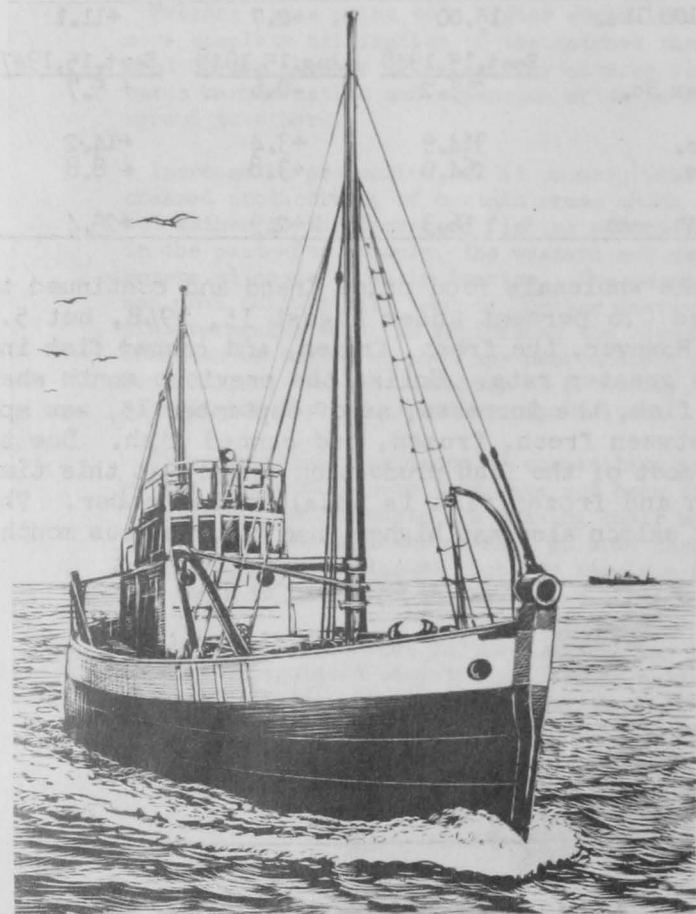




Australia

FISH PRODUCTION, SOUTH AUSTRALIA, FISCAL YEAR 1946-1947: Introduction: The total known production of fish in the State of South Australia amounted to 4,750,000 pounds for the fiscal year 1946-1947, according to a report from the South Australia Fisheries and Game Department. Of this total, 1,700,000 pounds were shipped by rail to Melbourne. Most of the fish in South Australia is caught by hand-lining.

South Australia ranks almost the lowest in productivity among the Australian States with its approximately 5,000,000 pounds total catch of fish. New South Wales leads with 30,000,000 pounds of fish per annum. A half of its catch is taken by a dozen trawlers and about 100 Danish seiners (small trawler-type boats). Victoria ranks second in the Commonwealth with 10,000,000 pounds of netted fish. Tasmania, with only a couple of Danish seiners, but many netters, produces 6,000,000 pounds of fish.



AUSTRALIAN TRAWLER

Pilchards: During the year, a special small-meshed net was purchased in order to test the shallow waters of the State for sardines or pilchards (Sardinia neopilcharda). This species of fish closely resembles the pilchard of the West Coast of the United States.

Large schools of sardines have been sighted in Australian waters during aerial observations and during boat patrols. Small lots of these fish have been captured by dabnet in the Port River and in Coffin Bay and adult fish up to 11 inches in length have been taken. An intensive search for these commercially valuable fish is to be carried out. It is to this species and to tuna and mackerel also, that the Australian Fisheries Department looks for the greatest development in their fisheries.

Frozen Fillets: Plants in the past few years have been gradually erected for filleting fish and sharp-freezing the fillets in order that freight costs could be reduced.

The fillets are packaged in cellophane, each pack being about one inch thick and of 5 pound weight, and then frozen quickly. Eight such packs of solidly frozen slabs of fillets fill the cardboard carton which is then sealed and ready for shipment. From some of these centers--and there are today eleven filleting-freezing plants operating in South Australia--the heavy, dirty, wooden fish boxes of yesteryear have been completely displaced by this hygienic pack.

Varieties Produced: In 1936, whiting was almost the only fish along the major portion of the South Australian coast that could bring reasonable returns to the fishermen. Today whiting are not the only fish worth catching because mullet, gar, ruffs, salmon and snook, which are usually caught commercially only by nets, also give good financial returns to fishermen. But many fishermen still do not realize the importance of these tasty fish. In most localities netting is principally done in winter because not only do the fish come close inshore then, but the crabs and sharks which can do great damage to nets have generally moved away from the shallow waters.



Belgium

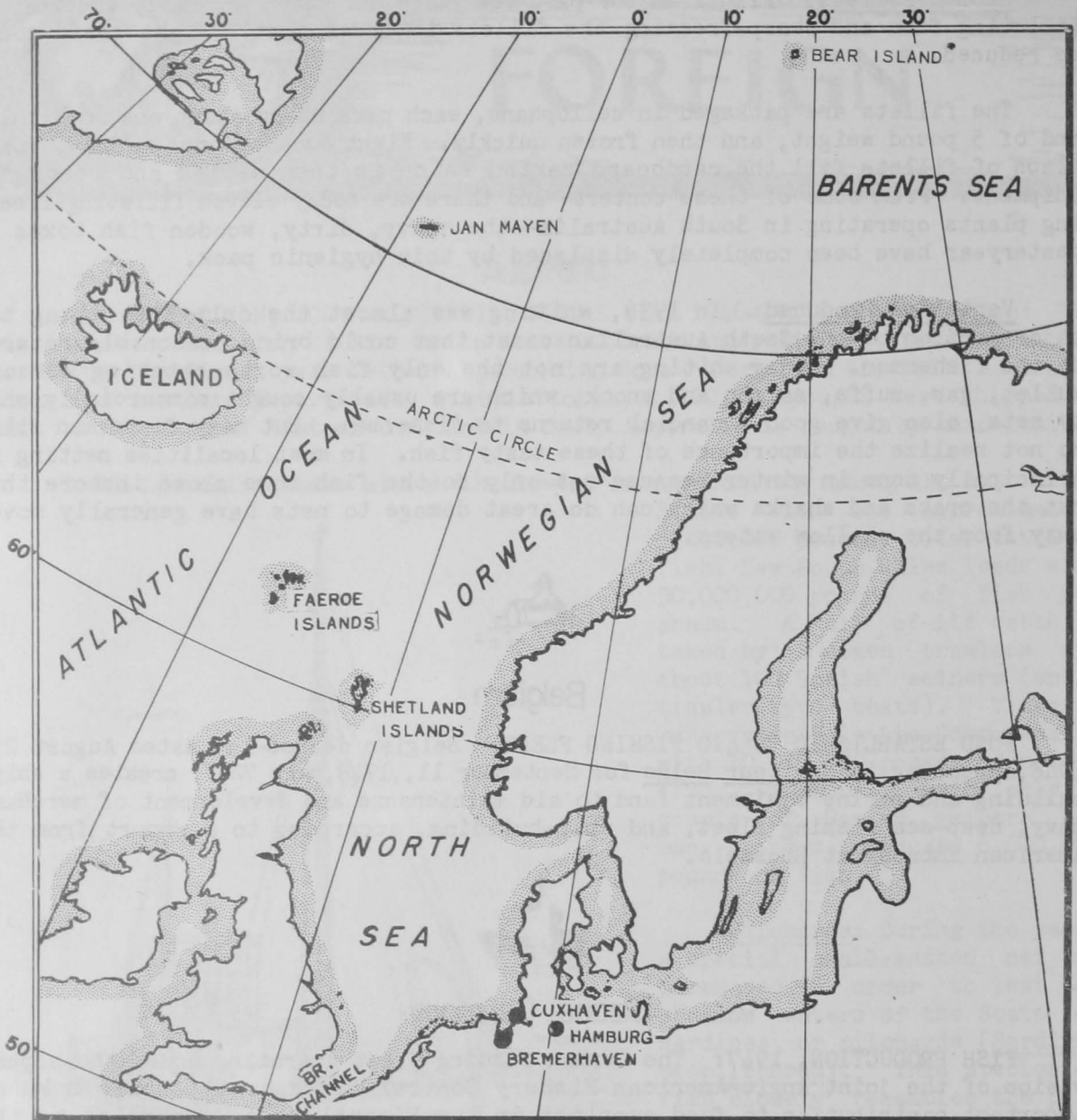
FUND ESTABLISHED TO AID FISHING FLEET: Belgian decree-law, dated August 23, 1948, appearing in Moniteur Belge for September 11, 1948, page 7288, creates a ship-building and marine equipment fund to aid maintenance and development of merchant navy, deep-sea fishing fleet, and ship-building, according to a report from the American Embassy at Brussels.



Bizone Germany

FISH PRODUCTION, 1947: The German fishing fleet operating under the supervision of the joint Anglo-American Fishery Control Board continues to make an important contribution to food supplies in the Bizonal Area, according to the Food and Agriculture Report of the Military Government, No. 32, March 1947-February 1948, from the U. S. Office of the Military Government for Germany. Fish are particularly important because of the low animal protein content of the present German diet. Approximately 269,000 metric tons of fish were landed in 1947, providing 251,600 tons of fish for the ration as compared with 232,901 tons for 1946. The remainder consisted of shrimps, mussels, undersized fish, and other types unusually susceptible to spoilage, which are unrationed. The supply of fish was further augmented by imports from the United Kingdom and from Scandinavian countries, amounting to over 113,000 tons valued at over \$13,000,000.

The increased catches for 1947 were due mainly to increases in the size of the fishing fleet. During 1947 the operating fleet increased from 142 to 160 deep sea trawlers and from 68 to 84 herring luggers. In addition to the foregoing, there were 425 German-owned coastal cutters and 2,781 small cutters and river boats operating out of coastal fishing villages.



HERRING FISHERY AT PEAK: The German herring industry is now reported to be operating at its highest peak since World War II, according to the American Consulate at Bremen. The season, beginning approximately at the end of May, ends in December. Fishing grounds extend from the Shetland Islands to the British channel according to the movement of the schools of herrings.

During the 1947 season, six companies operated 66 luggers, which landed catches totalling 22,601 metric tons of prepared and salted herring. The present season opened with 72 luggers, which landed 8,996 metric tons from 166 fishing trips up to and including August 18, 1948, as compared with 7,108 metric tons from 134 fishing trips during the corresponding period in 1947. Before the war, the German lugger fishing fleet consisted of 170 ships.

The present annual consumption of herring in the western Zones is estimated at approximately 99,792 metric tons. Experts estimate that the German production will yield 24,948 metric tons, indicating that the German lugger fishing companies are able to fill approximately 25 percent of the demand.

Herring Production (in metric tons)

1947	1946	1945	1938	1937
22,703	20,956	3,074	48,200	67,835

* * * * *

ICELAND FISHING VESSELS IN HAMBURG: Under a special agreement with the Military Government, a number of fishing vessels belonging to Iceland are based in Hamburg, Germany, and operate out of this port in order that their catches may be returned to that city, according to the American Consulate General at Hamburg, Germany. This eliminates transshipment of the fish from Iceland to Hamburg as the entire catch is contracted for by Military Government for the German population.

FISHERY IN GERMAN NORTH SEA PORTS: During the first half of 1948, the total amount of fish landed at North German ports was considerably larger than for this same period last year. Shown in the table is the total quantity of fish available for issuance to the population during the first half of 1948.

Fishery in German North Sea Ports, Jan.-June, 1947-48

	Jan. - June 1948			Jan. - June 1947		
	Trips	Metric Tons	U.S. \$	Trips	Metric Tons	U.S. \$
Landed at Hamburg, Cuxhaven, and Bremerhaven, by fishing steamers from:						
North Sea	448	17,274	1,980,600	298	13,698	1,420,200
Iceland	261	24,728	3,130,800	232	25,264	2,361,000
Norwegian Coast	295	38,710	3,851,700	49	5,536	434,700
Barents Sea	29	3,869	298,500	1	190	15,000
Bear Island	19	2,521	196,800	108	13,181	1,049,100
Total landings in smaller ports in Bizone	*	29,307	3,604,500	*	8,118	1,339,500
Total		116,409	13,062,900		65,987	6,619,500

* Not available.



Canada

MANITOBA WINTER FISHING, 1947-48 SEASON: The total catch for the winter fishing season in Manitoba (December 1, 1947 to March 15, 1948) amounted to 17,368,000

Quantities Caught and Values as Landed

Species	Quantity	Value
	lbs.	\$
Pickarel (yellow pike)	4,752,800	950,586
Pike (jackfish)	2,434,800	203,582
Sauger	1,789,200	319,301
Suckers (mullet, etc.)	1,988,700	45,725
Tullibee	3,441,400	152,687
Whitefish	2,153,300	248,311
Unclassified	807,800	143,722
Totals	17,368,000	2,063,914

pounds, valued at \$2,063,914. Pickerel (yellow pike) was the leading species with 4,752,800 pounds, valued at \$950,586, followed by sauger 1,789,200 pounds, valued at \$319,301, and whitefish 2,153,300 pounds, valued at \$248,311. The marketed wholesale value of the catch was \$2,828,870.



Chile

EFFECTIVE DATE OF SOVEREIGNTY OVER CONTINENTAL SHELF LAW CHANGED: The Chilean National Congress on August 18 passed legislation suspending the validity of the "Codigo de Aguas" from its effective date, June 11, 1948, until January 1, 1949, according to a report from the American Embassy at Santiago. The "Codigo de Aguas" included the extending of Chile's sovereignty over the seas adjacent to its coasts to 31 miles offshore. The legislative act of August 18 also restores to legal effect certain provisions of the Civil and Minerals Codes which had been specifically modified by the "Codigo de Aguas" and provides that during the period of the suspension of the "Codigo de Aguas" all laws, orders, regulations and decrees relating to waters, which had been in effect up to June 11, shall continue in full force and effect.



Denmark

MODERN FISH CANNERY OPENED: A Danish firm opened a large fish cannery at Frederikshavn, Jutland, on September 7, 1948, according to a report from the American Embassy at Copenhagen.

The cannery will work primarily on export production and will have a capacity of between 6 to 8 metric tons of fish per day. It will preserve mackerel, sprout sardines, tunny, cod, lobsters and shrimps, and will employ normally about 100 to 120 workers, mostly women, though at full capacity it could employ as many as 140 workers. The area of the plant comprises 12,915 square feet outfitted with very modern machinery and equipment to meet the highest hygienic standards.



Iceland

BUILDING MODERN TRAWLER: The most modern trawler of its type in the Icelandic fleet is now being built in England, according to Fiskets Gang. It will be 165 feet in length, measure 450 tons, and will be powered with a 970 hp. diesel motor. It will have a 13,500 cubic foot fish hold, hydraulic winches, a fish meal plant capable of producing 10 tons of dried meal each 24 hours, and a cod liver oil installation designed to produce up to 20 tons of oil per trip.

* * * * *

SUMMER HERRING SEASON POOR: Iceland's summer herring fisheries, which commenced about July 1, terminated September 11 with a very poor catch, according to

the American Legation at Reykjavik. Engaged in the fisheries along Iceland's northern coasts were 241 vessels employing 235 purse seine nets. These vessels delivered 44,669 metric tons of herring for processing to herring oil plants, and 11,456 metric tons were salted as compared to 124,687 tons and 6,303 tons, respectively, for the corresponding period last year.

To August 28, the production of herring oil was about 4,600 metric tons and herring meal, 4,800 metric tons.

Iceland's essential imports depend almost entirely upon its exports of fish and fish products. Having concluded several trade agreements with European countries, it is unlikely that Iceland will be able to meet the export totals stipulated in these agreements, for they call for shipments of herring oil and herring meal far above the present yield. In fact, this year's catch is the poorest in many years, although more modern boats were engaged in herring fisheries.

It is estimated that the failure of the herring catch will cost Iceland in the vicinity of 15 million dollars in foreign currencies. Consequently, this economic setback will necessitate a reorganization of the import program for the remainder of the year.

TO INCREASE FROZEN FILLETS SALE TO U. S.: Iceland's exports of frozen fillets to some extent depend upon tie-in sales. Iceland undertakes the export of herring oil provided the importing country will purchase frozen fillets. Since exports of herring oil will be considerably smaller than anticipated, Iceland's freezing plants have turned to the preparation of frozen fillets in one-pound cellophane packages, which will be more readily saleable abroad, and have discontinued temporarily the preparation of the standard seven-pound package. Iceland is endeavoring to make greater sales of frozen fillets in the United States, for which she can obtain dollars, though at a loss, to the Icelandic Government which heavily subsidizes its exports of frozen fish fillets.



Italy

NATIONAL FISHERIES CONGRESS: The Italian newspaper, Il Globo, on August 4, published the following information on the National Fisheries Congress which was held at Ancona, according to the American Embassy at Rome:

Particular attention was given to the possible influence of ERP on the fishing industry. According to the 1947 Paris report, Italian fish production by 1951 should be 210 thousand metric tons (of which 190 in fresh and frozen fish and 20 in preserved fish) or 30,000 metric tons above prewar production.

The fishing industry states that, on the basis of its urgent need for aid, its capacity to produce highest income for the State, absorb maximum manpower, and solve problems of depressed areas, it is entitled to an allocation from the ERP-Lira fund.

It was pointed out that in view of estimated imports of 1.5 million dollars worth of fish during the first semester of ERP aid, it would prove detrimental to the Italian fishing industry if these imports were

to continue in addition to the 60-70 thousand metric tons of cod and stockfish which are normally imported.

A resolution was approved requesting the Ministry of Commerce to include a protective tariff in the revised customs tariffs which are being drawn up, on imported fish produced more cheaply than domestic fish.

The wider use of refrigerators for fish was urged to solve the problem of distribution and to increase consumption.

Members of the Congress visited the National Fisheries Fair and the vast fish market under construction which will be one of the most modern in Europe.



Japan

FISHERIES RESEARCH: The following information on fisheries education and research was prepared for the Food and Agricultural Organization for its 1948 annual report by the Natural Resources Section of the Supreme Commander for the Allied Powers in Japan.

Japan has more personnel, institutions, laboratories, and vessels for aquatic research than any other nation. The problem confronting aquatic research in Japan, therefore, is more efficient use rather than the extension of research facilities. Planning, organization, and coordination are required for the most effective use of these facilities.

Japan has concentrated its research on fisheries production and utilization of aquatic products. Research on fish population management has been comparatively neglected. Japanese fish production methods vary greatly. A few are superior, some are equal to those in the United States, but many are very primitive. Work on fishery technology has been extensive. Certain phases of this work, involving the utilization of fish and fishery by-products, probably are more highly developed than in any other country.

Except for some work on aquaculture, Japanese research in the field of fishery management compares less favorably with other important fish-producing nations. Japan's philosophy has been one of exploitation and continuous expansion. Little work has been done to insure maximum continued production from nearby aquatic areas.

Rivers are largely wasted fishery resources, with production far below the maximum possible. Breeding stocks are insufficient to keep the rivers adequately supplied, and fish are taken long before they reach the most productive size. A limited production is maintained by expensive fish hatchery procedures. Many of Japan's inshore waters where fishing is intensive are overexploited. Little effort has been made to maintain adequate breeding stocks or to protect fish until they reach the most productive size.

In the future, Japan must look to the resources of the Home Islands for its supply of fish. Research must be directed to fish population management if Japan is to obtain a high return from its fishery resources.

Fisheries vocational training, academic education, and research facilities in Japan are closely related to current government reforms. In 1948, the Ministry of Agriculture and Forestry appointed a nine-man committee, the Aquatic Research Reform Committee, to study the problems of research and to recommend ways of unification and better use of research personnel and equipment. The committee consists of six top-ranking Japanese fisheries scientists and three fisheries industry men of high standing.

Reforms Recommended by Reform Committee: The Aquatic Research Reform Committee submitted recommendations recently to the Minister of Agriculture and Forestry. This committee was appointed to make recommendations for the reorganization of Japanese aquatic research. A translation and condensation of the recommendations follows:

FISHERIES RESEARCH REORGANIZATION PLAN

1. Purpose:

In order that the Japanese fisheries research work shall be more effective and efficient, greater coordination between the various phases shall be planned, and better synchronization of the numerous organs involved will be established.

The Fisheries Board is about to be established in the Japanese National Government.^{1/} Within this reorganization an efficient Research Bureau and several research stations under Government direction are planned so that more efficient research work can be accomplished in order to get more accurate data and better results, to be made available to the fisheries industry and fisheries administration for their guidance and benefit.

2. Outline of Organization:

a. Research Bureau

The Fisheries Research Bureau, within the Fisheries Board deals in general planning and coordination between organizations, summarizes the results of research, and renders technical service to the fishermen and to the fishing industries.

(1) The Research Bureau shall be divided into five sections. Eight stations are to be included in the Bureau as the basis for research work:

- (a) Resources Section: pelagic resources--tuna, bonito, whale, etc.
coastal resources--sardine, herring, etc.
- (b) Aquiculture Section: marine culture--shellfish, seaweeds, etc.
freshwater culture--freshwater fishes, etc.
- (c) Utilization Section: preservation, processing of products, etc.
- (d) General Affairs Section: administration, technical service to industries and fishermen, business liaison of research organizations, etc.
- (e) Statistics Section: fisheries statistics; survey or actual state of fishing resources and industries.

^{1/} The Fisheries Board, under the new organization plan, will replace the Bureau of Fisheries.

- (f) Research Stations: eight in number. The whole of Japan will be divided into seven geographical regions plus a fresh water region (not divided geographically but regarded as one region equal to any of the other seven regions). Each region has a central experimental station and one or more branch stations. Regional research stations will deal with fisheries problems within their respective regions, and regional research stations will also give technical services to the fishermen of the region along lines indicated by the Research Bureau.

(2) The Research Bureau chief shall appoint national research directors on important problems of intraregional and national scope. The regional research stations shall cooperate with each other under the chief of the Research Bureau.

b. Coordination with research organizations outside of the Research Bureau:

(1) The present prefectural experimental stations shall be the instruments for dispensing technical service to the fishermen of that prefecture, coordinated with the Regional Research Station.

(2) Educational institutions and private organizations shall join in the research work undertaken by the Research Bureau.

c. Committees:

(1) Fisheries Research Committee: A fisheries research committee shall be composed of five distinguished scientists and four experienced industrial men, appointed by the chief of the Fisheries Board to deliberate on items of research, budget, and other important problems, and shall present their opinions to the chief of the Research Bureau.^{2/}

(2) Regional Fisheries Research Committee: Regional fisheries research committees shall be composed of four scientists and five experienced fishermen within those regions, to discuss the regional problems of fisheries research and render technical services to the fishermen.^{2/}

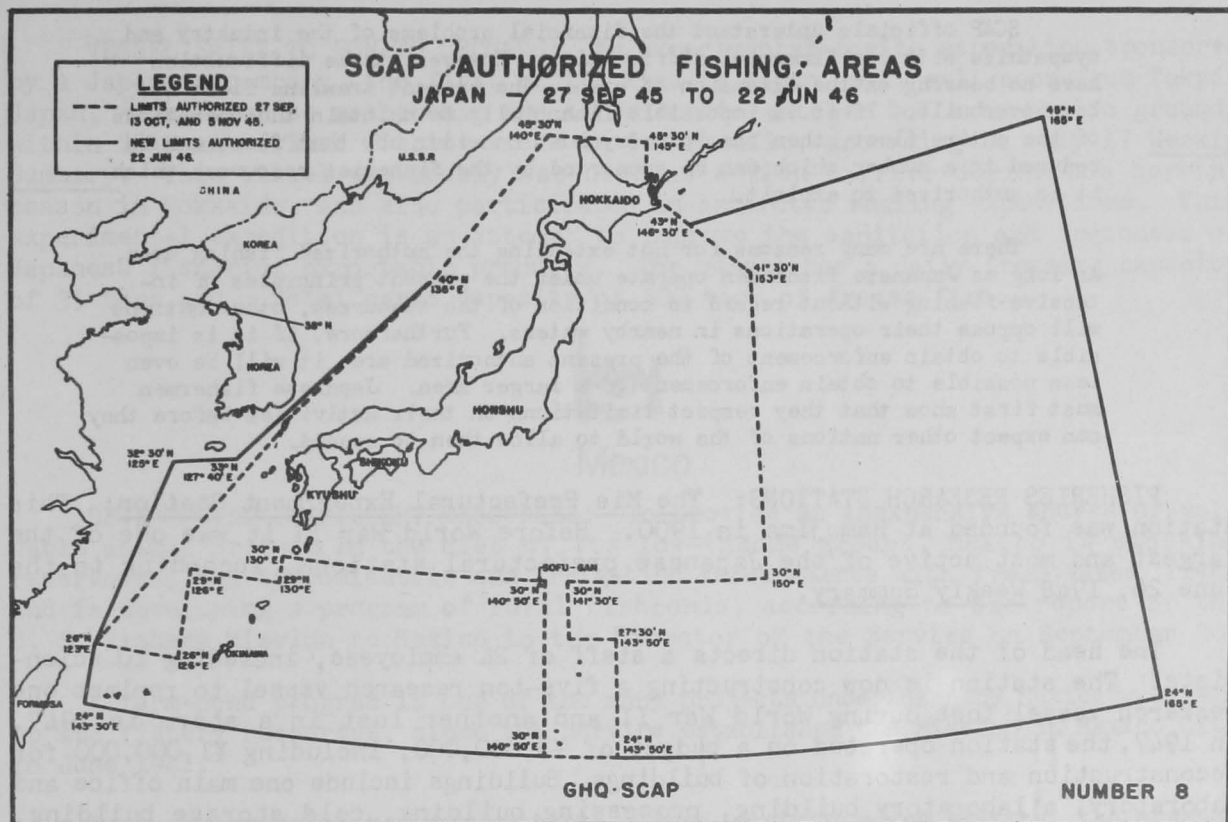
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AUTHORIZED FISHING AREA VIOLATIONS PROBLEM: At meetings held by the Trawlers Association at Nagasaki and Simonoseki to devise methods of curbing fishing outside the Japanese authorized area, a representative of the Natural Resources Section indicated the present position and the problems which must be solved, by the Japanese fishing industry, according to the July 4-10 Weekly Summary, of the Natural Resources Section of SCAP.

The SCAP official stated that General MacArthur is very much interested in the condition of the Japanese fishing industry and is particularly concerned about the welfare of the fishermen and the success of fishing operations to help feed the people of Japan. Because of this interest, he has authorized fishing in the present area from which 85 percent of Japan's home island fish production was taken in prewar years. Authorization has been granted for building fishing boats until Japan's present fleet of trawlers and tuna boats is greater in tonnage than that of prewar years. Fuel oil and fishing materials have been made available in increasing quantities to supply the requirements of the fishing fleet. Finally, two Japanese Antarctic whaling expeditions to produce food and oil for feeding the Japanese people have been authorized. As a result of this assistance, the fishing

^{2/}The term of service of the members of these two committees shall be six years, one third of the committee men changing every two years.

industry has almost entirely recovered from wartime difficulties. The fishing industry has still many problems, but, in general, it is in better condition than any other industry in Japan.



The SCAP official further pointed out that, in the trawl fishery, many boats were fishing outside the authorized area. Since the violations have increased in numbers, the following alternatives and warning were presented:

1. The Japanese Government has been instructed by the Supreme Commander to enforce SCAPIN 1033. The government must immediately work out with the fishing industry a program which will effectively enforce observance of the authorized area.
2. If this cannot be done, then it will be necessary to:
 - a. Reduce the area to a size which can be enforced.
 - b. Reduce the number of the boats to a level which can be supported within the authorized area, thus reducing the economic pressure to fish outside the area.
 - c. Reduce allotments of fuel oil and fishing materials to the level where it will be unprofitable to fish outside the area.

This is a problem which must be faced by the industry.

The official of SCAP made the following reply to the spokesman for the Japanese fishing industry who indicated that they desired the present fishing area extended:

The Japanese Government has the responsibility for enforcing the authorized area, therefore measures to be taken by the association should be worked out with, and approved by, the government.

The responsibility of the trawling industry is to maintain the maximum continuous production that can be supplied from the authorized area. It has no responsibility for maintaining production that requires fishing outside the area limitations.

SCAP officials understand the financial problems of the industry and sympathize with its financial difficulties. However, these difficulties have no bearing on the extension of area. The present trawling fleet has been overbuilt. If it is impossible financially to maintain the operations of the entire fleet, then the industry must consider how that fleet can be reduced to a number which can be supported by the fisheries resources which it is authorized to exploit.

There are many reasons for not extending the authorized fishing area. As long as Japanese fishermen operate under the present principles of intensive fishing without regard to condition of the resources, other nations will oppose their operations in nearby waters. Furthermore, if it is impossible to obtain enforcement of the present authorized area it will be even less possible to obtain enforcement of a larger area. Japanese fishermen must first show that they respect limitations on their activities before they can expect other nations of the world to allow them to expand.

FISHERIES RESEARCH STATIONS: The Mie Prefectural Experiment Station: This station was founded at Hamojima in 1900. Before World War II it was one of the largest and most active of the Japanese prefectural stations, according to the June 26, 1948 Weekly Summary.

The head of the station directs a staff of 24 employees, including 10 scientists. The station is now constructing a five-ton research vessel to replace one research vessel lost during World War II and another lost in a storm in 1947. In 1947, the station operated on a budget of ¥3,000,000, including ¥1,000,000 for reconstruction and restoration of buildings. Buildings include one main office and laboratory, a laboratory building, processing building, cold storage building, workshop, warehouse, and oil storage building. The library is relatively good.

Work is divided among four branches: Catch, Aquiculture, Processing, and Investigation.

The Catch Branch is in wireless communication with about 150 offshore tuna and bonito vessels working in pelagic fisheries. The Branch compiles data on locations of fishing grounds, fish movement, catch, temperature, currents; tests dyes for nets and paints for vessels; trains crews, officers, and wireless operators in navigation and oceanography by demonstrations and lectures.

The Aquiculture Branch has improved methods of spat collecting for pearl and edible oysters. It is now testing edible oysters for chemical composition and for methods of improving the quality of oysters in Mie Prefecture.

The Processing Branch conducts cold storage tests and studies methods of improving the manufacture of bonito stick. It has devised a method of processing the juice of bonito, formerly discarded, into soup.

The Investigation Branch is working principally on oceanographic studies of Ago Bay, although it studies other oceanographic problems which may arise in prefectural water.

The Hiroshima Prefecture Fisheries Experimental Station: Owing to the devastation of Hiroshima, the Hiroshima Prefecture Fisheries Experimental Station is in

poor condition. A staff of five scientists and 25 additional employees conducts experiments in seed oyster culture and laver culture. Facilities include one major and two minor buildings, all wood and in poor condition; one 11-ton research vessel; and a library.

VESSEL SAILS TO BONITO GROUNDS: An experimental bonito expedition sponsored by a Japanese company, the first of its kind in Japan, will sail soon from Tokyo, Japan, with Japanese mothership and three bonito catcher boats to bonito grounds within SCAP-authorized fishing areas in the Pacific, according to July 17 Weekly Summary. This vessel previously was used as a fish carrier during the herring season in Hokkaido, and also participated in Antarctic whaling expeditions. This experimental expedition is an attempt to improve the sanitation and freshness of Japanese fisheries exportable products. The vessel has a daily freezing capacity of 35 tons and a total cargo capacity of 500 tons of frozen fish.



Mexico

DEVELOPMENT OF FISHERY RESOURCES: To provide an inexpensive source of valuable animal protein in the diet of its low-income groups, Mexico is stocking reservoirs, and hydroelectric and irrigation impoundments with fresh-water fish, and is developing a program of rural fishponds, according to the report of the U. S. Fishery Mission to Mexico to the Director of the Service on September 30.

A farm-pond program is one of the many projects undertaken by Mexico to develop its fishery resources, since the Service established the Mission in Mexico City in June 1941.

Lack of natural lakes and suitable rivers, periodic rainy seasons, the absence of hatchery facilities, and the use of most of the streams in Mexico's central plateau region for irrigation purposes have blocked the growth of the country's fresh-water fisheries.

Improved production and stocking techniques introduced by the U. S. Fishery Mission have also heavily increased the stocking of trout in inland Mexico's colder waters.

Marine fishery research is receiving attention, too. A marine fishery laboratory has been built at Guaymas. Investigations include tagging experiments on shrimp, and the collection of catch statistics and oceanic data on tides and temperatures taken on Mexico's important fishing grounds. The investigations will show the extent of Mexico's marine fishery resources, and will determine future expansion of the Mexican fishing industry. It is hoped that continuing investigations will be undertaken so that annual assessments of the stock of fish available to commercial fishermen can be made.

There is great mutual interest in Mexico's fishery resources between the United States and the Latin American republic. Many of the marine species common to the United States and to Mexico are migratory between the two countries.

Major Mexican fisheries depend on the United States for a market (75 percent of the Mexican catch is either exported to the United States or is carried in U.S. vessels).

The U. S. Fishery Mission to Mexico is assisting both countries in uncovering facts about the little-known resources of Mexico and is assisting Mexico in training a competent staff of fishery investigators.

Present plans call for the continuation of the Mission for at least two more years. It acts in an advisory capacity to the Directorate-General of Fisheries and Allied Industries in Mexico's Ministry of Marine. Funds and personnel for cooperation with the Mission are supplied by the latter agency. The Fishery Mission is conducted by the Fish and Wildlife Service under the U. S. Government program for cooperation with the American Republics.

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FISHING FEES FOR AMERICAN BOATS: The Mexican Diario Oficial of August 30, 1948, carries a decree increasing via La Pesca fees 40 percent effective August 30. Increase is comparable to peso devaluation, hence there is no practical difference in the dollars paid now by the American boats for fishing fees compared to dollars paid prior to devaluation. The decree amends only paragraph six of Article 1 of the Mexican Tariff Act of 1939.



Norway

BILATERAL TRADE AGREEMENTS: An extensive schedule of bilateral trade agreements was announced, some of which in the interim were concluded but not yet signed, including one with Austria, according to a late September report from the American Embassy at Oslo. Austria looks toward receipt of Norwegian frozen fish and herring among other commodities in return for steel, chemicals, textiles, and other items. A supplementary agreement with Sweden scheduled for signature in the near future, provides for additional trade each way. Norway is to export nitrates, industrial cod liver oil, iron and steel, agricultural and other machinery.

Negotiations for the 1949 trade agreement with Russia was tentatively scheduled at Moscow early in November.

HERRING FISHERIES: Winter herring fishing in 1948 was the most successful on record. Weather conditions were ideal and fish were extremely abundant. The 1948 catch surpasses any previous records. The final account showed a total catch of 880,900 metric tons as compared to 531,500 metric tons in 1947 and 382,200 metric tons in 1946.

The following table shows the total catch and utilization of the catch:

Winter Herring Catch and Utilization

Item	1948	1947	1946	1938
		(in metric tons)		
Total Catch	880,900	531,500	382,200	533,800
Utilization:				
Exported fresh	131,000	102,100	56,800	79,200
Salted	127,100	110,800	80,800	29,400
To oil plants	579,800	283,200	208,600	382,000
Canned	19,200	18,400	18,500	11,600
For bait	15,700	10,400	7,900	8,500
Fresh for home market	8,100	6,600	9,500	12,200
Other uses	-	-	-	10,900

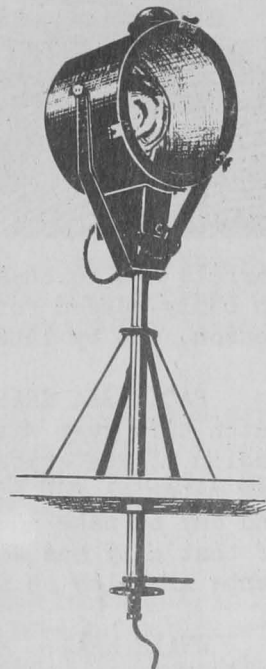
The success of the herring fishing must be ascribed not only to the abundance of fish but also to the increased capacity of the fishing fleet, and especially to the fact that the vessels are now equipped with radio-sound equipment and thus in a much better position than previously to locate the herring schools.

Even greater quantities of fish might have been taken were it not for the fact that the marketing facilities and processing plants were unable to handle additional quantities. Herring oil factories operated as late as one month after the end of the fishing season and the fish then being processed were not fresh.

LIGHT APPARATUS USED BY HERRING FISHING BOATS: Norwegian fishermen are using light throwers to attract to the surface schools of herring that otherwise stay too deep.

The apparatus consists of projectors with strong lights, as much as 2000 watts. These projectors are mounted on the vessels and throw light on the surface of the water. The light enables fishermen to operate at night and attract the herring to the surface so that they may be caught by purse seines operated from small boats. The current is furnished from a generator powered by the boat's motor.

One type of 2000 watt - 110 volt searchlight used is mounted on the roof of the pilothouse. Normally, it extends about three feet above the pilothouse, but it may be raised or lowered. The beam of the light can be adjusted to shine in any direction. Likewise, the lamp can be moved in or out from the reflecting mirror to produce an intense narrow beam to reach as far as possible, a broader beam as the vessel approaches, and, finally, a powerful working light. The searchlight is directed and all adjustments of the beam are made from within the pilothouse.



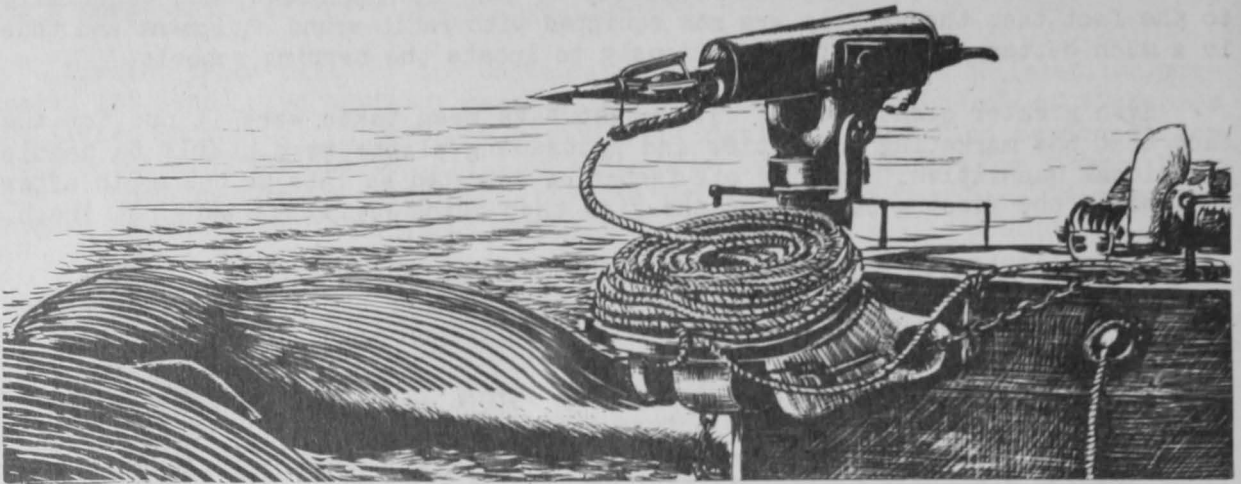
NORWEGIAN SEARCHLIGHT

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PREPARES FOR ANTARCTIC WHALING: There is a strenuous activity in southeastern Norwegian whaling ports as the Antarctic whaling fleet--this year, the largest since war's end--prepares to leave for the south polar fields, according to the Royal Norwegian Information Services. With the addition of the new floating factory, Thorshøvd, the 1948 fleet will be made up of 10 factory ships and 100 whale boats--the approximate size of the prewar fleet. It is estimated that over 6,400 Norwegian whalers and factory workers will be spending the coming season in Antarctic waters.

This year, several Norwegian whaling firms have purchased powerful wartime corvettes which will be used to tow the whales from the catchers to the factory ships--thus increasing the capacity of the fleet. Four of these vessels are being outfitted as whaling auxiliaries.

Using 9 factory ships, Norwegian whalers in 1947-48 caught and processed 935,902 barrels of whale oil and 54,741 barrels of sperm oil. Counting the output of one land station, 1947-48 production totalled 1,046,100 barrels. Due in part to over-age equipment, however, output per ship was somewhat below expectations last year--110,000 barrels against 175,000 barrels for British vessels in the same area. Present estimates indicate that if the 1948-49 catch can reach 1,200,000



barrels with no changes in present oil prices, the coming season may mean \$88,000,000 in badly needed foreign exchange. Opening date of the 1948-49 pelagic whaling season, set by international accord, has not yet been announced.

PACKS SEA CRABS: Fishermen in Trondheim, Norway, whose winter fishing catch this year was far from expectations, were unexpectedly blessed with an invasion of sea crabs. This marine delicacy, new to these parts, has provided good raw material for local canneries, and, at present, over 100 men are working night and day to take advantage of the unexpected arrivals. A Norwegian fish cooperative of that city has sold 800,000 quarter cases to a British firm, and sample shipments are also on their way to the United States and Canada.

WHALE MEAT: Enterprising Norwegian whalers have concluded a successful "sea beef" hunt in the North Atlantic. Unlike the larger expeditions which scour Antarctica for whale oil, this smaller experimental group turned northward to Spitzbergen in search of meat for European tables. During a hunting season which began in late May, a refrigerator ship and 12 catching vessels caught and processed over 375 tons of whale beef. The whole of the catch was delivered to England. Success of this year's venture, plus the growing popularity of quick-frozen whale meat, indicates a return expedition next year. It is noted that the expedition was evidently one of those licensed by the Norwegian Government to hunt smaller types of whales in northern waters. Catches of the oil producing variety are strictly regulated by an international agreement.



Republic of Panama

FISH CANNING PLANT PROPOSED: The Government of Panama is studying a proposal recently made by a Danish firm to establish a large fishing and sea food canning concern in the Republic of Panama to supply local and international markets, according to a consular report from the American Embassy at Panama, R. P.

The company reportedly owns modern equipment which has been in use in Europe, including vessels operated by expert tuna fishermen and canning machinery of different types.

A short time ago, a United States firm made a similar proposal, although of smaller proportions, to install a tuna fishing base at the Island of San Miguel in the Pearl Islands.



Republic of the Philippines

FUTURE CANNED FISH EXPORT SEEN: Whether Philippine canned fish can be of a quality suited for export in addition to local consumption, will depend largely on the results of tests on samples of locally canned fish shipped recently to the United States. The shipment is in keeping with the policy of the Philippine Bureau of Fisheries and the U. S. Fish and Wildlife Service to explore the possibilities of exporting Philippine marine products. It is the first such shipment to be made.

Samples sent to the Service's Laboratory in College Park, Maryland, were yellowfin tuna packed in brine, coconut oil, cottonseed oil, and in tomato sauce. Samples of dry shrimp or hibe prepared the native way, of native shrimp packed wet-pack style, samples of native oysters in brine, and gizzard shad (salmon style) were also shipped.

Of the four packing media for tuna, the product in coconut oil is of greatest local interest since it is hoped that it will serve as a substitute for cottonseed oil which is the common medium for tuna packing in the United States. The packing of tuna in tomato sauce is an effort to develop a specialty product that appeals to certain segments of the consuming public.

Since the demand for tuna is limited in the Philippine fresh-fishmarket, it is thought that the export of this fish would not deprive the Philippine public of any essential food item. Canned tuna is enjoying an increasing popularity in the Philippines and it is hoped that a large local market also can be developed. Furthermore, if successful, canning tuna with coconut oil will be of assistance to the coconut industry in the Philippines.

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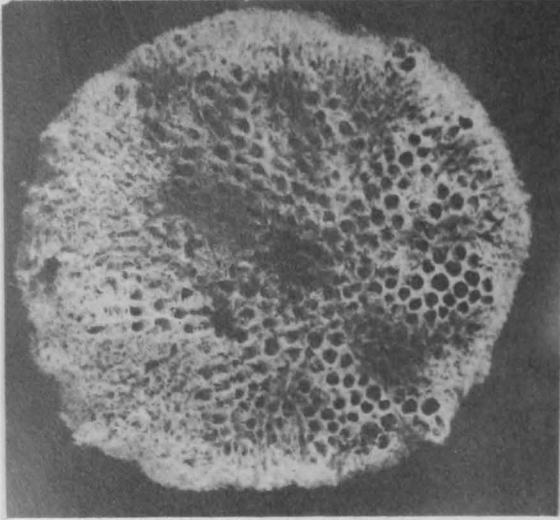
OCEANOGRAPHIC SURVEY OF SOUTHERN PHILIPPINE WATERS COMPLETED: The Spencer F. Baird, research vessel of the Fish and Wildlife Service, Philippine Fishery Program, left Manila the early part of September for the Celebes Sea on a cruise that marks the completion of a year's oceanographic survey of the waters of the Southern Philippines, according to a joint release from the Philippine Fishery Program, and the Philippine Bureau of Fisheries.

Upon the completion of the present voyage there will be available to fisheries scientists more oceanographic data on the Sulu and the Celebes Seas than has ever been collected anywhere in the Western Pacific. This material will be of great aid to the Philippine fisheries.

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OPPORTUNITIES IN SPONGE INDUSTRY SEEN: An opportunity for Philippine business capital in the sponge industry was revealed in an announcement on September 10 by the Director of the Philippine Bureau of Fisheries, and the Administrator of the Philippine Fishery Program.

Recent inquiries by the American Sponge Institute, the central trade body of the sponge producers, processors and sellers, indicate that the world's supply of natural sponges is very short and that the price is high. American interests are anxiously seeking new sources of supply.



PHILIPPINE TOILET SPONGE

According to a report of the Philippine Fishery Program, sponges were among the first items for export to come to the attention of the Americans on their advent to the Philippines and they did much to try to promote such trade.

Sponges have been an export item from the Philippines for a long time and records of the industry exist as far back as 1908. In those days, however, sponges were not a particularly lucrative business and the market apparently fluctuated widely. The introduction of plastic absorbent materials about 25 years ago also hindered the development of the industry. Production

continued at a small but steady rate throughout the entire American regime in the Islands. Recent technological developments, coupled with the intensive demand for plastic and other sponge substitutes for other uses, has placed new emphasis, apparently, on natural sponges. Also, many American sponge beds have become exhausted by exploitation and the famous Bahama beds have been depleted by disease. The Philippines remain, therefore, one of the few proven sources of supply and all that needs to be done is to get a good quality of sponges on the market.

Recent communications from the United States have asked for specimens of the Philippine product both in the raw state and in the finished condition. The American Sponge Institute is particularly anxious to obtain as complete a collection of sponges as possible to determine the suitability of the product for various purposes for which there exists a demand, and also in order to classify Philippine sponges in terms of the world's trade terminology.



Trieste

TO REBUILD FISHING FLEET WITH ECA FUNDS: Release of 6.4 billion lira of the counterpart funds in Trieste, (equivalent to approximately \$11,000,000) for the purpose of financing the rehabilitation and reconstruction of key industries and for the stimulation of productive activity in the US-UK zone of the free territory of Trieste was announced by the Economic Cooperation Administrator on September 24. The counterpart funds require a deposit in local currency by Trieste in an amount equivalent to grants in aid received from ECA.

The funds agreed to be released by ECA will provide local capital for the rebuilding and rehabilitation of existing ship-repair and shipbuilding facilities in Trieste, which has been its mainstay. They will also make possible the reconstruction of the fishing fleet and the development of a canning industry.

Union of South Africa

EXPANSION OF SOUTH AFRICAN FISHERIES: The following tables submitted by the American Consulate General at Capetown gives comparative data showing the recent expansion of the South African fishing industry and supplements the report shown in the July 1948 issue of Commercial Fisheries Review, pages 42-43.

Production of Fishery Products, 1941-1947

Item	Fiscal year: 1946-47		1945-46		1944-45		1943-44		1942-43		1941-42	
	lbs.		lbs.		lbs.		lbs.		lbs.		lbs.	
Frozen crawfish	2,500,000	1,815,473	434,508	369,620	579,240	1,627,390						
Canned "	4,100,000	2,626,984	2,235,408	2,184,603	2,730,532	3,688,618						
Other canned fish	*	11,541,038	7,684,052	6,301,969	3,621,894	3,888,933						
Smoked & dried fish	*	13,465,820	11,628,748	12,220,451	11,140,627	9,979,914						
Fish paste	*	557,653	320,722	401,217	155,565	199,307						
Fish meal	4,000,000	4,168,658	2,809,899	3,567,376	-	-						
Fish oil	*	997,730	733,183	797,314	778,550	-						
Misc. fish products	*	*	*	*	*	*						

*Not available.

Value of Fishery Products, 1941-1947

Item	Fiscal year: 1946-47		1945-46		1944-45		1943-44		1942-43		1941-42	
	U.S. \$		U.S. \$		U.S. \$		U.S. \$		U.S. \$		U.S. \$	
Frozen crawfish	*	707,111	103,701	81,904	128,112	249,630						
Canned "	*	970,359	699,191	666,554	732,531	905,056						
Other canned fish	*	2,871,717	1,990,737	1,460,771	727,321	543,385						
Smoked & dried fish	*	1,569,760	1,529,271	1,467,323	1,062,632	761,247						
Fish paste	*	254,237	152,736	175,594	69,391	88,054						
Fish meal	*	194,655	110,736	128,502	-	-						
Fish oil	*	913,653	608,563	622,786	532,389	-						
Misc. fish products	*	88,947	130,042	66,219	169,739	324,529						

*Not available.

The figures indicate the expansion in the 1945-1947 production of frozen crawfish tails, which is due to increased sales in the United States.



United Kingdom

HERRING OIL PRODUCTION: Production of oil from herring will be undertaken for the first time in Great Britain in the near future, according to the following text quoted from an article appearing in the English newspaper, Manchester Guardian of August 27, 1948, by the American Embassy at London.

The factory recently erected by the Herring Industry Board at Wick, Caithness, for the production of oil from herring began its trial run yesterday, when a quantity of fish from Ullapool was processed. The first factory of its kind in Britain, it will take herring from ports in the North when the markets cannot absorb them. The oil will be used in the manufacture of food products.

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CANNED WHALE MEAT: One-pound cans of whale meat will soon be on sale in Britain, according to The Fishing News of August 21. New Zealand has shipped 2,000 cases and further shipments will follow. The whale meat is cooked at New Zealand's only shore-based whaling station in Marlborough.

NEW FISHERY RESEARCH SHIP: England is building a new fishery research ship, the Ernest Holt, which is to be based at Grimsby when completed, according to the English periodical, The Fishing News of August 28. The whole range of the Arctic fishing grounds are to be studied continuously the whole year round by the vessel. When launched, the research ship will follow two main lines of research during the first two years.

First line of investigation will be the biology of the fisheries, the life cycle and feeding habits of cod and haddock, and the physical conditions of the waters which form their environment, such as temperature and salinity. With a fully equipped laboratory, the results of this work can be used during the cruise. It is hoped that these studies will yield valuable information about the likely distribution of fish at various times of the year.

The second line of research concerns the important commercial problem of improving the quality of fish from distant waters. The new research vessel is being fitted with experimental fish holds equipped with temperature-recording devices, so that new types of insulation and fish hold construction may be tried out.

NYLON TRAWL NETS: The first complete nylon trawl, for use by a Grimsby trawler will be ready soon, according to The Fishing News of August 7. The decision to use nylon trawls--only as an experiment at first--follows the successful use of nylon cod ends.

Half-nylon half-sisal trawls are already being made and it is hoped to try them out in three deep-sea vessels.

The high cost of a nylon trawl--about \$1,531 as compared with \$282 to \$322 for a sisal or manila trawl--is expected to be compensated for its longer wearing qualities.

A Hull trawler, experimenting with a nylon trawl, made five successful trips before losing it because of a rough sea bottom.

Deep-sea vessels often wear out one or two sisal or manila trawls on a normal voyage.



U. S. S. R.

RUSSIAN FISHING FLEET IN ATLANTIC: Two Soviet fishing flotillas are operating for the first time in the neutral waters of the North Atlantic during the 1948 Icelandic herring fishing season, according to press reports. The area is regularly fished by British, Norwegian, and Danish fishermen. According to the Soviet press, the Russians expected to reach the fishing area about the middle of July and to remain until the middle of September.

The Russian flotillas consist of 10 fishing boats, equipped with purse seines and drift nets, and two factory ships, the Tungus and the Onega, for preliminary processing of the catch. The fleet was manned by 150 men and 50 women and carried 40,000 herring barrels.