

TRENDS AND DEVELOPMENTS

Additions to the Fleet of U. S. Fishing Vessels

A total of 162 vessels of five net tons and over received their first documents as fishing craft during August--43 more than in the previous month, and 19 more than in August 1947, according to the Bureau of Customs of the Treasury Department. Louisiana led with 31 vessels, followed by California with 27, and Washington with 19. A total of 844 vessels received their first documents as fishing craft during the first eight months of 1948 compared with 925 during the same period in 1947.

Vessels Obtaining Their First Documents as Fishing Craft

Section	August		Eight mos. ending with August		Total
	1948	1947 ^{1/}	1948	1947 ^{1/}	1947 ^{1/}
	Number	Number	Number	Number	Number
New England	7	4	39	38	55
Middle Atlantic	4	7	34	44	64
Chesapeake Bay	7	4	36	54	83
South Atlantic and Gulf	80	65	355	312	486
Pacific Coast	53	44	270	322	415
Great Lakes	4	7	33	30	45
Alaska	7	5	70	101	123
Hawaii	-	7	7	23	28
Puerto Rico	-	-	-	1	1
Total	162	143	844	925	1,300

^{1/}Revised.

Note: Vessels have been assigned to the various sections on the basis of their home port.



Alaska Exploratory Vessel Operates Near Nome

The Alaska exploratory vessel, *Washington*, which sailed from Seattle, Wash., on August 24 on its first exploratory trip to Alaskan waters, arrived in Nome, Alaska, on September 13. (See Commercial Fisheries Review, September 1948, p. 30.)

Upon leaving Nome, the vessel made several drags in Norton Sound west to the International Date Line and then a series crossing the first, but obtained only very few fish--starry flounder, lemon sole, herring, smelt, two halibut, shrimp, and small female king crabs. The purpose of these drags was to provide a check of the species of fish available in these waters and where they are found at this season of the year.

Then the vessel proceeded to St. Lawrence Island but the weather in that area was so stormy as to prevent further fishing.

It is planned later to do some test dragging on the banks to the south of the Alaska Peninsula and as far east as Kodiak Island. In these latter waters

some work will be done with the vessel's echo-sounder to determine if herring schools can be detected.



ALASKA EXPLORATORY VESSEL WASHINGTON AT THE DOCK IN SEATTLE

In addition, some experiments with freezing fish at sea will be made by the Washington on her present trip. The vessel has equipment for brine freezing at present, and it is planned to add dry-freezing facilities later.

After the return of the vessel to Seattle later in the fall, a series of discussions will be held with industry in order to develop information as to the type of future exploratory work desired.

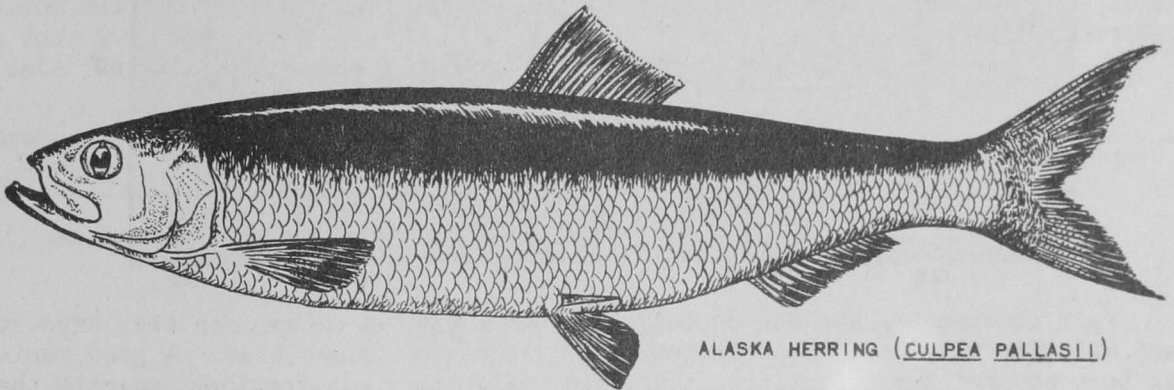


Alaska Herring Fishery Stabilizing

Following an unhappy decade during the 1930's, the Alaska herring industry is now definitely getting 'onto solid ground as its supply becomes increasingly abundant. Too much fishing so reduced the number of herring in Southeastern Alaska that by 1939 almost all the companies were forced out of business. To preserve a spawning stock for rebuilding the resource, the Service shut down the fishery during 1940, 1941, and 1942 and has permitted the taking of only predetermined quotas each year since. As a result the supply has improved to where a quota of 400,000 barrels was permitted this year.

The industry has now expanded its activity to the more distant grounds of Prince William Sound and around Kodiak Island. The quota for the former area was 180,000 barrels this year, and 390,000 barrels for the latter.

Quotas are determined in advance of each season by Service biologists. By making scientific studies on the ages and abundance of the different catches of herring each year, they are able to predict with considerable accuracy about how many fish will be available the next season and how many can safely be caught. There are still many things these experts would like to know about herring, but their findings so far have contributed to the stability and prosperity of an industry that was in chaotic condition not many years ago. Besides the amount of fishing, the abundance of herring depends upon factors of nature that, in some years, kill off most of the young. It is by studying the relative numbers of those that live to commercial size that the biologists are able to determine the catch quota.



ALASKA HERRING (CULPEA PALLASII)

A small part of the herring catch is salted, pickled, or smoked as food, but most of it is reduced to oil and meal. They are caught principally by large purse seine boats that move to Alaska during the summer when the pilchard fishery off California is slack.

Like any other fish, however, herring sometimes act in a strange and unpredictable manner. Thus, the Service can set a limit on the number of fish that it is safe to take from a conservation standpoint, but it cannot guarantee that the fishermen are always going to catch the limit.

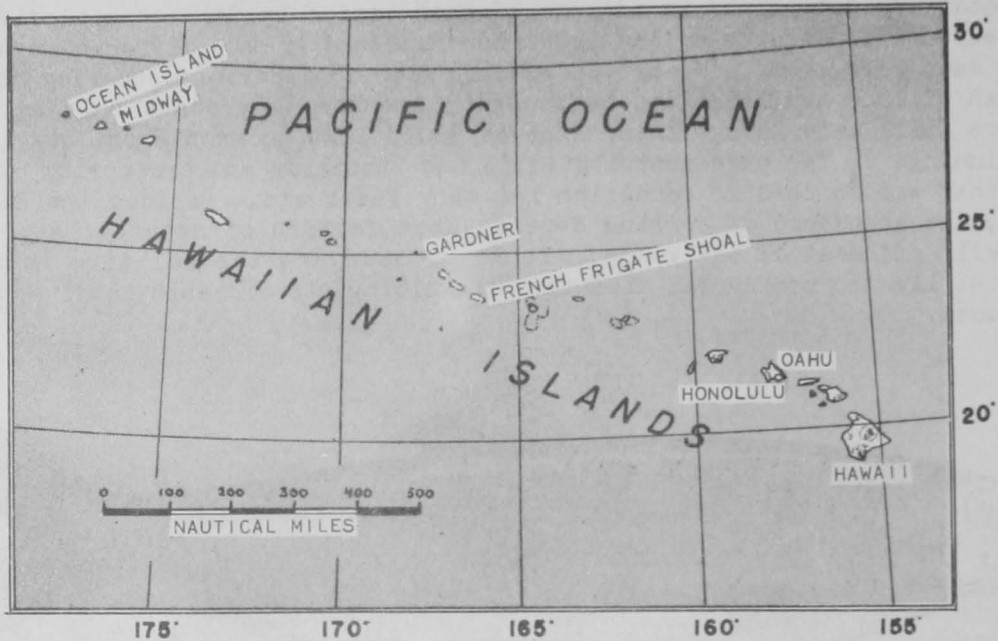


Central Pacific Exploratory Vessels Sight Tuna

The bait boat Oregon and the seiner Alaska, exploratory fishing vessels of the Pacific Exploration Company, were recently fishing in Hawaiian waters.

The Oregon left Honolulu on August 11, and proceeded to French Frigate Shoals, about half way between Oahu and Midway, to look for bait. Along the small sand islands and reefs of these extensive shoals, her crew caught a capacity load of 900 scoops of live bait fish in six days. They were a small silverside known as iao in Hawaii. This load of bait has continued to live well in the Oregon's brine wells and tanks. The iao is evidently a reasonably hardy bait fish, and they behave well when thrown to the tuna. They stick close to the ship, occasionally forming into compact little schools that can be scooped up and thrown out again.

From August 19 to September 5, the Oregon has been scouting for tuna and skipjack along the Hawaiian chain of islands from Gardiner Pinnacle in the northwest to the big island of Hawaii in the southeast.



Fair numbers of skipjack schools have been sighted but so far they have all been wild and they have not been hooked in commercial quantities. A good series has been secured for scientific study, and preliminary examinations indicate that some of the oceanic skipjack have just finished spawning.

The Alaska left Honolulu on July 26 and since then has been prospecting around various islands of the Hawaiian group. Schools of oceanic skipjack and yellowfin tuna have been sighted, but up to about the middle of August no successful sets had been made.



Changes in Railway Express Rates

EXPRESS RATES FOR OYSTERS, CLAMS, AND SCALLOPS INCREASED: The Railway Express Agency on September 9 filed with the Interstate Commerce Commission an increase of 10 percent in railway express rates for shipments of oysters, clams, and scallops from the East Coast to inland cities. The fishing industry had until October 4 to enter protests to this increase which became effective October 13, 1948.

CONTEMPLATED SINGLE NATIONAL SCALE FOR EXPRESS RATES: The change of the present Railway Express Agency's multiple transportation scale to a single national scale under ExParte 163 proceedings, will have no great effect on the fishery industry since scale rates are only applied on a relatively small portion of the fishery products shipped. Testimony on this was filed with the Interstate Commerce Commission on September 10. It is estimated that not more than 25 percent of the fishery products shipments will be affected.

INCREASE IN EXPRESS ICE CHARGES FILED: The Interstate Commerce Commission received on October 5, from the Railway Express Agency, the tariff increasing the charges for ice on shipments of fishery products. The new tariff will become effective November 22, 1948, unless the Commission receives protests and requests for suspension any time within ten days before the effective date.



ECA Procurement Authorizations for Fishery Products

Among the procurement authorizations for commodities and raw materials announced by the Economic Cooperation Administration, fishery products procurement authorizations for October, the leading month to date, totaled \$4,120,000. The aggregate authorized since the beginning of the ECA program on April 1, 1948, was \$16,703,911, or 31 percent of the total authorized for the 15-month period ending June 30, 1949. However, of this amount, only \$228,800 has been authorized to date for the procurement of fishery products in the United States.

ECA Procurement Authorizations for Fishery Products

Product	Country of Origin	Procuring Agency ^{1/}	Recipient Country	Amount Authorized
October 1948				
Fish, salted	Newfoundland Canada	Italy "	Italy "	\$ 1,473,000 466,000
Total				1,939,000
Fish meal	Angola (Portuguese W. Africa)	U.S. Dept. Army	Bizone Germany	1,381,000
Oil, shark liver	Chile	Chile	France	800,000
Total Approved in October				4,120,000
Total ECA Fishery Products Authorizations, April 1 - October 31, 1948				
Fish, canned	United States	Greece	Greece	128,800
Fish, salted	Newfoundland and Canada	Italy	Italy	4,279,000
Fish meal	Canada, Iceland, Norway & Angola	Denmark, Austria, & U.S. Dept. Army	Denmark, Austria, & Bizone Germany	3,066,361
Oil, herring	Iceland	U.S. Dept. Army	Bizone Germany	1,694,000
" , seal	Newfoundland	France	France	257,600
" , shark liver	Chile	Chile	France	800,000
" , technical fish	United States	U.S. Dept. Army	Bizone Germany	100,000
" , whale	Netherlands, Belgium & Norway	Austria & U.S. Dept. Army	Austria & Bizone Germany	6,378,150
Grand Total Approved				\$16,703,911

^{1/}Where the recipient country is shown as the procuring agency, the government of the participating country or its authorized agents or importers do the purchasing.



Federal Purchases of Fishery Products

DEPARTMENT OF THE ARMY, August 1948: Purchases of fresh and frozen fishery products during August 1948 by the Army Quartermaster Corps for the U. S. Army, Navy, Marine Corps, Air Force, and National Guard for military feeding amounted to 1,662,509 pounds valued at \$558,668. The total purchases to date, January through August, totaled 11,100,651 pounds valued at \$3,931,998.

Georges Bank Fish Census Almost Completed

The first census of the Georges Bank's fishery resources will be completed on one more voyage of the Albatross III, according to the Service's Branch of Fishery Biology.

By studying the population, size, and the birth and death rates of such valuable commercial fish as haddock, rosefish, herring, cod, and the flounders, the Service hopes to discover how New England fishermen can produce more food from the sea.

Commissioned on March 19 as a Federal marine fishery research vessel, the Albatross III has made nine voyages in the North Atlantic--investigating the stock of fish on New England's fishing banks, measuring hydrographic conditions on the banks which affect fishing, studying the effect of otter trawling on the productivity of the banks, testing improved methods of handling and preserving fish, and working on the selectivity of fishing gear and the design of trawl nets to save small fish.

Four of the voyages have been devoted to a sampling program designed to census the fish of the Georges Bank. Located off the coast of Massachusetts' Cape Cod, the Bank is one of the chief Atlantic commercial fishing grounds.



HAULING BACK THE TRAWL ABOARD THE ALBATROSS III

This census program is the Albatross III's major research project. About 3,200 square miles remain to be sampled of the total 22,000 square miles in the Georges Bank. A subsequent voyage will survey this remaining area.

Before the Albatross III's census work was undertaken on the Georges Bank, the knowledge of the population, size, and the distribution of the fish was scanty and was restricted to the incomplete records of the commercial fishing fleets.

A "random sampling" method, designed to obtain an average, is used in the census work. The Georges Bank is divided into "stations" on which the Albatross III makes its census trawls. When a haul is made, biologists aboard the vessel segregate the fish by species, and count and measure them. Scale samples are taken to determine the ages of the fish, and the stomach contents and sex organs of some specimens are examined. To study migratory habits, fish are tagged and released.

Information is collected on the number, size, and kind of fish taken on each station. It is analyzed at the Fish and Wildlife Service fishery laboratory in Woods Hole, Mass., by statistical methods similar to those used in the popular public opinion polls.

Imports of Fish Nets

The imports of all types of fish nets--cotton, flax, hemp, and manila--have shown a large increase in the first six months of 1948 and larger than imports for all of 1947. Although they are as great as in the prewar years of 1939-1941, there has been a shifting of the countries which shipped the netting. Of the cotton netting, Japan accounted for 93 to 96 percent of the total in the prewar years, while in 1947 and the first half of 1948, Japan was credited with only 15 to 17 percent of this type of netting. The main countries shipping at present are Netherlands, India, and Canada.

The imports of flax (linen) and hemp gill-netting were not large in the prewar years of 1939-1941. Japan was one of the smallest shippers, accounting for not more than 4 percent of the total. Since the war, Netherlands, United Kingdom, Italy, India, and Canada have been the main sources of this type of netting, with none coming from Japan.

In the prewar years, the main shipper of nets, and cod ends made from manila or partly of manila, was the United Kingdom. Japan supplied around 20 percent of these nets in the prewar years with the exception of 1940 when 40 percent of the quantity came from Japan. In 1947 and the first half of 1948, the United Kingdom was still the main shipper while Japan did not ship any.

The following table shows the imports of netting into the United States for the three prewar years, 1939-1941, the first year of the war (1942), last year and the first six months of 1948.

United States Imports of Netting

Year	Cotton Netting		Flax and Hemp Netting		Manila Nets, Including Cod Ends	
	pounds	value (\$)	pounds	value (\$)	pounds	value (\$)
1939	774,563	198,961	49,532	63,198	987,169	181,404
1940	656,336	209,964	13,259	22,607	1,007,722	187,890
1941	433,241	154,330	6,362	9,784	764,101	173,360
1942	26,427	11,652	10,789	17,377	188,315	50,978
1947	21,168	38,816	2,591	5,404	115,098	66,175
1948-6 mos.	83,098	86,473	5,530	10,572	312,564	186,856



Market Development Section to Concentrate on School Lunches

More fishery products in the lunches of many American school children should result from a newly-adopted program for the Market Development Section of the Service's Branch of Commercial Fisheries.

School lunch work was selected as the subject for concentrated attention after a meeting of field fishery marketing specialists in Washington, D. C., during the week of September 20. It was recognized that school lunches offer a promising field for increasing markets for fishery products, and that the present period of relatively high prices for meats is a most opportune time to initiate such a program.

Most food habits are formed during the school years. By making it possible for children to eat fish and shellfish during this strategic period, the Fish and

Wildlife Service expects to stimulate greater use of the products of our fisheries and add variety to the diet of the nation.

Activities will be centered in states where factors of cooperation, economics, and supply are the most favorable. Tentative selection of working areas is being made with the help of the school lunch specialists of the U. S. Department of Agriculture and the State departments of education.

Heretofore, fishery products have not been employed extensively in school lunches, and in many areas are almost entirely omitted from the menus. This situation reportedly is due to a lack of knowledge by school lunch personnel of the mechanics of buying, handling, preparing, and serving fish and shellfish. Also contributing are difficulties in locating supplies of the right species, form, quality, and price. Many schools lack suitable facilities for holding fresh and frozen stocks. To overcome as many of these difficulties as possible, fishery marketing specialists will provide information at effective levels; arrange cooking demonstrations and other group activities; and promote improvement of conditions of supply.

In the pursuit of these objectives, the field staff will participate in various types of meetings conducted for school lunch personnel. At these conferences, they will discuss the values that fishery products can contribute to the diet, and particularly the school child's diet, in terms of added variety, possible economy, content of nutritive elements, and experiences with unaccustomed foods. They will make available to the management of school lunchrooms the resources of the Service in the way of publications and visual aids. Some of this material may be used in interesting the pupils in fishery products while other material is designed to aid in the process of selecting, purchasing, preparing, and serving fish and shellfish. Thus, it is possible to approach the school child from two directions, one through the educational process and the other through the diet.

The experiment in the introduction of these commodities conducted in selected schools in 11 states in the spring of 1948 was a milestone in the development of the use of fishery products in school lunch programs. About 100 schools with some 30,000 students participated in this program. The Department of Agriculture supplied fresh, frozen, and canned fish to these schools without cost. The final results of these experiments have not been published, but from the active participation of the Service in assisting to develop recipes, in training the personnel to handle fish, and in other phases of the project, some knowledge of its course has been gathered. When the final results are available, some of the future work will be based on the findings. Furthermore, it may be possible to follow up the experiment of some of the individual schools so as to capitalize on the 1948 project and to develop, on a small scale, the results that may be anticipated in the project as a whole.



Sealskin Prices Drop at Fall Fur Auction

Although spirited bidding by a good attendance of fur buyers at the annual fall auction held by the Fouke Fur Company in St. Louis on September 27 resulted in the sale of the entire lot of Government-owned fur-seal skins, the average price declined 16.5 percent.

The gross proceeds from the sale of the sealskins amounted to \$1,363,503.25 while an additional \$1,377 was realized from Pribilof Islands fox pelts. At the last auction, held on April 19, 1948, a total of 29,362 fur-seal skins brought \$2,058,787.50 while \$2,250 was received from 497 blue fox pelts.

A total of 22,964 dressed, dyed, machined and finished fur-seal skins from the Pribilof Islands were offered by the Government at the September 27 auction through its agent, the Fouke Fur Company of St. Louis. The average price for the entire offering was \$59.38; at the spring auction it was \$70.10. The average at the October 1947 auction was \$57.92.



KENCHING SEALSKINS, ST. PAUL ISLAND, ALASKA. SKINS ARE SALTED AND PLACED IN BINS FOR TEN DAYS OR LONGER, THEN ROLLED FUR SIDE OUT IN BUNDLES, PACKED IN BARRELS, AND SHIPPED TO ST. LOUIS FOR DRESSING, DYEING, AND SALE AT PUBLIC AUCTION.

Of the skins sold, 13,314 were dyed matara brown, 7,574 were safari brown, and 2,076 were black. The average for all matara finished skins was \$63.24, a decline of 17.9 percent. Safaris averaged \$55.35, down 17.9 percent; blacks averaged \$49.28, an advance of 7 percent. The average for blue fox was \$3.81, a decline of 15.9 percent.

The South African Government's Cape of Good Hope skins averaged \$31.19, an advance of 4.8 percent. Sealskins sold for the account of other shippers averaged \$27.98, an advance of 15.3 percent.



Service Biologist to Study Fur-seals in Japan

In order to study Japanese scientific records on the migration and food habits of fur-seals and to investigate the fur-seal herd in Japanese waters, a Service wildlife research biologist flew to Japan from Washington, D. C. on October 4.

The biologist will be attached to the Fisheries Division of the Natural Resources Section, General Headquarters, Supreme Commander for the Allied Powers, in Tokyo, and will remain in Japan for about two years.

In October 1941, Japan abrogated the North Pacific Fur-Seal Convention of 1911. The killing of seals while they are in the sea (pelagic sealing) was prohibited by this international agreement, signed by the United States, Japan, Russia, and Great Britain. Uncontrolled pelagic sealing had threatened the North Pacific fur-seal herds with extinction.

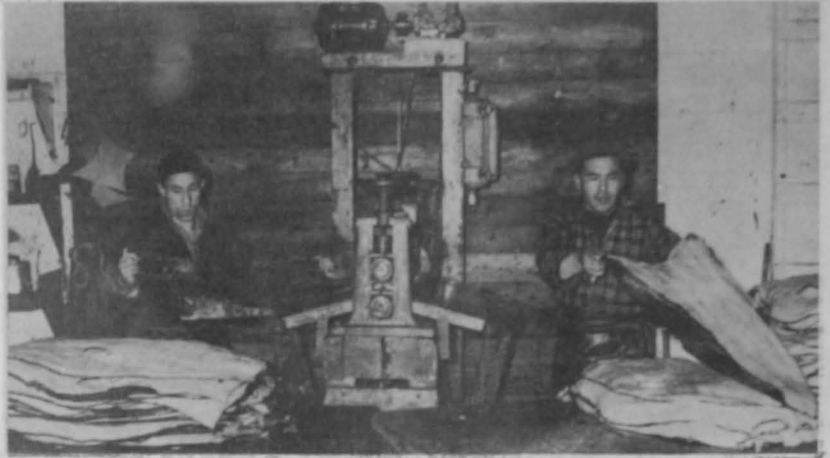
Under the terms of the 1911 Convention, Japan had been entitled to 15 percent of the proceeds of the sale of skins taken on the United States-owned Pribilof

Islands. Payments under this provision amounted to about \$1,500,000. The United States, in return, had received 10 percent of the fur-skins taken from the small herd on Japanese-owned Robben Island in the south Okhotsk Sea.

In abrogating the international agreement, Japan declared that a portion of the huge Pribilof herd was proceeding down the Japanese coast and destroying valuable food fishes during its winter migration.

Investigations conducted by the U. S. Bureau of Fisheries at the beginning of the century showed that the Pribilof herd did not mingle with Asiatic fur-seal herds. The Pribilof herd migrated from the eastern portion of the Bering Sea as far south as California, according to the investigations, and confined its winter migrations to the American side of the Pacific Ocean.

Studies of stomach contents by U. S. biologists showed that the fur-seals subsisted largely on squid, pollock, seal fish, and other species not used commercially in the United States.



WRINGING EXCESS SEA WATER FROM FRESHLY BLUBBERED SKINS,
ST. PAUL ISLAND, ALASKA.

The Department of State recommended that U. S. scientific data on the migration and food habits of the Pribilof fur-seals be brought up to date as a basis for future international negotiations on the protection of fur-seal resources.

At the end of World War II, the Service began a study of the migratory route of the fur-seals from the time they leave the Pribilof Islands in the fall until they return in the spring, to learn definitely whether there are points of concentration during the course of migration and whether any of the animals that frequent the North American coast cross the Pacific to the Asiatic side. Cruises by the Black Douglas, a Service research vessel, have not as yet reported significant findings.

During the 1930's, two Japanese research vessels conducted wide investigations in the Bering Sea. As a result of these and other studies, the Fish and Wildlife Service believes that Japan has accumulated some thorough biological information on the North Pacific fur-seal herds.

SCAP's Fisheries Division, in Tokyo, has located and assembled confidential records on the fur-seal investigations in Japanese universities, government research stations, and libraries.

The biologist will check the authenticity of this scientific data. He will also conduct field investigations in Japanese waters to study the food habits of fur-seals inhabiting Japanese waters.

South Pacific Commission

The Department of State announced that the three United States Commissioners in the South Pacific Commission arrived at Washington on September 15, to confer with officers of this Government.

The South Pacific Commission was established May 1948 as a regional advisory and consultative body on social and economic matters to the Governments of Australia, France, the Netherlands, New Zealand, the United Kingdom, and the United States. The territorial scope of the Commission comprises all those non-self-governing territories in the Pacific Ocean which are administered by these participating Governments and which lie wholly or in part south of the Equator and east from and including Netherlands New Guinea.

The Commission, like its prototype, the Caribbean Commission, is designed to encourage and to strengthen international cooperation in advancing the economic and social rights and welfare of the inhabitants of the territories within its scope.

The Commission will be concerned primarily with subjects which are of every day concern in the lives of the people, particularly agriculture, communications, transport, fisheries, forestry, industry, labor, marketing, production, trade and finance, public works, education, health, housing, and social welfare.

Although the Commission does not have an organic connection with the United Nations, it will cooperate as fully as possible with the United Nations and its specialized agencies.



Study of Louisiana and Mississippi Oyster Areas

A preliminary study of the oyster producing areas of Louisiana and Mississippi, which were damaged during the 1945 floods, has been made by Dr. Philip Butler, a biologist of the Service. He has outlined a summary of present conditions and a plan of research to carry out the program authorized last spring by the 80th Congress which appropriated funds for the study of the damage caused by the overflow of the Mississippi through the Bon Carre Spillway.

Dr. Butler will make his headquarters at Pensacola, Fla., and the program will include a critical analysis of the oyster bottoms and studies of the continuing mortality of oysters.



Survey of European Markets for American Fishery Products

On August 20, Arthur M. Sandberg, Fishery Marketing Specialist in the Service's Branch of Commercial Fisheries, left the United States on a two-month survey of marketing conditions in Europe for the Office of Foreign Agricultural Relations under the Department of Agriculture's Research and Marketing Program, to determine current and future possibilities for export of United States fishery products. He will survey markets in France, England, Ireland, Belgium, the Netherlands, Germany, Switzerland, Austria, Italy, and Greece.

Before leaving for Europe, he visited production and distribution centers to become acquainted with the interests and needs of producers and exporters and the availability of products for export. (See Commercial Fisheries Review, September 1948, page 33.) Producers of all areas expressed interest in European markets; the consumer acceptance of their products or of similar products in those countries; the probable demand for new products; information on preferences in labels; fish names most acceptable to the markets; sizes, weights, and packs preferred; and import restrictions in the areas covered.

In general, producers of brands and items which are standard in the American market, are currently having few marketing problems. Most of these producers recognized, however, that despite ample domestic demand, they should try to channel enough of their products through customary European trade outlets to retain their position on these markets. Many firms, some of which enlarged their plants during the war to handle increased production, anticipate more difficulty in the future in selling to the domestic market.

Producers most interested in developing foreign trade, according to his study, are the canners of lower-priced products such as rockfish, pollock, mussels, and whiting, for which there is not as yet an extensive demand. It was felt that many of these products offer comparatively good values in terms of food weight per dollar. In general, these products could be produced in larger quantity if larger markets for them could be developed.

All interested parties recognized the problem of exchange and hoped there would be some means for European countries to finance shipments. Several cited difficulties in obtaining import permits on products shipped recently. It was considered that the survey might help, directly or indirectly, to solve such problems.

With 20,000 cases of canned sardines shipped to Europe last year and large quantities of government-purchased stocks consumed in Europe during the war, New England canners feel it important for the United States to try to make permanent customers of the people who have learned to like American products. With no distress stocks available, these canners said they could supply sardines, sea herring, mackerel, pollock and pollock flakes, hake flakes, whiting, bluefin tuna, and mussels. Items such as sea herring, pollock, mussels, and whiting, that lack as yet a well-developed domestic demand, can be packed in increasing quantities if foreign demand justifies and foreign specifications can be met.

New England producers of fresh and frozen fish said that considerable quantities of lower-priced fish--pollock, whiting, rosefish, mackerel, and scup--could be frozen if foreign demand for them were developed.

In the Middle Atlantic States, packers estimated they could can up to a million cases of herring and whiting, mostly the latter, if commitments were available.

California packers of pilchards, tuna, and mackerel said a marketing program should be undertaken for Europe and that they would be willing to direct portions of their packs to Europe to retain markets where their products were well-known. Several expressed an opinion that a special pack of anchovies could be prepared for export. Available for export from this area are anchovies, squid, pilchards, herring, rockfish, mackerel, and tuna.

In the Pacific Northwest, salmon and pilchard canners and mild-cured salmon producers expressed a desire to retain European markets. Retention of the United

Kingdom market for canned salmon and the Swedish market for mild-cured salmon was causing concern. Northwestern canners reported they would be glad to supply canned salmon, halibut tails, shad, tuna, and rockfish for export.

The canning season for several important products, including salmon, tuna, and California and Maine sardines was not sufficiently advanced to justify prophesies of pack totals. Packers, therefore, were unable to give accurate estimates of canned fish stocks that would be available for export.



U. S. Army and Air Force Canned Fish Requirements

The following are the latest requirements of the U. S. Army and Air Force to be procured from the 1948 canned fish pack, as announced by the Army Quartermaster Corps late in October:

Type of Canned Fish	Dozens No. 1 Cans
Salmon	879,000
Sardines	483,000
Tuna	529,000
Total	1,891,000



Work of FAO, 1947-1948

Work of FAO, 1947-1948^{1/} summarizes the work of the Food and Agriculture Organization since the Third Conference held in Geneva from August 25 to September 11, 1947. Mention is made of the fisheries meeting at Baguio where an agreement was drawn up for an Indo-Pacific Fisheries Council, the taking over in part by FAO of UNRRA's rehabilitation and development work in fisheries in China, and the dispatching of two fisheries experts to Siam.

FISHERIES

The work conducted by the Fisheries Division in 1947-48 is described as follows:

Much of the work relating to fisheries in 1947-48 has been concerned with the initiation of regular statistical and other services, and with the setting up of regional fisheries councils, which will decentralize many of the activities in this field.

A number of special studies and projects have been undertaken. During the year, a report on the salted fish industry from 1920 to date was completed. This reviews the effects of the economic crisis of the early 1930's and the failure of the industry to recover until it received the artificial stimulation of the war. Data are presented looking toward reducing the vulnerability of this industry in the future. A similar study of the herring industry, which has also faced long-standing difficulties, has now been started. Work has been initiated on the development of an international code of quality standards for certain fisheries products entering into international trade.

A study of the fish resources of the world is under way, not only covering the highly exploited areas, but pointing out areas that are little exploited or entirely unknown. A descriptive international catalogue of

^{1/}May be obtained for \$1.00 from the Food and Agriculture Organization, Longfellow Building, Washington, D. C. by requesting C 48/10.

educational and research institutions in fisheries and a directory of fisheries scientists are in preparation. In statistical reporting, descriptions of methods used by various countries are being compiled as a first step in bringing about greater uniformity.

Two members of the staff of the Fisheries Division, one located in Europe and the other in the East, have given consultative service to the fisheries administrators.

The Yearbook of Fisheries Statistics and the Fisheries Bulletin are discussed as well as the possibility of distributing, in some form, abstracts of literature relating to fisheries.

FUNCTIONS OF FISHERIES DIVISION

The functions of the Fisheries Division are as follows: Acts as technical adviser to the Director-General regarding fish and fisheries and assists him in carrying out the relevant recommendations of the Council and Conference.

Its primary responsibility includes:

1. The development and maximum utilization in perpetuity of living aquatic resources.
2. Technical problems of fishing and handling fisheries products.
3. Production, marketing, and consumption of fisheries products.

PROPOSED PROGRAM OF FISHERIES DIVISION

The proposed Program of Work for the Division is divided into three types of activity:

GENERAL AND REGULAR ACTIVITIES: Administration: Services to the Conference, the Council and its committees, technical bodies, and international organizations; ad hoc advisory services as requested.

Yearbook of Fisheries Statistics: A biennial publication containing statistics on landings and trade, and miscellaneous statistics on the fisheries industry such as labor, craft and gear, utilization and capacity of processing facilities.

Fisheries Bulletin: A monthly publication which is largely statistical in nature but which contains summary comments on the state of fisheries in various countries as well as short articles of topical interest.

Fishing Methods: Development of information on existing methods and maintenance of a consulting service in this field for member governments.

Fish Resources: Estimation of present known fisheries resources of the world; development of information on resources now little known or unknown, with a view to their fullest possible wise utilization.

Quality Standards: Continuation of work on development of codes for certain fish products entering into international trade.

Statistical Standards: Maintenance of a consulting service for member governments on statistical methods adapted to fisheries and fisheries products.

Fisheries Technological Abstracts: Continuation of a project to collect, publish, and distribute in translation some of the most widely useful abstracts in fisheries technology and engineering.

Fish Cultural Methods: Continuation of work of assembling information on all branches of fish culture and providing a consulting service for member governments.

Catalogue of Fisheries Institutes: Continuation of work of compiling a catalogue of educational and research institutes in this field.

SPECIAL PROJECTS: Commodity Studies: Continuation of work of collecting data and analyzing economic conditions relating to certain important fish commodities that have been subject to chronic market difficulties. Herring will be the product studied in 1949.

Special Bibliographies.

LOCAL ACTIVITIES: Preparation for and Servicing of Regional Fisheries Councils: The secretariat of the proposed Indo-Pacific Fisheries Council and the others under consideration will be furnished by FAO, and much of FAO's regional work in fisheries will be done through the councils. Preliminary work will be carried out in 1949 looking toward the establishment of councils for the European and Latin-American regions.

Regional Liaison and Missions for Europe, the Indo-Pacific Region, and Latin America: In addition to work carried out through the Fisheries Councils, FAO fisheries officers in the regions will be in constant contact with national fisheries administrators, will supply information, and will generally furnish the services available from the organization.

Conferences and Meetings: Conference for inauguration of Indo-Pacific Fisheries Council; conference to consider the establishment of a regional fisheries council for Latin America; conference to consider the establishment of a regional fisheries council for the Mediterranean; meeting of Standing Advisory Committee on Fisheries; meeting of study group for preparation of commodity study on herring; meeting of study group in connection with preparation of material for publication on quality standards; working party to prepare material on statistical standards; special technical conferences on request to deal with regional problems as they arise.

Finally, technical committees and fisheries publications are listed.



The State of Food and Agriculture, 1948

The State of Food and Agriculture, 1948^{1/} was prepared by the Food and Agriculture Organization at the request of member governments as a basic document for the intergovernmental consultations on plans and programs at the Fourth Session of the FAO Conference in November in Washington but is also addressed to the general public.

The report contains a chapter on fisheries products as well as a tabulation of the per capita consumption of fishery products in European countries, Australia, New Zealand, Canada, and the United States in the chapters covering those regions. Whaling statistics are in the section covering fats and oils, as well as in the chapter on fisheries products.

^{1/}May be obtained for \$2.00 from the Food and Agriculture Organization, Longfellow Building, Washington, D. C., by requesting C 48/8.

The latter chapter introduces its discussion of Recent Developments by Regions, World-wide Trade Trends, and Whaling, with the following paragraph:

The shortage of land-produced food during and after the war has turned increasing attention to the sea and inland waters as sources of protein food. There is an awakening of interest in both the western and eastern nations in the latent possibilities of the fisheries. Relatively high prices have increased the extent of fishing activity. A similar influence has been exerted by the development of methods for the detection of fish in the sea, such as the use of sonic depth sounders, and by the use of improved gear, often of new pattern. In countries where fishing is mechanized, the higher fisheries earnings of recent years have resulted in the building of vessels with greater cruising radii. This development, which recently has been coupled with the development of fast refrigerated carrier vessels and factory ships, is extending the areas of effective fishing operations. Largely because of exchange difficulties and other problems of reconstruction and rehabilitation, much of the trade in fisheries products is still controlled by governments. Various kinds of special stimuli for fishing, fish-processing, and trade are still in existence.

The chapter concludes with the following outlook:

Present signs point to a higher world level of fisheries production and a more complete utilization of the catches than has existed. It is probable that in the absence of relatively adverse economic conditions the trend towards mechanization and expansion which is evident in some countries will spread to others.

Increase in production, if it occurs, will not so much be due to the increased productivity of certain areas which were not fished during the war, but rather to the increased fishing effort in areas that were little used in the past--for example, the western and central Pacific Ocean and the waters adjacent to Latin America. The increased interest in fish farming and pond culture will tend to further increase total production. Nations also recognize that, in exploiting the resources of the sea, sources of food can be tapped without any encroachment upon the living space of man himself, and that no husbandry is necessary, which in itself is an incentive in the face of expanding populations.

There is already evidence of competition in fishing, between nations, in waters of the high seas that have not been subject to sovereign rule or regulation. Governments are turning their attention to the protection of their interests in these areas. In some cases, this takes the form of the assertion of an exclusive right to regulate fishing of their own and other nationals in waters of the high seas contiguous to their shores.

Many of the resources in these waters may be exhaustible, and it is likely that unregulated competition between nations for them will lead to commercial failure. On the other hand, some of the living resources may not be so affected, and in others the yield might actually be increased by more intensive fishing.



Wholesale and Retail Prices

The wholesale index for all commodities on September 18 continued to increase, while that for all wholesale foods continued to decline; but the decline in all foods was not as great as that recorded for the previous month, according to the Bureau of Labor Statistics, U. S. Department of Labor. Topping the previous post-

war peak of August 7 and 21, the comprehensive index for all commodities advanced by September 18 to 169.4 percent of the 1926 level. The wholesale index for all foods decreased 0.2 percent compared with August 14, 1948, but increased 5.0 percent compared with September 13, 1948.

The wholesale average price of canned pink salmon at Seattle during September was 5.1 percent higher than August and 29.1 percent higher than September 1947. Although the wholesale average price of canned red salmon also increased, it was only 0.7 percent higher than August 1948 and 11.1 percent over September 1947.

Wholesale and Retail Prices

Item	Unit	Percentage change from--		
		Sept. 18, 1948	Aug. 14, 1948	Sept. 13, 1947
<u>Wholesale: (1926 = 100)</u>				
All commodities	Index No.	169.4	+0.2	+7.6
Foods	do.	189.9	-0.2	+5.0
Fish:				
Canned salmon, Seattle:		Sept. 1948	Aug. 1948	Sept. 1947
Pink, No. 1, Tall	\$ per doz. cans	5.848	+5.1	+29.1
Red, No. 1, Tall	do.	6.649	+0.7	+17.7
Cod, cured, large shore, Gloucester, Mass.	\$ per 100 lbs.	15.00	+2.7	+11.1
<u>Retail: (1935-39 = 100)</u>				
All foods	Index No.	Sept. 15, 1948	Aug. 15, 1948	Sept. 15, 1947
		215.2	-0.6	+5.7
Fish:				
Fresh, frozen, and canned	do.	314.9	+3.4	+14.2
Fresh and frozen	do.	264.0	+3.8	+8.8
Canned salmon:				
Pink	¢ per lb. can	56.3	+2.9	+25.4

Retail food prices followed the wholesale food price trend and continued to decline. The retail food index was 0.6 percent under August 15, 1948, but 5.7 percent over September 15, 1947. However, the fresh, frozen, and canned fish index continued to increase and at a greater rate. Unlike the previous month when the increase was mainly on canned fish, the increase, as of September 15, was approximately equally distributed between fresh, frozen, and canned fish. Due to the tapering off of production in most of the fish production centers at this time of the year, the increase in fresh and frozen fish is usual in September. The average retail price of canned pink salmon also was higher than the previous month.

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"THERE IS NOTHING NEW UNDER THE SUN"

In the archives of the Great Grimsby Coal, Salt, and Tanning Company Ltd., there is a copy of a document in Norman-French, dated 1376, which tells of various men of Brightlingsea being in trouble for "using a net with mesh so close that no fish may escape, however small."