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GAIN Report

Global Agricultural Information Network

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Fish and Seafood Market in Lithuania.

Report Categories:

Fishery Products

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Report Highlights:

In 2015 the total fish catch in Lithuania was 83,705 MT, which included the long-distance, Baltic Sea, and inland fisheries. Almost the entire fish catch from long-distance ocean fisheries and 85 percent of the Baltic Sea catch was sold directly to foreign countries. Lithuania is a net exporter of fish and seafood products in terms of value and net importer in terms of volume. Lithuanian processors import 95 percent of their raw materials and export value added products.

General Information:

Production

Fishing sector

In 2015 the total fish catch was 83,705, which included the Baltic Sea, long-distance ocean and inland fisheries. The fish catch in 2015 was 44 percent lower than in 2014 because a higher catch in the Baltic Sea did not offset a reduced catch in the long-distance ocean and European Union Waters fisheries. In 2015 most of the ocean fish catch was carried out in Moroccan waters, followed by Angolan waters and the Pacific Ocean region. The total amount of catch from the long-distance fisheries amounted to 58,293 MT, a 57 percent decrease compared to 2014 because of lower harvest of Mauritania fishing grounds.

Fish catch by fishing ground (000 MT)

	2011	2012	2013	2014	2015
Baltic Sea	15,991	16,827	15,383	13,823	17,900
High seas:					
North West Atlantic	1,009	708	0	7	0
North East Atlantic	6,434	3,725	1,425	2,502	3,445
Mauritanian EZ	66,133	23,225	55,472	83,861	0
Greenland EZ	0	694	0	694	0
Moroccan EZ	16,445	0	0	18,268	23,357
Angolan EZ	0	0	0	0	18,892
Guinea EZ	0	13,118	5,000	0	0
Senegal EZ	0	12,598	0	0	0
Pacific Ocean	0	9,947	9,947	0	11,275
Curonian Lagoon	1,138	955	1,105	1,039	0
European Union Waters	0	0	1,320	30,092	6,884
Norway EEZ	0	0	0	0	303
Inland waters	337	659	360	155	325
Other seas	0	0	0	0	1,649
Total catch	141,847	72,509	90,448	150,034	83,705

Source: Statistical Office

In 2015 the total catch in the Baltic Sea amounted to 17,897 MT, an increase of 30 percent compared to 2014. The main species caught were European sprat, Baltic herring and cod.

Pelagic species (herring and sprats) are the mainstays of the Lithuanian harvests and accounted for almost 86 percent of the total fish catch in the Baltic Sea. In 2015 catch quotas allocated for herring, sprat and cod were utilized at 92, 96 and 51 percent, respectively. The annual Baltic Sea fishing quota is negotiated on an annual basis by the EU's agriculture and fisheries ministers. The International Council for the Exploration of the Sea (ICES) is a global organization that develops science and advice to support the sustainable use of the oceans. The ICES recommends to the Council the size of quota for the next year. In October 2015 the Council of Ministers agreed on a 20 percent reduction of the 2016 quotas for cod compared to 2015, resulting in a total allowable catch (TAC) of maximum 41,143 MT for the Eastern stock and 12,720 MT for the Western stock of the Baltic Sea. Member countries agreed

on additional measures for the western stock because it is below sustainable biological limits. The 2016 quotas for sprat were lowered by 5 percent compared to 2015, to a TAC of maximum 202,320 MT.

Baltic Sea fish catch (MT)

	2010	2011	2012	2013	2014	2015
Baltic sprat	10,223	9,730	11,245	10,353	9,679	11,003
Baltic herring	1,557	2,655	2,276	2,475	2,152	4,724
Cod	3,199	3,057	2,483	1,742	1,196	1,737
Other fish	558	549	823	813	796	433

Source: Department of Fishery, Ministry of Agriculture.

In 2015 the main part of the fish catch came from the Atlantic and Pacific oceans, which in 2015 amounted to 58,293 MT. The fish catch in the Baltic Sea in 2015 was almost 70 percent smaller than the catch from the oceans. According to the Fishery Department of the Ministry of Agriculture, all catches from the oceans, an estimated 85 percent of Baltic Sea catches, and 40 percent of aquaculture is exported. As a result, the fish processing industry almost entirely relies on imports of raw materials. In 2015 Lithuania completed the process of reducing its fishing capacity, decreasing fishing capacity by 40 percent since 2004. The costs of restructuring of the Lithuanian fleet were covered by EU funds.

As of January 1, 2016 the Lithuanian fishing fleet consisted of 145 fishing vessels. Lithuania has 11 long distance fishing vessels which operate in Morocco, Angola, Pacific and Atlantic waters. In 2015 104 vessels were used for coastal fishing and 30 vessels for Baltic Sea offshore fishing. The majority of fishing vessels used for coastal fishing are of gross tonnage of less than 50 tons. The fishing fleet operating beyond coastal waters has been declining within the past few years because of the implementation of a boat scrapping program of the European Union. The program aims at reducing the capacity of fishing in response to reduced fish stocks.

Processing

There are 49 fish processing plants in Lithuania. In 2015 total fish processing production amounted to 107,900 MT and was 18 percent higher than in 2014. The value of production of fish processing industry in 2015 amounted to Euro 479 million (U.S. \$500 million). Almost 35 percent of processed products are preserved fish (mainly surimi), followed by smoked fish (35 percent), fish filets (14 percent), canned fish (11 percent) and other fish products (5 percent). The main processed fish are herring, sprat and salmon.

The Viciunai group, established in 1991, is the largest fish processor in Lithuania. The company is one of the largest producers of surimi products and fish in Europe. The group sells to 56 countries in the world under the brand “VICI”. They have 6 processing plants in Lithuania (Plunge and Kaunas), one plant in Kaliningrad (Russia) and one in Spain. Their annual production is 120,000 MT of different fish products. The company is present in most major foodservice companies in Europe. Viciunai currently imports from the U.S. Alaska Pollock, white fish and salmon. Atlantic herring is imported mainly from

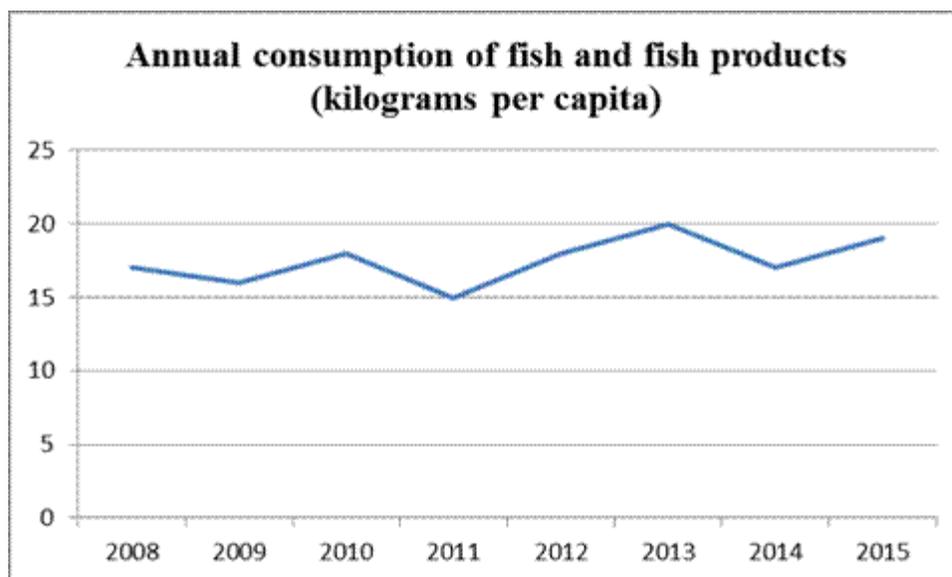
Norway and Iceland. The majority of salmon is imported from Norway. Herring and sprats are imported from Latvia and Poland. In the Estonian processing plant they produce breaded fish fingers from Alaska Pollack imported from the United States. For production of surimi products in processing plants located in Lithuania, they import frozen blocks of white fish from the U.S. and India. In the future they might be also interested in imports of lobsters from the U.S. for the HORECA sector.

Exports to the U.S. are mainly destined to go to the Russian origin diaspora in the area of SF, NYC and LA. They sell 50 percent under their own brand (VICI) and 50 percent under a private label.

Consumption

Fish products are popular and present in most supermarkets. Lithuania is one of the largest producers of surimi in the world (it is called a Lithuanian Phenomenon). In 2015 the average annual per capita fish consumption in Lithuania was 12 percent higher than in 2014 and amounted to 19 kilograms. There is a general upward long-term trend in overall consumption and a positive perception of fish and fish products among consumers.

Pollock, herring, and mackerel are the most popular saltwater species, while carp and trout are the most popular freshwater species. Pollock and salmon are gaining popularity in the market, indicating a structural change in consumption. There is a growing awareness among Lithuanian consumers regarding fish and seafood consumption. They are choosing fish products with more care and attention, are getting information about products, and are benefiting from campaigns promoting consumption and the health benefits of fish and seafood.



Source: Statistical Office

Distribution

Seafood is sold in stores ranging from specialized stores, supermarkets, hypermarkets, and small independent grocers. Many hypermarkets also feature extensive displays for fresh seafood products

including live fish (in tanks) for purchase. Small independent grocers typically lack fresh options but instead offer processed, brand labeled options or frozen filets frequently with no brand association. The “RIMA” chain of supermarkets offers selection of fish products dominated by the Lithuanian brand VICI produced by Viciunai company. The Viciunai company which is the largest processor of fish in Lithuania and has also branch offices in Latvia, would be good partner for seafood promotional activities in Lithuania.

Trade

Lithuania is a net exporter of fish and seafood products in terms of value and net importer in terms of volume. Lithuanian processors import 95 percent of raw materials and export value added fish and seafood products.

Imports

Lithuania imports mainly raw fish which is used by the local industry for further processing. In 2015 Lithuania imported 132,777 MT of fish and seafood for a value of U.S. \$439 million. Sweden, Norway, Latvia and the United States were the major suppliers of fish to Lithuania in 2015. Lithuania imported from these four countries 68 percent of total imports of fish and seafood products. In the first ten months of 2016 the volume of imports increased by six percent because of higher imports from Sweden and Russia (mainly cod).

Value of Imports of Fish and Seafood Products to Lithuania

Partner Country	Thousands United States Dollars			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	422,099	496,159	439,250	100.00	100.00	100.00	- 11.47
Sweden	136,521	196,312	198,662	32.34	39.57	45.23	1.20
Norway	40,369	51,590	50,571	9.56	10.40	11.51	- 1.98
Latvia	30,464	28,663	26,681	7.22	5.78	6.07	- 6.91
United States	17,720	23,326	25,298	4.20	4.70	5.76	8.45
Germany	42,716	47,483	22,372	10.12	9.57	5.09	- 52.88
Russia	7,257	7,756	16,210	1.72	1.56	3.69	109.00
Poland	6,071	10,948	11,460	1.44	2.21	2.61	4.68
Denmark	9,528	12,250	10,210	2.26	2.47	2.32	- 16.65
Kazakhstan	21,967	18,420	9,284	5.20	3.71	2.11	- 49.60
Spain	11,746	10,177	8,446	2.78	2.05	1.92	- 17.00
Estonia	11,474	17,981	7,953	2.72	3.62	1.81	- 55.77
Chile	8,521	4,800	5,553	2.02	0.97	1.26	15.70
Netherlands	10,698	5,692	5,355	2.53	1.15	1.22	- 5.93
China	8,235	7,193	5,272	1.95	1.45	1.20	- 26.71
Iceland	11,093	4,745	5,190	2.63	0.96	1.18	9.37
United Kingdom	9,946	13,314	4,242	2.36	2.68	0.97	- 68.14
Vietnam	3,332	5,161	2,947	0.79	1.04	0.67	- 42.91
Argentina	4,510	3,439	2,533	1.07	0.69	0.58	- 26.34

Source: *Global Trade Atlas*

For the first ten months of 2016 imports of salmon (fresh or chilled) increased by eight percent in comparison to the same period of 2015, while imports of cod increased by 67 percent. In 2015 imports of Alaska Pollock were 50 percent down compared to 2014 due to reduced demand in the domestic market. In 2015 growing demand for cod stimulated imports.

Volume of Imports of Fish and Seafood Products to Lithuania

Commodity	Unit	Description	Quantity			% Change 2015/2014
			2013	2014	2015	
Fish & Seafood Products	T	Group 9 (2012)	122,709	139,420	132,777	-5
030214	T	Atlantic Salmon and Danube Salmon Fresh or Chilled	22,156	31,139	35,944	15
030363	T	Cod, Frozen	7,378	11,496	11,136	-3
030499	T	Fish Meat, Frozen, Except Steaks and Fillets	10,379	11,769	9,914	-16
030354	T	Mackerel, Frozen	12,066	9,971	8,303	-17
030495	T	Fish of Families Bregmacerotidae etc, Frozen	1,260	2,511	6,176	146
030351	T	Herrings, Frozen, except Fillets, Livers and Roes	9,324	6,179	6,162	0
030389	T	Fish, Frozen	6,172	5,460	4,963	-9
030365	T	Coalfish, Frozen	409	1,526	4,891	221
030366	T	Hake, Frozen	3,919	3,868	3,536	-9
160420	T	Fish, Prepared or Preserved,	5,247	5,119	3,454	-33
030494	T	Alaska Pollock, Frozen, except Fillets	5,940	6,435	3,149	-51
030441	T	Pacific, Atlantic, Danube Salmon Fillet Fresh/Chilled	3,024	3,461	2,986	-14
030489	T	Fish Fillets, Frozen	3,272	2,800	2,653	-5
030243	T	Sardines Sardinella Brislings/Sprats Fresh/Chilled	1,855	3,284	2,364	-28
030313	T	Atlantic Salmon and Danube Salmon, Frozen	4,516	5,602	2,198	-61
030486	T	Herring Fillets, Frozen	2,530	3,609	2,063	-43
030474	T	Hake Fillets, Frozen	1,828	1,827	1,821	0
160413	T	Sardines/Sardinella/Brisling Prep/Pres, not Minced	1,406	1,552	1,365	-12
030369	T	Fish Bregmacerotidae Eulichthyidae etc Frozen	454	1,016	1,252	23
030353	T	Sardines, Sardinella, Brisling or Sprats, Frozen	1,507	1,191	1,242	4
030561	T	Herrings, Salted, or in Brine, not Dry or Smoked	1,415	1,175	1,054	-10
160414	T	Tunas/Skipjack/Bonito Prep/Pres not Minced	1,140	1,028	1,035	1

Source: Global Trade Atlas

In 2015 the value of imports of fish and seafood products from the United States amounted to U.S. \$25,298,000, eight percent higher than in 2014. However, in the first ten months of 2016 imports from the U.S. decreased by 13 percent because of lower imports of cod-like fish from the family of Bregmacerotidae.

Value of Imports of Fish and Seafood Products from the United States

Commodity	Description	000 United States Dollars			% Change
		2013	2014	2015	2015/2014
Fish & Seafood Products	Group 9 (2012)	17,720	23,326	25,298	8
030495	Fish Of Families Bregmacerotidae etc, Frozen	2,327	5,888	14,426	145
030494	Alaska Pollock, Frozen, Except Fillets	13,074	14,184	8,770	-38
160521	Shrimp & Prawns Prep/Preserved not Airtight Contnr	119	415	901	117
030311	Sockeye Salmon, excl Fillet, Livers & Roes, Frozen	117	124	703	468
030390	Fish Livers And Roes, Frozen	195	429	331	-23
160432	Caviar Substitutes Prepared from Fish Eggs	1,139	935	95	-90
030474	Hake Fillets, Frozen	0	37	44	18
030367	Alaska Pollock, Frozen	0	21	25	18
030353	Sardines, Sardinella, Brisling or Sprats, Frozen	0	1	2	76
030366	Hake, Frozen	44	226	1	-100
030339	Flat Fish Nesoi except Fillets, Livers, Roes, Frozen	0	0	0	n/a
030351	Herrings, Frozen, Except Fillets, Livers and Roes	48	0	0	n/a
030475	Alaska Pollock Fillets, Frozen	544	509	0	-100
030499	Fish Meat, Frozen, Except Steaks and Fillets	113	553	0	-100
030539	Fish Fillets Dried Salt in Brine, not Smoked	0	4	0	-100

Volume of Imports of Fish and Seafood Products from the United States

Commodity	Unit	Description	Quantity			% Change
			2013	2014	2015	2015/2014
Fish & Seafood Products	T	Group 9 (2012)	7,491	9,638	9,313	-3
030495	T	Fish Of Families Bregmacerotidae etc, Frozen	1,161	2,431	6,059	149
030494	T	Alaska Pollock, Frozen, except Fillets	5,933	6,364	3,006	-53
160521	T	Shrimp & Prawns Prep/Preserved not Airtight Contnr	17	57	99	76
030311	T	Sockeye Salmon, excl Fillet, Livers & Roes, Frozen	10	15	87	460
030474	T	Hake Fillets, Frozen	0	20	20	-3
030390	T	Fish Livers and Roes, Frozen	14	35	20	-44
030367	T	Alaska Pollock, Frozen	0	10	13	29
160432	T	Caviar Substitutes Prepared from Fish Eggs	40	39	5	-86
030353	T	Sardines, Sardinella, Brisling Or Sprats, Frozen	0	1	4	280
030366	T	Hake, Frozen	24	133	1	-100
030339	T	Flat Fish Nesoi Except Fillets, Livers, Roes, Frozen	0	0	0	n/a

030351	T	Herrings, Frozen, Except Fillets, Livers and Roes	45	0	0	n/a
030475	T	Alaska Pollock Fillets, Frozen	159	163	0	-100
030499	T	Fish Meat, Frozen, except Steaks and Fillets	88	371	0	-100
030539	T	Fish Fillets Dried Salt in Brine, not Smoked	0	0	0	-100

Exports

In 2015 Lithuania exported fish and seafood products worth U.S. \$530 million, a five percent decrease in comparison to the previous year. Major destinations of Lithuanian exports of fish were Germany, Italy and Belgium. In the first ten months of 2016 exports were up five percent mainly because of higher exports of sardines and herring to Denmark. The EU countries are the main destination for exports of Lithuanian fish and seafood. In 2015 98 percent of Latvian fish products were exported to the EU.

Value of Exports of Fish and Seafood Products from Lithuania

Partner Country	Thousands United States Dollars			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	455,403	556,107	530,026	100.00	100.00	100.00	- 4.69
Germany	154,196	202,089	190,994	33.86	36.34	36.03	- 5.49
Italy	41,506	49,832	60,536	9.11	8.96	11.42	21.48
Belgium	48,218	54,590	60,389	10.59	9.82	11.39	10.62
United Kingdom	18,674	25,528	25,488	4.10	4.59	4.81	- 0.16
Latvia	30,109	29,567	25,403	6.61	5.32	4.79	- 14.08
Estonia	24,230	25,018	23,912	5.32	4.50	4.51	- 4.42
France	31,038	30,188	23,609	6.82	5.43	4.45	- 21.79
Denmark	11,102	16,466	20,181	2.44	2.96	3.81	22.56
Poland	20,020	23,979	19,243	4.40	4.31	3.63	- 19.75
Spain	10,144	11,092	11,675	2.23	1.99	2.20	5.26
Sweden	7,355	12,376	10,585	1.61	2.23	2.00	- 14.48
Belarus	7,984	8,408	9,386	1.75	1.51	1.77	11.63
Netherlands	2,862	6,317	7,236	0.63	1.14	1.37	14.55
Ukraine	9,865	12,101	5,754	2.17	2.18	1.09	- 52.45
Czech Republic	3,547	4,854	5,372	0.78	0.87	1.01	10.67
Japan	2,714	3,615	3,087	0.60	0.65	0.58	- 14.62
Finland	751	2,246	2,748	0.16	0.40	0.52	22.35
Bulgaria	2,731	2,728	2,734	0.60	0.49	0.52	0.24
Hungary	1,528	2,041	2,181	0.34	0.37	0.41	6.87
Romania	2,333	2,360	2,034	0.51	0.42	0.38	- 13.84
Austria	2,844	2,780	1,996	0.62	0.50	0.38	- 28.18
Norway	979	1,865	1,834	0.21	0.34	0.35	- 1.66
Russia	9,187	11,875	1,758	2.02	2.14	0.33	- 85.19
Croatia	1,029	1,996	1,599	0.23	0.36	0.30	- 19.91
United States	868	1,553	1,442	0.19	0.28	0.27	- 7.16

Source: Global Trade Atlas

Volume of Exports of Fish and Seafood Products from Lithuania (MT)

Commodity	Unit	Description	Quantity			% Change 2015/2014
			2013	2014	2015	
Fish & Seafood Products	T	Group 9 (2012)	101,186	114,407	113,910	-0.43
160420	T	Fish, Prepared or Preserved	28,400	32,420	31,651	-2.37
030541	T	Pacific, Atlantic and Danube Salmon, Smoked	11,469	14,408	18,132	25.85
030471	T	Cod Fillets, Frozen	4,541	6,974	6,728	-3.52
160412	T	Herrings Prep Or Pres, Whole or In Pieces	6,208	6,489	6,289	-3.08
030243	T	Sardines Sardinella Brislings/Sprats Fresh/Chilled	7,673	7,590	5,311	-30.02
030313	T	Atlantic Salmon And Danube Salmon, Frozen	6,027	7,261	4,723	-34.96
030499	T	Fish Meat, Frozen, Except Steaks And Fillets	2,054	3,200	4,024	25.76
030481	T	Pacific, Atlantic And Danube Salmon Fillets Frozen	1,235	2,800	3,897	39.2
030473	T	Coalfish Fillets, Frozen	495	1,264	3,672	190.46
030354	T	Mackerel, Frozen	7,349	5,295	3,302	-37.64
030241	T	Herrings, Fresh Or Chilled	1,767	1,378	2,719	97.31
030489	T	Fish Fillets, Frozen	3,357	2,941	2,297	-21.88
030351	T	Herrings, Frozen, Except Fillets, Livers and Roes	2,238	1,197	2,252	88.12
030389	T	Fish, Frozen	1,865	1,789	1,690	-5.52
160413	T	Sardines/Sardinella/Brisling Prep/Pres, not Minced	927	975	1,392	42.82
160419	T	Fish, Prepared or Preserved, Whole or Pieces	1,393	1,383	1,309	-5.35
030444	T	Fish Fillets Fam Bregmacerotidae etc Fresh/Chilled	488	3,760	1,156	-69.26

Source: Global Trade Atlas

In 2015 Latvian exports of fish and seafood products to the United States amounted to U.S. \$1.4 million, seven percent lower in comparison to 2014 because of reduced shipments of herrings. In the first ten months of 2016 exports to the U.S. increased by over 50 percent because of higher sales of frozen salmon.

Value of Exports of Fish and Seafood Products to the United States

Commodity	Description	000 United States Dollars			% Change 2015/2014
		2013	2014	2015	
Fish & Seafood	Group 9 (2012)	868	1,553	1,442	-7

Products					
160412	Herrings Prep or Pres, Whole or in Pieces	356	660	502	-24
160420	Fish, Prepared Or Preserved	251	392	438	12
160413	Sardines/Sardinella/Brisling Prep/Pres, not Minced	14	32	117	260
030561	Herrings, Salted, Or In Brine, not Dry or Smoked	80	101	106	5
030549	Fish Including Fillets, Smoked	60	160	83	-48
030541	Pacific, Atlantic and Danube Salmon, Smoked	42	63	79	26
030559	Fish, Dried, Whether Salted but not Smoked	19	72	58	-19
030569	Fish, Salted or In Brine, not Dry or Smoked	13	45	44	-3
030542	Herrings, Including Fillets, Smoked	3	6	6	-2
160419	Fish, Prepared or Preserved, Whole or Pieces	0	0	5	n/a
030539	Fish Fillets Dried Salt in Brine, not Smoked	11	2	3	45
160415	Mackerel, Prepared or Preserved, not Minced	9	9	2	-84
030543	Trout, Smoked, Including Fillets	1	0	0	n/a
030579	Fish Fin Edible Offal Smoke Dried Salt Brine	1	0	0	n/a
030890	Aquatic Invertebrates, Edible Flours etc	6	7	0	-100
160411	Salmon, Prepared or Preserved, Whole or Pieces	0	3	0	-100

Source: *Global Trade Atlas*

Current Tariff for Seafood Products

Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species, level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official [EU Journal](#) in pages 47-69 and 134-139.

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:304:0001:0915:EN:PDF>

Market Access

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Lithuania. Products packed for retail sale also must bear a label in the Lithuanian language with the date of production clearly stated. Exporters should also check with Lithuanian importers regarding standards.

For guidelines regarding seafood exports to Lithuania and the EU in general, information is available from the National Oceanic and Atmospheric Association, <http://www.noaa.gov/> or

http://www.seafood.nmfs.noaa.gov/export/export_certification/export_certification.html

Market Entry Strategy

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. The Fishery Department of the Ministry of Agriculture may also be a partner in a generic promotion of fish products.

U.S. exporters of seafood products may also obtain a list of current importers by contacting the Office

of Agricultural Affairs of the U.S. Embassy in Warsaw.

Trade Shows and Contact

European Seafood Exposition, Brussels, Belgium

April 25-27, 2017

<http://www.seafoodexpo.com/global/>

For more information concerning market entry and a current importer list contact:

Office of Agricultural Affairs, Warsaw, Poland

Embassy of the United States of America

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End of Report.