixed rate duties used to reach significant *ad valorem* equivalent levels and were the major reason why a significant portion of imports went through the "shadow market". For the majority of less-expensive frozen fish products, the official *ad valorem* import duty is now zero or between 2% to 5% of CIF value. Import duties for the verity of seafood products from the premium market segment were fixed at 10%. The table comparing the old fixed rates to the new *ad valorem* rates is provided in the attachments.

In addition to import duties, all importers must pay a 20% value-added-tax (VAT), as well as expenses associated with currency conversion (1% Pension fund tax, 0.7% banking fee, etc.). Imports of all types of fish are subject to certification. For chilled fish, this may become a significant problem since certification procedure requires up to 7 business days. With a shelf life of 10-12 calendar days, this long clearance procedure is becoming a significant obstacle for importers. Most Ukrainian companies do not work with chilled fish, but smaller companies sometimes bring it in unofficially.

Currently, Ukraine is not a WTO or *Codex Alimentarius* member and the Ukrainian Veterinary Service does not accept statements provided in the export certificates issued by competent authorities in exporting countries. All testing procedures, outlined in the Ukrainian legislation must be conducted in local (port) state veterinary laboratories. The cost of inspections and laboratory tests will differ, depending on product type, uniformity of the shipment and quantity. For a 100-ton shipment, an importer would pay between $60 and $70 dollars for different fees and compulsory veterinary services.

The Ukrainian Veterinary Service or State Committee for Technical Regulations and Consumer Policy sometimes enforces existing State Standards (GOSTs and DSTUs) for fish and fish products. Exporters should be aware that Ukrainian standards are quite strict and imported fish in some cases may be declared unwholesome. Some of the GOSTs below were adopted many years ago in the Soviet Union. These old standards often establish an unusually short shelf life for a product or omit U.S. fish species' definitions (which are thus classified in "other species" group). This may cause trade disruptions and product detention at the border. FAS Kiev is working with the government of Ukraine to soften unjustifiably strict GOSTs, but U.S. exporters are encouraged to contact their Ukrainian partners and in particular pay attention to the product's shelf life. A list of valid standards directly applicable to seafood products is provided in the table below. Veterinary, health and customs clearance procedures are described in Attachment 1.

Number	Title of a GOST or DSTU	Application
168-86	Frozen Fish	Frozen fish of all species
20057-96	Oceanic Frozen Fish	Frozen fish of all species caught in oceans and all adjoining seas and bays
15-12-98	Frozen Herring	Frozen herring: Atlantic, Pacific, Azov and Black Seas, Kertch's, Dnieper's, Don's, Danube's and Black Sea
3948-90	Frozen Fish Filet	Frozen fish filet of all species excluding herring and cartilage species
7448-96	Salted fish	All salted fish except sprat species, herring, sardines, sturgeon, salmon, pike-perch, capelin and oceanic cartilage species
7449-96	Salted salmon	Salmon species
815-88	Salted herring	Salted herring
7636-85	Fish species, sea mammals, sea non-vertebrate species and products	Analysis methods and techniques for fish, sea mammals, sea non-vertebrate species and products

Section V. Key Contacts and Further Information

Should you have any questions about this report or need assistance in accessing the Ukrainian seafood market, please do not hesitate to contact the FAS/USDA office in Kiev at the following Address:

Agricultural Affairs Office
10 Yuriy Kotsyubinsky St.,
Kiev, 01901

Tel: +38-044-490-4005
Fax: +38-044-490-4110
e-mail: AgKiev@usda.gov
Hompage: http://kiev.usembassy.gov/faskyiv_index_eng.html

For information concerning current import regulations an exporter may want to contact the Ukrainian State Veterinary Inspection Service:

State Veterinary Inspection Service of
Ministry of Agrarian Policy of Ukraine
24 Khreschatik St.,
Kiev, 01001

Tel: +38-044-279-1270
Fax: +38-044-279-4981
Hompage: http://www.minagro.gov.ua/veterinary/index.php3
Certificates Page http://www.vetcontrol.org/info/sert001.htm

The State Department of Fishery of
Ministry of Agrarian Policy of Ukraine
45-A Arthema St.
Kiev,

Tel: +38-044-216-6243
Fax: +38-044-216-0244

The most recent list of importers is available from FAS Kiev to exporters of U.S. seafood products. The Ukraine Country Commercial Guide, prepared by the U.S. Foreign Commercial Service is available at: http://www.buyusainfo.net/body2.cfm?dbf=ccg1&search_type2=int&country=Ukraine&logic=and&loadnav=no

For the most recent "The Exporter Guide" and product briefs describing market potential for U.S. products in Ukraine as well as in other countries, please visit the Foreign Agricultural Service official page at www.fas.usda.gov.

Attachments

List of Documents Required by Ukrainian Authorities from Fish Importing (Exporting) Companies.

1. **Certificate of Origin (Issued by the Producer-Exporter and verified by the U.S. Chamber of Commerce) for each allotment.**
   FAS/Kiev Comment: Please note, that definition of "one allotment" is not clearly defined by Ukrainian legislation. In some cases the Ukrainian veterinary service defines shipments based on production dates (boxes produced 3 days apart maybe defined as belonging to different allotments). Many importers will request U.S. exporters to ship fewer allotments to avoid excessive sample collection for testing and to avoid long delays.

2. **Conformity Certificate or Equivalence Recognition Certificate.**
   FAS/Kiev Comment: The Equivalence Recognition Certificate is issued for each exporter of fish products for a term of 2 years. Production/processing line inspections by experts from the Ukrainian State Committee for Technical Regulations and Consumers' Policy are required.

   Conformity Certificate is issued for each fish allotment and is issued by the Ukrainian State Committee for Technical Regulations and Consumers' Policy on the basis of the following documents:
   - Form 2 (issued by the State Veterinary Service in exchange for a U.S. export certificate);
   - Hygienic results from the Ministry of Health (Valid for 1 year for each exporter and requires random sampling 1 time every 3 months)
   - U.S. Veterinary Export Certificate;
   - Samples Testing Protocol (samples are to be taken from each allotment by the Ukrainian State Committee for Technical Regulations and Consumers' Policy)

3. **Veterinary Certificate for Every Allotment**
   FAS/Kiev Comment: The Certificate is issued on the basis of the following documents:
   Certificate of Origin (required from the U.S. Exporter)
   Wholesomeness Certificate from the Supplier (required from the U.S. Exporter)
   Expert results issued for each and every allotment.

4. **Quarantine Certificate for packaging for products of plant origin**
   (issued once every 3 moths for specific countries and specific border crossing points).

FAS/Kiev Comment: Due to a very cumbersome and lengthy procedure, customs, health and veterinary clearances should be performed by the Ukrainian importer/partner. The List of Documents above is subject to unpredictable and sporadic changes. Please contact FAS/Kiev office in order to get an update.

Table 3. Import Duties in 2004-2006

Ukrainian HS Code	Code Description	Import Duties prior to August of 2005		Current Import Duties
		Official Ad valorem Import Duty Rate	Fixed minimum rate, EUR per 1 kg.	Ad valorem Import Duty Rate
0301	Live fish	20%	0.1 € per1 fish	10%
0302	Fresh and chilled fish, except codes below	-	0.2 €	0%
0302 12 0302 19 0302 21 0302 12	Fresh and chilled salmon, flat-fish and halibut	-	0.5 €	
0302 65 0302 69	Shark (Squalus Acanthias) Carpus and Anchovy only	-	0.5 €	10%
0302 90 0302 91 0302 98	Sprats	-	0.5 €	5%
0303	Frozen fish	5%	-	0%
0303 2110	Trout	5%	-	5%
0303	Other trout	5%	-	2%
0303 3920	Megrim (Lepidorhombus spp.)	5%	-	5%
0303 3930	Rhombosolea	5%	-	5%
0303 71	Sprats	5%	-	5%
0303 74	Mckerel	5%	-	2%
0303 75 0303 7911	Shark (Squalus Acanthias) Carpus	5%	-	5%
0303 7935 0303 7937	Redfish	5%	-	2%
0303 79 65	Anchovy	5%	-	2%
0303 7991	Horse-mackerel	5%	-	5%
0303 7993- 0303 7996	Other species under these HS Codes	5%	-	2%
0303 8090	Caviar and milt	5%	-	5%
0304	Fish fillet (fresh, chilled, frozen)	10%	-	0%
0304 1011	Trout	10%	-	10%
0304 101910-30	Sturgeon, pike-perch, others	10%	-	5%
0304 1091 10, 20 and 90	Sturgeon, pike-perch, others	10%	-	5%
0304 2011	Trout	10%	-	5%
0304 201910, 20 and 90	Sturgeon, pike-perch, others	10%	-	5%
0304 2037	Redfish others	10%	-	5%

0304 2051 and 53	Scomber	10%	-	5%
0304 9031	Redfish	10%	-	5%
0304 9055	Bream	10%	-	5%
0304 9010	Other species	10%	-	5%
0305	Dried, salted, marinated fish, except codes below	20%	0.5 €	0%
0305 10	Fish mill	5%	-	2%
0305 30	Fish filet salted, not smoked	20%	0.5 €	10%
0305 41-49	Smoked salmon, herring, halibut, mackerel, trout, eel, other smoked fish	-	1.0 €	10%
0305 59-69	Fish filet salted and in brine	20%	0.5 €	10%
0306	Crustaceous	-	1.0 €	0%
0306 1990	Other Crustaceous	-	1.0 €	10%
0307	Mollusks, except codes below	-	0.2 €	0%
0307 21-39	Scallops and other	-	0.2 €	5%
0307 41	Live, chilled or frozen cuttlefish, squid, octopus and other non-vertebrates	-	1.0 €	0%
0307 49	Live, chilled or frozen cuttlefish, squid	-	1.0 €	2-5%
0307 60 0307 99	Snails Other non-vertebrates	-	1.0 €	10% 5%
1604	Prepared fish foods and cans, caviar, except codes below	20%	0.2 €	
1604 15-30	Mackerel, Anchovy, Salmon etc.	-	10.0 €	10%
1604 30 90	Roe replacements	-	6.0 €	
1605	Prepared and canned crustaceous and mollusk, except codes below	-	4.0 €	0%
1605 10	Crab	-	6.0 €	0%
1605 40-90	Lobsters and other mollusk	-	8.0 €	10%

Data Source: The Law of Ukraine "On Customs Tariff" as of December 1st of 2005.

Table 4. Ukraine's Imports of Frozen Fish (HS 0303) (millions US Dollars)

HS	Description	2003	2004	2005
030310	Pacific Salmon	0,9	1,0	4,6
030322	Atlantic Salmon	1,7	2,8	10,8
030350	Herrings	29,7	34,9	65,5
030371	Sardines	5,1	5,9	14,1
030373	Atlantic Pollock	3,6	5,0	9,3
030374	Mackerel	17,4	14,6	5,1
030378	Whiting & Hake	3,0	12,1	24,2
030379	Other Species	13,0	12,3	45,3
030300	**TOTAL**	**74,4**	**88,6**	**178,9**

Source: State Statistics Committee of Ukraine

Table 5. Ukraine's Imports of Frozen Fish (HS 0303) (thousand metric tons)

HS	Description	2004	2005	% Change 2004/2005	CIF Value, $ million	
					2004	2005
030310	Pacific Salmon	1616	4318	167,15	1,0	4,6
030321	Other Frozen Trout,	1079	1726	59,86	1,0	4,2
030322	Salmon Atlantic	2782	4298	54,5	2,8	10,8
030329	Other Salmon	158	756	379,24	0,1	0,5
030331	Halibut / Greenland Turbot	280	363	29,52	0,3	0,8
030332	Plaice	524	972	85,57	0,2	0,5
030339	Other Flat Fish	277	958	246,02	0,1	0,5
030350	Herrings	111251	130429	17,24	34,9	65,5
030371	Sardines	20892	42330	102,61	5,9	14,1
030373	Atlantic Pollock	11095	17618	58,8	5,0	9,3
030374	Mackerel	30420	10347	-65,99	14,6	5,1
030378	Whiting & Hake	22698	32780	44,42	12,1	24,2
030379	Other 0303	36097	71967	99,37	10,3	26,7
030380	Fish Livers, Roes	62	257	312,25	0,2	0,8
0303	**Total Frozen Fish, Not Fillets**	**239300**	**330283**	**38,02**	**88,6**	**178,9**

Source: State Statistics Committee of Ukraine

Table 6. Import of Fish and Seafood (HS 03) by Country (million U.S. dollars)

Rank	Description	2004	2005	% Change 2004/2005
1	Norway	48,3	100,1	107
2	Russia	3,2	14,3	351
3	United States	8,7	13,7	57
4	Iceland	7,2	11,8	63
5	Canada	4,4	8,7	100
6	Argentina	3,5	8,4	139
7	China	1,4	6,8	394
8	Estonia	5,4	5,9	8
9	Netherlands	1,9	5,5	189
10	Chile	1,0	5,4	421
11	Mauritania	0,2	5,4	2114
12	United Kingdom	6,5	5,3	-19
13	Faeroe Islands	0,9	4,8	439
14	Spain	2,0	4,0	97
	Others	8,6	21,6	151
	Total	**103,3**	**221,7**	**115**

Source: State Customs Committee of Ukraine

Table 7. Import of Prepared and Canned Seafood by Ukraine (HS 1604) (million U.S. dollars)

HS	Description	2004	2005	% Change 2004/2005
160411	Salmon, Whole, Pieces	0,1	0,1	-44
160412	Herring, Whole, Pieces	4,2	7,7	85
160413	Sardine, Etc, N Minced	6,8	10,8	58
160414	Tuna, Etc, Not Minced	0,2	0,3	56
160415	Mackerel, Not Minced	0,6	0,6	-5
160416	Anchovies, Not Minced	0,0	0,0	199
160419	Fish, Other Whole, Pieces	2,8	6,4	127
160420	Fish, Other	9,5	22,0	132
160430	Caviar, Caviar Substitutes	5,3	13,2	147
1604	**Total Prepared Fish and Seafood**	**29,6**	**61,8**	**109**

Source: State Customs Committee of Ukraine

Table 8. Fish Take in Ukraine (tons)

	2002	2003	2004	2005
Herring	173	138	182	270
Sardines	29815	24549	29873	38979
Sprat	42575	28701	23494	31423
Sardelle	13611	9422	7238	12563
Khamsa	12026	11144	9136	5407
Roach	1338	1455	1232	1077
Pike-Perch	1682	770	615	423
Bream	2858	2313	2081	1979
Grey mullet (Pelengas)	2696	2156	4455	6035
Carp	10683	9777	10054	10531
Silver Carp	14157	15612	13467	14705
Mackerel	9840	9565	4236	2880
Horse-Mackerel	14402	28891	21756	25773
Bullhead Fish	3408	5921	10204	9607
Sand-Fish	343	236	376	380
Cod Species	14702	2166	8492	1375
Others	79538	69569	48176	70778
Total Catch	**253847**	**222385**	**195067**	**234185**

Source: State Statistics Committee of Ukraine

Table 9. Seafood Take in Ukraine (tons)

	2002	2003	2004	2005
Crustaceans	26864	17136	10965	14077
Mollusks	12491	8655	19867	17256
Water-plants	-	-	-	4
Seafood and Crustaceans, Total	**39358**	**25791**	**30838**	**31400**

Source: State Statistics Committee of Ukraine

Table 10. Production of Fish and Seafood Products in Ukraine (tons)

	2000	2001	2002	2003	2004*
Frozen Fish	155345	109891	96527	89583	79503
Special frozen fish	100	171	293	27	n/a
Frozen filet	154	244	301	602	n/a
Salted fish, excluding herring	21351	28045	24400	17642	13122
Salted herring	7360	7218	5066	6607	7437
Smoked fish	8620	9332	9331	9261	8530

Dried and jerked fish	1054	1746	1886	1863	1972
Salted with spices or marinated	342	1055	790	985	n/a
Cooked fish	142	167	216	653	84586
Cooked filet	96	144	114	120	n/a
Roe	-	18	128	297	173
Edible seafood	1918	1408	1414	1545	1947
Edible fish offal	1343	717	1262	1208	n/a
Non-edible fish offal	17665	14925	20698	13699	9694
Canned fish, including seafood, thousand of standard cans	121136	173821	168072	139200	n/a

Source: State Statistics Committee of Ukraine
**Data collection for 2004 changed so categories differ from 2000-2003 and contain a different set of products.*

Table 11. Consumption of Fish Products and Ukrainian Household Spending (2002-04)

Code COICOP*	Items Purchased	2004		
		Quantity 1000 MT	Value Million $	Price $/kilogram
HE 01.1.3	Fish (ND)	86072	121589	1,40
HE 01.1.3.1	Fresh, chilled and frozen fish	56053	66980	1,19
HE 01.1.3.1.01	Fish, fresh and chilled	34734	33075	0,95
HE 01.1.3.1.02	Fish, frozen	21319	33904	1,58
HE 01.1.3.2	Fresh, chilled and frozen seafood	223	796	3,54
HE 01.1.3.2.01	Squids, crabs and shrimps	200	703	3,49
HE 01.1.3.2.02	Other seafood and freshwater crawfish	23	94	4,02
HE 01.1.3.3	Dry, smoked, salted fish and seafood	n/a	36856	1,65
HE 01.1.3.3.01	Herring	14601	22835	1,55
HE 01.1.3.3.02	Other species of dry, dry-cured and smoked fish	7611	14021	1,83
HE 01.1.3.4	Other canned, processed, cooked fish and seafood	n/a	16958	2,22
HE 01.1.3.4.01	Crab Sticks (surimi)	1234	3101	2,49
HE 01.1.3.4.02	Canned fish in oil	4033	9808	2,41
HE 01.1.3.4.03	Canned fish in tomato juice	1899	2069	1,08
HE 01.1.3.4.04	Salmon fish roe (red caviar)	22	852	38,78
HE 01.1.3.4.05	Caviar (black caviar)	0	45	428,57
HE 01.1.3.4.06	Other canned meat	67	367	5,47
HE 01.1.3.4.07	Fish semi-cooked products and other fish products	330	716	2,15

Source: FAS Kiev calculations based on Consumption Surveys and other State Statistics Committee Data

** Please refer to http://unstats.un.org/unsd/cr/registry/regcst.asp?Cl=5 for UN Statistics Division Classification of Individual Consumption according to Purpose (COICOP) detailed explanations and notes*

*** Exchange Rate $1=5,3UAH for 2002 - 2003 and $1=5,32 for 2004*