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TRENDS AND PROSPECTS OF WORLD MARKET OF FISH AND SEAFOOD

With the consolidation in national jurisdiction of exclusive right to catch biological resources in its 200-mile exclusive economic zone (EEZ), introduced in 1982 by the UN, the vector of commercial fishing in the oceans has changed significantly. Food security, protection of national stocks of marine biological resources from exhaustion came to the forefront of national policy in this area.

The aim of the article is to study the major trends observed in the global market of fish and fish products; outline the range of critical issues that reflect the current problems of the fishing industry.

An important contribution to the study of the state of the world market of fish and seafood, was made by such scholars as: Lip'yanina K.V., Kernasyuk Y., Hrynzhevskyy M.V., Barshcheuski P.P., Anforova O.M. and others. In scientific studies the author referred to the general trends of the world market of fish and fish products, state of export-import operations.

Sales of fish and seafood in the world are increasing steadily. In 2009–2013 global sales of fish products increased by 13.1% and

in 2013 amounted to 147.3 million tonnes. During this period, the volume of exports of expensive fish and seafood increased, except 2012, where we observed reduction in global export supply of products by 3.3% compared to last year. In 2013, the volume of exports of fish and seafood amounted to 126.3 million USD, which is by 44.8% higher than in 2009. During the period studied, the figure almost doubled to countries such as China, Vietnam, 40% – Norway and Thailand, which in today's market conditions are leading exports of fish and seafood. The rapid growth in exports of the product showed the US – 55% (table 1).

According to BusinessStat, in 2015–2018 exports of fish and seafood in the world will grow by an average of 2.5% per year (table 2).

In 2013 the production of fish and seafood in the world totalled 154.5 million tonnes, which is 13.5% higher than in 2009.

The main producers supplying fish and seafood in Ukraine are representatives of Norway (Marine Harvest AS Ice Seafood AS, Hallvard Leroy, Norway Royal Salmon, Nergard AS, Norway Pelagic AS,

Egersund Fisk Group, CA Mordal Consulting), Scotland (Denholm Seafoods Ltd), Holland (Marine Foods BV), Iceland (Iceland Pelagic, Iceland Seafood ehf), USA (Pacific Seafood), Canada (Ocean Choice International Ltd), Russia (Flyfish, Rusfishtrade), Belarus (Santa Bremer), Lithuania (Benko Servisas). They all work with state structures. Ukraine today imports about 90% of the fish. This situation is

determined by the lack of profile of the fleet, the processing industry, quotas in international waters and poaching. In addition, the cost of Ukrainian fish is higher than of the imported one, so the product is losing its competitiveness.

The main trends of the world market of fish and fishery products were determined. In the development of world fisheries has developed a steady downward trend in

Table 1

**Export of fish and seafood for the leading countries,
2009–2013 (mil. USD)**

| Country | 2009 | 2010 | 2011 | 2012 | 2013 |
|-------------------|--------|--------|---------|---------|---------|
| China | 10 304 | 13 227 | 16 995 | 18 160 | 20 192 |
| Norway | 6 943 | 8 698 | 9 287 | 8 746 | 9 668 |
| Thailand | 6 199 | 6 993 | 8 101 | 8 054 | 8 699 |
| Vietnam | 4 246 | 5 017 | 6 112 | 6 662 | 7 561 |
| USA | 4 053 | 4 546 | 5 651 | 5 579 | 6 298 |
| Canada | 3 221 | 3 819 | 4 144 | 4 197 | 4 533 |
| Chile | 2 984 | 2 823 | 3 941 | 3 790 | 4 261 |
| Indonesia | 2 250 | 2 560 | 3 183 | 3 598 | 3 947 |
| Netherlands | 2 629 | 2 743 | 3 511 | 3 388 | 3 708 |
| India | 1 610 | 2 405 | 3 350 | 3 365 | 3 763 |
| Denmark | 2 694 | 2 753 | 3 068 | 3 194 | 3 344 |
| Sweden | 2 019 | 2 645 | 2 848 | 2 861 | 3 118 |
| Russia | 1 758 | 2 254 | 2 537 | 2 654 | 2 860 |
| Germany | 1 892 | 1 993 | 2 454 | 2 196 | 2 504 |
| Great Britain | 1 793 | 2 086 | 2 356 | 2 099 | 2 290 |
| Republic of Korea | 1 332 | 1 572 | 1 993 | 1 986 | 2 178 |
| Iceland | 1 581 | 1 658 | 1 966 | 1 911 | 2 093 |
| Japan | 1 574 | 1 936 | 1 856 | 1 802 | 1 926 |
| France | 1 536 | 1 539 | 1 673 | 1 672 | 1 764 |
| Poland | 1 092 | 1 322 | 1 485 | 1 443 | 1 607 |
| Peru | 512 | 637 | 1 031 | 1 064 | 1 122 |
| Italy | 698 | 690 | 776 | 794 | 842 |
| Myanmar | 336 | 648 | 454 | 529 | 599 |
| Nigeria | 337 | 324 | 104 | 51 | 43 |
| Other countries | 20 545 | 21 618 | 25 576 | 20 885 | 23 353 |
| All countries | 87 240 | 99 748 | 118 367 | 114 454 | 126 333 |

Source: United Nations Statistics Division (UNSD), *BusinessStat*

Table 2

Forecast world exports of fish and seafood, 2015–2018 (bln. USD)

| Parameter | 2015 | 2016 | 2017 | 2018 |
|---------------------------------|-------|-------|-------|-------|
| Exports (billion. Dollars. USA) | 148,7 | 160,9 | 175,2 | 190,9 |
| Dynamics (% to previous year) | 8,9 | 8,2 | 8,8 | 9,0 |

the share of traditional industrial fisheries in total fishing industry in conditions of the rapid development of global aquaculture production. The article represents the actual data on the processes that took place last few years and at present in the fish market. The author determined leaders of the world fisheries among countries and among industrial corporations. The undisputed world leader is China, due to the economy, increase of income levels and improvement of the purchasing power of consumers. The forecast on the development of world market of fish and fishery products has been made.