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中俄水产品贸易形势分析

Overview and Analysis of Aquatic Products Trade between China and Russia

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中国水产品生产和贸易

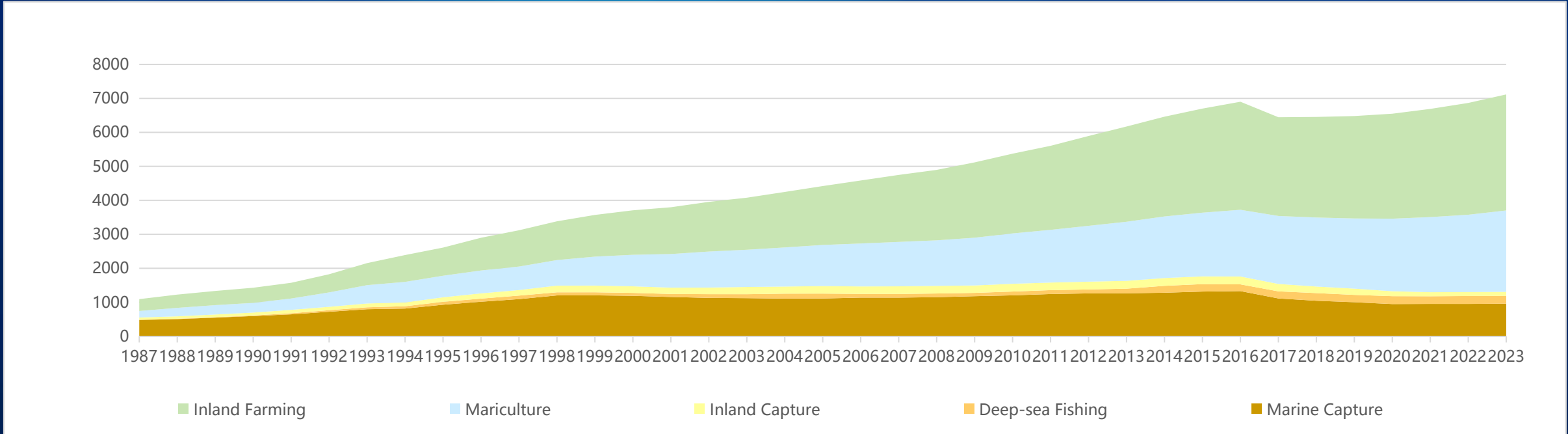
**Overview of production and trade of
aquatic products
in China**

中国水产品产量变化(1987-2023)



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Changes in China's aquatic product production from 1987 to 2023



1989年，中国水产品总产量跃居世界第一位，自此一路领先。

据FAO统计，2022年全球水产养殖产量1.31亿吨（以鲜重当量计），其中包括水生动物9440万吨和藻类3650万吨。

中国水产养殖产量5565.46万吨，占全球水产养殖总产量的42.5%，其中水生动物产量5293.07万吨，占全球水生动物总产量的56.07%。

捕捞渔业基本稳定，增量均来自养殖业。

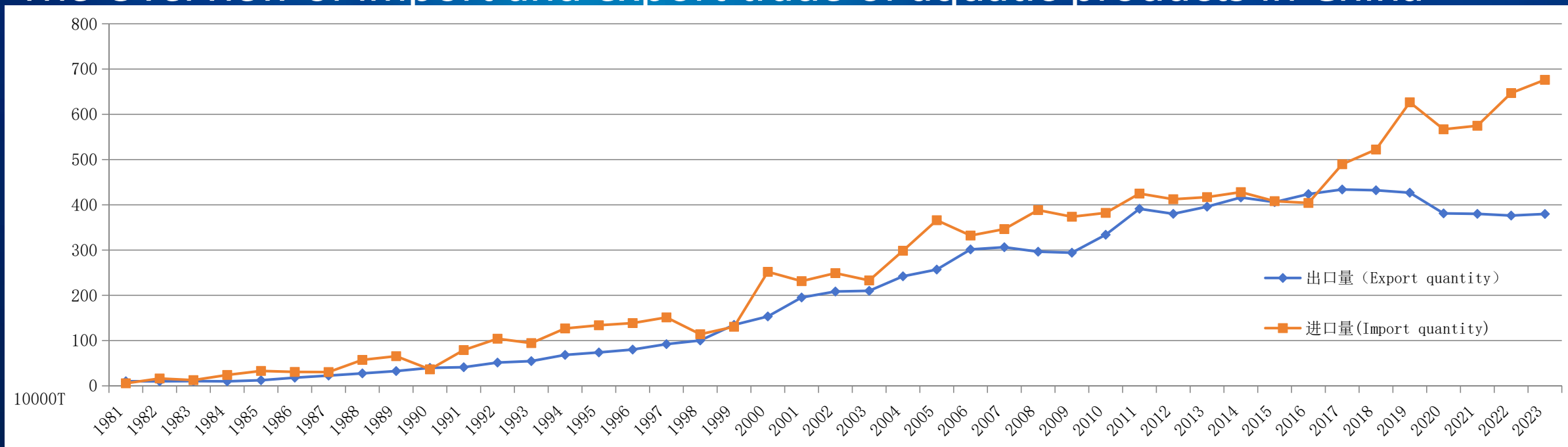
In 1989, China's total aquatic product production jumped to the top of the world, and then on take the lead.

In 2022, the global aquaculture production was 131 million tons (in fresh weight equivalent), including 94.4 million tons of aquatic animals and 36.5 million tons of algae.

The aquaculture production in China is 55.6546 million tons, accounting for 42.5% of the total global aquaculture production. Among them, the production of aquatic animals is 52.9307 million tons, accounting for 56.07% of the total global aquatic animal production.

Capture fisheries industry is basically stable, and the increase comes from the aquaculture industry.

The Overview of import and export trade of aquatic products in China



2000年后，中国水产品出口一直位列第一。贸易顺差保持到2021年。2022年，中国水产品贸易首次出现逆差。

2023年，中国水产品出口量379.82万吨、204.63亿美元，同比分别增长0.94%和下降11.15%；进口量676.23万吨、237.74亿美元，同比分别增长4.52%和0.28%。

2024年1-6月，中国水产品出口量195.58万吨、97.58亿美元，同比分别增长8.53%和下降3.96%；进口量321.52万吨、108.67亿美元，同比分别下降7.17%和11.65%。

Since 2000, China's aquatic product exports have consistently ranked first. Trade surplus maintained until 2021.

In 2023, the export volume of aquatic products in China was 3.7982 million tons and 20.463 billion US dollars, an increase of 0.94% and a decrease of 11.15% year-on-year, respectively; The import volume was 6.7623 million tons and 23.774 billion US dollars, an increase of 4.52% and 0.28% year-on-year, respectively.

From January to June 2024, the export volume of aquatic products in China was 1.9558 million tons and 9.758 billion US dollars, an increase of 8.53% and a decrease of 3.96% year-on-year, respectively; The import volume was 3.2152 million tons and 10.867 billion US dollars, a year-on-year decrease of 7.17% and 11.65% respectively.



02

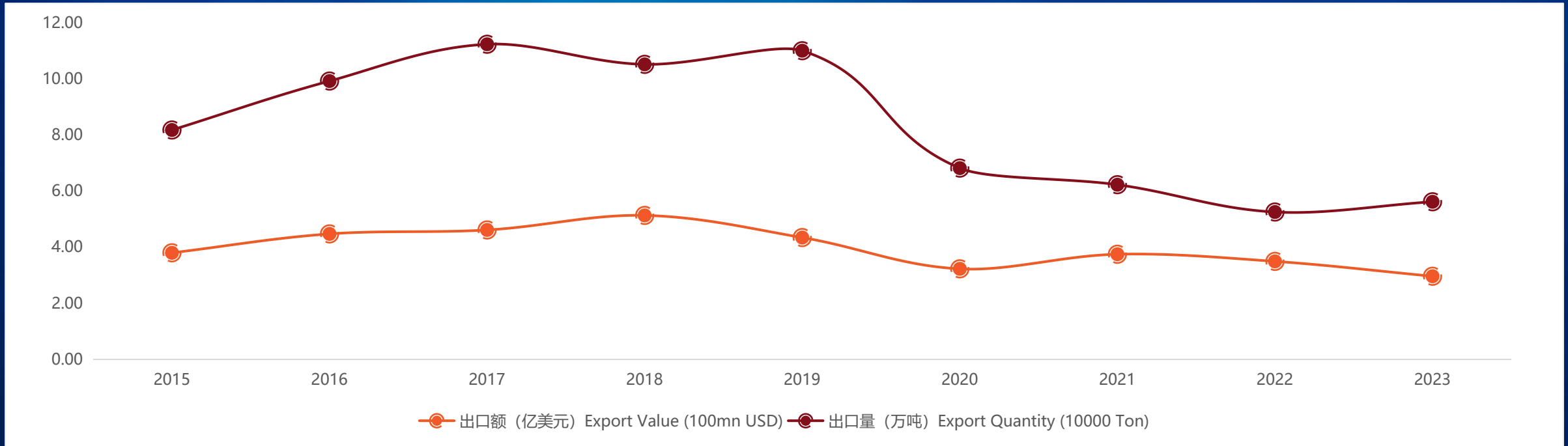
中俄水产品贸易情况
**Aquatic products trade
between China and Russia**

近10年中国出口俄罗斯水产品情况



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China's export of aquatic products to Russia in the past decade



2023年中国对俄出口水产品5.62万吨，同比增长6.96%，2.96亿美元，同比下降15.19%，
2024年1-6月中国对俄出口水产品4.19万吨，同比增长56.70%，1.91亿美元，同比增长28.22%。

In 2023, China exported 5,620 tons of aquatic products to Russia, a year-on-year increase of 6.96% and a decrease of 15.19% to 296 million US dollars, a year-on-year decrease of 15.19%.

From January to June 2024, China exported 4190 tons of aquatic products to Russia, a year-on-year increase of 56.70% and a total of 191 million US dollars, a year-on-year increase of 28.22%.

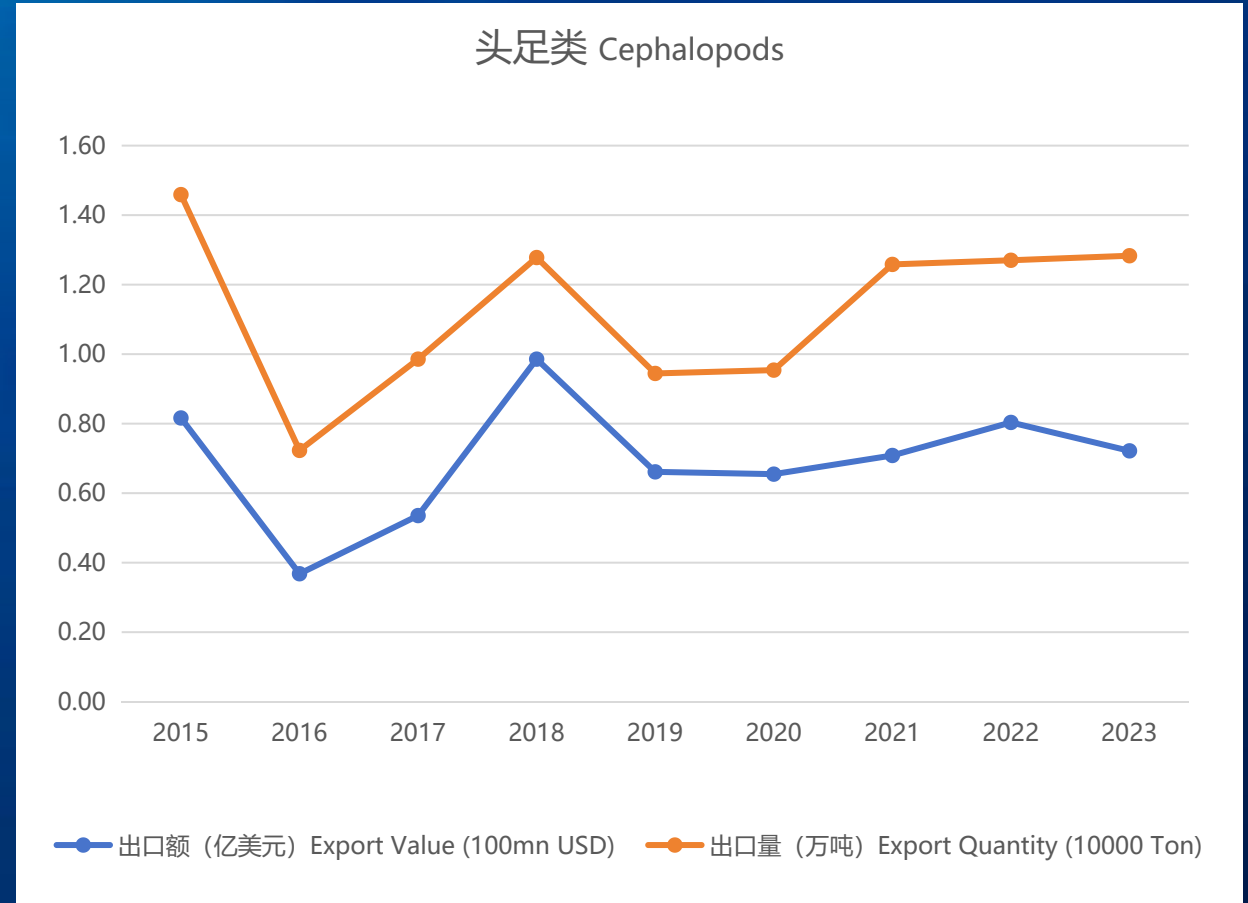
近10年中国出口俄罗斯水产品情况



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China's export of aquatic products to Russia in the past decade

- 2023年中国对俄出口头足类1.28万吨，同比增长1.02%；出口额0.72亿美元，同比下降10.17%。
- 2024年上半年中国对俄出口头足类1.19万吨，0.54亿美元，同比分别增长103.62%和56.83%。
- 同时，中国还对俄出口鲱鱼、罗非鱼、鲭鱼、鳗鱼等。
- In 2023, China exported 12800 tons of cephalopods to Russia, a year-on-year increase of 1.02%; The export value was 72 million US dollars, a year-on-year decrease of 10.17%.
- In the first half of 2024, China exported 11900 tons of cephalopods to Russia, worth 54 million US dollars, an increase of 103.62% and 56.83% year-on-year, respectively.
- At the same time, China also exports anchovy, tilapia, mackerel, eel, and other fish to Russia.

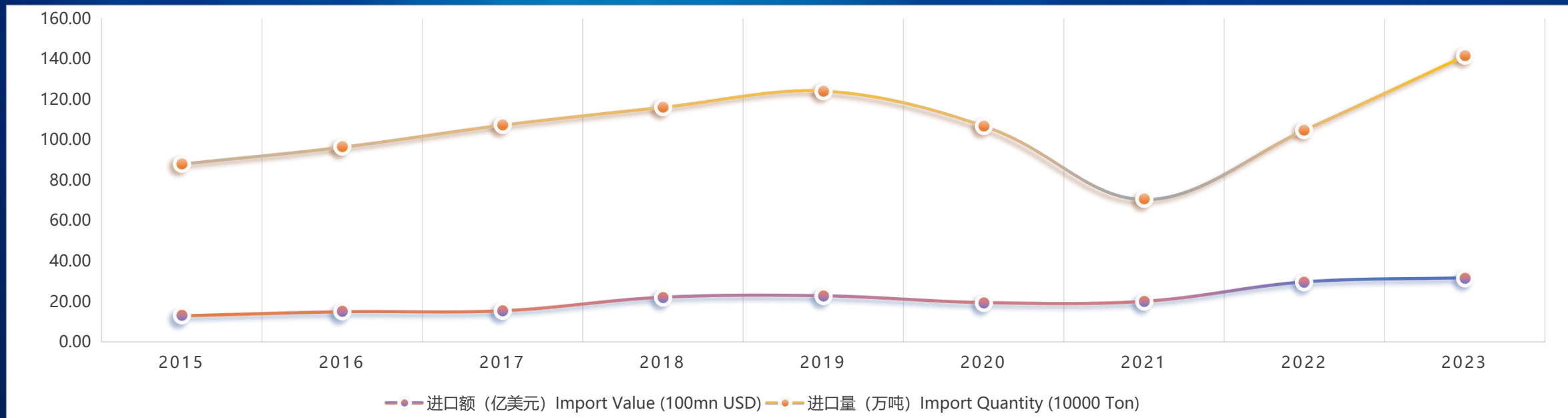


近10年中国自俄罗斯进口水产品情况



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China's imports of aquatic products from Russia in the past decade



- 中国水产品进口主要贸易伙伴有：俄罗斯、秘鲁、厄瓜多尔、越南、印尼、印度、美国、挪威、阿根廷等国。其中俄罗斯长期以来，一直是中国进口水产品的主要供应国。
- 从进口量看，俄罗斯是中国最大的水产品供应国；从进口额看，俄罗斯位居第二位，仅次于厄瓜多尔。与厄瓜多尔不同，**中国自俄进口水产品中22.65%用于国内消费**，其余为加工再出口。
- 2023年中国自俄进口水产品141.55万吨，同比增长34.72%，占我国进口水产品总量的20.93%，进口额31.63亿美元，同比增长6.68%。
- 2024年1-6月中国自俄进口水产品69.46万吨，同比增长0.85%，15.16亿美元，同比下降7.40%。
- The main trading partners of China's aquatic product imports include Russia, Peru, Ecuador, Vietnam, Indonesia, India, the United States, Norway, Argentina and other countries. Russia has long been the main supplier of imported aquatic products to China.
- From the perspective of import volume, Russia is the largest supplier of aquatic products to China; In terms of import volume, Russia ranks second, only behind Ecuador. Unlike Ecuador, 22.65% of China's imported aquatic products from Russia are used for domestic consumption, while the rest are processed and re exported.
- In 2023, China imported 1.4155 million tons of aquatic products from Russia, a year-on-year increase of 34.72%, accounting for 20.8% of China's total imported aquatic products. The import value was 3.163 billion US dollars, a year-on-year increase of 6.68%.
- From January to June 2024, China imported 694600 tons of aquatic products from Russia, a year-on-year increase of 0.85% and a decrease of 7.40% to 1.516 billion US dollars.

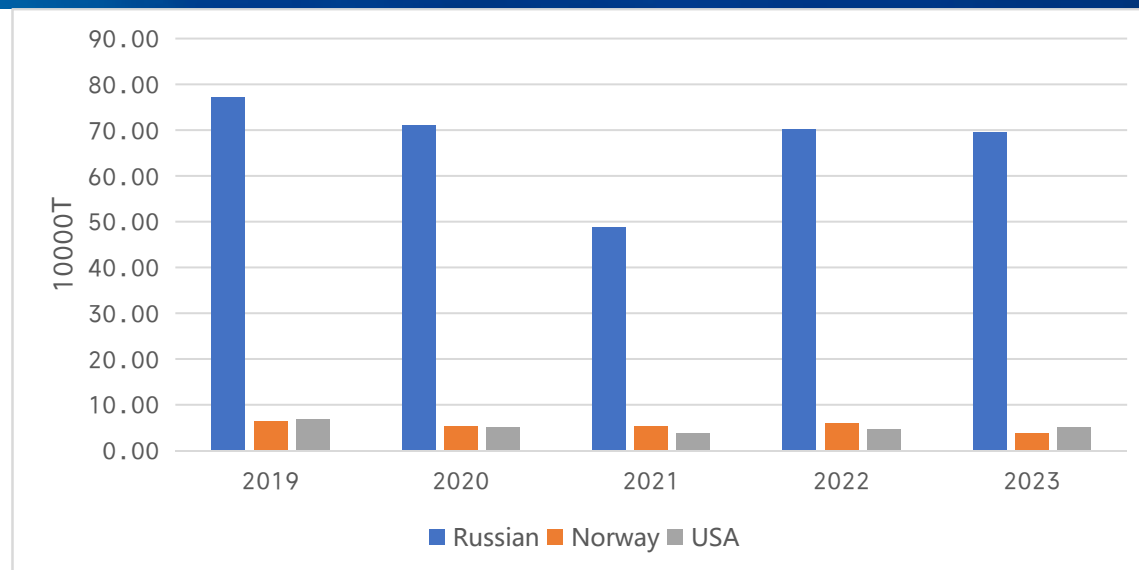
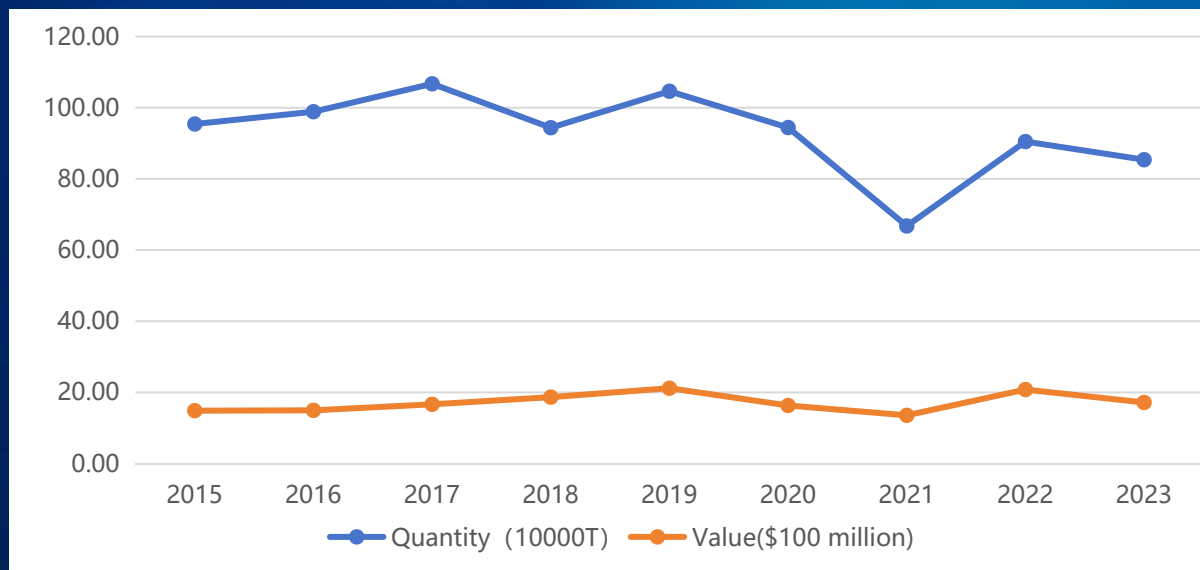
自俄罗斯主要进口水产品种——白肉鱼



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The main imported aquatic species from Russia – White fish

中国市场整体白肉鱼供应情况 Overall supply of cod in the Chinese market



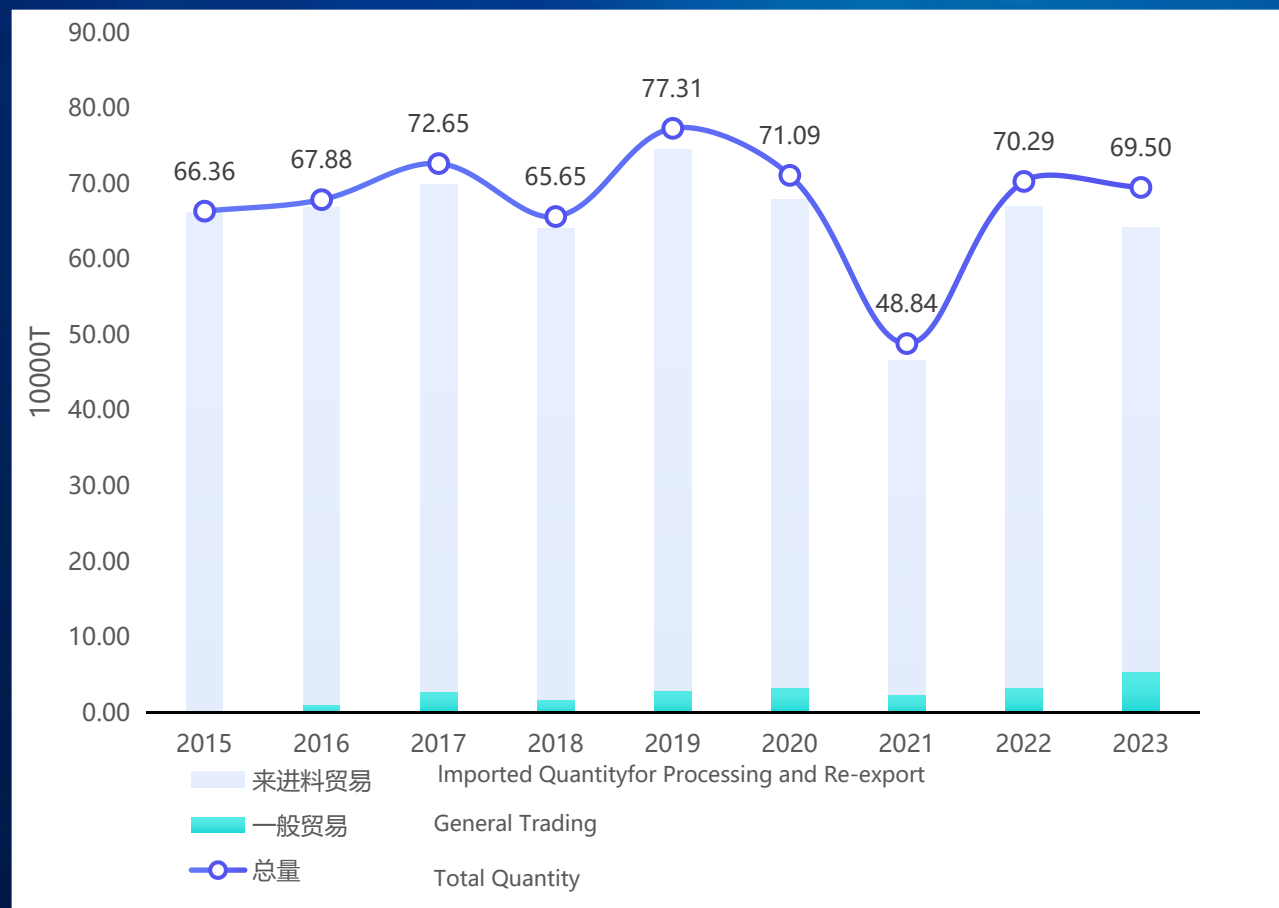
- 俄罗斯是中国白肉鱼(狭鳕、真鳕、黑线鳕、绿青鳕、无须鳕等)最主要供应国。
- 2023年中国进口白肉鱼85.4万吨、17.17亿美元，同比分别下降5.63%、17.44%，自俄进口白肉鱼产品（主要为狭鳕和真鳕）占中国进口白肉鱼总量的81.38%。
- 2024年1-6月，我国进口白肉鱼52.98万吨、9.23亿美元，同比分别增长5.27%和下降8.46%，进口均价1742美元/吨，同比下跌13.04%。
- Russia is the main supplier of white fish (Pollock, Cod, Haddock, Saithe, Hake, etc.) to China.
- In 2023, China imported 854000 tons and 1.717 billion US dollars of white fish, a year-on-year decrease of 5.63% and 17.44% respectively. White fish products imported from Russia (mainly narrow and true cod) accounted for 81.38% of China's total imported white fish.
- From January to June 2024, China imported 529800 tons and 923 million US dollars of white fish, an increase of 5.27% and a decrease of 8.46% year-on-year, respectively. The average import price was 1742 US dollars per ton, a decrease of 13.04% year-on-year.

自俄罗斯主要进口水产品种——白肉鱼



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The main imported aquatic species from Russia – White fish



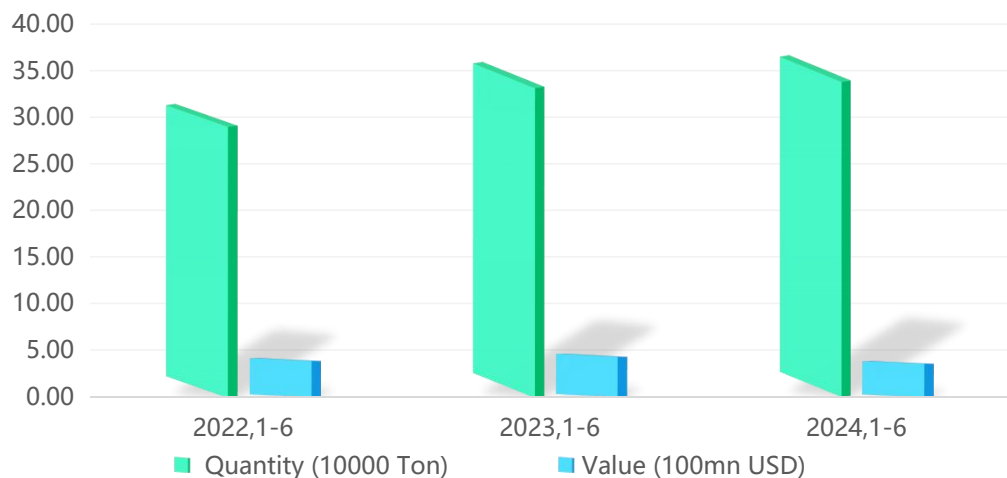
- 2023年中国自俄进口白肉鱼69.5万吨、11.22亿美元，同比分别下降1.12%和18.37%，占自俄进口水产品总量的49.10%。其中，来进料加工进口64.19万吨，10.45亿美元，同比分别下降4.21%和20.98%。
- 2024年1-6月自俄进口白肉鱼42.62万吨，同比增长0.47%，进口额5.72亿美元，同比下降18.62%。其中来进料加工进口37.77万吨，5.21亿美元，同比分别下降5.06%、21.90%。
- In 2023, China imported 695000 tons and 1.12 billion US dollars of white fish from Russia, a year-on-year decrease of 1.12% and 18.37% respectively, accounting for 49.10% of the total imported aquatic products from Russia. Among them, the import of raw materials for processing and re-export was 641900 tons, with a value of 1.045 billion US dollars, a year-on-year decrease of 4.21% and 20.98% respectively.
- From January to June 2024, about 426,200 tons of white fish were imported from Russia, a year-on-year increase of 0.47%, with an import value of 572 million US dollars, a year-on-year decrease of 18.62%. Among them, 377,700 tons of imported materials for processing and re-export amounted to 521 million US dollars, a year-on-year decrease of 5.06% and 21.90% respectively.

中国自俄罗斯进口狭鳕和真鳕情况

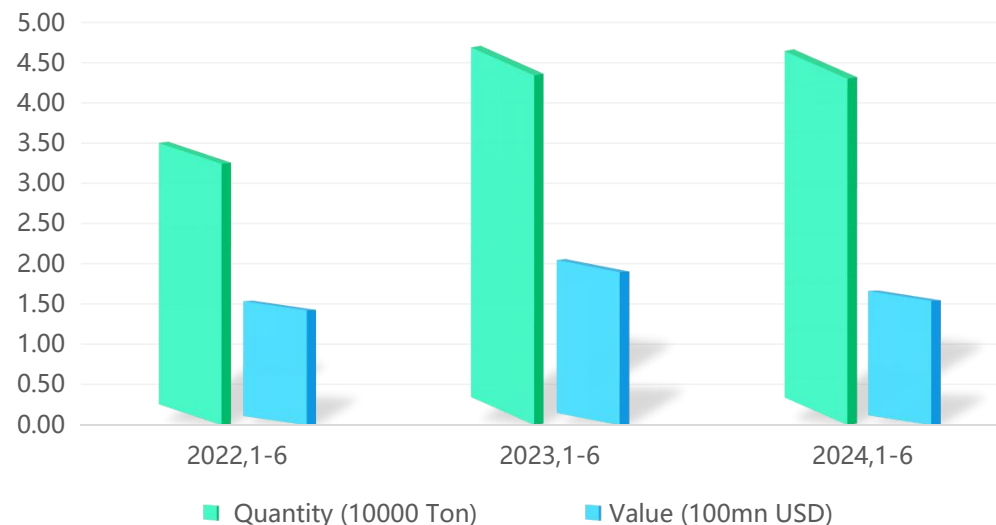


China's imports of pollock and cod from Russia

中国自俄进口狭鳕China imports pollock from Russia



中国自俄进口真鳕China imports cod from Russia



1-6月中国自俄罗斯进口狭鳕36.57万吨、3.76亿美元，同比分别增长1.78%和减少17.39%，进口均价1027美元/吨，同比下跌18.84%。

From January to June, China imported 365,700 tons and 376 million US dollars of **Pollock** from Russia, an increase of 1.78% and a decrease of 17.39% year-on-year, respectively. The average import price was 1027 US dollars per ton, a decrease of 18.84% year-on-year

1-6月自俄罗斯进口真鳕4.66万吨、1.66亿美元，同比分别减少1.27%、19.14%，进口均价3563美元/吨，同比下跌18.1%。

From January to June, 46,600 tons and 166 million US dollars of **cod** were imported from Russia, a year-on-year decrease of 1.27% and 19.14% respectively. The average import price was 3563 US dollars per ton, a year-on-year decrease of 18.1%.

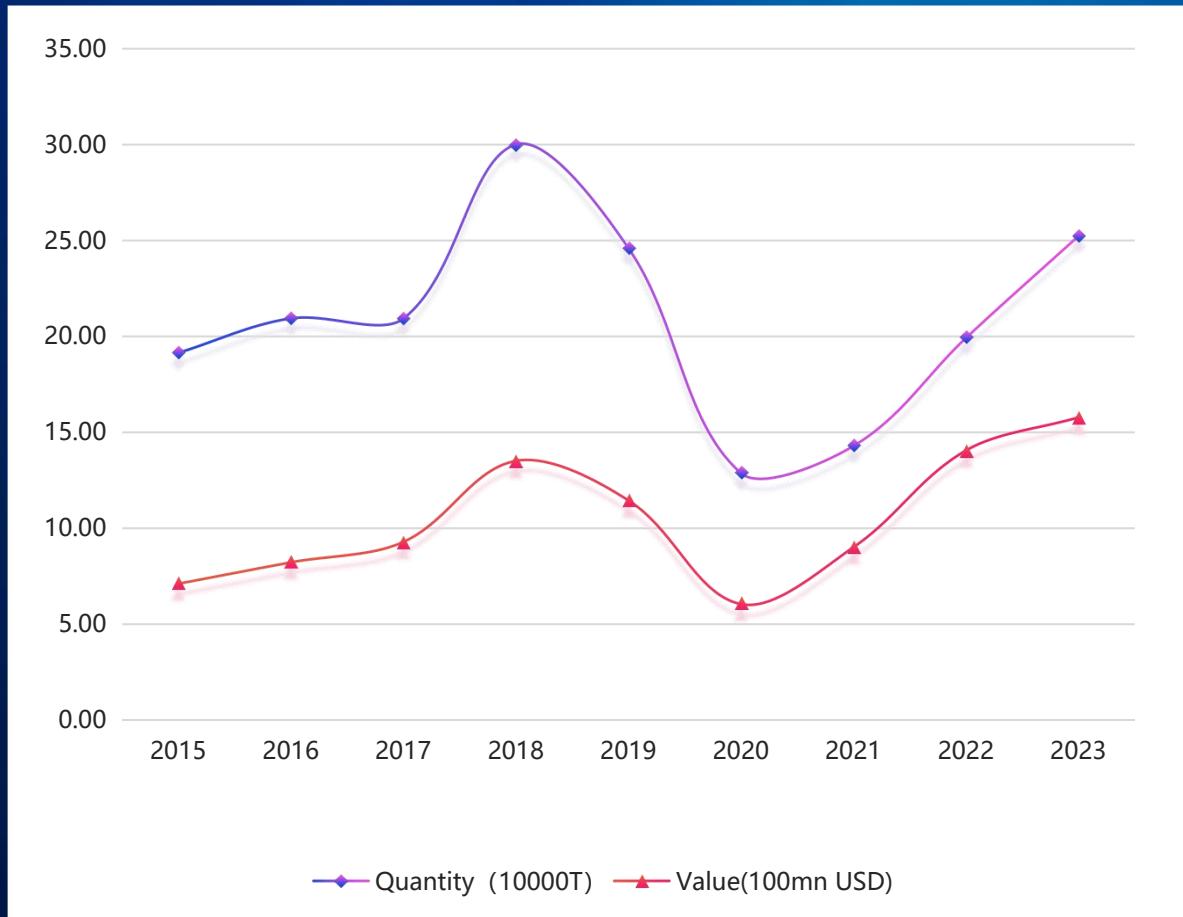
自俄罗斯主要进口水产品种——马哈鱼及鲑鱼



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Main imported aquatic species from Russia - Salmon

中国市场整体马哈鱼及鲑鱼供应情况 Overall supply of salmon in the Chinese market



- 俄罗斯是中国马哈鱼及鲑鱼最主要的供应国之一。
- 2023年中国进口马哈鱼及鲑鱼25.23万吨、15.74亿美元，同比分别增长26.51%、12.16%，自俄进口马哈鱼及鲑鱼占中国进口总量的35.62%。
- 2024年1-6月中国进口马哈鱼及鲑鱼7.80万吨、同比增加9.58%，6.83亿美元、同比下降12.02%。其中，来进料加工进口2.74万吨，同比增长18.06%，进口额0.67亿美元，同比下降31.86%。
- Russia is one of the main suppliers of salmon from China's market.
- In 2023, China imported 252,300 tons and 1.574 billion US dollars of salmon, an increase of 26.51% and 12.16% respectively year-on-year. Imports of salmon from Russia accounted for 35.62% of China's total imports.
- From January to June 2024, China imported 78000 tons of salmon, an increase of 9.58% year-on-year, and 683 million US dollars, a decrease of 12.02% year-on-year. Among them, the import of raw materials for processing and re-export was 27400 tons, a year-on-year increase of 18.06%, and the import value was 67 million US dollars, a year-on-year decrease of 31.86%

自俄罗斯主要进口水产品种——马哈鱼及鲑鱼



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Main imported aquatic species from Russia - Salmon



- 2023年中国自俄进口马哈鱼及鲑鱼8.99万吨，同比增长21.75%，进口额1.6亿美元，同比下降35.8%。其中，来进料加工进口8.93万吨，同比增长21.35%，进口额1.59亿美元，同比下降36.08%。
- 主要进口产品为粉鲑、狗鲑，占自俄总进口马哈鱼及鲑鱼比例为99.64%。
- 2024年1-6月，中国自俄进口马哈鱼及鲑鱼1.55万吨，同比增长2.35%，进口额0.33亿美元，同比下降39.83%。其中，来进料加工进口1.53万吨，同比增长2.10%，进口额0.32亿美元，同比下降40.15%。
- In 2023, China imported 89900 tons of salmon from Russia, a year-on-year increase of 21.75%, with an import value of 160 million US dollars, a year-on-year decrease of 35.8%. Among them, the import of raw materials for processing was 89300 tons, a year-on-year increase of 21.35%, with an import value of 159 million US dollars, a year-on-year decrease of 36.08%.
- The main imported products are pink salmon and dog salmon, accounting for 99.64% of the total imports of salmon from Russia.
- From January to June 2024, China imported 15500 tons of and salmon from Russia, a year-on-year increase of 2.35%, with an import value of 33 million US dollars, a year-on-year decrease of 39.83%. Among them, 15300 tons of raw materials were imported for processing, a year-on-year increase of 2.10%, and the import value was 32 million US dollars, a year-on-year decrease of 40.15%.

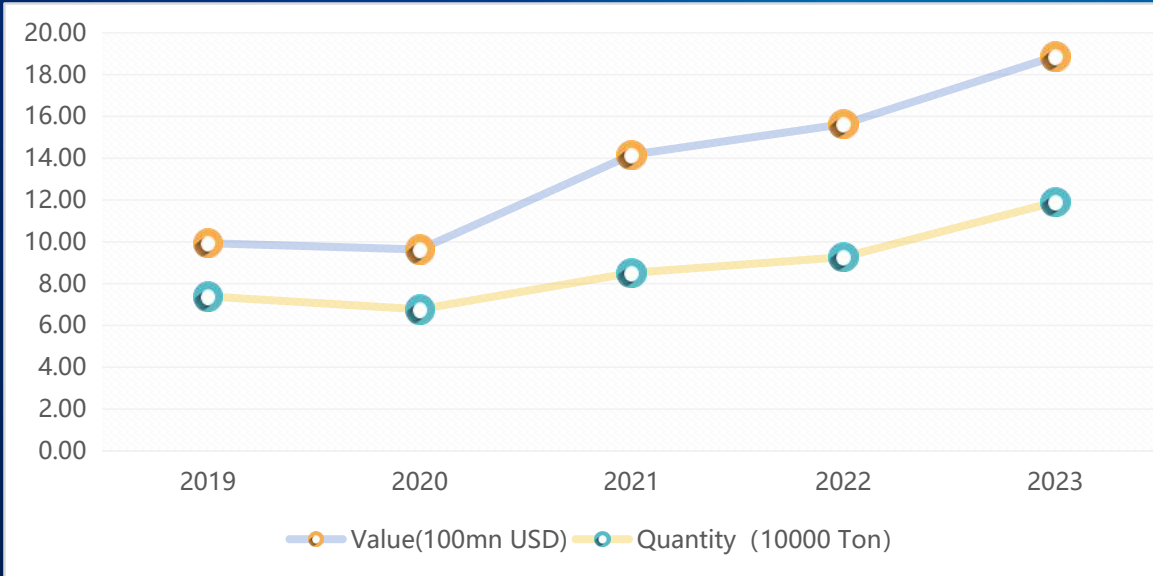
自俄罗斯主要进口水产品种——帝王蟹



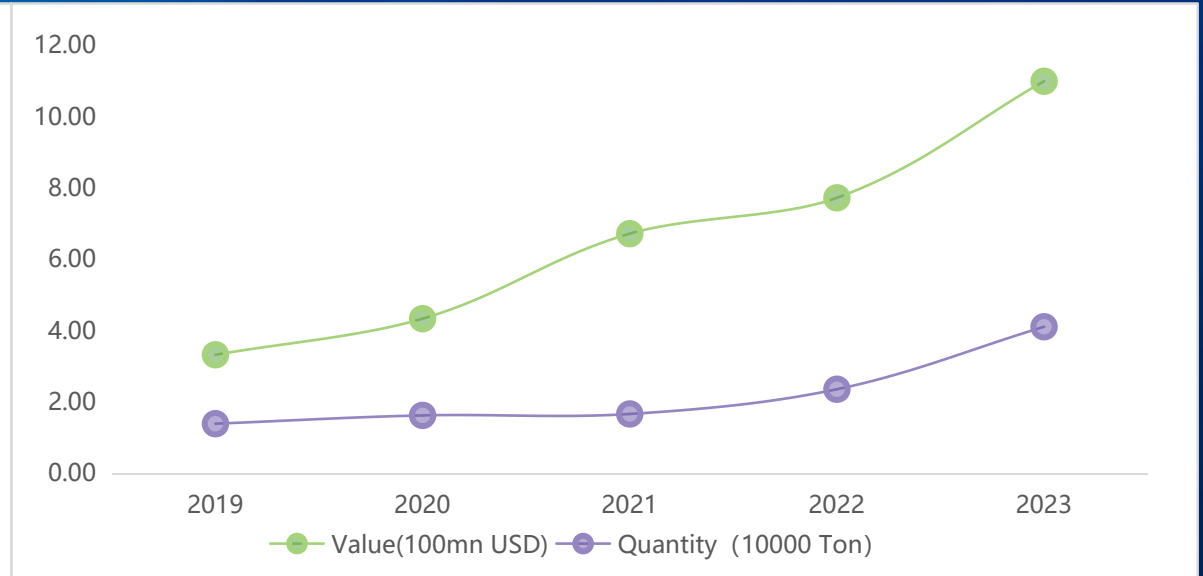
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The main imported aquatic species from Russia - King Crab

中国整体进口蟹类 China's overall imports of crabs



中国自俄罗斯进口蟹类 China's crab imports from Russia



- 2023年中国进口蟹类11.91万吨、18.88亿美元，同比分别增长28.43%、20.76%，自俄进口蟹类占中国进口总量的34.53%。
- 2023年中国自俄进口蟹类4.11万吨、10.99亿美元，同比分别增长74.16%、42.29%。
- In 2023, China imported 119100 tons and 1.888 billion US dollars of crabs, an increase of 28.43% and 20.76% respectively year-on-year. Crab imports from Russia accounted for 34.53% of China's total imports.
- In 2023, China imported 41100 tons and 1.099 billion US dollars of crabs from Russia, an increase of 74.16% and 42.29% respectively year-on-year.

- 俄罗斯是中国蟹类最主要的供应国之一。
- 在中国的水产品消费市场，以帝王蟹为代表的俄罗斯的水产品，知名度越来越高，帝王蟹已经成为中国商业宴请，大型聚餐餐桌上常见的高档水产品。
- Russia is one of the main suppliers of crabs for China's market
- In the Chinese aquatic product consumption market, Russian aquatic products represented by the king crab are becoming increasingly well-known. The king crab has become a common high-end aquatic product on Chinese commercial banquets and large scale gathering.



03

中俄水产品贸易展望

Outlook for Sino Russian aquatic products trade



(一) 中国市场潜力 Potential of the Chinese market

1. 需求潜力 demand potential

- 城镇人均可支配收入由1980年的**343元**增长至2020年的**4.93万元**;
- 人口城镇化率上升至2020年的**65.22%**;
- 每10万人中具有大学文化程度的由2010年的8930人上升为1.6万人;
- 达到推荐摄入量, 中国需增加600万吨水产品;
- 2022年低经济价值鱼类有1,699万吨, 占鱼类总产量47%, 这部分产能逐步减少, 甚至退出。
- The per capita disposable income in urban areas increased from 343 yuan in the year of 1980 to 49300 yuan in 2020;
- The urbanization rate of the population has risen to 65.22% in 2020;
- The number of people have a university education per 100000 people has increased from 8930 in 2010 to 16000;
- To achieve the recommended intake of seafood, China needs to increase its seafood production by 6 million tons;
- In 2022, there were 16.99 million tons of low value fish, accounting for 47% of the total fish production. This part of the production capacity is gradually decreasing or even withdrawing from the market.

2. 供应能力 Supply capacity

- 深远海养殖: 布局设施养殖, 增强海水鱼类供应能力;
- 海洋牧场、大水面渔业: 优质生态产品供应;
- 池塘标准化改造: 水产品综合生产能力进一步提高;
- 稻渔综合种养: 优质水产品供应
- 工厂化养殖: 环境友好型, 生产可控
- 水产品加工: 世界一流加工厂、9500座冷库
- Deep sea aquaculture: Layout facility aquaculture to enhance the supply capacity of marine fish;
- Marine ranching and large-scale fisheries: supply of high-quality ecological products;
- Standardized transformation of ponds: further improvement of comprehensive production capacity of aquatic products;
- Integrated farming and aquaculture of rice and fish: supply of high-quality aquatic products
- Factory farming: environmentally friendly and Eco-friendly
- Aquatic product processing: world-class processing plants, 9500 cold storages and facilities with function of warehouse.



(二) 不确定因素 Uncertain factors

- 全球经济仍处于低迷状态，通胀及原料价格上涨推高产品生产成本，限制了消费量的扩大。
- 世界政治局势动荡，区域性冲突不断，水产品贸易发展面临的国际环境仍然复杂多变。
- 中国加工业鳕鱼原料需求下降：2024年6月1日起，美国全面禁止俄罗斯海产品（包括在第三国加工的俄罗斯原料）进口贸易，今年欧盟不再对俄罗斯产品开通自主关税配额，目前俄罗斯原料制成的鱼片适用13.7%的关税。
- 中国国内鳕鱼消费市场培育需要一个过程。
- 中俄须加强合作交流，发挥各自的资源、市场优势，推动全球水产品贸易健康可持续发展。
- The global economy is slowing down, with inflation and rising raw material prices pushing up production costs and limiting the expansion of consumption.
- The global political situation is turbulent, regional conflicts continue, and the international environment for the development of aquatic product trade remains complex and ever-changing.
- The demand for cod raw materials in China's processing industry has declined: Starting from June 1, 2024, the United States will completely ban the import trade of Russian seafood (including Russian raw materials processed in third countries). This year, the European Union will no longer open independent tariff quotas for Russian products. Currently, fish fillets made from Russian raw materials are subject to a tariff of 13.7%.
- The market cultivation of cod consumption in China requires more time.
- China and Russia need to strengthen cooperation, leverage their respective resources and market advantages, and promote the healthy and sustainable development of global aquatic product trade.



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中国水产流通与加工协会（CAPPMA）联系方式：

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