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## Latvia

## Exporter Guide

## Annual

## 2001

Approved by:

**Lana Bennett**

**U.S. Embassy, Stockholm**

Prepared by:

Jolanta Andersone

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### **Report Highlights:**

**Successful economic development continued in 2001, as GDP surged 8.8 percent in the first half of the year. The inflow and fast development of large Nordic/European retail chains into Latvia along with other Baltic countries offer new opportunities for American exporters who can successfully connect with them. With consumer purchasing power on the rise and growing tourism, prospects for increased demand for high-value food imports are viewed as favorable. Major current constraints to exports of U.S. products include the unfamiliarity of consumers with U.S. products and tariff disadvantages vis-a-vis European suppliers and partners of Free Trade Agreements with Latvia.**

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## SECTION I. MARKET OVERVIEW

In 2000, Latvia's GDP grew by 6.6 percent, the greatest growth in the Baltic region. However, its per capita GDP of US\$ 3,013 was several times lower than the average among countries of the European Union. Successful economic development continued in 2001, as GDP surged 8.8 percent in the first half of the year. Stringent monetary policy fostered low inflation and provided for macroeconomic stability. The official unemployment rate dropped to 7.9 percent of the total labor force.

Stimulated in part by the expectation that Latvia will accede to the European Union within the next 2-4 years, foreign investments and restructuring, including the modernization of the retail sector, have given a boost to standards of living. With overall purchasing power of the population on the rise, there is an increased demand for processed food products. Annual investments into Latvia have risen considerably since the early 1990's. In 2000, foreign investments went up 22 percent, accounting for a 5.7 percent share of the country's GDP. Consumer prices rose 2.6 percent in 2000, and purchasing power increased by 4.2 percent over the previous year's level, allowing for further consumption growth. Income increases are skewed, however, with benefits going mainly to the urban/suburban populace.

The ongoing consolidation of the food retail sector and the inflow of Scandinavian/European retail chains increased competition and contributed to the fast growth of processed food product sales in an expanding number of supermarkets and hypermarkets. In 2000, supermarkets and hypermarkets accounted for 15 percent of retail food sales estimated at US\$ 155 million. Supermarket and hypermarket sales are expected to double within the next few years.

Challenges in this market for U.S. exporters include tariff disadvantages. Due to preferential tariff duties and increased TRQs for agricultural and food products provided by Latvia's July, 2000 agreement with the European Union, duties for EU imports are gradually declining vis-a-vis the MFN rates applied to imports from the U.S. Under free trade agreements (FTAs) signed with its Baltic neighbors, EFTA and CEFTA countries, products from these sources are also advantaged over imports from the United States. As much as 84 percent of Latvian agricultural export and 80 percent of Latvian import trade occurs with EU countries and countries with which Latvia has FTAs.

In addition, Latvia has been modifying sanitary and phytosanitary standards in conjunction with its preparations for EU accession. Some of these changes have blocked once-existing U.S. trade, especially of pork and beef. The new poultry import certificate requirements which were effected September 1, 2001, could hamper exports of US poultry. Moreover, Latvian consumers are generally unfamiliar with U.S. products since U.S. exporters of most product types have paid little attention to this region of the world.

Advantages and Challenges Facing U.S. Products

Advantages	Challenges
The general image of U.S. products is positive. They are considered to be safe and of good quality. Businesses are receptive to U.S. companies.	Low awareness of U.S. retail products, too few U.S. products on shelves of supermarkets
Inflow of Scandinavian/European retailers into the Latvian food retail sector and emergence of pan-Baltic food retailers. This offers the opportunity for chains to consolidate imports for the entire Baltic region.	Long-established consumer preference for domestic fresh products without additives and preservatives.
Latvia joined the WTO in 1999, improving market access.	U.S. products face MFN duty rates compared to preferential tariffs and zero rates for exports from the EU and FTA partners
Increased purchasing power is creating consumer demand for greater diversity and convenience of food products.	Consumer demand remains very price sensitive

## SECTION II. EXPORTER BUSINESS TIPS

**Local Business Customs**

Market entry strategies for U.S. food products should include:

- 1) Market research in order to assess product opportunities.
- 2) Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.
- 3) Locating an experienced distributor or independent reliable agent with strategic distribution channels, to advise on import duties, sanitary regulations, and labeling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also want to consider trade fair participation to raise awareness of the product.
- 4) Explore the purchasing arrangements of the larger retail chains.

Cash and carry operations are common, although distributors and processors provide direct deliveries with their own sales force and delivery trucks to service retail grocery stores and chains. This type of distributor provides credit terms of up to seven days. Small and medium-size companies mainly make their purchases through importers and wholesalers who have a direct relationship with foreign suppliers. Larger chains use their own distribution centers. Few wholesalers undertake nation-wide distribution, and almost none carries a complete range of products. Frequently, the choice of importer/supplier

depends on a trading company's ownership, as part of the company's stock may belong to foreign investors who base their decisions on financial ties rather than on quality or price.

U.S. products traditionally have lower customer awareness in Latvia. Several constraints have contributed to the small market presence of U.S. foods:

- Trade terms for U.S. companies tend to require advance payment of up to two months.
- An aversion to the assumption of exchange rate risks.
- Minimum quantities offered have often been too large for the small Latvian market.
- A perception that persists among Latvian importers that landed costs of U.S. products will be higher compared to European products due to higher transportation costs.
- A perception that U.S. exporters are simply too far away to service the Latvian market.
- Latvian importers and buyers have not been exposed to U.S. processed food products.

As a result of the fast-developing consolidation process, perhaps the most effective strategy for U.S. exporters would be to connect with parent companies of the European food retail chains (mainly in Finnish, Swedish and Norwegian) that are expanding their outlets in the Baltics. These companies already have a degree of familiarity with U.S. products.

### **General Consumer Tastes and Preferences**

Latvia has a population of approximately 2.5 million. The average gross monthly wage in the public sector totaled US\$ 282 in mid 2001. The average monthly income per household member was US\$ 110 (close to the minimum sustainable level), up by 7 percent from 2000. On average, Latvians spend approximately 37 percent of their income on food, and estimates show that eating out accounts for 13 percent of their total food expenditure. Women account for 49 percent of the nearly 1.0 million people employed, and contribute to the increased demand in meals consumed away from home and the interest in ready-made products.

Although the average consumer remains very price sensitive, there is a growing number of western-oriented consumers who prefer to shop at modern stores with a wide and attractive product assortment. Consumer preferences differ significantly among various income, age and ethnic groups. A preference for new products is strong among the younger population. An increased expatriate community and fast-growing tourism is adding to the demand for high-value processed products. The tourism business brought 1.9 million visitors to Latvia in 2000. The majority of Latvians, however, are still not major buyers of high-value products. Of about one million shoppers in Latvia, only the higher income segments (10-15 percent) are regular consumers of high-value processed food products. These customers buy food at supermarkets 2-4 times per week, and are more concerned with variety, quality and brand names than price. The average retail purchase is of considerably lower value than that of the average Western European consumer.

Another 10-15 percent of the population makes up the second income group, categorized as occasional buyers, or "tasting level" buyers. With increased purchasing power, this group provides the base for future demand for high-value products and should be targeted for promotional activities.

### **Food Standards and Regulations**

Compliance with EU veterinary and phytosanitary requirements are among the prerequisites for Latvia's accession to the EU. The Latvian Food law is based on EU directives and was introduced in August 1997. It regulates the flow of food products (production, trade and distribution), as well as health issues, consumer protection and food control. Special laws and ordinances regulate the flow of alcohol, grain, meat, dairy products, labeling, packaging, use of additives, level of residues, incl. veterinary and phytosanitary legislation.

Labeling in the Latvian language which includes product name, the name of the manufacturer, the origin, a listing of ingredients, additives, net quantity, name and contact information for the importer, instructions of use, storage directions and expiration dates is required.

With regard to bioengineered ingredients, Latvia will follow EU regulations and certification requirements. As of July, 2001, special labeling is required for food products and ingredients produced of or derived from genetically modified organisms (GMOs). A one percent threshold is permitted for accidental contamination. The importer should be consulted regarding packaging and labeling requirements.

Imported food products are tested and approved by the Conformity Assessment Centre. In Latvia, the following conformity assurances from the EU member states, Baltic FTA and EFTA countries are automatically recognized: testing and calibration reports, product certificates, and certificates of quality systems. Conformity of products from other countries is recognized by the Product Conformity Assessment Center (PCAC), through the following procedure:

- 1) The importer applies to the PCAC and presents product conformity documentation, certificates, producer's declaration, product samples, etc.;
- 2) PCAC evaluates the conformity of the product or processing technology, or process;
- 3) A certificate of conformity allowing for sales is issued by PCAC.

It is common that the importer or agent undertake product clearance and approval procedures. Those could be rather costly for US products - up to \$300 per product or group of products.

Some of the EU veterinary and phytosanitary requirements adopted by Latvia have blocked once-existent U.S. trade for pork and beef. Also, the newly enforced poultry import certificate requirements may complicate exports of US poultry, starting January 1, 2002.

A number of regulations were adopted to adjust to EU requirements with respect to control of pesticide residues (Regulation No 293 of August, 1999), radioactive pollution of animal feed (Regulations of March, 1999), pollution level of food products (Regulation No 292 of August, 1999), remains of harmful residues and medicines in food products (Regulation No 264 of August 2000), as well as the use of medicines for productive animals (Regulation No 327 of September 19, 2000). Regulations No 264 and No 327 are fully based on the respective EU directives and may prohibit imports of beef with growth promoting hormones into Latvia.

The general meat import procedures are set out in Regulation No 174 of June, 1999. Regulation (No 133 of May, 1999) established lists of countries and lists of meat processing plants eligible to export meat and meat products to Latvia. Regulation No 128 of May, 1999, required Latvian meat and dairy product importers to register to ensure that safety and hygiene requirements in handling imported meats

are implemented. Once certificates for pork and beef of U.S. origin are mutually accepted (those are currently in process of negotiations) Latvia will accept red meats from U.S. plants which have been approved for export to the EU. No red meat of U.S. origin has been imported in the past two years. For imports of poultry, seven U.S. poultry plants are now on Latvia's list of approved poultry plants.

Regulation No 213 of October, 1998, established a list of countries and dairy plants eligible to export dairy products to Latvia. The State Veterinary Service is receiving applications to conduct plant inspections as a prerequisite for approval to export meat, dairy and poultry products to Latvia. Applications should be submitted through U.S.D.A.'s Food Safety Inspection Service (FSIS) to the Latvian State Veterinary and Food Service.

The Latvian legal system is presently sufficiently developed to have in place both trademark protection and licensing provisions. Franchising is increasingly being used for business expansion.

### **General Import and Inspection Procedures**

Latvian food control institutions include: the Veterinary and Food Service; Food Quality Inspection; Plant Products Inspection; and Sanitary Border Inspection.

Customs authorities require the following documentation for imported products: a copy of the contract, an invoice, a bill of lading, indication of the amount, weight and value of the goods and the original certificate of origin, producer's declaration, safety and quality certificates and veterinary and phytosanitary certificates.

All applicable duties and taxes are collected by customs authorities upon clearance of imported goods at the border, unless the cargo is forwarded to a bonded warehouse.

### **Competition**

During the past seven years, Latvia's agricultural trade balance has run a deficit. In 2000, Latvian imports of agricultural products totaled US\$ 405 million, while the value of exports totaled a much lower US\$ 108 million (not including wood products). The EU leads in exports to Latvia, (47 percent), followed by its Baltic neighbors - Estonia and Lithuania (25 percent), and Central European countries (12 percent). The U.S. share in Latvian agricultural trade was 2.7 percent, reflecting both the inability of U.S. products to compete effectively with other suppliers and lack of U.S. supplier interest.

Of the total U.S. agricultural product exports to Latvia in 2000, poultry products accounted for 30 percent, coffee extracts and essences for 12 percent, frozen fish for 12 percent, tobacco products for 7 percent and dried fruits and nuts for 7 percent. Other major products included rice 4.5 percent, alcoholic beverages 3.2 percent, fats and oils 3 percent, pet food 2.3 percent, and wines 2.1 percent. U.S. suppliers dominated in Latvian imports of poultry products 55 percent, almonds 38 percent, corn 35 percent, dried fruits 32 percent, rice 12 percent, instant coffee 10 percent. For most products, domestic production meets between 70-90 percent of the demand.

## SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

### Food Retail Sector

Although small shops and outdoor markets still dominate, the number of supermarkets and the market share they are capturing are expanding rapidly. As a part of the ongoing restructuring, the total number of stores selling food is declining. In 2000, the domestic retail food trade amounted to US\$ 1.3 billion, and growth in 2001 is estimated at between 10-12 percent.

In 2000, food was sold in 87 supermarkets, 2 hypermarkets, 5,693 retail stores, nearly one hundred outdoor farmers' markets, and numerous kiosks and stands. Given the relatively small consumer base in the Baltic region as a whole (Latvia, Estonia and Lithuania have a combined populace of about 8 million), it is the emergence of pan-Baltic retail chains with centralized purchasing and logistical operations which will bring the greatest economies and efficiencies to the Baltic markets.

Imported food products account for a 30 percent share of the total value of the Latvian retail food market. Imports are mainly viewed by retailers as a means of adding to the variety of products on shelves to attract the higher income level buyers.

Western investors entered the Baltic retail food market in the mid 90's. The ground breakers were Finland's Rautakirja, Kesko, S-group and Stockmann and Norway's Rema1000.

Sweden's/Norway's/Netherland's ICA Ahold with its daughter company ICA Baltic, mainly Norwegian-owned Baltic Food and Narvesen Baltija, which is owned by Norwegian Reitan Narvesen and Finnish Rautakirja. Both ICA Baltic and Baltic Food are running stores in all three Baltic countries.

Narvesen Baltija has a large number of kiosks and convenience stores only in Latvia. Apart from Nordic investors, the Lithuanian company VP-market, Vilnius Prekyba has opened stores in Latvia and Estonia.

### HRI Food Service

A successful hotel/restaurant trade has rapidly developed in Latvia. The growth within the hotel and restaurant sector has been boosted by the expansion of tourism. There were 1.9 million visitors to Latvia in 2000. Latvian hotel, restaurant and institutional (HRI) food sales, including alcohol and tobacco, totaled US \$176 million in 2000, an increase by 60 percent over the past five years. Of the total food service turnover in 2000, imports accounted for about 25 percent. Restaurant sales have increased by 75 percent over the past five years. The new fast food outlets and restaurants with international style cuisines have begun to change the structure of the food service market. In addition to fast food offerings such as pizza, hot dogs and hamburgers, various ethnic cuisines, such as Mexican, Chinese, Vietnamese, Italian and Indian, have entered the food service industry. Preferences differ significantly among various groups of the population. The younger population and tourists are the engines behind the successful introduction of the new cuisines in the Latvian market. The majority of the consumers remain at the "tasting level," however. Presently, only a few chain restaurants are present.

### Food Processing Sector

The food industry maintained its leading position among the branches of Latvia's economy, accounting for nearly 5 percent of the GDP, and 31 percent of total manufacturing output. In 2000, food production volume totalled US\$ 541 million.

The value of raw materials and ingredients used for production was US\$244 million, of which 31 percent were imports. The largest food processing industries are meat, dairy and fish, and the level of production is rather high. In the early 90's, Latvia's agricultural production met the demand of the food processing industry. In 2000, the level of self sufficiency in basic agricultural products: food grains 154 percent, milk 118 percent, potatoes 85 percent, beef 79 percent, pork 59 percent, poultry 28 percent, and vegetables/fruits 47 percent. Import needs for red meats are mainly supplied by countries within the Baltic Free Trade. Pork is imported from Estonia (56 percent of total 4.6 TMT imported pork in 2000), and the EU (28 percent), and beef from Lithuania (82 percent of 3.2TMT total imported beef) and the EU (12 percent). The U.S. is the leading supplier of poultry with 10.3 TMT in 2000, or a 59 percent of share of total imports. Other major imported products include edible oil, juice concentrates, barley malt, spices and seasonings, vegetables, fish. Except for poultry, relatively small quantities of U.S. products are used in the food processing sector.

The development of food processing industry is currently impeded by the inadequate domestic supply of agricultural raw products and limited export possibilities. Only a few dairies and fish processors comply with EU quality requirements and packaging standards.

U.S. exporters should contact large wholesalers and distributors who are seeking direct relationships with foreign suppliers. The large food processors purchase their raw materials and food ingredients directly from foreign exporters.

#### SECTION IV. BEST HIGH VALUE PRODUCT PROSPECTS

Rather unfamiliar to Latvian consumers are low fat, low salt, sugar free, and cholesterol free products, as well as brown sugar, cake mixes, marshmallows, tortillas, corn meal, graham crackers, chocolate chips and Creole/Cajun food. Potential U.S. export items include: snack foods with a long shelf life such as raisins, dried foods, nuts, peanut butter, jams, jellies, frozen yogurt, ice cream mixes?, sherbets, soft drinks, drink mix powders, frozen juice, wine, frozen foods, pizzas, meat, pasta preparations, frozen and canned seafood, frozen and canned vegetables and fruits, maple syrup, and assorted convenience goods such as cheese, sauces, salad dressings and breakfast cereals.

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**SECTION V. KEY CONTACTS AND FURTHER INFORMATION**

Latsert, Product Conformity Assessment Center (PCAC)  
Unijas Street 45/47, 3 rd Floor  
Riga LV 1039  
Latvia  
Tel: +371 7533033  
Fax: +371 7533050  
latsert@latnet.lv

Latvian Traders Association  
Gertrudes Street 36,  
Riga  
LV1011  
Latvia  
T: 371 7217372  
F: 371 7821010  
www.lta.lv

Latvian State Veterinary Service  
Republic Sq 2  
Riga  
LV 1981  
T: 371 7027 475  
F: 371 7322727  
Email: vvd@vvd.vita.gov.lv

Latvian Food Center  
Valdemara Street 38  
Riga LV1013  
T: 371 7021575, 371 7027 713  
F: 371 7021 755  
Email: orlova@lpc.gov.lv

To include your products in a regional Baltics "virtual trade fair", please visit  
<http://baltic.trade-fair.com>

The business center of the Latvian Development Agency has established a website  
<http://lda.gov.lv/eksports/bizness> to help matching of trade interests. Your cooperation and investment proposals can be sent to [invest@lda.gov.lv](mailto:invest@lda.gov.lv) , or to fax: 371 782 0458.

For general questions about product import into Latvia, please contact:

Foreign Agricultural Service, USDA  
American Embassy  
Raina Blvd. 7  
Riga LV1510  
Latvia  
Tel: +371 7036212  
Fax: +371 7227390  
E mail: [agriga@apollo.lv](mailto:agriga@apollo.lv)

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page: [www.fas.usda.gov](http://www.fas.usda.gov) and the FAS/Stockholm regional headquarter office at [www.usemb.se/Agriculture](http://www.usemb.se/Agriculture)

**TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION**

<b>Agricultural Imports From All Countries (\$Mil) /U.S. Market Share ( percent)*</b>	<b>381/2</b>
<b>Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share ( percent)*</b>	<b>278/3</b>
<b>Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share ( percent)*</b>	<b>21/3</b>
<b>Total Population (Millions)/Annual Growth Rate (percent)</b>	<b>2,36/-0.8</b>
<b>Urban Population (Millions)/Annual Growth Rate (percent)</b>	<b>0.9/-0.8</b>
<b>Number of Major Metropolitan Areas</b>	<b>1</b>
<b>Size of the Middle Class (Millions)</b>	<b>0.6</b>
<b>Per Capita Gross Domestic Product (U.S. \$)</b>	<b>3013</b>
<b>Unemployment Rate ( percent)</b>	<b>7.9</b>
<b>Per Capita Food Expenditures (U.S. \$), year</b>	<b>495</b>
<b>Percent of Female Population Employed</b>	<b>43</b>
<b>Average Exchange Rate US\$1</b>	<b>0.606Lats</b>

\* Source: UN Trade Data Base

Latvia Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	257	419	278	7	9	7	3	2	3
Snack Foods (Excl. Nuts)	19	35	24	1	1	1	0	0	0
Breakfast Cereals & Pancake Mix	3	5	3	0	0	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	12	12	12	1	1	1	0	1	1
Red Meats, Prepared/Preserved	3	4	3	1	1	0	0	0	0
Poultry Meat	8	12	8	2	4	3	31	35	40
Dairy Products (Excl. Cheese)	15	23	19	1	1	0	0	0	0
Cheese	1	3	4	0	0	0	0	0	0
Eggs & Products	2	4	1	0	0	0	0	0	0
Fresh Fruit	21	44	40	1	1	1	1	0	0
Fresh Vegetables	12	23	17	1	0	0	0	0	0
Processed Fruit & Vegetables	18	33	18	1	1	1	2	1	3
Fruit & Vegetable Juices	11	12	5	1	1	1	1	1	1
Tree Nuts	3	5	3	1	1	1	13	13	11
Wine & Beer	23	43	23	1	1	1	1	1	1
Nursery Products & Cut Flowers	6	12	7	1	1	1	0	0	1
Pet Foods (Dog & Cat Food)	6	11	7	1	1	1	3	3	3
Other Consumer-Oriented Products	93	139	85	3	3	2	3	2	2
<b>FISH &amp; SEAFOOD PRODUCTS</b>	27	34	21	2	2	1	9	5	3
Salmon	1	3	2	1	1	1	4	0	2
Surimi	1	1	1	0	1	0	0	1	0
Crustaceans	1	2	1	0	0	0	0	0	0
Groundfish & Flatfish	5	9	5	1	1	1	1	7	3
Molluscs	1	1	1	0	0	1	0	0	6
Other Fishery Products	19	20	12	2	1	1	12	5	4
<b>AGRICULTURAL PRODUCTS TOTAL</b>	389	585	381	8	12	9	2	2	2
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	441	675	441	11	14	10	3	2	2

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

**Latvia Imports****CONSUMER-ORIENTED AGRICULTURAL IMPORTS**

(\$1,000)	1998	1999	2000
Lithuania	30377	59254	46583
Netherlands	31668	58805	32232
Estonia	25816	41585	26117
Poland	21831	40549	23649
Germany	24390	35972	23467
Spain	8695	13256	17230
Denmark	13620	22171	14412
Italy	6718	13357	11798
France	7967	12118	9217
Ukraine	3847	4658	8678
United States	6742	8957	6970
Bulgaria	4788	11104	5825
Hungary	5284	11110	5782
Russian Federation	2556	4449	4610
Belgium	0	5755	4048
Other	62652	75713	36955
World	256963	418811	277620

Source: United Nations Statistics Division

**FISH & SEAFOOD IMPORTS**

(\$1,000)	1998	1999	2000
Norway	9333	13845	8269
United Kingdom	1784	2658	2183
Lithuania	1199	2437	1966
Estonia	1913	3742	1603
Russian Federation	2139	2540	1398
Netherlands	976	1533	1037
Denmark	1140	1770	986
United States	2353	1575	740
Iceland	623	923	591
Spain	116	502	570
Germany	617	703	455
Mauritania	0	866	383
Sweden	1600	316	308
Korea, Republic of	131	120	120
Kazakhstan, Repub	30	135	110
Other	3140	816	560
World	27094	34489	21288

**TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & FISHERY PRODUCTS**