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Functioning of the Fish and Seafood Market in Ukraine

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► **Abstract.** Ukraine is one of the states that, to a large extent, meet their own needs for various crop and livestock products. At the same time, the capabilities of our agricultural sector allow forming an offer in an amount sufficient for profitable supplies to other countries. Therefore, when considering in detail the functioning of most agri-food markets in Ukraine, production and export are mainly described as the main structural elements of the balance sheet. In the case of the fish and seafood market, a completely different picture is observed, when the indicators and features of import and consumption come to the fore. The problem of import dependence in this segment only increases over time, caused by a combination of objective and subjective factors of an economic, social, and political nature. It is important from a scientific standpoint in this context to compare individual indicators of the world and Ukrainian fish and seafood markets to demonstrate the reasons for the different levels of their development at the present stage. The need to consider these and other related issues indicates the relevance of this topic. The purpose of the study is to investigate the situation on the Ukrainian fish and seafood market, the importance of its import for the generation of domestic supply and demand, to determine the potential of production in Ukraine at the expense of its own specialised industries. The following methods are used: theoretical generalisation, analysis and synthesis, comparative evaluation, historical, graphical, and tabular. The dynamics of import to Ukraine of products of group 3 of the UKTZED "Fish, crustaceans, mollusks" in quantitative and cost indicators, the general balance of these products, changes in its production by Ukrainian enterprises together with the key reasons, a detailed description of quantitative and qualitative indicators of the global market for these products, in particular, with the selection of leading countries in production, exports, consumption trends, assessed the prospects for its development, established a focus on the systemic development of the world market of fish and seafood in the context of movement of goods from primary producer to the final consumer, provided proposals for Ukrainian market to increase own production through legalisation and stimulation of aquaculture. The provisions of the study are aimed at informing Ukrainian industry enterprises, potential producers, and responsible state authorities about current trends in the global fish and seafood market to identify the potential of domestic production and reduce Ukraine's dependence on imports of this group of products

► **Keywords:** import dependence, domestic demand, fish and seafood, production potential, aquaculture

► Introduction

Recently, Ukraine has managed to significantly increase the volume of exports of agri-food products, while simultaneously increasing the value of the positive balance of foreign trade in them. Thus, Ukrainian exports increased from USD 14.6 billion in 2015 to USD 27.7 billion in 2021, the positive balance for this period increased from USD 11.1 billion to USD 20.0 billion [1; 2]. This contributed to the further establishment of Ukraine as a serious player in the global agricultural market. However, Ukraine's deeper involvement in the system of international integration processes and the global food market has led to an increase in the role of import supplies, in particular in relation to certain products. In addition, due to the ongoing decline in the

already insufficient production of aquatic biore-sources, Ukrainian agriculture, fisheries, and the processing industry cannot fully meet the needs of consumers in the domestic market on their own; a number of important items in this regard are forced to be imported. One of them is product group 3 of the UKTZED "Fish, crustaceans, mollusks", purchases of which abroad are crucial for the domestic market of Ukraine. Since these products are included in the list of main ones for which self-sufficiency and import dependence are given and calculated [3], it is important to better understand the commodity structure of purchases, their cost volumes, and the geographical diversification of supplies from abroad. Considering the fact that part of the specified assortment,

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namely, fresh freshwater fish, some types of marine fish, crustaceans, and mollusks are produced and extracted in Ukraine, it is advisable to consider the objective possibilities of the Ukrainian fishing industry and aquaculture in terms of reducing import dependence.

The characteristics of the functioning of various food markets within the country, region, and world were considered by Ukrainian researchers, in particular Yu.O. Lupenko [4], M.I. Puhachov [4; 5], O.G. Shpykuliak [5], O.V. Khodakivska [5]. The scientific aspect of the Ukrainian fish market from the standpoint of its problems and prospects is covered in research papers by Ukrainian scientists [6; 7]. Objective prerequisites for the practical development of aquaculture in Ukraine are given in the specialised literature [8]. Official statistical information of State Services shows the volume of fish and seafood imports to Ukraine and their role in shaping the balance of the domestic market [1-3]. The general overview of the Ukrainian market pays much more attention to the state and problems of industrial production [9; 10]. Current trends in consumption on the world market and the reasons for non-compliance with them on the Ukrainian market are reflected in popular scientific publications of Ukrainian experts [11-13]. International statistical databases help determine the quantitative and cost capacity of the global fish and seafood market, including its forecasts [14-16]. Separate narrow thematic reports focus on the importance of freshwater fish for the overall species diversity and the need to prevent the extinction of many representatives of this group [17].

Fundamental differences and key standards of the Ukrainian fish and seafood market are identified in comparison with the indicators of global production, consumption, and trade, including environmental care and the latest changes conditioned by the coronavirus pandemic. *The purpose of the study* is to consider the functioning of the fish and seafood market of Ukraine at the present stage, the current ratio of its own and imported products, to explore the possibilities of developing and increasing production by the fishing industry.

► Materials and Methods

In the process of researching the Ukrainian fish and seafood market, the following methods were used: theoretical generalisation – for the basic characteristics of the functioning of the domestic fish and seafood market of Ukraine at the present stage; analysis and synthesis – for the investigation of current trends in the world market of this product with a focus on its commodity and geographical structure, paying attention to the distribution of natural and artificial cultivation; comparative assessment – for the identification of the most statistically significant differences in the dynamics of indicators of the Ukrainian and world market; historical – for the assessment of

the extraction of aquatic bioresources in Ukraine at the end of the 20th century and the catch yield of wild fish in the world at the beginning of the 21st century; graphic and tabular – for the optimisation of the display of statistical and calculated results. Structurally, the study consists of three main stages: 1. Characteristics of the Ukrainian fish and seafood market – the commodity and geographical structure of their imports with prices for the most typical products of this group, the balance of fish and fish products, and the dynamics of obtaining aquatic bioresources in times of independence are considered. 2. Current trends of the world fish and seafood market – statistical data on the growth of quantitative volumes of production of this product are given, the ranking of its general export profitability in comparison with other types of food, achievement in general of the optimum balance between wild-caught and artificially grown products, the nature of consumer tastes in the markets of the European Union, the USA, and Japan as the defining countries for further global trends are explained. 3. Forecasts and recommendations – summarises the development of this market in the world in the near future, including Ukraine, the listed production and consumption problems in the Ukrainian market, and provides appropriate proposals to increase the efficiency of Ukrainian reserves and opportunities to increase the production of fish and seafood both naturally and artificially to stabilise own supply and reduce dependence on imported supplies. The information base of this study is scientific publications of Ukrainian researchers, information from the State Statistics Service of Ukraine, the State Customs Service of Ukraine, statistical and analytical data from the Food and Agriculture Organisation of the United Nations (FAO), the International Trade Centre (ITC), the Organisation for Economic Cooperation and Development (OECD), thematic information from the Internet, developments, and results.

► Results and Discussion

Among the major food groups, fish products for Ukraine are traditionally highly dependent on imports. If earlier, in the first years of independence, there were more opportunities for the development of the Ukrainian fishing industry, then after the annexation of Crimea in 2014, this problem significantly worsened. Statistical data from the State Statistics Service and the State Customs Service clearly demonstrate that their import supplies are of key importance for the Ukrainian fish and seafood market at the present stage. Among the products of group 3 of the UKTZED “Fish, crustaceans, mollusks, etc.”, mainly frozen fish, fresh and chilled fish, fish fillets, and various crustaceans are imported to Ukraine [1; 2]. The volume of imports from abroad of live fish, as well as dried, salted, and smoked fish, shellfish, and aquatic invertebrates, are noticeably lower (Table 1).

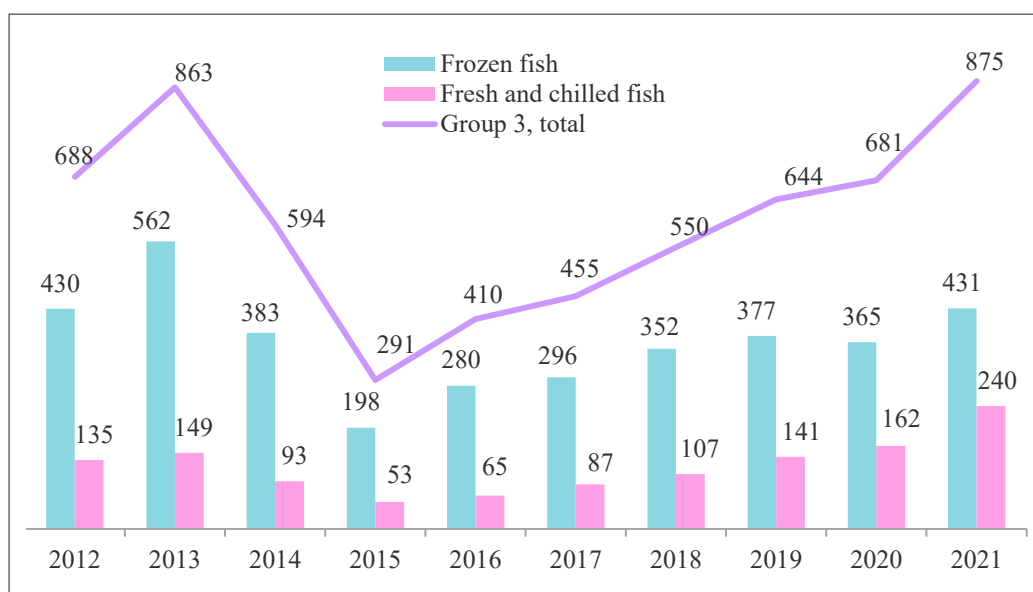
Table 1. Import of product group 3 “Fish, crustaceans, mollusks” to Ukraine, ths. t.

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total	383	415	308	210	273	296	344	358	359	393
Including:										
Frozen fish	303	330	245	181	234	253	291	285	271	286
Fresh and chilled fish	26	23	14	11	10	12	15	23	30	36
Fish fillet	43	49	37	13	23	21	25	32	36	39
Various crustaceans	8	8	4	1	2	3	5	7	12	16

Source: compiled by the author based on [1; 2]

As for the cost indicators of imports, in general, for group 3 of the UKTZED, the amounts of purchases abroad of two items – frozen fish and fresh

and chilled fish, in particular, amounted to about 77% in 2021 (Fig. 1).

**Figure 1.** Import value of product group 3 “Fish, crustaceans, mollusks, etc.”, USD million

Source: compiled by the author based on [1; 2]

Recently, a serious decline in fish and seafood imports in monetary terms was recorded in 2014-2015 due to the annexation of Crimea, hostilities in the Donbas region, which caused a rapid devaluation of UAH, a drop in the purchasing power of Ukrainian consumers, and the curtailment of business activities related to foreign purchases [2]. Restoration of previous import figures for 2012-2013 at the level of USD 700-800 million was achieved only recently. In 2021, the value of imports to Ukraine of product group 3 of the UKTZED was the highest among agri-food products, amounting to USD 875 million. The main suppliers of fish and seafood to Ukraine were European and North American countries, in particular, Norway (35.2% of the import value), Iceland (13.2%), the United States (7.7%), Canada (5.6%), the United Kingdom (4.7%), and Spain (4.4%). In general, they provided almost 71% of foreign supplies of these products to the Ukrainian food market [1; 2].

As for import prices for fish and crustaceans, they are quite different, since the commodity structure of

this group includes a wide range of products. In general, the average import price of group 3 of the UKTZED to Ukraine in 2021 was 2,225 USD/tonne, but it was differentiated in the context of the main commodity items. Thus, 1 tonne of frozen fish imported from abroad costs USD 1,509, the cost of fresh or chilled fish – 6,691 USD/tonne, fish fillet – 2,460 USD/tonne, crustaceans – 4,646 USD/tonne [1; 2].

To clearly demonstrate the functioning of the fish and seafood market in Ukraine, it is necessary to consider their balance in recent years. In addition to the actual products of group 3 of the UKTZED, this also includes ready-made and canned fish, caviar, crustaceans, and shellfish. Current statistics show that Ukraine provides only a fifth of the needs of the domestic market with its own production (extraction of aquatic bioresources by specialised enterprises and fishing by households), while the rest is achieved by import supplies (Table 2). Consequently, the highest import dependence is recorded for this group.

Table 2. Balance of fish and seafood in Ukraine, thousand tonnes

	Consumption fund	Production	Export	Import
2017	460	132	13	338
2018	497	128	13	394
2019	524	128	14	417
2020	517	118	15	424
2021*	554	114	15	461

Note: *preliminary estimates

Source: compiled by the author based on [1-3]

At the same time, Ukrainian exports of fish and seafood are at a consistently low level, which is clearly illustrated by the very high negative balance of foreign trade in them. Thus, at the end of 2021, Ukraine exported products of group 3 of the UKTZED in the amount of USD 57 million, at the same time, the largest revenue was received from sales of fish fillets – about USD 42 million. In quantitative terms, the total export amounted to almost 9 thousand tonnes, of which 5 thousand tonnes were fish fillets. The main markets for fish products last year for Ukraine were Germany, the United States, Denmark, Lithuania, Israel, and Moldova, that is, the geographical structure of Ukrainian exports is also quite extensive [1; 2].

Separately, it is worth highlighting the extraction of aquatic bioresources in Ukraine, which is characterised by a constant decline. Thus, in the first years after independence, it was at the level of 400 thousand tonnes, before the annexation of Crimea it exceeded 200 thousand tonnes, in 2014 it was already 91 thousand tonnes, and in 2021 – only 70 thousand tonnes (including inland water bodies – 23 thousand tonnes, other fishing regions – 36 thousand tonnes, aquaculture – 11 thousand tonnes), of which fish accounted for 42 thousand tonnes. Consequently, the consumption of fish and seafood in Ukraine per person per year is significantly lower than the global average (12 kg vs. 20 kg, respectively) and does not correspond to the rational norm, which is just 20 kg/year [2; 14].

However, official statistics [2] do not reflect the entire quantitative volume of production of aquatic bioresources in Ukraine. A significant part of the Ukrainian market is in the shadows. According to various estimates, about half of the production is not taken into account, so its real volume is now in the range of 140-150 thousand tonnes [2; 7; 18]. Ukraine is a member of the CCAMLR (Commission for the Conservation of Antarctic Marine Living Resources), where it fishes by vessels under the national flag of Ukraine. On average, 21-22 thousand tonnes of aquatic bioresources have been produced in recent years [10]. Notably, FAO forecasts for the period up to 2030 are reduced to a slight increase in the production of aquatic bioresources by Ukraine [16].

In the context of the above, it is also important to understand current trends in the global fish and seafood market. Thus, the global production is characterised by growth in dynamics: 2000 – 124 million tonnes, 2010 – 145 million tonnes, 2019 – 171 million tonnes. The main share of production (about 70%)

is formed by Asian states [14]. The leading countries with the largest supply volumes in this market in 2019 were China (63 million tonnes), Indonesia (13 million tonnes), India (12 million tonnes), Vietnam (7 million tonnes), and the United States (5 million tonnes) [14].

In addition, group 3 of the Harmonised Commodity Description and Coding System “Fish, crustaceans, mollusks” occupies one of the main places in international trade in agri-food products. Over the past ten years, the value of its exports has increased significantly – from USD 82 billion in 2010 to USD 112 billion in 2020 [15]. In the list of agri-food products with the highest export value in 2020, fish and seafood took the fifth place, behind meat products, fruits and berries, cereals, alcoholic and non-alcoholic beverages [15].

Considering specific products in the group of fish and crustaceans, the export of which brings the greatest revenues, then in 2020, traditionally, these were crustaceans (USD 27 billion), fish fillets (USD 23 billion), frozen fish (USD 23 billion), fresh or chilled fish (USD 19 billion), shellfish (USD 12 billion). As for the main exporting countries, their rating was as follows: Norway – USD 11 billion, China – USD 11 billion, Vietnam – USD 6 billion, India – USD 5 billion, Chile – USD 5 billion [15].

However, statistics from FAO and the International Trade Center allow only a quantitative and comparative assessment of the global market. But the qualitative characteristics of its functioning, together with the latest marketing trends, provide much deeper information. A truly global trend in the field of fish farming and seafood has become an increase in the share of aquaculture, that is, products that are artificially grown and bred under fully or partially controlled conditions [8; 12]. Currently, the global supply is divided roughly in half between natural catch yield and industrial aquaculture. The volume of wild fish caught in the world has been at a stable level of 90 million tonnes for more than two decades [11]. However, the existing climatic conditions do not allow increasing the catch of wild fish, which, moreover, is subject to quotas and rationing to preserve this valuable biological resource [17]. Consequently, the quantitative volumes of artificially grown fish and seafood are growing, helping to solve the problem of a constant increase in global demand for them [4]. According to experts, in the near future, the balance will change in favour of aquaculture, and its share will only grow [11].

Consumer trends are developing on the principles of sustainability, and more and more attention is paid to taking care of the environment and avoiding overfishing, when some fish have to be thrown away due to death. The trend for healthy eating remains very popular all over the world, so fish and seafood as a very useful animal protein, easily absorbed by the body, perfectly fits into this concept [12]. The coronavirus pandemic has also made its own adjustments to the consumption of fish products, including in Ukraine [5]. A significant decline was observed in public catering establishments, while a noticeable increase was observed in online sales. As a result, the quantitative consumption of fish and seafood almost did not change, because people began to cook more at home. In countries that set global consumer trends (European Union, USA, Japan), a very wide range of fish and seafood is presented on store shelves, and it is sold ready-made and divided into portions for maximum convenience and time saving [12; 13; 18]. Considering these trends, at the present stage of development, the global fish and seafood market is constantly growing with a dynamic change in consumer tastes, production methods, storage and processing technologies. Although it is not fully saturated, however, the fundamental trends of its functioning are clearly formed for the short and medium-term, expressing an optimal balance in the interests of all interested parties – producers, consumers, and intermediaries.

Ukraine lags behind the world's leading trends in the fish and seafood market. First of all, the culture of consumption of these products has not yet been established, Ukrainian pay little attention to it as a valuable food resource and, accordingly, spend little money. The industry itself, including production and processing, is generally technologically backward with outdated management methods, which leads to a systemic shortage of products for the needs of the domestic market. Business development in this area is at an initial stage, since the volume of goods produced is quite insignificant and limited in the product range.

The peculiarity of fish and seafood consumption in Ukraine is that it has a pronounced seasonal character with a significant increase in the autumn-winter period, which accounts for many traditional holidays for Ukrainians, along with a greater need to provide the body with a variety of nutrients. Considering the product range, the imported products are dominated by frozen fish, while chilled products are far less numerous. Modern freezing technologies allow preserving the original freshness and even texture of fish and seafood meat, so its quality often exceeds the quality of fresh or chilled fish, which reaches the consumer a few days after catching [12]. The most popular types from abroad are herring, mackerel, hake, and various salmon fishes. Ukrainian products on the market are mainly represented by live freshwater fish, such as crucian carp, carp, sazan, silver carp, catfish, pike, etc. In Ukraine, the price of fish and seafood is on average lower than the price of other main types of

meat (beef, pork, chicken), so they are an affordable alternative source of protein. In addition, the price of fish shows the highest elasticity, which is clearly evident from the trend of 2014-2015, when its import and consumption in Ukraine sharply decreased due to the rapid devaluation of the hryvnia and a drop in the purchasing power of the population [6; 19].

At the same time, there are still opportunities to stabilise and increase the production of fish and seafood in Ukraine, in particular, in terms of getting production out of the shadows. As long as it is profitable to operate illegally and official status offers no advantages – structural change is unlikely, but the implementation of state financial support to the industry, with the obligatory condition that only registered companies are granted, can completely change the situation. An important role will be played by the development of specialised industry associations of general and narrow specialisation, which would consider and express the interests of producers and processors as much as possible. Another way to increase domestic production should be to purposefully stimulate aquaculture, which is able to achieve an increase in absolute and relative indicators in the structure of the supply of Ukrainian fish and seafood in a relatively short time. If these conditions are met, the issue of attracting the necessary domestic and foreign investment in the industry will be solved much easier. Although even under such positive circumstances, Ukraine's import dependence on fish and seafood products will remain high, because Ukraine cannot produce most of its foreign products due to the lack of proper natural and climatic conditions.

► Conclusions

The fish and seafood market in Ukraine is the most import-dependent among others, while its own production provides too little for its needs. According to available estimates, about half of the catch yield in Ukraine is in the shadows. To cover the existing deficit, Ukraine imports mainly frozen fish products from abroad, including fresh fish, fillets, and crustaceans. Ukrainian exports of products of this group remain very low compared to imports. The culture of consumption of these products in Ukraine is developing too slowly, so Ukrainians eat much less fish than the average in the world.

Global trends in the international market are set by the European Union, the United States, and Japan. Consumers are now interested not only in a wide product range, but also in minimising the time required to prepare the product. In the world, the catch of wild fish has long remained at a relatively stable level, but there is growth conditioned by aquaculture, that is, artificial and controlled growing. All the time, the emphasis in production is placed on the maximum environmental friendliness of the industry to preserve biological diversity and the necessary number of marine and freshwater fish. For its part, Ukraine is far from the principles of constancy in the process of formation and development of the

fishing industry and aquaculture. The fully comprehensive entrepreneurship and profitability of this industry are mostly in conditions of uncertainty and riskiness. In fact, any negative social, economic, or political factors reduce the capacity of our Ukrainian market for fish products and the volume of their consumption by the population, because it is very sensitive to price changes. Recently, such challenges have been the devaluation of the hryvnia in 2014-2015 and the ongoing coronavirus pandemic.

Despite this, Ukraine has enough opportunities to increase both its own fish catch yield and the development of aquaculture, which will help reduce its dependence on supplies from abroad. Further prospects for study on this topic may include consideration of state support for the industry in the main fish-producing countries and foreign experience in reducing the dependence of the domestic markets of selected countries on import purchases of these products.

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Функціонування ринку риби і морепродуктів в Україні

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► **Анотація.** Україна належить до тих держав, які у значній мірі самі забезпечують власні потреби у різних видах рослинницької і тваринницької продукції. При цьому можливості нашого аграрного сектору дозволяють формувати пропозицію в кількості, яка достатня і для прибуткових поставок в інші країни. Тому при детальному розгляді функціонування більшості ринків агропродовольчої продукції в Україні переважно описуються виробництво та експорт як основні структурні елементи балансу. У випадку ринку риби та морепродуктів спостерігається зовсім інша картина, коли на перший план виходять показники та особливості імпорту й споживання. Проблема імпортозалежності в цьому сегменті з часом тільки наростає, викликана сукупністю об'єктивних та суб'єктивних чинників економічного, соціального та політичного характеру. Важливим з наукової точки зору в цьому контексті є порівняння окремих показників світового та українського ринків риби і морепродуктів, щоб продемонструвати причини різного рівня їх розвитку на сучасному етапі. Необхідність розгляду цих та інших суміжних питань свідчить про актуальність даної тематики. Мета статті – дослідити кон'юнктуру українського ринку риби- та морепродукції, значення її імпорту для формування внутрішнього попиту і пропозиції, визначити потенціал виробництва в Україні за рахунок власних спеціалізованих галузей. Використано методи: теоретичного узагальнення, аналізу і синтезу, порівняльної оцінки, історичний, графічний і табличний. Розглянуто динаміку імпорту в Україну продукції групи 3 УКТЗЕД «Риба, ракоподібні, молоски» в кількісних і вартісних показниках, загальний баланс цієї продукції, зміну обсягів її добування українськими підприємствами разом з ключовими причинами, наведено детальну характеристику кількісних і якісних показників функціонування глобального ринку цієї продукції, зокрема з виділенням країн-лідерів у виробництві, експорті, трендах споживання, зроблено оцінку перспектив його розвитку, встановлено орієнтацію на системний розвиток світового ринку риби і морепродуктів в контексті руху товару від первинного виробника до кінцевого споживача, надано пропозиції для суб'єктів українського ринку щодо нарощування власного виробництва через легалізацію діяльності та стимулювання напряму аквакультури. Положення статті спрямовані на доведення до українських галузевих підприємств, потенційних виробників, відповідальних органів державної влади інформації щодо актуальних тенденцій світового ринку риби і морепродуктів з метою виявлення потенціалу внутрішнього виробництва та зниження залежності України від імпорту цієї групи продукції

► **Ключові слова:** імпортозалежність, внутрішній попит, риба і морепродукти, потенціал виробництва, аквакультура