

RUSSIAN FEDERATION PROFILE

Main seafood products and exports

Total Russian exports of fish and seafood were valued at US\$ 2.4 billion in 2012, a drop of 10% from the previous year. Primary seafood export markets were concentrated in East Asian countries, including South Korea (41% of all seafood exports), China (35%) and Japan (10%). Some of the exports to China are re-exported to Russia as processed products. Most pollack, molluscs and crabs, for example, are exported.

According to one source in June 2015¹, preliminary estimates from Russia indicated that fish, fish products and seafood amounted to 540.7 thousand tonnes for the first four months of the year. This was 10.4% less than for the same period the previous year. Exports were made up of 89.3% frozen fish, 6.3% fish fillets, 3.2% crustaceans and molluscs, and 0.4% prepared or preserved fish products. The main export item was frozen pollack, accounting for over 66% at over 357,000 tonnes.

Russia's fish processing sector is concentrated in its Far Eastern region, where over half the processing capacity is located. Moreover, some 45% of total processing capacity is used for canned production. The strongest growth in processing has been in frozen fish fillets. The Government has tried to curb overseas processing through new legislation requiring that all fish and seafood caught within the national territory be cleared by Russian customs at Russian ports, rather than shipped directly from the vessels at sea. This has benefited processors in port cities such as Vladivostok, while local governments in the Far East and Murmansk regions have increased funding for coastal processing facilities.

With Russia's vast territorial and coastal resources, seafood production and export trends have to be understood on a regional basis. While the Far East exports mainly to East Asian countries, the Murmansk region in north western Russia is of far more importance for EU countries. This region accounts for 16% of the overall fish and seafood harvest in Russia, the majority of the region's catch actually being harvested from foreign zones including those of Norway, Greenland and the Faroe Islands. The annual regional fish catch is up to 660,000 tonnes, stabilising in recent years after an earlier drop as a result of improved fish stocks in the Barents Sea, primarily for cod, and an increased catch quota for cod. The Murmansk region exports 40% of its fish catch by volume, and 70% by value, and is improving its processing infrastructure as a result of government efforts to renovate coastal fishing. 142 fishing companies in Murmansk own quotas for catching in the coastal area, and there are 46 processing facilities (80% of them small or medium-sized). The EU, Norway and U.S. are the primary export destinations from this region. Cod, white fish, groundfish and king crab are the primary export products, white fish having the largest value. Of the 214 fishing vessels registered in Murmansk, 12 are large, 122 medium-sized, and 68 small. The U.S. Department of Agriculture reports that, despite a generally favourable investment climate, uncertainty regarding the future of quotas is hampering long term

¹ "Russian Seafood Exports Fall in 2015", The Fish Site, 1 June 2015.
<http://www.thefishsite.com/fishnews/25753/russian-seafood-exports-fall-in-2015/>

investment. The current quota allocation lasts until 2018, and many companies are waiting until then before investing in new vessels or refurbishing old ones².

Seafood exports to the UK

In 2014 the UK imported over 14.6 million kg. of seafood from Russia, valued at UK£ 56,515,544. The main items by value were cod (£35,151,753), haddock (£13,069,559), pollack (£6,217,204), and salmon (£ 1,961,531). Smaller amounts were imported of coley (£ 86,035) and crabs (£ 2,462).

Employment in seafood

National statistics have only been found for 2003. In that year 370,000 persons were employed in fisheries, compared with 556,000 over two decades previously in 1991. Approximately a third, or 124,000 persons, were working as crew on vessels. 15% or 56,000 people were directly employed in the seafood processing industry, while 51,000 worked in the fish trade or marketing sector. Fleet-based support employees (excluding crews) comprised 40,000, and 30,000 persons were employed in the fish catching industry.

Human trafficking and forced labour: indicators, rankings and reports

Russia is ranked Tier 3 (the lowest ranking) in the U.S. Government's 2015 Trafficking in Persons³ (TIP) report. Labour trafficking is identified as the predominant human trafficking problem, affecting in particular the migrant workers who are officially and unofficially estimated at between five and 12 million persons. Many of these migrant workers experienced exploitative labour conditions characteristic of trafficking cases, such as withholding of documents, non-payment for services rendered, physical abuse, or extremely poor living conditions. The report observes that instances of labour trafficking have occurred in different sectors but makes no specific reference to fishing or seafood.

The Walk Free Foundation ranks Russia at No. 32 in its 2014 Global Slavery Index⁴, with 1,049,700 persons (or 0.732% of the total population) in modern slavery. The Index makes specific reference to fishing in a general commentary on Russia and the Eurasian region, observing that "Over seven per cent of the total number of people enslaved in the world are from the Russia and Eurasia region, reflecting forced labour in construction, manufacturing, domestic work, agriculture and fishing within the region".

In addition, some well documented reports have described the trafficking of migrant crewmen on Russian fishing and other maritime vessels. For example, a 2012 publication describes the experiences of 46 Ukrainian men trafficked within the seafaring and fishing sectors between 2005 and 2010, 38 of whom were trafficked to

² Data taken from USDA Foreign Agricultural Service, GAIN Report RS 1337, 6 November 2013. <http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Forms/Past%20Month.aspx>

³ United States Trafficking in Persons Report 2015 <http://www.state.gov/j/tip/rls/tiprpt/>

⁴ Global Slavery Index 2014 http://d3mj66ag90b5fy.cloudfront.net/wp-content/uploads/2014/11/Global_Slavery_Index_2014_final_lowres.pdf

Russia⁵. The study uses such indicators as fee-charging by recruitment agencies, excessive hours of work, restriction on freedom of movement, and violence and physical abuse on the vessels.

More recently, there have been sporadic reports of labour abuse against Asian migrants in waters of Russia's Far East. A high profile case was the sinking of the Russian trawler *Dalnyi Vostok* off Khamchatka Peninsula in the Sea of Okhotsk on 1 April 2015, with widespread loss of life. It later emerged that 42 of the dead were Burmese migrants. The Myanmar Times subsequently reported that two of the five Myanmar recruiting agencies responsible for sending Burmese seamen aboard this vessel had knowingly falsified workers' registration cards, and that such practices were widespread in the industry. The companies told this newspaper that they regularly registered recruited seamen to government-approved vessels, but instead sent the workers into uncharted territories and unpermitted industries, such as the fishing sector. Families of the deceased crewmen also reported to the Myanmar Times that "the men had no idea they were being sent to a fishing vessel until it was too late. When the men found out their lot, they were given no other employment options and, having already paid a steep fee to the agency, felt they had little option but to take menial fishing work in exchange for promised high wages"⁶.

Ratification of international human rights and labour instruments

United Nations treaties and procedures

The Russian Federation has ratified the core international human rights instruments of the UN system. These are, with their date of ratification by the Russian Federation:

- International Convention on the Elimination of All Forms of Racial Discrimination (1969)
- International Covenant on Civil and Political Rights (1973)
- International Covenant on Economic, Social and Cultural Rights (1973)
- Convention on the Elimination of All Forms of Discrimination against Women (1981)
- Convention against Torture and Other Cruel Inhuman or Degrading Treatment or Punishment (1987)
- Convention on the Rights of the Child (1990).

Under UN special procedures, the country has also accepted visits by its Special Rapporteurs, on issues including: racism and racial discrimination (2007); and the independence of judges and lawyers (2013).

International Labour Organization (ILO) Conventions⁷

Russia has a good record of ratifying ILO instruments, having ratified no less than 73 ILO Conventions and one Protocol altogether, including all eight of its core human

⁵ *Trafficked at Sea: The exploitation of Ukrainian seafarers and fishers*, International Organization for Migration/ Nexus Institute, 2012. http://publications.iom.int/bookstore/free/Trafficked_at_sea_web.pdf

⁶ "Trawler tragedy lifts veil on illegal recruitment", Myanmar Times, 7 April 2015. <http://www.mmmtimes.com/index.php/national-news/13967-trawler-tragedy-lifts-veil-on-illegal-recruitment.html>

⁷ The International Labour Organization's Fundamental Conventions http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_095895.pdf

rights Conventions. A recent ratification in 2012 was the ILO's Maritime Labour Convention, 2006.

Fisheries administration and recent policy trends

A Federal Agency for Fisheries was created within the Ministry of Agriculture in 2004, as the main body responsible for fisheries management.

In March 2013, the Government enacted a Decree on the "Federal Programme on the Development of the Russian Fishery Industrial Sector from 2013 till 2020". Its overall objective is to ensure a transformation from a fishing industry based on the production and export of low-value raw materials, towards one based on new technologies to ensure that Russian seafood products can be globally competitive.

As reported by one source⁸, Russia's "Concept of Fisheries 2012" is set to significantly change the country's fishing industry, by reducing state control and increasing finance available to fish farms to produce higher value products. The Concept includes plans to support coastal regions for fisheries development. The first such plan was adopted in the Sakhalin region, providing an estimated US\$ 10.4 billion for support to fishers. Similar programmes have been envisaged in all coastal regions. A further declared policy objective is to develop Russia's huge potential in aquaculture, though a modern regulatory basis would be required to settle ownership rights, and determine how to allot and register fish-breeding places.

Measures against IUU fishing

On illegal, unreported and unregulated fishing (IUU) fishing, the finger of responsibility has often been pointed at Russia. Media sources have estimated that Russia's illegal king crab fishing is worth as much as US\$ 700 million⁹. And in their overview reports on the subject, such NGOs as the World Wildlife Fund (WWF) and the Environmental Justice Foundation (EJF) have made extensive reference to Russian IUU.

There have been some but few attempts to document Russian IUU on a more systematic basis. A study undertaken for the Norwegian government some years back sought to assess (among other things) to what extent cod and haddock from the Barents Sea is sent to such Asian countries as China for processing; and what per cent of the whitefish going to Asia is IUU fish¹⁰. The study (for which the fieldwork was carried out before the EU's 2010 regulations against IUU fishing), showed the complexity of this kind of investigation. It documented some cases of IUU fishing, but notably linked this to corruption and violence in the Russian fishing industry, among

⁸ "Rebuilding Russia", World Fishing and Aquaculture, 21 February 2013.

<http://www.worldfishing.net/news101/regional-focus/rebuilding-russia>

⁹ "Searching for the Russian Crab Mafia", Bloomberg Business, 19 June 2014.

<http://www.bloomberg.com/bw/articles/2014-06-19/illegal-king-crab-fishing-off-russia-valued-at-700-million-a-year>

¹⁰ Gunnar Album, "Survey of the trade flow in the fisheries sector of Asia", Analysis for the Norwegian Ministry of Fisheries and Coastal Affairs", Friends of the Earth Norway/WWF Norway (undated).

https://www.regjeringen.no/globalassets/upload/fkd/vedlegg/rapporter/2010/trade_flow_survey_revised_public_version.pdf

other things in the allocation and control of fishing rights. In early 2014 Russia adopted a new plan to prevent, deter and eliminate IUU fishing. Measures included:

- Analysing Russian legislation for compliance with international law
- Regulating the procedure for chartering foreign vessels
- Inspecting vessels that sail under foreign flags in Russian seaports
- Properly marking fishing vessels and fishing equipment
- Introducing electronic logbooks and signatures for fishing vessel captains
- Strengthening administrative and criminal punishment for the violation of Russian legislation on fishing.

Overall risk assessment

Given the reported widespread incidence of trafficking and labour abuse, particularly against migrant workers, Russia has to be considered a medium to high risk country. However, the risk may vary by region. Though the information is largely anecdotal, it appears that the risk is highest where Asian migrants are employed as crew, most likely in the Far Eastern region.

The risk is not absent in the Barents Sea region, producing most of the exports to the UK and other EU countries. Human rights violations have been documented also in this region over the past decade. However, there has not been recent documentation of serious labour abuse against either Russian or migrant fishers in this region. Investment in new technology and modern vessels, a declared part of Russia's new fisheries policy, could serve to attenuate the risk. UK importing companies need to exercise due diligence identifying contractual arrangements (including the possible presence of migrant workers) on the vessels catching cod, haddock and other species for the UK market.

For further information

- **United States Trafficking in Persons Report 2015**

<http://www.state.gov/j/tip/rls/tiprpt/>

The Department places each country in this Report onto one of four tiers, as mandated by the Trafficking Victims Prevention Act (TVPA). This placement is based more on the extent of government action to combat trafficking than on the size of the country's problem. The analyses are based on the extent of governments' efforts to reach compliance with the TVPA's minimum standards. Tier one is the best ranking and Tier 3 the worst.

- **Global Slavery Index 2014**

http://d3mj66ag90b5fy.cloudfront.net/wp-content/uploads/2014/11/Global_Slavery_Index_2014_final_lowres.pdf

The Global Slavery Index estimates the prevalence of modern slavery country by country, the absolute number by population, how governments are tackling modern slavery, and what factors explain or predict the prevalence of modern slavery. Rankings range from 1 to 167 - with 1 the worst and 167 the best, in terms of the prevalence of the population in modern slavery. This is based on three factors: estimated prevalence of modern slavery by population, levels of child marriage and levels of human trafficking into and out of the country. This gives a 'weighted measure'.

- **The International Labour Organization’s Fundamental Conventions**
http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_095895.pdf
Ratifications of fundamental Conventions and Protocols by country
http://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:10011:0::NO::P10011_DISPLAY_BY,P10011_CONVENTION_TYPE_CODE:1,F

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