

Modern state of fish and fishery products export in Ukraine

M. I. Burhaz, T. I. Matviienko, O. M. Soborova, K. I. Bezyk, O. Y. Kudelina, A. I. Lichna

Odessa State Ecological University, Lvivska Str., 15, Odessa, 65016, Ukraine

Article info

Received 29.01.2020

Received in revised form

28.02.2020

Accepted 29.02.2020

Correspondence author

Marina Burgaz

Tel.: +38-067-990-49-26

E-mail: marinaburgaz14@gmail.com

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Contents

1. Introduction	21
2. Materials and methods	21
3. Results and discussion	22
4. Conclusions	25
References	25

Abstract

For every country in the world trade plays an important role in the fishing industry as an employment center, a food supplier, a source of income, a contribution to economic growth and development, as well as it provides food security and nutrition. In fisheries the fierce competition not only for resources but also for markets is not weakening. Leading fishing states are implementing the strategies aimed at ensuring the excellence in both domestic and foreign markets. The purpose of the work was to find out a current state of the fish and fish products export in Ukraine. Based on the specialized literature a current state of the fish and fish products export in Ukraine has been evaluated. A state of the fish and fish products export in Ukraine from 2015 to 2019 was analyzed; the main consumer countries of Ukrainian fish and fish products were identified; the structure of Ukrainian fish and fish products export was analyzed and the ways to increase the export of Ukrainian fish products in the main fish markets of the World were determined. Nowadays Ukraine has excellent resources for growing and catching fish and is gradually gaining the fish markets of many countries around the world. To develop the fishing industry the state constantly allocates the funds that are to support the industrial species of aquatic bio-resources, especially herbivorous fish, which do not breed naturally in Ukraine, to update the material and technical base for genetic research and cryopreservation work, etc. It was established that in recent years there is a tendency to increase the export of fish and fishery products of Ukraine in the markets of different countries of the World. In 2015 this figure was 6.4 thousand tons of fish and fishery products, and in 2019 it reached 7.6 thousand tons. The main countries that buy Ukrainian fish are: Moldova, Denmark, Georgia, Azerbaijan and Germany. The main export is processed fish products: crab sticks, canned sardines, coleslaw, while sprats or sprats, frozen cod, salmon and other fish.

Key words: fishing industry, fish, seafood, fish and fish products export, aquatic bioresources, production, fisheries.

Citation:

Burhaz, M. I., Matviienko, T. I., Soborova, O. M., Bezyk, K. I., Kudelina, O. Y., & Lichna, A. I. (2020). Modern state of fish and fishery products export in Ukraine. *Ukrainian Journal of Veterinary and Agricultural Sciences*, 3(1), 21–26.

1. Introduction

Around the world fish and fish products are among the most popular food items. Trade plays an important role in the fishing industry as an employment center, a food supplier, a source of income, a contribution to economic growth and development, as well as it provides food security and nutrition. For many countries and numerous coastal, river, island and inland regions, the fish export is critically important to the economy (COFI:FT/XV/2016/3, 2015).

Fish trade has grown significantly in recent decades, and the fishing industry is operating in the face of increasing globalization. Fish can be grown in one country, be processed in the other, and be consumed in the third one.

Sustainable demand, trade liberalization policy, globalization of food systems, technological innovations, as well as the changes in the distribution and marketing have greatly changed fish products preparing, processing, selling and delivering to consumers.

The purpose of the work was to find out a current state of the fish and fish products export in Ukraine.

To achieve this goal the following tasks were set:

1. to analyze a state of the fish and fish products export in Ukraine;
2. to identify the main consumer countries of Ukrainian fish and fish products;
3. to analyze the structure of Ukrainian fish and fish products export;
4. to determine the ways to increase the export of Ukrainian fish products in the main fish markets of the World.

2. Materials and methods

Based on the specialized literature, an assessment of the fish exports and fishery products current state in Ukraine has been carried out. The structure of Ukrainian fish and fishery products export for the last years, from 2015 to 2019, has been carried out. According to statistics, the main countries that purchase Ukrainian fish and fish products are identified.

3. Results and discussion

In fisheries the fierce competition not only for resources but also for markets is not weakening. Leading fishing states are implementing the strategies aimed at ensuring the excellence in both domestic and foreign markets.

One of the main tools for market promotion is specialized organizations that carry out marketing projects with the aim of increasing the demand for fish products, strengthening the brand of national fishing industry and penetrating the sales markets.

Ukraine has excellent resources for growing and catching fish and is gradually gaining the fish markets of many countries around the world.

To develop the fishing industry the state constantly allocates the funds that are to support the industrial species of

aquatic bioresources, especially herbivorous fish, which do not breed naturally in Ukraine, to update the material and technical base for genetic research and cryopreservation work, etc.

For Ukraine, as for many countries in the world, the fish and fish products export is critically important to the economy.

After researching the Ukrainian export of fish and fish products on the markets of different countries of the world, it should be noted that in recent years there has been a tendency to increase the domestic producers export. Thus in 2015 the export amounted to 6.4 thousand tons of fish and fish products, and in 2019 reached a value of 7.6 thousand tons (Fig. 1).

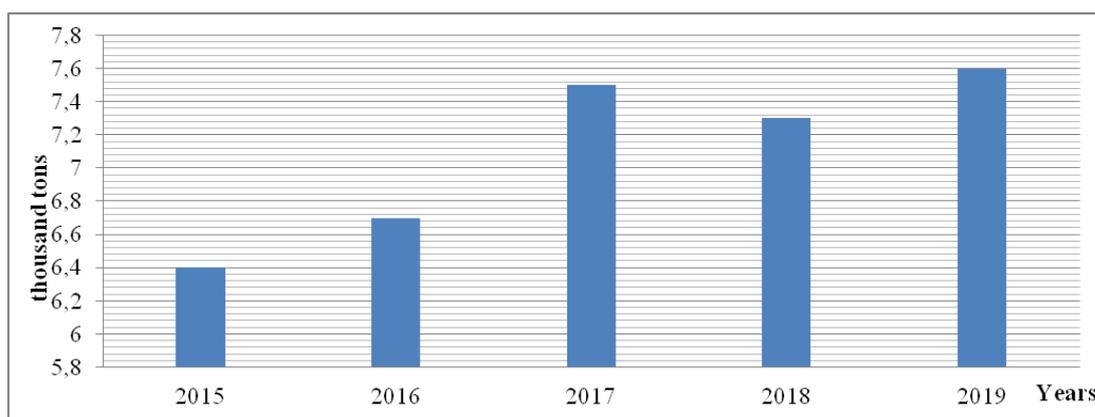


Fig. 1. The export of fish products of Ukraine 2015–2019 (according to the State Statistics Committee of Ukraine)

The export of fish, fish products and other aquatic bioresources in January-August 2015 decreased by 80 % compared to the same period of 2014, which is primarily due to the lease of the vessels from which fishing was directed for export, and the ban on the import of canned fish to Russia.

In turn in 2014 the export also decreased by 23 % compared to 2013 and amounted to 39.6 thousand tons for a total of \$ 48.6 million, while in 2013 it was 51.4 thousand tons for a total of \$ 65.1 million.

Table 1

The export of fish and fish products of Ukraine in January-August 2015 (according to the State Statistics Committee of Ukraine)

Type of products	Quantity, ton	Cost, \$	Type of products	Quantity, ton	Cost, \$
TOTAL 6384 t, 11 181.30 \$					
Fresh or chilled fish	2462.3	2103.3	Crustaceans with or without shells, live, fresh, chilled, frozen, dried, salted or in brine, smoked crustaceans with or without shells, hot or cold smoked, crustaceans in shells, cooked in water or boiled in water	130.7	650.1
Frozen fish, except fish fillets and other fish meat	142	171.8	The Antarctic krill	124.8	624
Other fish	13.9	154.5	Shellfish in shell or without shell, live, fresh, chilled, frozen, dried, salted or in brine, smoked shells in shell or without shell, hot or cold smoked, flour, powder and pellets, fit for consumption	261.5	280.6
Fish fillets and other fish meat (including minced meat), fresh, chilled or frozen	998.9	4377.5	Snails except sea snails	260.1	266.4
Dried, salted or in brine fish, hot or cold smoked fish, fishmeal, powder and pellets	110.1	567.8	Prepared or preserved fish, sturgeon caviar (black caviar) and other fish eggs:	2262.4	2878.8
Other fish	72.4	223.3	Prepared or preserved crustaceans, molluscs and other aquatic invertebrates	15.6	151.3
			Cuttlefish and squid	14.2	136.9

The decline in the export during this period is due to the loss of almost the only foreign market, as Ukraine supplied 80–85 % of all fish, fish products and other aquatic bio-resources export to the Russian Federation. On July 29, 2014, the Russian Federation imposed a ban on the import of canned fish, 75 % of which came from Ukraine. In addition the fishing industry of Ukraine is constantly facing the problems such as regulation. Today according to the State Fisheries Agency of Ukraine, referring to experts, due to the complexity of the quota issuing process, about 80 % of the market is in the shadow.

In 2017 Ukrainian companies increased their fish products export to 9477 tons, compared to 6767 tons in 2016 (Fig. 2, 3). The export growth amounted to 40 %.

At the same time, in monetary terms, in 2017 fish products were exported for 27.7 million US \$, compared to 16.3 million US \$ in 2016 (*Obzor ukrainskogo eksporta rybnoj produkcii v 2017 godu, 2018*). As can be seen from Fig. 2 and Fig. 3, there is an increase in the export of almost all fish and fish products.

Due to the active work of fishing companies with foreign counterparts, it was able to open the new markets and distribution points for their products. The demand for the fish products produced and processed by the Ukrainian companies is growing in the foreign markets.

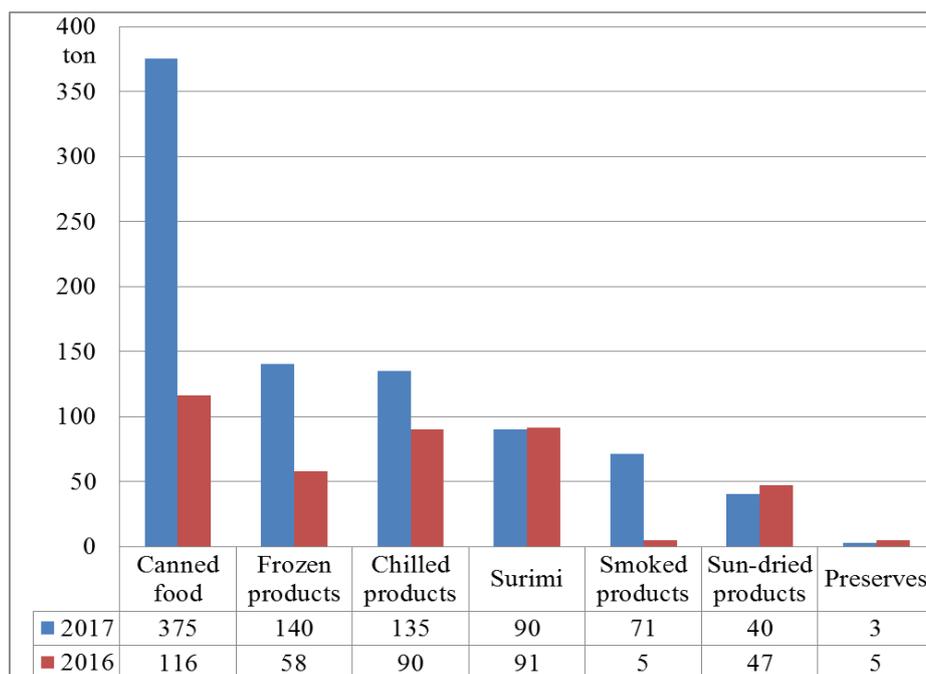


Fig. 2. The export of fish and fish products of Ukraine in 2016–2017 (according to the State Statistics Committee of Ukraine)

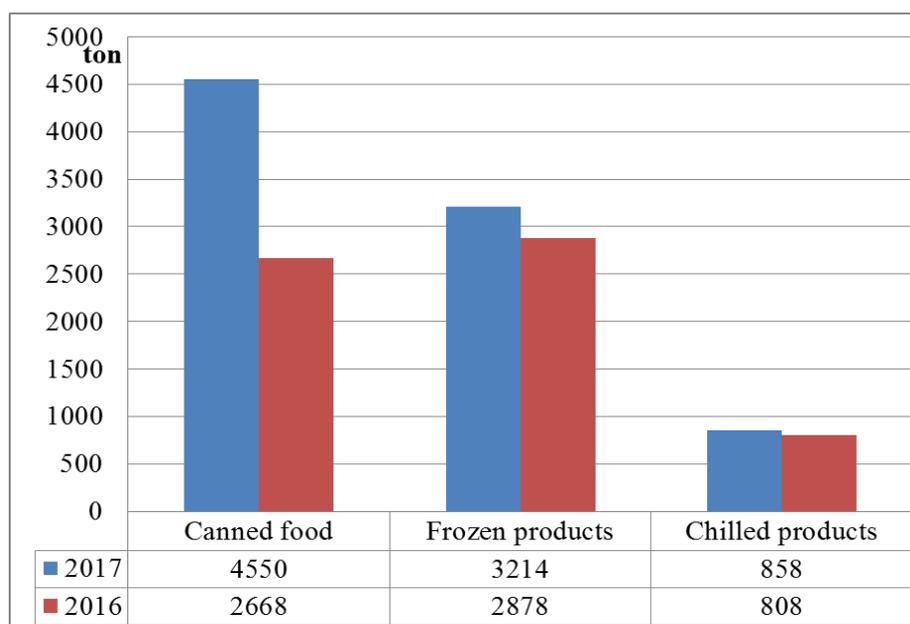


Fig. 3. The export of fish and fish products of Ukraine in 2016–2017 (according to the State Statistics Committee of Ukraine)

In 2017 most of all Ukraine exported the fish products to such countries as: Moldova (1424 tons), Germany (1036

tons), Belarus (852 tons), Georgia (846 tons), Denmark (825 tons).

During 9 months of 2018 Ukraine exported 7.3 thousand tons of aquatic bio-resources for \$ 25.7 million, which corresponds to approximately the same data for 2017 (7.5 thousand tons). Mostly Ukrainian fish is sold to Moldova, Denmark, Georgia, Azerbaijan and Germany. The main export is the processed fish products: crab sticks, canned sardines, coleslaw or sprats, frozen cod, salmon and other fish, which production is made from the imported raw materials (V Ukraine vyroslo rybnoe proizvodstvo, 2019).

During 10 months of 2018 Ukraine supplied 511.9 tons of frozen fish to the foreign markets (Ukrainskaya ryba zavoevyvaet Evropu: komu i skolko prodaem, 2018). For this amount of fish export, the country received \$ 1.1 million. For comparison, in the same period of 2017, Ukraine

sold 485 tons of frozen fish abroad for \$ 770.000. Thus for a year the export earnings for this product increased by 43 % (Ukrainskaya ryba zavoevyvaet Evropu: komu i skolko prodaem, 2018).

In 2018 the main buyers of Ukrainian frozen fish were Germany – 110 tons for \$ 348.3 thousand, Hungary (126.6 tons for \$ 297.3 thousand), Moldova (112 tons for \$ 196 thousand) and Azerbaijan (62 tons for \$ 94 thousand). And in 2017, most of such goods were supplied to Belarus - 229.6 tons for \$ 301 thousand (Eksport ukrainskoj morozhenoj ryby v etom godu vyros na 43 %, 2018).

In 2018 Ukraine exported 7 types of frozen fish with a total value of \$ 562.4 thousand (Fig. 4, 5).

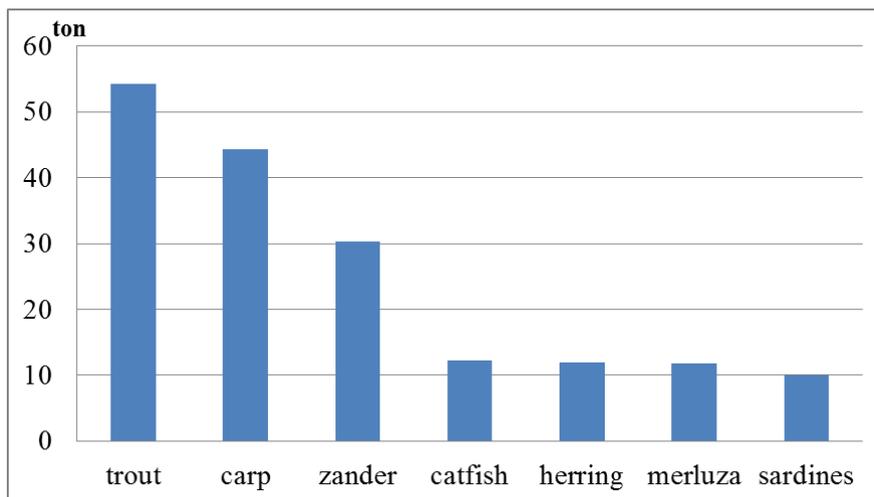


Fig. 4. The export of frozen fish of Ukraine in 2018, tons

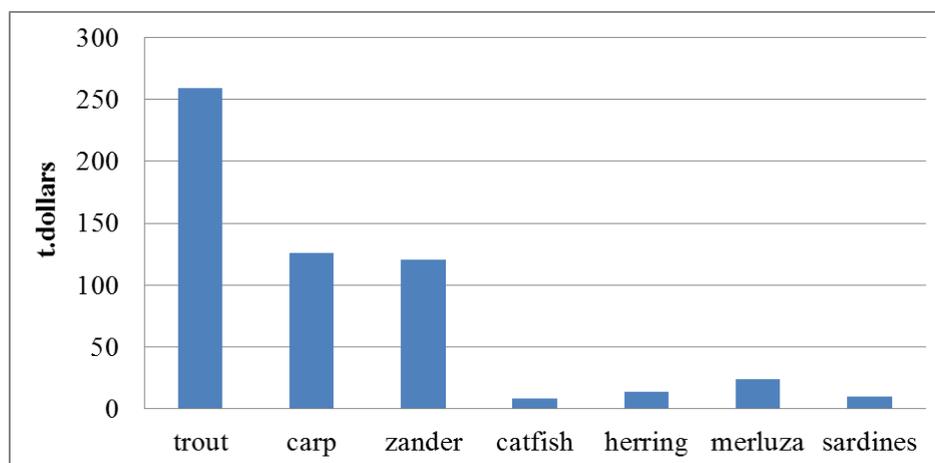


Fig. 5. The export of frozen fish of Ukraine in 2018, ths d.

In the period of January-October 2019 Ukraine supplied 3030 tons of processed and canned fish to the foreign markets for \$ 5.8 million (Moldova skupaet tret eksporta ukrainskoj ryby, 2019).

48 % of all Ukrainian processed and canned fish export (in monetary terms) went to the CIS countries (more than \$ 2.8 million). 20 % of the production for \$ 1.2 million were supplied to Asia and 8 % for \$ 483.000 were supplied to Europe (Moldova skupaet tret eksporta ukrainskoj ryby, 2019).

Moldova (965 tons for \$ 1.6 million), Georgia (508 tons for \$ 731 thousand), the United States (147 tons for \$ 496 thousand), and Uzbekistan (370 ton for \$ 349 thousand), Israel (81 tons for \$ 335.000), Belarus (228 tons for

\$ 329.000) and Armenia (271 tons for \$ 262.000) became the main buyers of these products. These countries account for 70% of the processed and canned fish export. Significant supplies were also made to Germany, Azerbaijan and Lithuania (Moldova skupaet tret eksporta ukrainskoj ryby, 2019).

During the first nine months of 2019 Ukraine exported 2.441 tons of processed or canned fish with a total value of \$ 3.07 million (Fig. 6, 7).

In fisheries the fierce competition not only for resources but also for markets is not weakening. Leading fishing states are implementing the strategies aimed at ensuring the excellence in both domestic and foreign markets (Soloviov et al., 2005; Stratehii rozvytku haluzi rybnoho hospodarstva Ukrainy na period do 2023 roku, 2019).

One of the main tools for market promotion is specialized organizations that carry out marketing projects with the aim of increasing the demand for fish products, strengthening

the brand of national fishing industry and penetrating the sales markets.

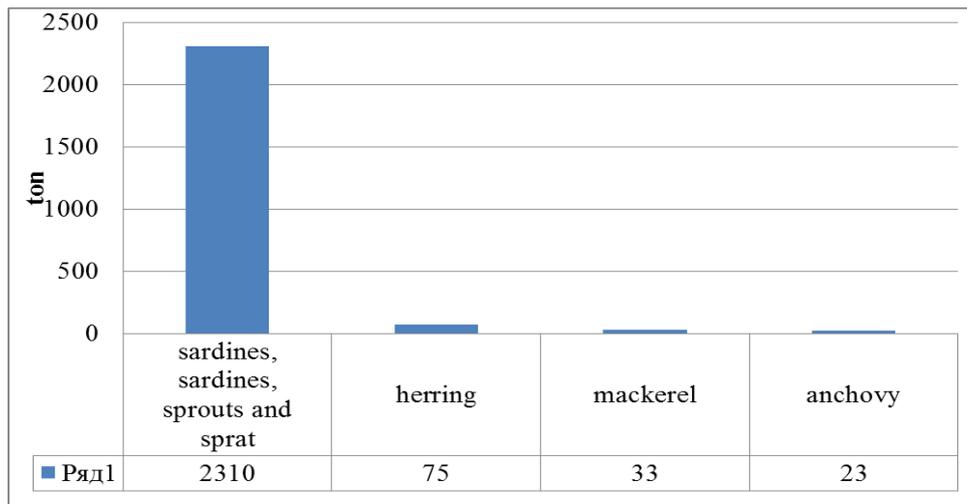


Fig. 6. The export of processed or canned fish products of Ukraine in 2019, tons

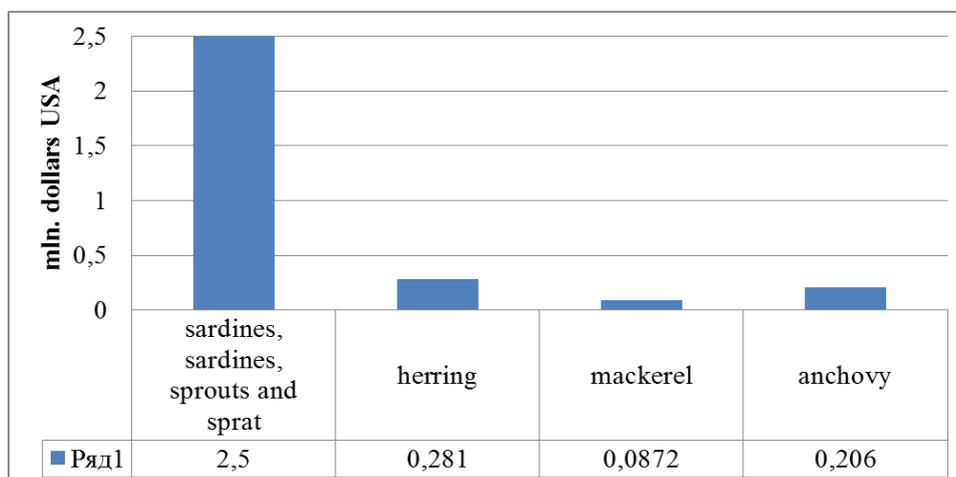


Fig. 7. The export of processed or canned fish products of Ukraine in 2019, millions of USD

Today Ukraine is implementing “A strategy for the development of the fisheries industry for the period up to 2023”, which aims to ensure the sustainable development of fisheries industry, increase the level of consumption of domestic fish products and their production on the basis of the balance of economic, environmental and social interests, increase its competitiveness in accordance with the EU and international standards, take fisheries industry of Ukraine out of the shadow, increase its export capacity (Soloviov et al., 2005; Mihneva & Lebskaya, 2012).

Due to this fish production in Ukraine should be increased and its competitive ability should be increased according to the European Union and international standards.

4. Conclusions

In recent years there has been a tendency of increasing the export of Ukrainian fish and fish products to the markets of different countries of the world. In 2015 this indicator was 6.4 thousand tons of fish and fish products, and in 2019 it reached a value of 7.6 thousand tons.

The main countries that buy Ukrainian fish are Moldova, Denmark, Georgia, Azerbaijan and Germany.

The main export is processed fish products: crab sticks, canned sardines, coleslaw or sprats, frozen cod, salmon and other fish.

Germany, Hungary, Moldova, Azerbaijan have become the main buyers of Ukrainian frozen fish.

Ukraine exports processed and canned fish, 48% of all export of these products are supplied to Moldova, Georgia, USA, Uzbekistan, Israel, Belarus, Armenia, Germany, Azerbaijan and Lithuania. Also 20 % of such products are exported to Asian countries and 8 % to European countries.

With the support of the state and with the proper development of the fisheries industry, it is possible to increase the production capacities and the quality of the domestic products, as well as take the fishing industry of Ukraine out of the shadow and increase its export capacity.

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