



**Intesco
Research
Group**

RUSSIAN MARKET OF SEAFOOD



MOSCOW 2011

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INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

METHODS OF RESEARCH

Subject of research:

MARKET OF SEAFOOD

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2011-2012

Regions of research:

RUSSIA

RF REGIONS

Main blocks of research:

RUSSIAN SEAFOOD MARKET VOLUME

TRENDS ON RUSSIAN SEAFOOD MARKET

STATE REGULATION OF RUSSIAN MARKET OF FISH AND SEAFOOD

ANALYSIS OF SEAFOOD RETAILING

HARVESTING OF CRUSTACEANS IN RUSSIA

HARVESTING OF MOLLUSCA IN RUSSIA

HARVESTING OF SEAWEED IN RUSSIA

SEAFOOD PRODUCTION IN RUSSIA

LARGEST RUSSIAN SEAFOOD PRODUCERS

ANALYSIS OF RUSSIAN SEAFOOD IMPORT

ANALYSIS OF RUSSIAN IMPORT OF CRUSTACEANS

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CONSUMER PREFERENCES ON FISH AND SEAFOOD MARKET

FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF SEAFOOD FOR 2010-
2012.

Seafood categories studied in the research:

CRUSTACEANS
MOLLUSCA
SEAWEED

Seafood kinds studied in the research:

SEA SCALLOP
MUSSELS AND OYSTERS
LAMINARIA
SQUIDS
SHRIMPS
WHELK
CRABS
KRILL
CRAWFISH

Largest Russian enterprises profiles of which were drawn up:

JSC “NBAMR”
LLC “ALBATROS SEAFOOD PRODUCTION”
CJSC “AKROS”
JSC “OKEANRYBFLOT”
LLC “KUK”

The research includes the main enterprises’ production volumes, financial performance of activities, balance sheets, profit-and-loss reports, cash-flow statements, subsidiary enterprises and other information.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sales reports
Materials of the field’s main players
Field printed and electronic publications

Market of Seafood. Current Situation and Forecast

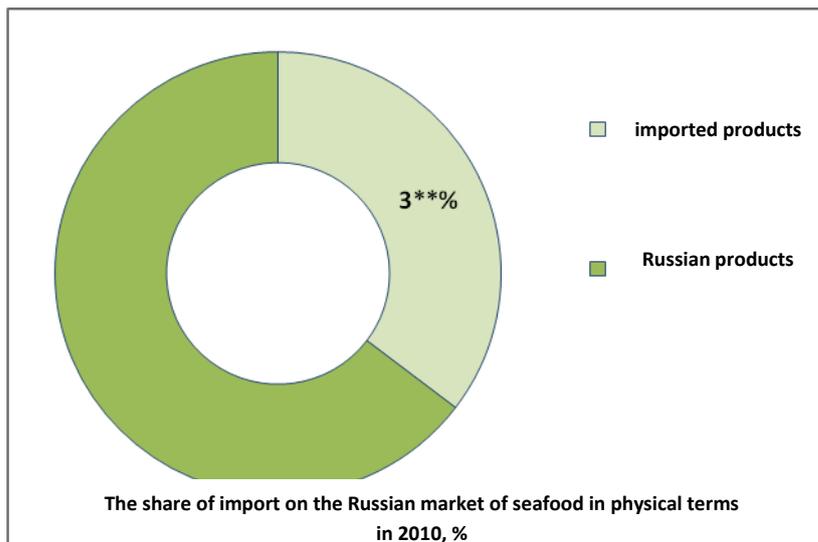
The research presents 109 graphs, 85 diagrams, 95 tables.

EXTRACTS FROM RESEARCH

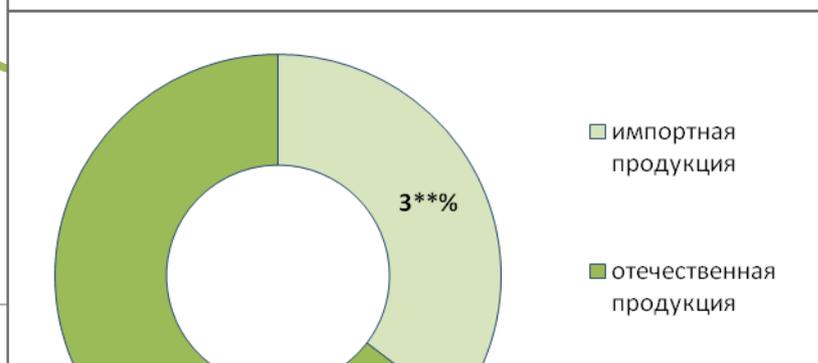
CHAPTER 3

VOLUME OF RUSSIAN MARKET OF SEAFOOD

Before the crisis the Russian market of seafood has recommended itself as one of the most dynamically growing ones among all food markets. Having decreased a little in 2009, it could revive by 2010. According to Intesco Research Group experts, in 2010 the volume of the Russian market of seafood increased by 6,6 ths. tons and made up about ***,1 ths. tons. The market growth took place, first of all, because of an increase of the volume of foreign supplies to the Russian market.



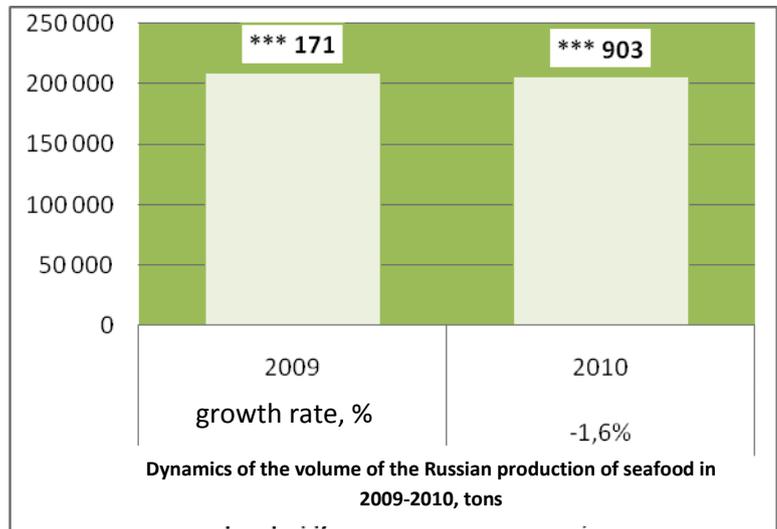
The import share on the Russian market of seafood is rather high and makes up a third part of all the products on the market.



CHAPTER 10

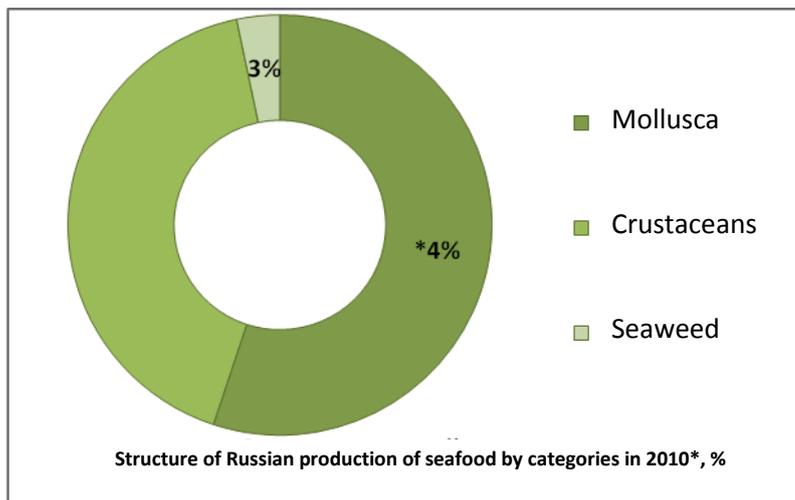
PRODUCTION OF SEAFOOD IN RUSSIA

In 2009 Russian enterprises produced 171,2 ths. tons of seafood. In 2010 the volume of production was 1,6% lower than in the previous year. In total, the supply of Russian food on the market over 200 ths. tons.



According to Intesco Research Group experts, more than a half of all the Russian

production of seafood in 2010 accounted for production of mollusca. Crustaceans had 34%. The share of seaweed was not more than 3%.

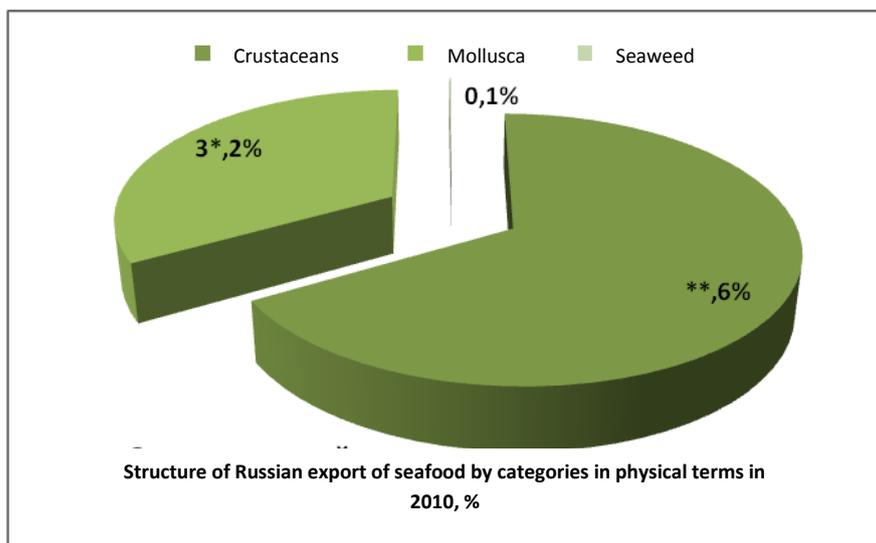
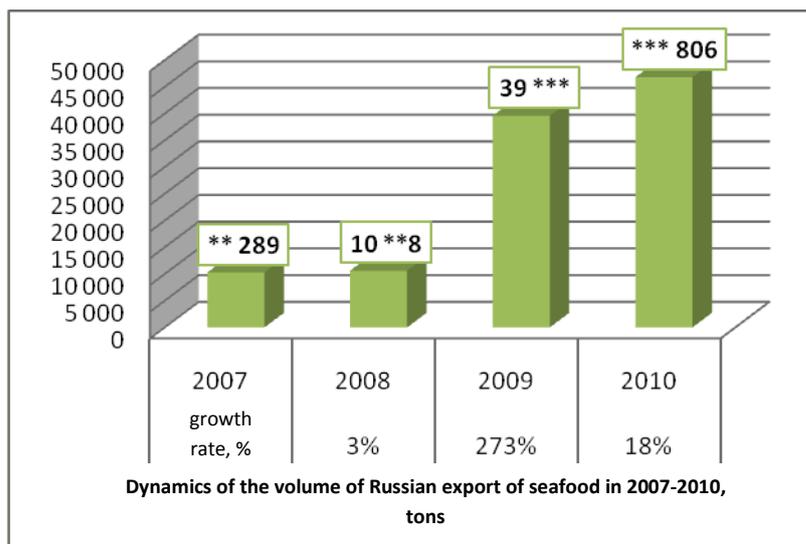


CHAPTER 11

ANALYSIS OF RUSSIAN EXPORT OF SEAFOOD

In 2009 the index of the volume of Russian export of seafood was exceeded almost 3 times in comparison with the similar index of 2008. Thus, the export volume made up 39,* ths. tons of products. A sharp increase of export took place, first of all, because of an increase in the segment of crustaceans.

By results of 2010 ** ths. tons of Russian market were sent to the foreign markets, that is 18% more than in the previous year.



The share of crustaceans in the structure of Russian export of seafood in 2010 made up **,6%. The corresponding share of mollusca was 3*,2%. the share of seaweed did not exceed 0,1%.

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