

Sustainable fisheries in Russia: current status

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Growing fisheries

Russian catches have grown about 25% during last decade. An official forecast indicates further catch increases about 40% above present level (up to 6 million mt) by 2020.

Russia is the sixth country by fishery production (about 2.5% of total production).



Towards sustainability

About a decade ago the first Russian fishery entered MSC process and got certificate in 2009. Since that many Russian fisheries participated in certification and FIPs and Russia is becoming more and more important player on the sustainable seafood market. Likely, significance of Russia in this market will grow further.

At the same time, the success of the process varies a lot from fishery to fishery and faces a number of problems.





Current status of
Russian fisheries,
including export
and import

Fisheries production of Russia by region (4.215 mln mt in 2014)

Barents Sea

Baltic Sea

Black Sea

Caspian Sea

EEZ of other states

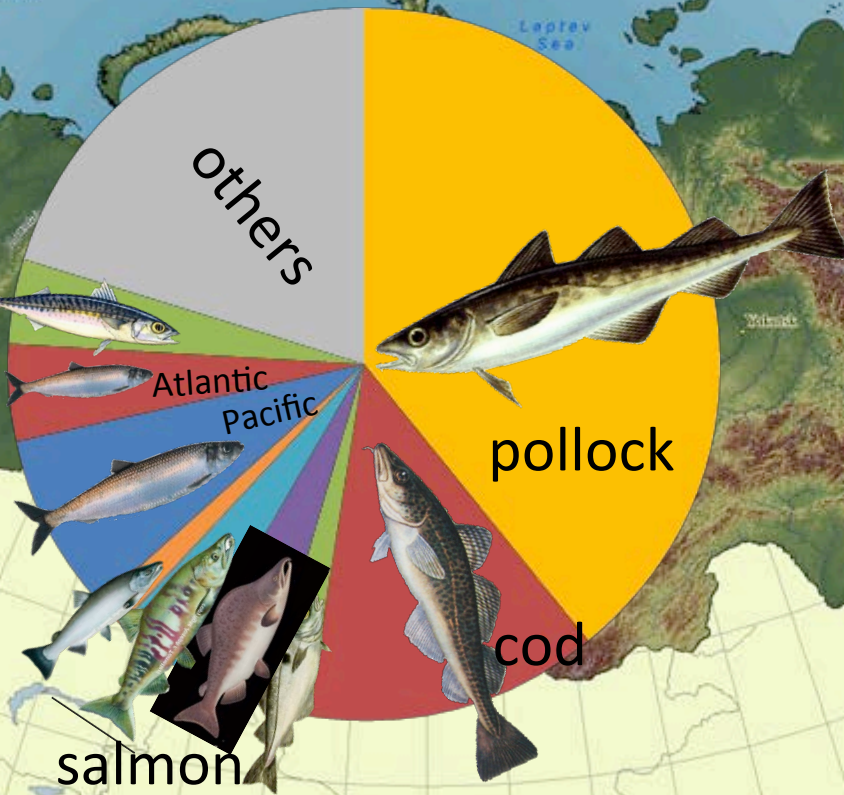
fresh waters

open ocean

Far East (Sea of Okhotsk and Bering Sea)



Production of fisheries in Russia by species (4.215 mln mt in 2014)



Compare to other countries

Legend

Major Cities
• Moscow
• Cities

Major Lakes
■ Lakes

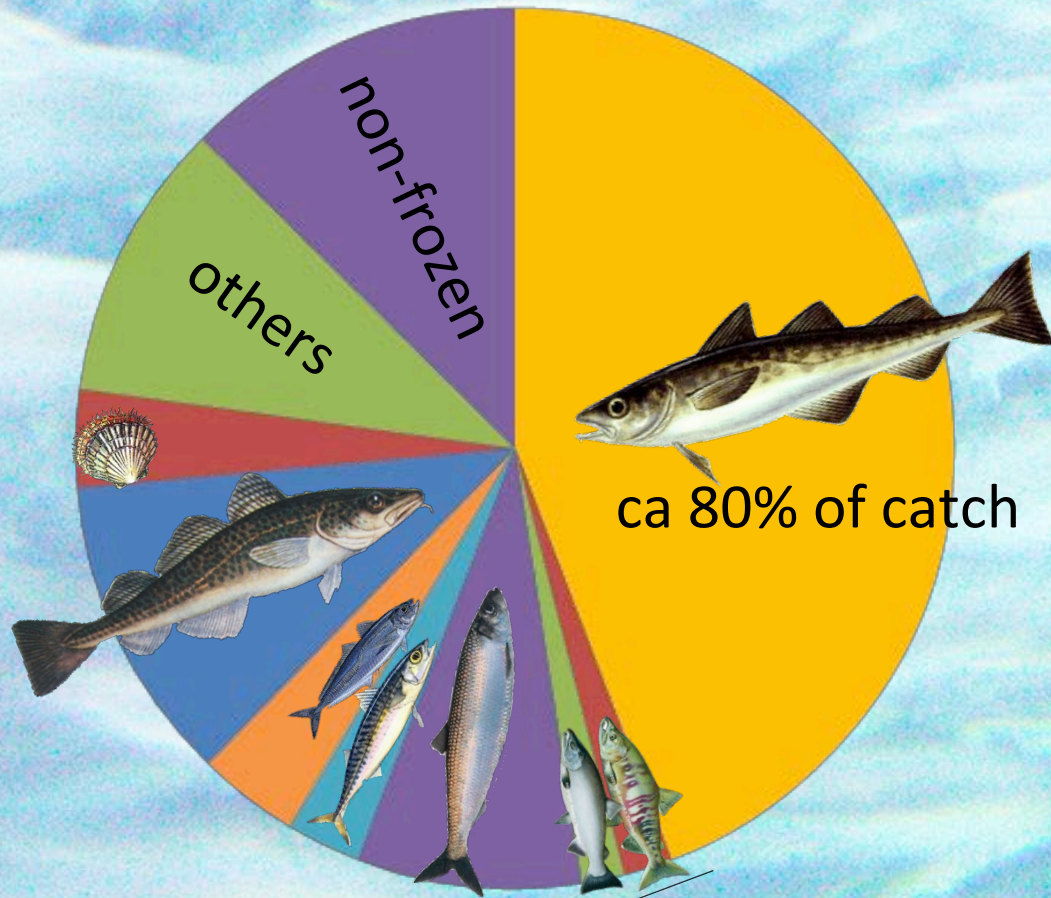
Major Rivers
— Rivers

Elevation of Russia (Meters)
■ >3000
■ 0

Countries (2002)
■ Countries



Russian export of fisheries production, 2013 (1411.7 thousand mt, ca 1/3 of total catch)



Main exporting countries (based on various sources)

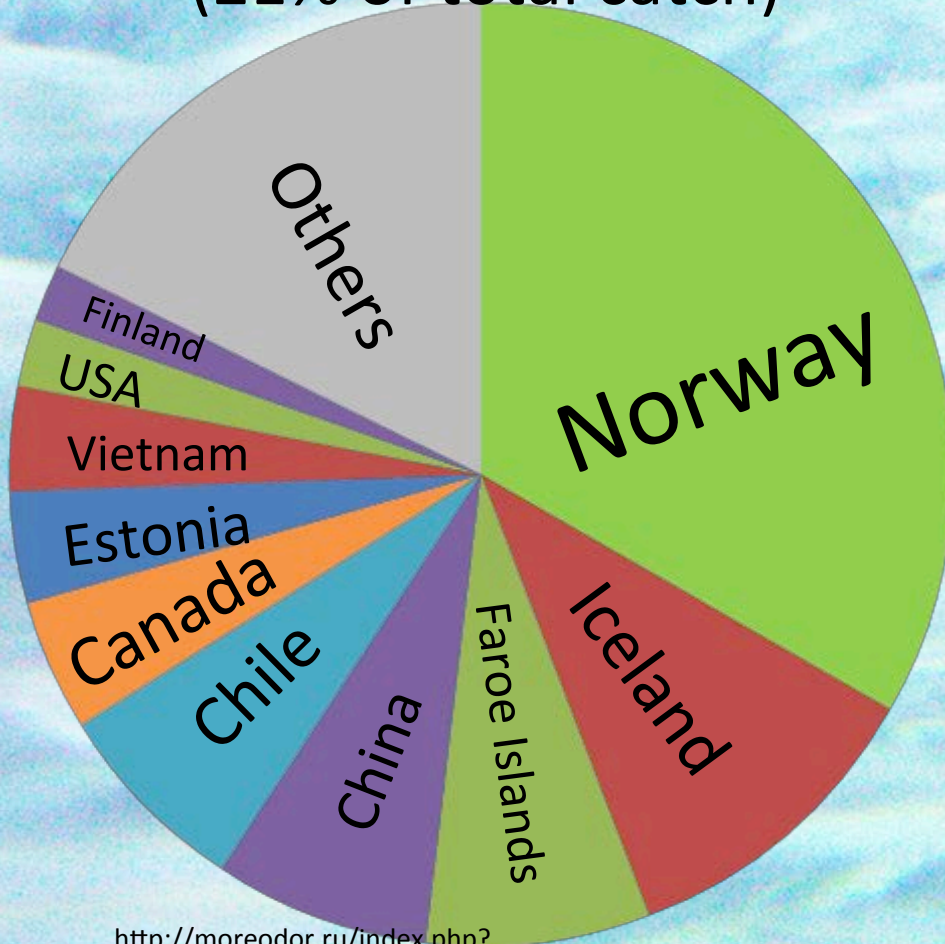
Alaska pollock: Japan, China, South Asia

Codfish: Norway, Netherland

Sockeye: Japan

Russian import of fisheries production, 2013 (approximate)

901.6 thousand mt
(21% of total catch)



Main imported species
(size reflects import volume)



Atlantic salmon



Rainbow trout



Atlantic herring



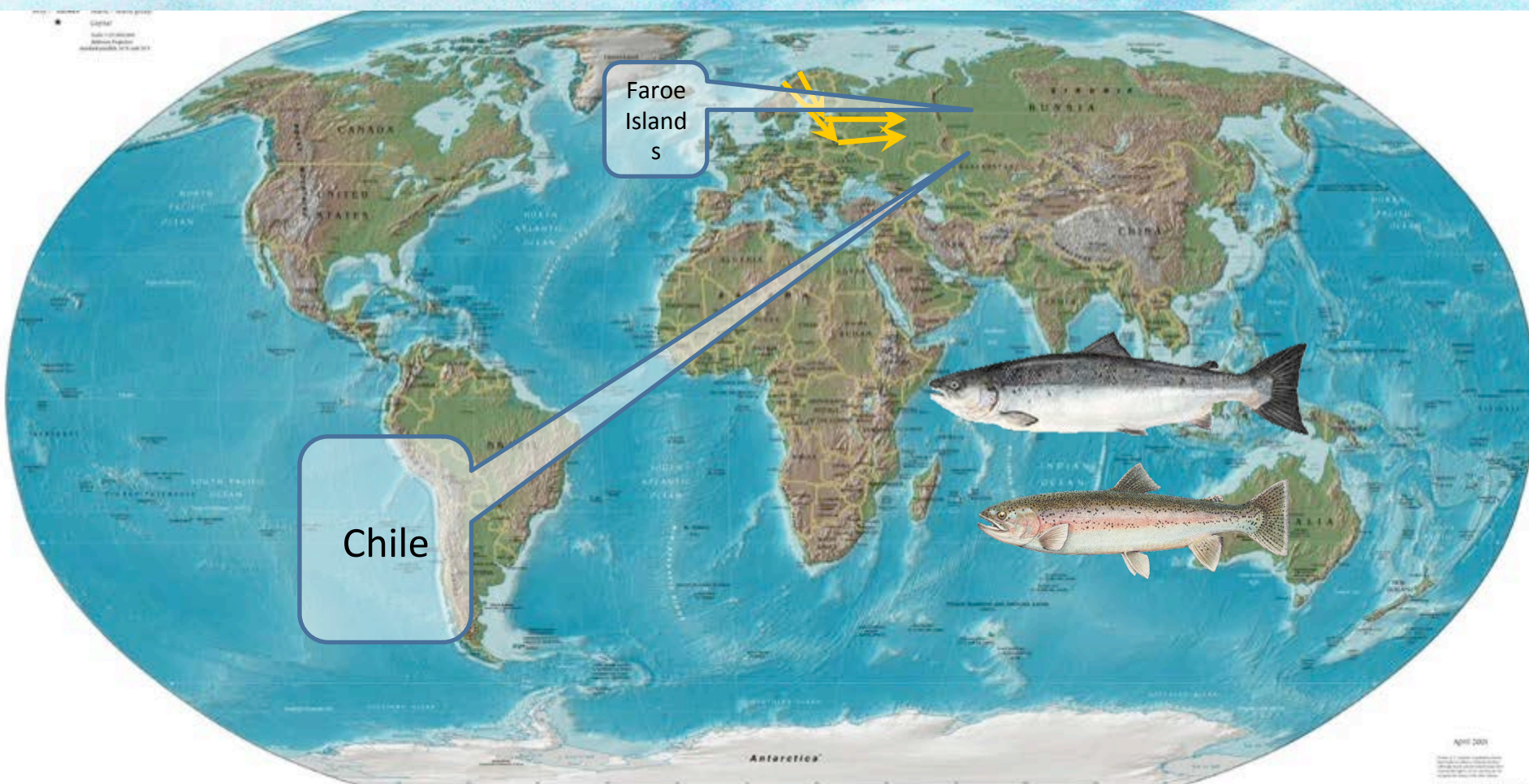
mackerel



capelin

Market response to embargo of import of fishery production to Russia introduced 6 August 2014

(mostly, substitution of fresh and frozen Atlantic salmon and rainbow trout from Norway. Just after embargo export of salmon and trout reduced for 60%, and herring – for 40%, but after that it recovered)




No market for sustainable seafood in Russia so far.

The first attempt to create such market – a brochure published by WWF in 2010. “А вы знаете, что покупаете”, but it takes a long time!

Now MSC certification is important only for fisheries exporting their production.





Current status of MSC certification and FIPs in Russia

Map of MSC certifications in Russia



Pacific salmon (pink, chum, sockeye, coho)



Iturup Island pink and chum salmon

Client	J.S.C. Gidrostroy
Certifier	Scientific Certification Systems
Species	Pink (<i>Oncorhynchus gorbuscha</i>) and Chum (<i>O. keta</i>) salmon.
Catch size	37,000 MT (pink salmon), 10,000 MT (chum salmon)
Geographic area	Iturup Island
Current status of certification	Certified September 2009. Currently under reassessment
Fishing gear	Coastal stationary fish traps
Commercial market	Asia, Europe and North America market



Sakhalin Island Northeast trap net pink salmon

Client	Smirnykhovsky Regional Fisheries Association and Nogliki Regional Fisheries Association
Certifier	MARG Americas
Species	Pink salmon (<i>Oncorhynchus gorbuscha</i>)
Catch size	Smirnykh - 11,000 MT, Nogliki - 9,9 MT
Geographic area	East Sakhalin Island
Current status of certification	Certified June 2012.
Fishing gear	Coastal trap net
Commercial market	Russia with increasing interest from the US and Europe.



Ozernaya River sockeye salmon

Client	Fishing Companies Vityaz-Avto and Delta
Certifier	MRAG Americas
Species	Sockeye salmon (<i>Oncorhynchus nerka</i>)
Catch size	3,000-5,000 MT
Geographic area	Russian Far East, Sea of Okhotsk, Western coast of Kamchatka peninsula, Ozernaya River
Current status of certification	Certified September 2012
Fishing gear	Set nets and beach seine
Commercial market	Japan, China and Korea.



Narody Severa-Bolsheretsk salmon

Client	Bolsheretsk Ltd, Narody Severa Ltd
Certifier	MRAG Americas
Species	Sockeye, chum, pink (<i>Oncorhynchus nerka</i> , <i>O. keta</i> , <i>O. gorbuscha</i>)
Catch size	2012 г - 30,000 MT
Geographic area	Western Kamchatka, Sea of Okhotsk and Bolshaya, Opala and Kikhchik rivers.
Current status of certification	Planned in January 2015.
Fishing gear	Set nets and beach seines
Commercial market	Russia

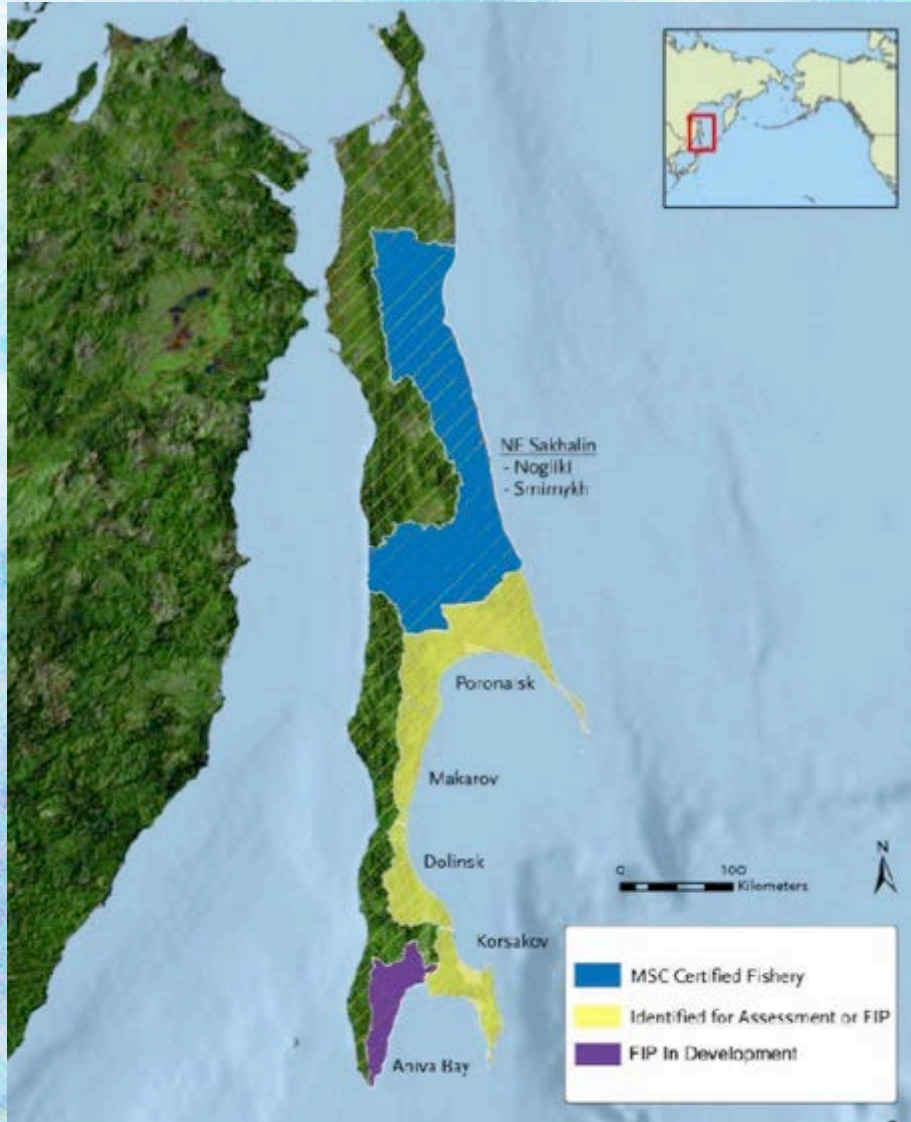


Aniva Bay trap net pink salmon

Client	Aniva Regional Fisheries Association
Certifier	MARG Americas
Species	Pink salmon (<i>Oncorhynchus gorbuscha</i>)
Catch size	Catches are very low last 4 years
Geographic area	Aniva Bay, Sakhalin Island
Current status of certification	Withdrawn May 2014
Fishing gear	Coastal trap net
Commercial market	Russia with increasing interest from the US and Europe.



4 active salmon FIPs currently in Russia Ocean Outcomes



Barents Sea codfish (cod, haddock, saithe)



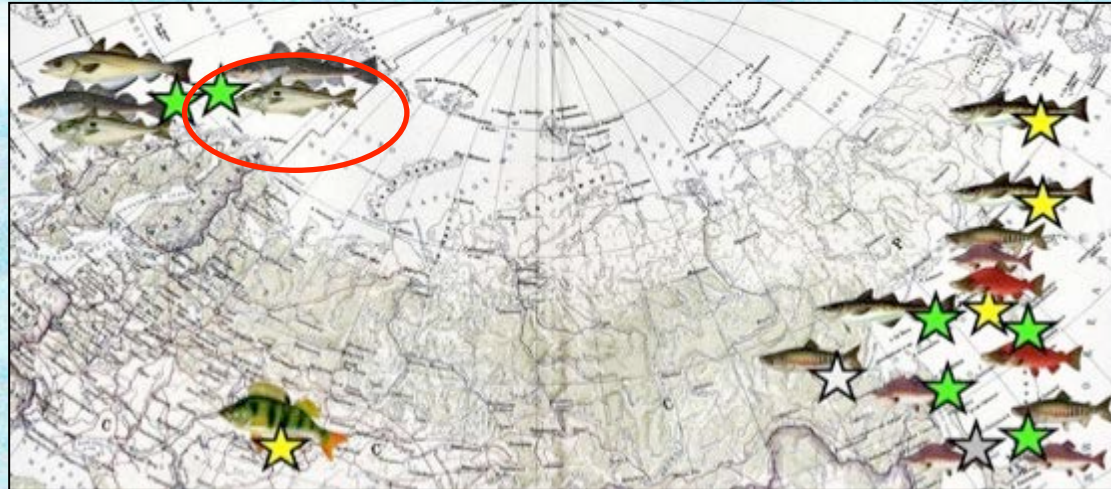
Barents Sea cod, haddock and saithe fishery

Client	Ocean trawlers
Certifier	Food Certification International Ltd (FCI)
Species	Northeast Arctic Cod (<i>Gadus morhua</i>), Northeast Arctic Haddock (<i>Melanogrammus aeglefinus</i>), Northeast Arctic Saithe (<i>Pollachius virens</i>)
Catch size	Cod - 65,535 MT (2009), Haddock - 23, 837 MT (2009)
Geographic area	Barents Sea
Current status of certification	Certified November 2010
Fishing gear	Demersal Otter Trawl
Commercial market	Most fish landed in Holland with the rest landed in Norway, UK and Russia.



FIUN Barents & Norwegian Seas cod and haddock

Client	The Union of fishermen of the North
Certifier	Food Certification International Ltd (FCI)
Species	Atlantic cod (<i>Gadus morhua</i>) & haddock (<i>Melanogrammus aeglefinus</i>)
Catch size	Cod 751,000 (2012), haddock 318,000 MT (2012)
Geographic area	Barents and Norwegian Seas
Current status of certification	Certified June 2013
Fishing gear	Demersal Otter Trawl, longline
Commercial market	Russia, USA, Europe, China



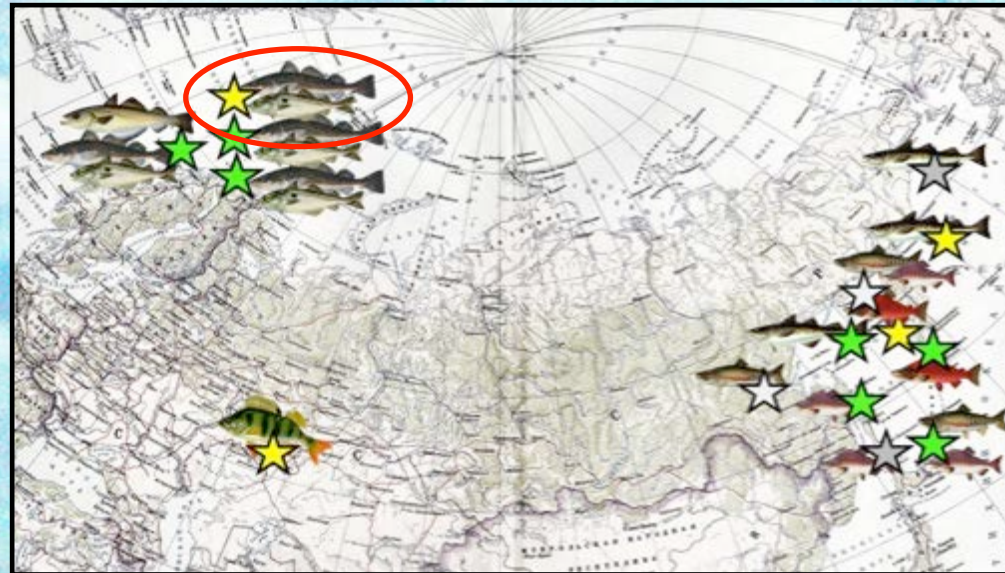
Russian Federation Barents sea cod and haddock

Client	ZAO Strelets (former Joint Stock Company Murmansk Trawl Fleet -1) , ZAO Eridan (former Joint Stock Company Murmansk Trawl Fleet - 4)
Certifier	Det Norske Veritas Certification AS
Species	Atlantic cod (<i>Gadus morhua</i>) & haddock (<i>Melanogrammus aeglefinus</i>)
Catch size	2013: Cod: 5141.5 MT, haddock: 1317.4 MT
Geographic area	ICES Sub-areas I and II. FAO 27. Primarily Norwegian EEZ and Svalbard FPZ
Current status of certification	Certified 6 May 2014
Fishing gear	Bottom trawl
Commercial market	Main Commercial Markets: Norway, China, UK, Holland, Poland, Canada, USA, France, Germany, Spain, Portugal and Iceland.



Arkhangelsk Trawlfleet Barents Sea cod & haddock

Client	OJSC Arkhangelsk trawlfleet
Certifier	Food Certification International (FCI) Ltd
Species	Cod (<i>Gadus morhua</i>) Haddock (<i>Melanogrammus aeglefinus</i>)
Catch size	Cod - 424,735 MT, haddock - 75,115 MT
Geographic area	ICES Areas I and II, Barents & Norwegian Seas, & within Norwegian and Russian EEZ and International Waters FAO statistical area/s: FAO Area 27 ICES Areas: Ia Ib, IIa and IIb
Current status of certification	Full assessment started 31 October 2014
Fishing gear	Demersal trawl
Commercial market	EU countries, Countries of PRC



Alaska pollock



OCEAN
FLAQUET
SMITHSONIAN

Russia Sea of Okhotsk pollock

Client	Russian Pollack Association
Certifier	Intertek Fisheries Certification Ltd
Species	Walleye pollock (<i>Theragra chalcogramma</i>).
Catch size	840,000 MT
Geographic area	Sea of Okhotsk
Current status of certification	Certified 24 September 2013.
Fishing gear	Mid-water pelagic trawl
Commercial market	Japan, southeast Asia, Europe



Russia Bering Sea pollock

Client	Russian Pollack Association
Certifier	Intertek Fisheries Certification Ltd (Moody Marine)
Species	Walleye pollock (<i>Theragra chalcogramma</i>).
Catch size	
Geographic area	EEZ waters of Western Bering Sea
Current status of certification	Additional stakeholder consultations by mid-2014.
Fishing gear	Mid-water pelagic trawl
Commercial market	Japan, southeast Asia, Europe



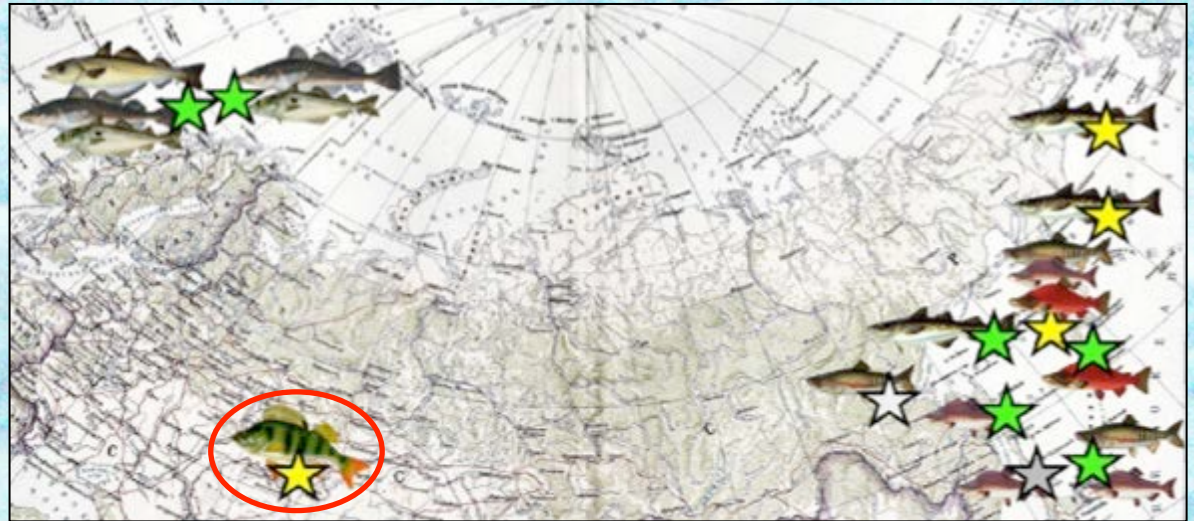
Russia Navarinsky pollock

Client	Russian Pollack Association
Certifier	Intertek Fisheries Certification Ltd (Moody Marine)
Species	Walleye pollock (<i>Theragra chalcogramma</i>).
Catch size	
Geographic area	Russian EEZ waters of Western Bering Sea
Current status of certification	Application withdrawn January 2015
Fishing gear	Mid-water pelagic trawl
Commercial market	Japan, southeast Asia, Europe



Irikla Reservoir perch

Client	Fish and More GMBH
Certifier	MRAG Americas
Species	Common perch (<i>Perca fluviatilis</i>)
Catch size	Total available catch 310-350 MT
Geographic area	Irikla Reservoir on Ural River, Orenburg Province
Current status of certification	Expected to be certified October 2015.
Fishing gear	Gillnets of 30-36mm mesh size
Commercial market	Frozen fillet of perch is sold in markets of Switzerland and Canada



European perch (inland waters)





Barriers to FIPs and certification in Russian fisheries

Insufficient interest and of state structures (Federal Agency of Fisheries, research institutions) to certification, despite coincidence of strategic goals of the management system and MSC certification – long-term sustaining of aquatic biological resources.



Some differences in strategy of fishery management between Russian traditions and MSC

Russian management system aims to achieve the maximum production of the target species.

MSC aims to achieve the maximum production of the entire ecosystem.

This results in insufficient attention to ecosystem effects of fishery



Poaching is still quite common in Russia, in particular, in the Far East, but its level decreased since 1990s. It is associated with corruption. Poaching is often perceived as a norm by public, partly because of too strict limitations of for local population. At the same time, some fisheries are enforced very well.



Artificial reproduction (in case of salmon)

Hatchery fish are usually less adapted to environmental changes, in particular, to climate changes (reduced “genetic memory”).

Hatcheries often compete with other conservation programs for financial resources (for instance, some calculations show that in some cases the resources are more effectively to spend for controlling illegal fishing, than to hatcheries)

Hatcheries are included to the strategy of development of fisheries as the main way to increase of the fishery production



Insufficient control over fisheries (fishery observers)



Availability of fisheries-related information

ФЕДЕРАЛЬНОЕ АГЕНТСТВО ПО РЫБОЛОВСТВУ

ФЕДЕРАЛЬНОЕ ГОСУДАРСТВЕННОЕ УНИТАРНОЕ ПРЕДПРИЯТИЕ
КАМЧАТСКИЙ НАУЧНО-ИССЛЕДОВАТЕЛЬСКИЙ ИНСТИТУТ РЫБНОГО
ХОЗЯЙСТВА И ОКЕАНОГРАФИИ (ФГУП КамчатНИРО)



УТВЕРЖДАЮ
Директор КамчатНИРО, д.т.н.
О.М. Лапшин
« » 2012 г.

ОТЧЕТ ПО ДОГОВОРУ №01/12-Н

Conclusions and some thoughts

Codfish fisheries, such as **cod**, **haddock**, **saithe** in the Barents Sea are certified (or are in the process of certification) almost completely.

Salmon fisheries in the Far East are partly certified or in the process (totally about 1/3). Problems preventing the further certification: most of companies sale their production in Russia; lacking of financing for processing; high poaching ; hatchery production (for some fisheries). Sometimes insufficient scientific information.

Alaska pollock is certified for about half of total amount. Problems: likely, insufficient surveillance in the ground

Freshwater perch: lack of financing because the fisheries are small-scale, insufficient scientific information. But interest to certification now is growing. The same is with **pikeperch**, but its stock status is usually more tight than in perch because of high demand for this species in Russia.

Other candidate species for MSC process: Pacific herring, Pacific sauri, Kamchatka crab.

Current political and economical situation has ambiguous effect : first, political instability does not facilitate long-term investments like MSC certification, also, xenophobia increased. Second, weak rouble may result in increase of export and make foreign investments more profitable.

To develop sustainable fisheries movement in Russia in long-term prospective it is needed to develop market of sustainable seafood, in short-term – one opportunity is to search for investors to develop fish processing.