



**Intesco
Research
Group**

WORLD MARKET OF FISH AND FISH PRODUCTS. RUSSIAN AND MARKET OF FISH AND FISH PRODUCTS – 2012



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..... Ошибка! Закладка не определена.

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Subject of research:

MARKET OF FISH AND FISH PRODUCTS

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2015

Regions of research:

WORLD

RUSSIA

RF REGIONS

Main blocks of research:

WORLD MARKET OF FISH AND FISH PRODUCTS

VOLUME OF RUSSIAN MARKET OF FISH AND FISH PRODUCTS

STRUCTURE OF RUSSIAN MARKET OF FISH AND FISH PRODUCTS

TRENDS ON THE RUSSIAN MARKET OF FISH AND FISH PRODUCTS

FACTORS INFLUENCING THE RUSSIAN MARKET OF FISH AND FISH PRODUCTS

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ANALYSIS OF RETAIL SALES OF FISH AND FISH PRODUCTS IN RUSSIA

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ANALYSIS OF IMPORT OF FISH AND FISH PRODUCTS

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RETAIL PRICES ON THE RUSSIAN MARKET OF FISH AND FISH PRODUCTS

FORECAST OF DEVELOPMENT OF THE RUSSIAN FISH AND FISH PRODUCTS MARKET FOR 2012-2015

Largest Russian companies with profiles:

«MURMANSKY TRALOVY FLOT» JSC

«OKEANRYBFLOT» JSC

«ARKHANGELSKY TRALOVY FLOT» JSC

FISHING COLLECTIVE FARM NAMED AFTER V.I. LENIN

«NAKHODKINSKAYA BAZA AKTIVNOGO RYBOLOVSTVA» JSC

Market segmentation by:

TYPES OF FISH AND FISH PRODUCTS
BY IMPORTED/DOMESTIC PRODUCTS
SALES CHANNELS OF FISH AND FISH PRODUCTS

Types of fish and fish products, researched:

LIVE FISH
COOLED FISH
FROZEN FISH
BALYK PRODUCTS
HERRING
SALTED FISH
SMOKED FISH
MARINATED FISH AND FISH IN SPICY SALTING
DRIED AND AIR-CURED FISH
FISH FILLET
MINCED FISH
FISH OF SPECIAL CLEANING

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data are presented.

Information sources used:

Federal State Statistics Service
RF tax service
Expert evaluations
Materials of field establishments
Field print and electronic, business and specialized publications
Material of producing companies and market players

The research presents 143 schedules, 86 diagrams and 150 tables.

EXTRACTS FROM RESEARCH

CHAPTER 4

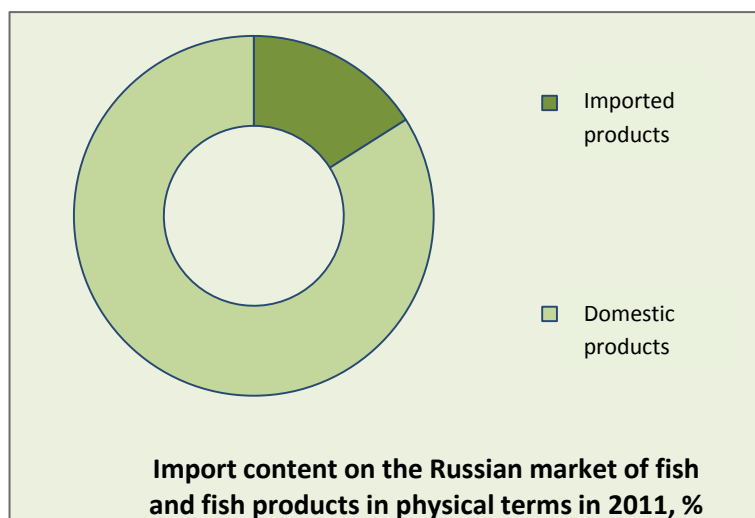
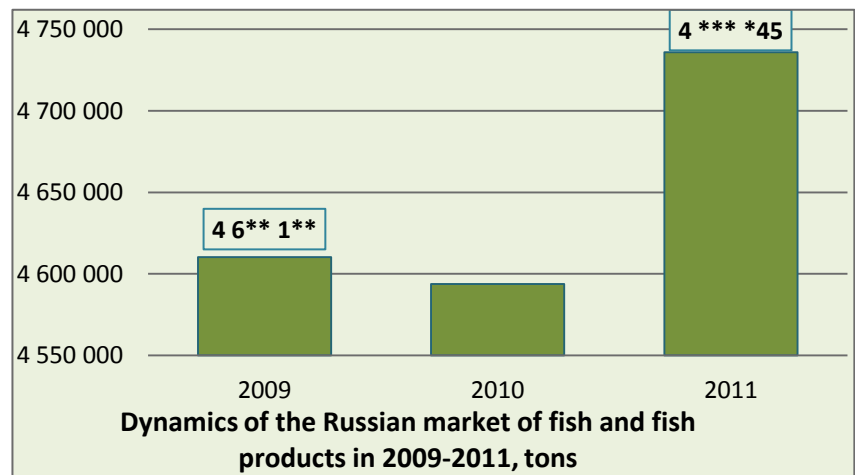
VOLUME OF THE RUSSIAN MARKET OF FISH AND FISH PRODUCTS

During the surveyed period of 2009-2011 volume of the Russian market of fish and fish products increased: in

2011 this parameter increased by *% and amounted to 4,* mln tons.

The reason of the market development was an active politics of the state in this direction. It is reflected in the propagandism of fish consumption and development of fish

legislation. Another important reason was useful properties of fish (included into many diets).

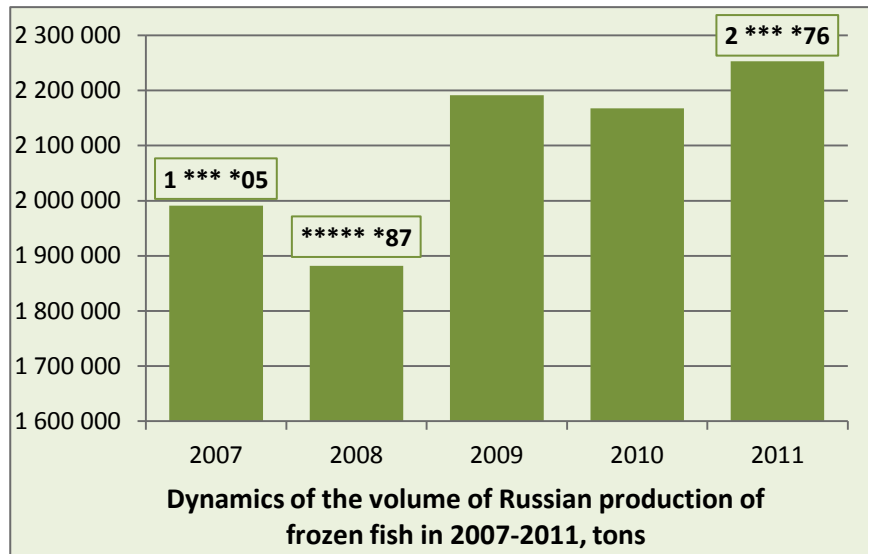


In 2009 this parameter amounted to 18,6%, and in 2011 decreased by **% and amounted to **%.

CHAPTER 9

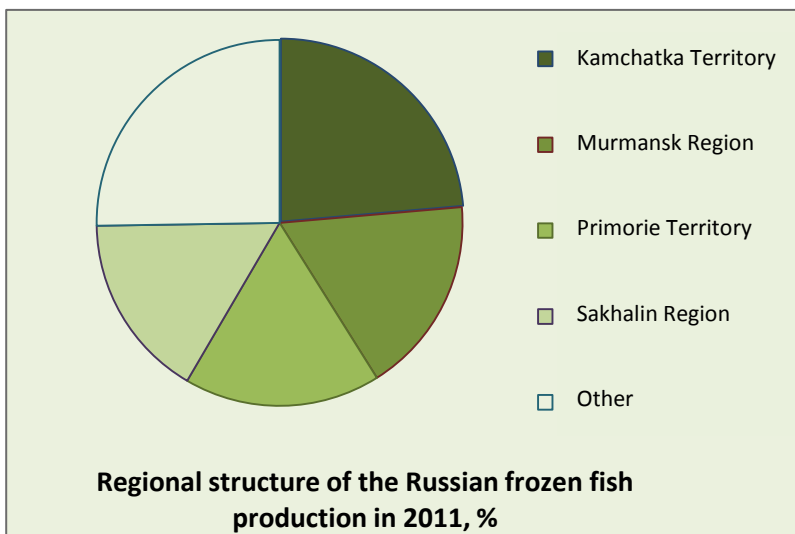
**PRODUCTION OF FROZEN FISH
IN RUSSIA**

The main category of the Russian fish and fish products production is frozen fish. During 2007-2011 Russian production of frozen fish increased by **% to *,** mln tons. However, it should be mentioned that dynamics of the Russian production volume turned into negative in 2008 and 2010 when the growth rate amounted to -**% and -**% respectively.



The largest region of Russia by frozen fish production in 2011 was Kamchatka Territory. In the regional structure of the Russian production of frozen fish its share was equal to **,6%.

Murmansk Region and Primorie Territory had **,5% and **,4% respectively in this structure.



The share of Sakhalin Region was equal to **,3%. 4 largest regions produced **,8% of frozen fish in RF.

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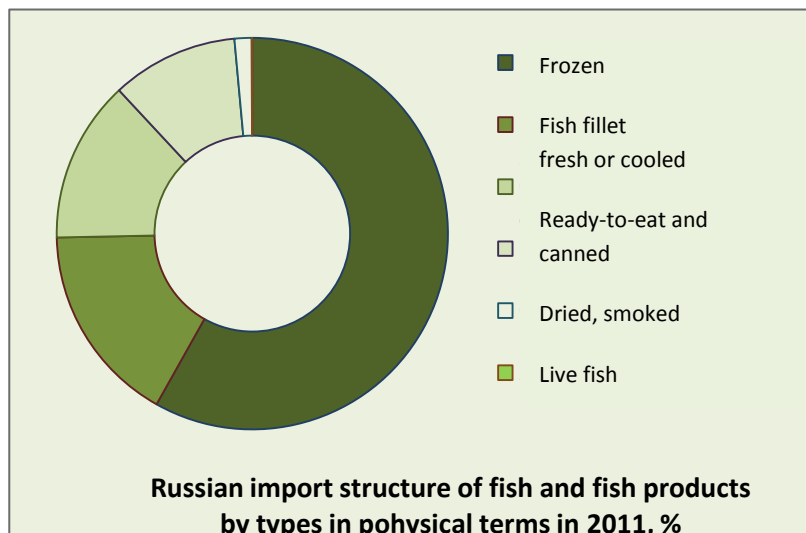
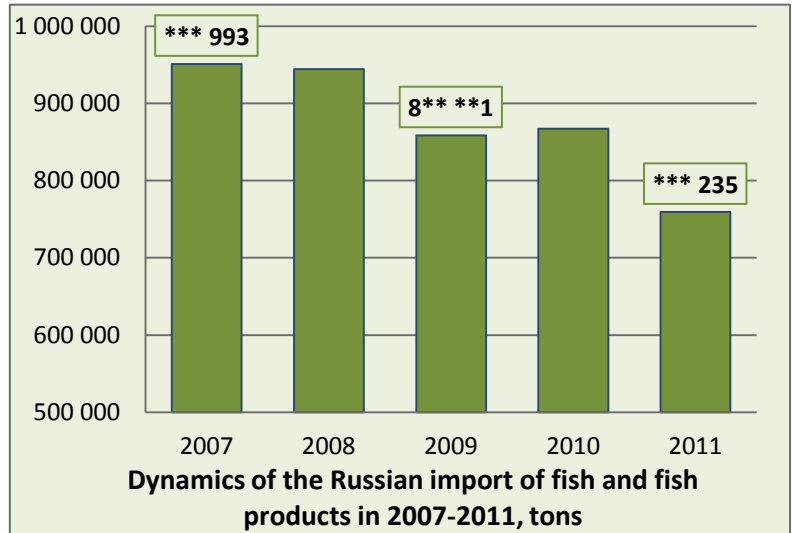
RUSSIAN IMPORT OF FISH AND FISH PRODUCTS IN GENERAL

Volume of import of fish and fish products in Russia has been insignificantly decreasing. Positive dynamics was marked only in 2008 and 2010.

In 2011 volume of import content decreased by **% compared to 2007 and amounted to *** ths tons.

In 2011 the basis of the Russian import of fish and fish products (**,1%) consisted of

frozen fish. The second largest category by import content was fish fillet, mince and other fish meat (**,5%), third – fresh or cooled fish (**,4%). Import of ready-to-eat or canned fish had **,5%. The least shares belonged to dried, salted in salting, of hot and cold smoking (*,4%) and live fish (*,*)%.



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