

# АКТУАЛЬНІ ПРОБЛЕМИ ТА ПЕРСПЕКТИВИ

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UDC: 639.2/.3:338.124.4(477)

## CURRENT STATE AND DEVELOPMENT OF THE FISHERIES SECTOR OF UKRAINE IN THE CRISIS

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**Purpose.** Fisheries has a strategic importance for supplying the population with food, while the sectors of the national economy with raw materials, for strengthening the country's position in the international arena, for preserving spatial and national integrity of Ukraine, plays an important role in the restoration of natural resources and in the increase in employment. In recent years, fisheries sector of Ukraine is in a severe, protracted economic crisis. Considering its socio-economic and strategic importance for the state, there is a task for developing an effective policy for fisheries development in Ukraine that defines the relevance of the research and practical importance of its results. Thus, a compilation and analysis of the existing information on the current state and development of fisheries sector in the crisis period will allow a deeper understanding of problems in the fisheries sector in Ukraine and finding quick solutions. The main goal of the state policy in the field of fisheries in Ukraine has to be meeting the needs of the population in fish and fish products by creating conditions for effective operations and development of aquaculture and fishing enterprises.

**Findings.** The article reviews the current state of the development of fisheries sector in Ukraine, consumption, catch, processing of fish and seafood, dynamics of fish product exports and imports, legislative and regulatory framework of fisheries sector, state of the implementation of WTO and EU requirements, as well as finding ways for the fisheries sector out from the crisis.

**Originality.** This work is a compilation of the information on the current state of fisheries sector development in Ukraine. The information is provided in the form of a coherent presentation of information on the current state of fisheries sector in Ukraine, both in the domestic and foreign markets.

**Practical Value.** The fact that the fisheries sector of Ukraine is still in a depressive state calls for further search of effective ways for creating and implementing the public policies for its development. This review of data and statistical information can be used in the planning and implementation of reforms to address such complex issues as finding ways for the fisheries sector of Ukraine out from the crisis and ensuring its further development in the coming years.

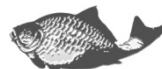
**Keywords:** fisheries sector of Ukraine, import, export, crisis, WTO, EU.

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## PROBLEM STATEMENT AND ANALYSIS OF LAST ACHIEVEMENTS AND PUBLICATIONS

At the present stage of human development, one of the major global problems is food deficiency. Countries all over the world, including Ukraine, focus their efforts to address this issue. Malnutrition is typical for the majority of the world's population, which in turn affects the demography and health of the nation. The development of the fisheries sector is one of the solutions for increasing food availability [1].

Ukraine's fishery was a part of the integrated fishery complex in the Union of Soviet Socialist Republics, which played an important role in the soviet economy. Ukraine had all the elements of this complex, activities of which included: fishing and

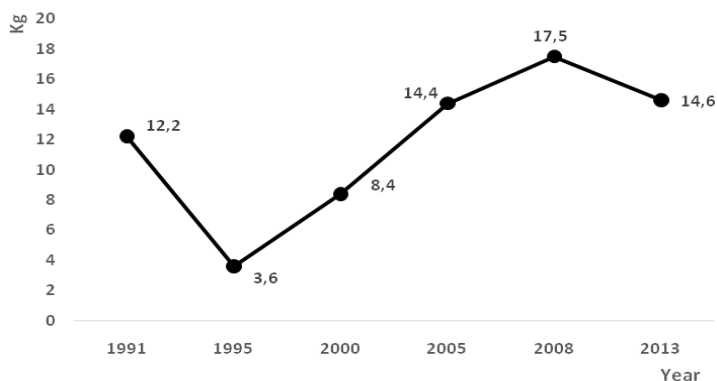


fish processing; reproduction and protection of fish stocks; pond and basin aquaculture and commercial fish farming; fish selective breeding and other elements. Since then, a significant transformation of the soviet system complex into a separate complex of Ukraine has occurred. This transformation was quite painful and done in more severe conditions than in other post-Soviet states. During this process of changes, the state support was minimal, and even completely absent in some areas. The main difference from the former soviet system is the fact that almost all subjects of economic activities in the field of fisheries are private. The state has institutions of higher education, research institutions, marine fishing ports, etc. There is also a small number of state enterprises in the area of the restoration of fish resources.

Currently, the central body of executive power in the fisheries sector of Ukraine is the State Agency of Fisheries of Ukraine. The main task of the State Agency of Fisheries of Ukraine is the implementation of state policy in the field of fish industry and fisheries, protection, exploitation and restoration of aquatic biological resources. We can assume that for today, the place and role of the fisheries sector in Ukraine as an integral fishery complex were restored. It now plays an important role in the economy of Ukraine and contributes to solving the problems of supplying the Ukrainian population with fish and other aquatic biological resources as necessary components of nutrition of modern people. Now, the priorities of the fisheries sector of Ukraine are an improvement of fish production technologies, resource conservation, improvement of fish quality, and securing the competitiveness of products in the domestic and global markets while increasing fish productivity in the conditions of environmentally friendly farming.

### Consumption of fish and seafood products

It is well known that aquatic living resources are the source of the proteins of animal origin, vitamins, minerals, trace elements and biologically active substances, so their consumption by humans is an important indicator of the quality of life [1]. Consumption of fish and seafood products per capita in Ukraine is below the international physiological norm of 20 kg per year [2] and does not reach the average world level of fish consumption that according to FAO is 19.6 kg [3]. In 2013, this value amounted to 14.6 kg. However, the highest fish consumption was observed in 2008. This increase was achieved through an increase in fishing in inland waters, especially in fish farms, and an increase in imports. Figure 1 shows the dynamics of fish and fishery product consumption by the population of Ukraine for the period of 1991–2013 (per capita) (Fig. 1).



*Fig. 1. The dynamics of fish and fishery product consumption by the population of Ukraine for the period of 1991–2013 (per capita)*



## Fish catches

In 2013, the catch of fish and other aquatic bioresources by fishing enterprises of Ukraine amounted to 225.8 thousand tons that was 10.7% more than the total catch in 2012.

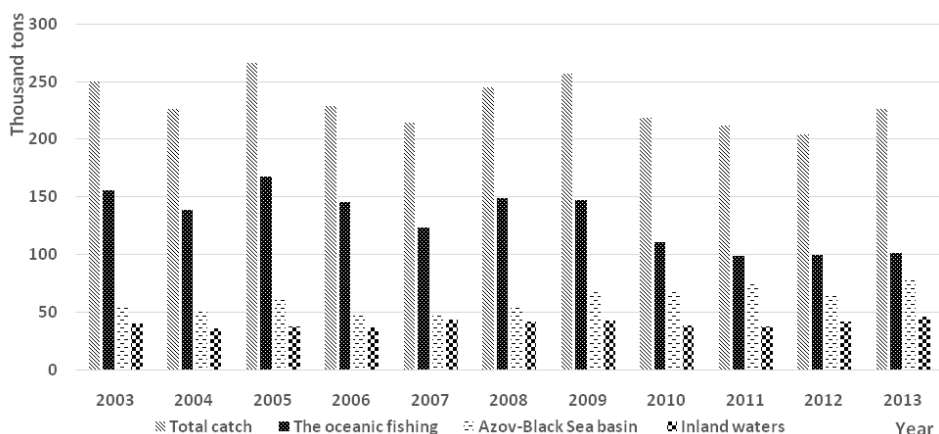
In 2013, the catch of fish and seafood by Ukrainian vessels in the economic zones of other countries and the World Ocean amounted to 101.3 thousand tons that was 2.4% more than in 2012 (98.9 thousand tons).

In 2013, fish catches in the Azov and Black Seas were 78.8 thousand tons, 24% more than the previous year. In recent years, there is a tendency of an increase in fish catches in the Azov and Black Seas.

The problem of temporary occupation of the Crimean peninsula remains unsolved as well as the uncertainty with the feasibility of full-scale fishing in the Azov-Black Sea basin. Ukraine has a significant potential of inland water bodies suitable for fishing activities. Fish catches in inland waters in 2013 amounted to 45.7 thousand tons that was 9.9% more than the catches in 2012, 25.4 thousand tons were pond fish that was 12.8% more than the catches in the previous year.

Currently, the industry has a task to develop domestic production in order to increase the market of high quality fresh fish and increase the share of the national product, first of all through aquaculture products.

Figure 2 shows the catches of fish and other biological resources of Ukraine for the period of 2003–2013 (Fig. 2). The figure shows that despite some fluctuations in the total fish catch, it started growing.



**Fig. 2. Catch of fish and other biological resources of Ukraine for the period of 2003–2013**

## Enterprises of the fisheries sector

There are 136 enterprises of different ownerships, which produce canned and preserved products of fish and seafood. The total assortment of the products produced of fish and other aquatic resources reaches three thousand item names [4].

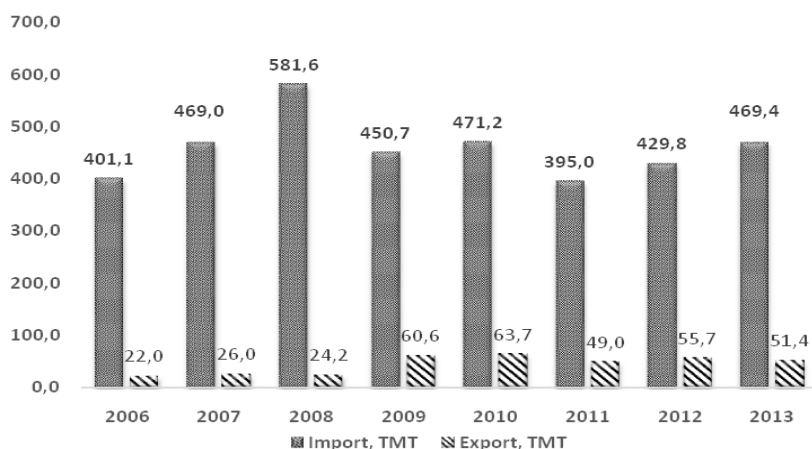
Only 14 enterprises have the right to export their products to the EU [5]. The reason for this is the implementation of EU regulations in the field of standardization and certification, which require essential expenses for the development and implementation of new institutions and mechanisms for adopting these procedures.



Much of the costs that are associated with the transition to these new standards fall on domestic producers.

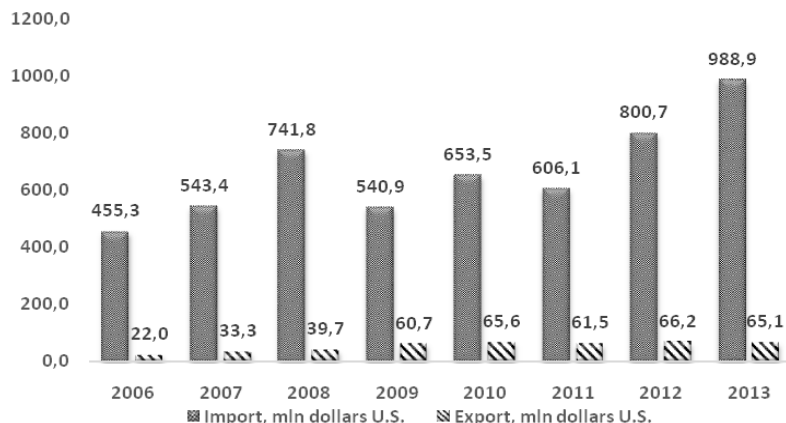
### Export-import dynamics

The dynamics of the export-import of fish and fish products in Ukraine during 2006–2013 (thousand tons) shows that the largest amount of fish was imported in 2008, but with the onset of the crisis and a decline in the ability to pay, the amounts of the imported products dropped. The exports of fish products increased drastically after Ukraine joined the WTO in 2008 and since then we have a positive dynamics (Fig. 3).



*Fig. 3. Dynamics of the exports and imports of fish and fish products in Ukraine for 2006–2013 (thousand tons)*

The value of the imported fish products in 2013 increased almost two times in comparison with 2006 due to an increasing demand (Fig. 4).



*Fig. 4. Dynamics of the exports and imports of fish and fish products in Ukraine for 2006–2013 (million dollars U.S.)*

### Exports

In 2013, exports of fish and seafood from Ukraine decreased by 7.7% compared to 2012 and amounted to 51.4 thousand tons for a total of 65.1 million US dollars, while in 2012 it amounted to 55.7 thousand tons worth of 66.2 million US dollars.

The main reason for the drop in Ukrainian exports according to the experts of SC



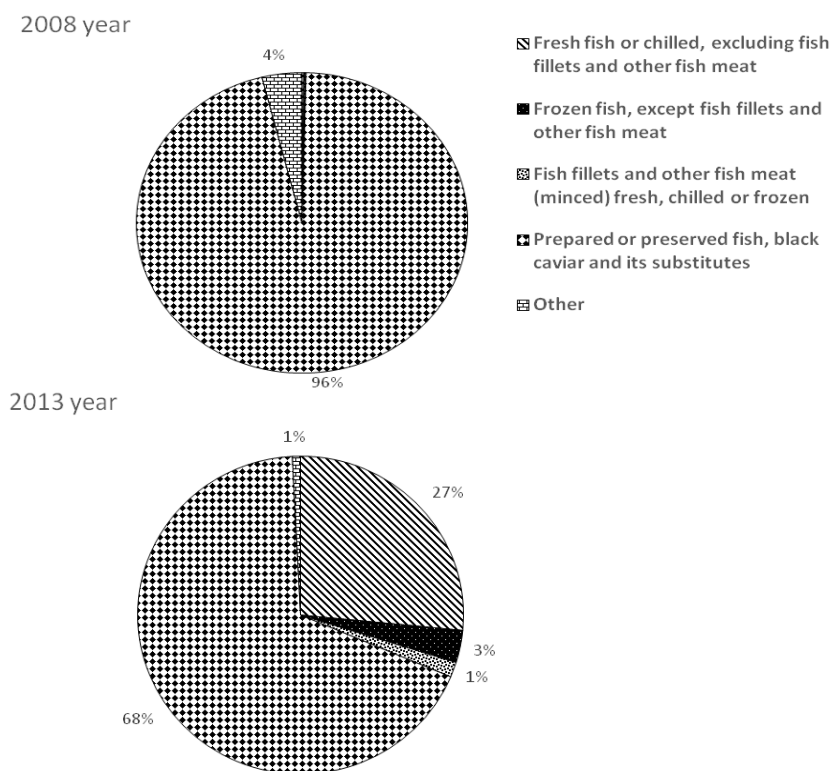
«DERZHZOVNISHINFORM» was an unfavorable price situation on the world markets and problems in trade relations with Russia [6].

The Ukrainian export to the CIS countries (Russia, Belarus, Kazakhstan, Moldova and Uzbekistan) accounted for almost 95.5% of the total exports of fish and fish products (Table 1).

*Table 1. Exports of fish and fish products in 2013*

No	Country	Thousand tons	Million US dollars	%
1	Russia	42.0	46.0	81.7
2	Belarus	1.6	1.3	3.2
3	Kazakhstan	1.6	1.6	3.1
4	Moldova	1.2	2.3	2.3
5	Uzbekistan	0.7	0.8	1.5

Comparing the exports of fishery products in 2008–2013, we can see some changes (Fig. 5).



*Fig. 5. Exports of fish and fish products in 2008–2013 (by types of products)*

At the time of joining the WTO, the dominating product group were «Prepared or preserved fish», but in 5 years the exported products were composed mainly of two groups: «Prepared or preserved fish», «Fresh fish or chilled, excluding fish fillets and other fish meat».

The problem of the competitiveness of Ukrainian fish production is explained by the fact that the fish, which comes from the EU, China and other countries, were caught and grown with the government subventions, which greatly affect the final price of fish. Over the past 20 years, Ukrainian fisheries sector did not have such a support, and it is very difficult to increase its competitiveness without it. Also, European entrepreneurs



have an opportunity to receive subsidies from the European Maritime and Fisheries Fund, including redevelopment and modernization of products in accordance with the requirements of the quality management and food safety (HACCP) [4].

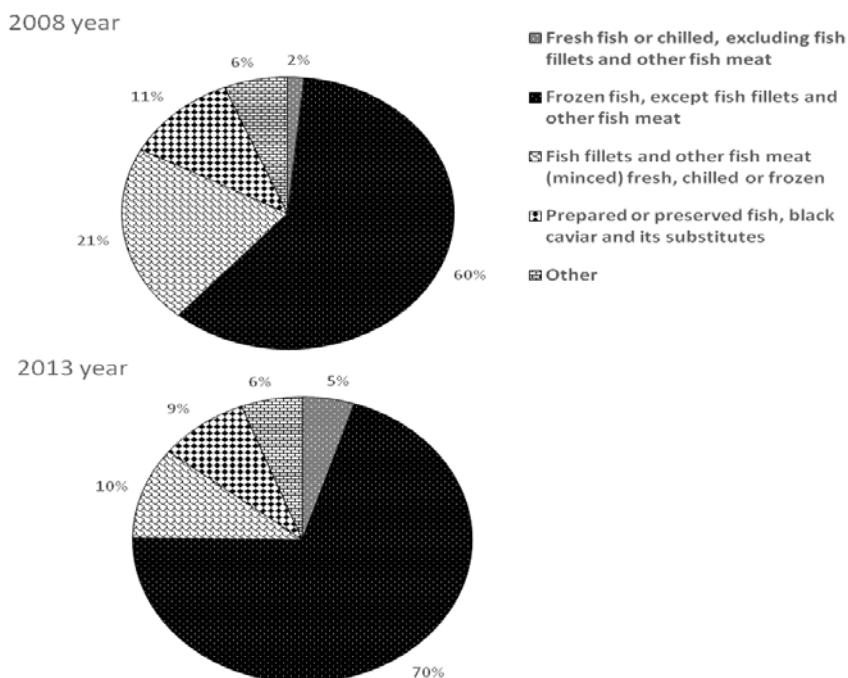
**Imports**

In 2013, imports of fish, fish products and other aquatic bioresources to Ukraine increased by 9.2% compared to 2012 and was 469.4 thousand tons valued at 988.9 million dollars. The greatest quantity of fish and fish products originate from Norway, Iceland, United States, Estonia, Vietnam and other countries (Table 2).

*Table 2. Import of fish and fish products for 2013 year*

No	Country	Thousand tons	Million US dollars	%
1	Norway	104,1	273,5	22,2
2	Iceland	79,7	112,7	17,0
3	USA	44,6	105,6	9,5
4	Estonia	25,6	21,1	5,5
5	Vietnam	23,2	40,4	4,9

A comparison of the dynamics of the amounts of imported fish products in 2008–2013 by different product groups demonstrate that no significant changes occurred (Fig. 6).



**Fig. 6. Import of fish and fish products in 2008–2013 (by the groups of products)**

Mostly «Frozen fish or fillets» are imported, which compose more than 80.6% of all imports of fish, fish products and other aquatic bioresources, and they are mainly used for further processing. The majority of frozen fish is composed of traditional products for Ukrainian population: herring, mackerel, sardine, sprat, etc. Import of the prepared or preserved fish in Ukraine composed 9% of the total imports of fish products.

It should be noted that the tastes of Ukrainians are changing and each year the



share of the group «Fish, fresh or chilled» increases despite some fluctuations (Fig. 7). Ukraine is now import-dependent, like the majority of the developed countries, including the EU. Nearly 70 percent of the consumption is imported, which includes such fish species that are caught offshore in the economic zones of other countries that is related to the characteristics of the biological cycle of these species [7].

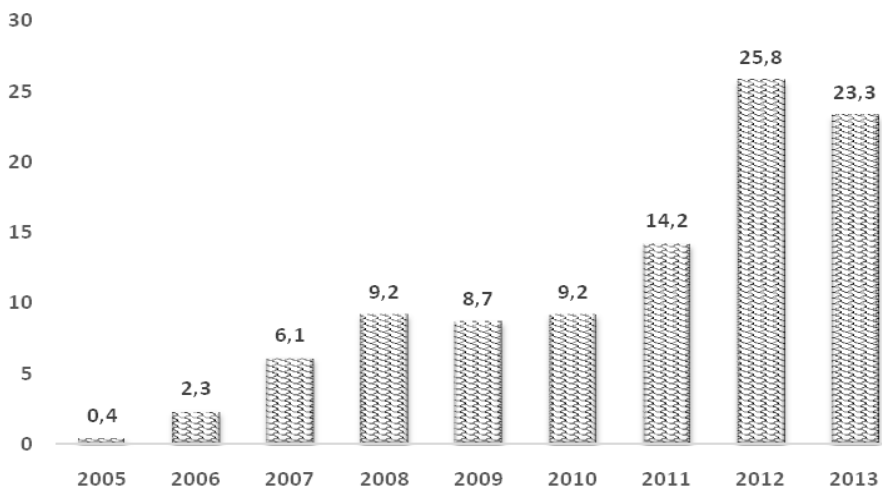


Fig. 7. Imports of fresh or chilled fish in 2005-2013

#### Improvement of fisheries legislation

In order to create favorable conditions for the development of the fisheries sector, the Law of Ukraine «On the fisheries, industrial fisheries and protection of aquatic bioresources» was adopted in 2011. This law will provide a holistic economic and legal mechanism for managing the fishery complex of Ukraine in the interests of the state and population in order to increase the production and consumption of fish and a sound basis for the adoption of appropriate by-laws.

Another Law «On the Aquaculture» was adopted in 2012 and it is aimed at improving the efficiency of aquaculture related activities, it establishes clear rules of relationships, is a common approach and procedure for the regulation of the use of the whole process of aquaculture, including mariculture perspective, and establishes the procedures for leasing inland marine waters [8, 9].

Moreover, to support the development of fisheries at the state level, the State Target Economic Programme of Fishery Development for 2012–2016 was adopted in 2011 [10]. The program aims at creating favorable conditions for the development of fisheries and its competitiveness in local and foreign markets.

One of the priorities for the state in the field of the exploitation of natural resources is restoration of aquatic biological resources. One of important problems is to restore the natural populations of sturgeon species listed in the Red Book of Ukraine and the stocks of valuable commercial fish species. Every year, the State Agency of Fisheries of Ukraine carries out the organization and monitoring of activities related to the restoration of aquatic bioresources in inland waters and the Azov-Black Sea basin.

Under the state program of the restoration of aquatic bioresources in inland waters and the Azov-Black Sea basin, private enterprises stocked 6.2 million fish in 2013, of which 3.8 million of fingerlings of such species as haarder, pikeperch and golden mullet were released into the Azov Sea basin, 1.6 thousand juveniles of Black Sea



turbot were released into the Black Sea; 2.4 million fingerlings of Chinese and common carps were released into the Dneprodzerzhinsk, Kahovka, Kremenchuk, Kyiv and Kaniv reservoirs.

Besides this, the state complexes released 8.5 million juveniles of some native species, Chinese carps, sturgeons and trout into the lower reaches of the Dnieper River and other rivers, which is 35% more than the previous year. In general, 55.5 million fish juveniles were stocked in 2013 due to all sources of funding, including special commodity fisheries, that is 2.3% more than the previous year [4].

The current choice of Ukraine based on the recognition of integration as a factor promoting state independence, national security, political stability, economic development and intellectual progress, provides opportunities to learn the experience of different countries for effective implementation of EU requirements on the total liberalization of trade relations.

An important positive aspect for the development of Ukrainian business was the simplification of customs procedures. Reduction of the level of import duties resulted in an increase in the competitiveness of enterprises, which use imported components.

A significant progress was achieved in the field of the harmonization of the rules and principles of standardization and certification, the system of state orders and sanitary regime with WTO requirements. Ukraine also works in this field after signing the Association Agreement between Ukraine and the European Union.

At the same time, it is necessary to take into account that the majority of trading partners of Ukraine receive substantial support (subsidies) for fisheries and apply nonmarket-based control methods [4]. In particular, this applies to the European Union and the Customs Union. Appropriate subsidies should be introduced in Ukraine. In particular, Ukraine should get assistance in the adaptation of processing enterprises to HACCP requirements, in the modernization the fishing fleet, in the development of the aquaculture industry, receiving loans, etc., i.e. the main areas of the assistance as defined in the principle of European Maritime and Fisheries Fund.

## CONCLUSION AND PERSPECTIVES OF FURTHER DEVELOPMENT

In view of the potential of the Ukrainian fisheries sector, its strategic importance for food security and the necessity to restore the image of Ukraine as a great maritime and fisheries state, the industry should be raised to a new level [11].

For further stabilization and production expanding, promotion of competitiveness of domestic fish production, the government policy regarding the reforms in the fish industry in the coming years should focus primarily on:

- ✓ continued work on the regulation on the legislative level for supporting and developing fish industry;
- ✓ increase of own manufacture of fish products by significantly increasing their amounts based on the intensification of aquaculture development;
- ✓ creating an attractive investment environment, the use of new technologies and investment promotion to the enterprises of fish industry;
- ✓ greater control over the quality of fish and fish products.

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## СУЧАСНИЙ СТАН ТА РОЗВИТОК РИБНОЇ ГАЛУЗІ УКРАЇНИ В КРИЗОВИЙ ЧАС

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**Мета.** Рибне господарство має стратегічне значення для забезпечення населення продовольством, а галузей національної економіки – сировиною, зміцнення позицій країни на міжнародній арені, збереження просторової і національної цілісності України, відіграє значну роль у відтворенні природних ресурсів та підвищенні зайнятості населення. В останні роки рибне господарство України перебуває в глибокій, затяжній економічній кризі. Враховуючи його соціально-економічну і стратегічну значимість, перед державою стоїть завдання формування ефективної політики розвитку рибного господарства України, що зумовлює актуальність дослідження і практичну значущість його результатів. Таким чином, узагальнення і аналіз існуючої інформації про сучасний стан та розвиток рибної галузі в кризовий час дозволить більш глибоко зрозуміти існуючі проблеми та знайти швидкі шляхи їх вирішення, для того, щоб основною метою державної політики розвитку рибного господарства України стало максимальне задоволення потреб населення країни в рибі і рибопродукції, необхідно створити умови для ефективної роботи та розвитку підприємств аквакультури та рибальства.

**Результати.** У роботі розглянуто сучасний стан розвитку рибної галузі України, споживання, вилову, переробки риби та морепродуктів, динаміку експорту-імпорту рибопродукції, законодавчу та нормативно-правову базу рибної галузі, стан впровадження вимог СОТ та ЄС, а також шляхи виведення рибогосподарської галузі з кризового стану.

**Наукова новизна.** Дана робота є узагальненням інформації про сучасний стан розвитку рибної галузі України. Інформація представлена у формі послідовного викладення відомостей про сучасний стан рибогосподарського комплексу України, як на внутрішньому, так і на зовнішньому ринках.

**Практична значимість.** Той факт, що рибне господарство України все ще знаходиться в депресивному стані, зумовлює необхідність подальшого пошуку ефективних напрямів формування та реалізації державної політики його розвитку. Представлений огляд даних та статистичної інформації може бути використаним при плануванні та впровадженні в життя реформ щодо розв'язання такої комплексної проблеми, як виведення рибного господарства України з кризового стану та забезпечення його подальшого розвитку у найближчі роки.

**Ключові слова:** рибна галузь України, імпорт, експорт, криза, СОТ, ЄС.

СОВРЕМЕННОЕ СОСТОЯНИЕ И РАЗВИТИЕ РЫБНОЙ ОТРАСЛИ УКРАИНЫ  
В КРИЗИСНОЕ ВРЕМЯ

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**Цель.** Рыбное хозяйство имеет стратегическое значение для обеспечения населения продовольствием, а отраслей национальной экономики – сырьем, укрепления позиций страны на международной арене, сохранения пространственной и национальной



целостности Украины, играет значительную роль в воспроизводстве природных ресурсов и повышении занятости населения. В последние годы рыбное хозяйство Украины находится в глубоком, затяжном экономическом кризисе. Учитывая его социально-экономическую и стратегическую значимость, перед государством стоит задача формирования эффективной политики развития рыбного хозяйства Украины, что предопределяет актуальность исследования и практическую значимость его результатов. Таким образом, обобщение и анализ существующей информации о современном состоянии и развитии рыбной отрасли в кризисное время позволит более глубоко понять существующие проблемы и найти быстрые пути их решения, для того, чтобы основной целью государственной политики развития рыбного хозяйства Украины стало максимальное удовлетворение потребностей населения страны в рыбе и рыбопродукции, не обходимо создание условий для эффективной работы и развития предприятий аквакультуры и рыболовства.

**Результаты.** В работе рассмотрено современное состояние развития рыбной отрасли Украины, потребления, вылова, переработки рыбы и морепродуктов, динамику экспорта-импорта рыбопродукции, законодательную и нормативно-правовую базу рыбной отрасли, состояние внедрения требований ВТО и ЕС, а также пути вывода рыбохозяйственной отрасли из кризисного состояния.

**Научная новизна.** Данная работа является обобщением информации о современном состоянии развития рыбной отрасли Украины. Информация представлена в виде последовательного изложения данных о современном состоянии рыбохозяйственного комплекса Украины как на внутреннем, так и на внешних рынках.

**Практическая значимость.** Тот факт, что рыбное хозяйство Украины все еще находится в депрессивном состоянии, вызывает необходимость дальнейшего поиска эффективных направлений формирования и реализации государственной политики его развития.

Представленный обзор данных и статистической информации может быть использован при планировании и внедрении в жизнь реформ по решению такой комплексной проблемы, как вывод рыбного хозяйства Украины из кризисного состояния и обеспечение его дальнейшего развития в ближайшие годы.

**Ключевые слова:** рыбная отрасль Украины, импорт, экспорт, кризис, ВТО, ЕС.

