


<b>FISHERY COUNTRY PROFILE</b>	<b>Food and Agriculture Organization of the United Nations</b>	<b>FID/CP/BLR</b>
<b>PROFIL DE LA PÊCHE PAR PAYS</b>	<b>Organisation des Nations Unies pour l'alimentation et l'agriculture</b>	 <b>February 2004</b>
<b>RESUMEN INFORMATIVO SOBRE LA PESCA POR PAISES</b>	<b>Organización de las Naciones Unidas para la Agricultura y la Alimentación</b>	

## THE REPUBLIC OF BELARUS GENERAL ECONOMIC DATA

### STRUCTURE AND CHARACTERISTICS OF THE FISHING INDUSTRY

#### Inland water fisheries

The Republic of Belarus is a landlocked country. The main rivers are the Dnepr, the Pripyat, the Berezina, the Neman, the Sozh, and the Zapadnaya Dvina. All these, with the exception of Neman and the Zapadnaya Dvina, flow through the Gomel region, where more than 70% of river fish is caught. About 1 400 km of rivers are allocated to fishing.

The fishing is mostly effected by drag nets or seines (up to 80% of all catches); the rest is taken in fixed nets, drift nets and traps. There are no fixed sites, but fishing is carried out by teams of 4–10 men moving from site to site. Based on licences issued for industrial fishing in rivers and lakes as of 1 September 2003 there were 270 such groups. The main species caught (60–80%) is *Abramis brama*, followed by *Blicca bjoerkna*, *Rutilus rutilus* and *Perca fluviatilis*; with small quantities of *Lota lota*, *Esox lucus*, *Lucioperca lucioperca*, and *Anguilla anguilla*.

The largest lakes are Naroch (7 960 ha), Osveya (5 815 ha), Chervonoye (4 375 ha), Lukomlskoye (3 642 ha), Drivyaty (3 374 ha), Neshcherdo (2 857 ha), Vygonovskoye (2 596 ha) and Selyava (2 507 ha). Up to 70% of fish comes from lakes. The species, gear and fishing methods are the same as in the rivers.

#### Aquaculture

The output of pond fish peaked in 1990, at 16 300 t, of which 90% was carp. Since then, production volumes have fallen significantly, reflecting the increasingly difficult economic situation, and particularly the price increases for fuel and energy-intensive inputs, such as fish feed.

The main aquaculture units are located in Gomel, Minsk and Vitebsk regions. The farms are either state owned (under the Ministry of Agriculture) or joint stock companies in which the government has a shareholding.

## Processing industry

The fishery processing sector was minor and in the largest cities little developed before the 1970s. It mainly handled surplus aquaculture production. There were also small-scale operations that produced salted and smoked fish as well as precooked and culinary items. In 1972, a massive, large-scale programme was initiated to build up specialized cold stores and refrigerated stores for preserving fish and large plants for the processing.

As a result, overall fish imports in 1986 reached 202 000 t; processed fish production reached 19 500 t; fish consumption was 20.7 kg *per capita*, and the situation remained fairly constant until the break up of the former USSR in 1990.

The process of reform of the fisheries resulted in significant contraction in processing quantities in the mid-1990s.

Starting from 1999, imports of fish and seafood products into the republic increased, with a corresponding increase in consumption, with *per capita* fish consumption rising gradually to the current level of 14 kg, from a low of 6.1 kg in 1998.

This is connected with the increase in number of the enterprises and organizations in the private sector engaged in fish imports and processing. As of 1 January 2003, more than 300 entities had a licence from the Ministry of Agriculture for fish processing. About 100

entities are occupied in fish importing and trading. However, it should be noted that up to 80% of the import and production volume in the hands of a few large factories that have a long experience of operating in the domestic market.

The raw material for fish processing is largely from Russia via the Baltic ports (Latvia and Lithuania).

## Demand

Because of the limited purchasing power of the general population (average monthly salary in 2002 was about US\$ 100), cheaper fish species are in demand. The considerable share of herring fillets/flaps in overall imports is connected with its use in pickled preparations.

Traditional consumption patterns have moulded the main processing activities in Belarus:

- canned fish and preserves from processed and non-processed fish (sprats, Baltic herring, herring, mackerel);
- salted fish and salted fish with spices (herring, mackerel, sprats, Baltic herring);
- cold-smoked fish (herring, mackerel, salmon species).

In recent years, sales of deep frozen fish products has been actively expanding (fish sticks, fishburgers, other seafood products). These products, together with preserved and canned fish (sales in 2003 amounted to more than 25 million standard cans), originate mostly from Russia and the Baltic states.

## **Subsidies**

The aquaculture sector receives regular support from the state budget for purchases of feed compounds and medical preparations or drugs, totalling about US\$ 500 000/year. Fish processing enterprises rely on short-term rouble credits for acquisition of raw material.

## **Legislation**

Since 2003, processing and trade in fish are regulated by a Decree issued by the President of the Republic of Belarus "About state regulation of import, processing, sale of oceanic fish and seafood products".

According to the above reglamentation, the licensing of fish processing is conducted by the Executive Directorate of Affairs of the President of Belarus. Before a licence is issued, it is necessary to obtain the consent of the fire-fighting service, of sanitary supervision, of the Standardization Committee, etc. In addition to the fees for inspections and coordination, the licence is valid for 5 years.

Fish importing is limited to those enterprises that have been successful in the contest for quotas. The contest is organized by the Executive Directorate of Affairs of the President of Belarus. Imports must go through special customs stores that are on the approved list of the State Customs Committee

## **International cooperation**

In 2002, Belarus and Russia signed an agreement on collaboration in the field of fisheries. According to Article 5 of the agreement, Russia annually allocates an amount of fish from the Russian EEZ that can be caught in the name of Belarus, and issues licences for fishery activities for joint Belarusian-Russian enterprises.

## **RESEARCH**

The main institutes are:

Belarusian Research and Design Institute of Fish Industry (Academy of Agricultural Sciences of Republic of Belarus), in Minsk; and

Institute of Zoology of the National Academy of the Republic of Belarus, Minsk.

The institutes are mostly engaged in investigations in the aquaculture sector.

## **AID**

External support has been received from the European Bank of Reconstruction and Development in the form of credit (US\$ 2 million) for a joint company "Santa-Bremor" in the city of Brest, where a processing department with a capacity of 35 t/day was brought into operation in 2001. The "Minskiy Rybokomplex" OAO, Minsk, in 2003–2004 received interest-free credit equivalent to € 4.2 million for factory reconstruction.