



Australia

PER CAPITA FISH CONSUMPTION: Preliminary figures of per capita fish consumption in Australia for the year ended June 30, 1947, indicate 5.3 pounds of fresh and 3.0 pounds of canned fish as compared with an average per capita consumption in the last three prewar years of 6.4 pounds of fresh and 4.1 pounds of canned fish, according to the October 1948 Canadian Trade News.

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FISHERIES DEVELOPMENT: Permanent Fisheries Authority Established: For a number of years, consideration has been given to the need for study of Australia's fishery resources, methods, conservation, etc., according to the October 2 issue of the Canadian Foreign Trade. In 1941, the Commonwealth Tariff Board recommended that a Fisheries Developing Authority be established to "lead in organizing and developing the commercial side of the industry."

During the war, the Fisheries Division of the Department of War Organization and Industry was established to ensure that the Australian fishing industry participated fully in the war effort. When the wartime emergency had ended, a permanent Commonwealth Fisheries Authority was established and, in the early part of 1946, the Commonwealth Fisheries Office was set up within the Department of Commerce and Agriculture of the Australian Government. Later that year, a Director of Fisheries was appointed.

Functions of Fisheries Officials: Under the constitution of Australia, it was necessary to define the relation between the Commonwealth and the States, and at a conference, held early in 1947 and attended by the chief fisheries officers of the States, the respective spheres of the Commonwealth and the States were determined. The Commonwealth officers are, in general, responsible for the control of extra-territorial waters, whaling and pearling, rehabilitation of ex-servicemen in the fishing industry, fishery training schools, commercial development of the industry, promotion of uniform conditions as regards catches, statistics, and similar information.

Functions of the Commonwealth Fisheries Development Authority comprise:

1. Rehabilitation of the pearling industry;
2. Establishment of coastal whaling--a Norwegian has been engaged to develop this section of the industry as a potential earner of dollars through the demand for and prevailing high price of whale oil;
3. Development of purse seining to catch pelagic fish, such as horse mackerel, pilchards, and tuna;
4. Conservation of trawling grounds off New South Wales and Victoria, where over-fishing has been indicated;

5. Exploration of fishing possibilities in adjacent waters, such as those of New Guinea;
6. Experimental work (by the Council of Scientific and Industrial Research) on Japanese oyster culture, and, at a later date, on pearl culture.

Valuable Research Work Undertaken: The research work being done by the Council of Scientific and Industrial Research is divided into two main sections: exploratory and biological. The exploratory work, which was begun in 1938, was interrupted by the war. The early investigations were concerned with oceanographic surveys and with pelagic fish in the waters of southeast Australia. Investigations upto the present indicate that marine conditions in Australian waters are tropical and sub-tropical and resemble those in similar latitudes in the Southern Hemisphere, where offshore banks are absent and the catch is moderate rather than large.

On the biological side, the distribution, habits, rate of growth, spawning, migration, and life histories of the important commercial fish are being studied, particularly pelagic fish such as tuna, mackerel, pilchards, sprats, barracouta, and Australian salmon; trawl fish of southeast Australia; and certain estuarine fish, e.g., mullet and bream. The investigations which have been and are being made are designed to determine conditions in various sections of the industry, so that production may be kept at a productive level and operated economically.

Research has also been done in the cultivation of rock oysters, and a small shipment of Japanese oysters has recently arrived in Australia. Study is being made of the Tasmanian scallop beds and of the biology of the crayfish of Western Australia and Tasmania.

Fisheries Training School: A training school for ex-servicemen has been established near Sydney. Twenty weeks are spent in basic training, after which specialization is undertaken in the branch of the industry which the student intends to follow. During the training period, the ex-serviceman is paid under the Commonwealth Reconstruction Training Scheme allowances. Among the subjects taught are



fisheries technology, economics, biology, administration, navigation and meteorology, and food technology. The school operates two trawlers and several smaller working boats.

Production, Fiscal Year 1945: There were 8,086 boats and 14,612 men engaged in the industry. The fishing industry is not large, considering the extent of Australia's coast line. (See table, page 31.)

Fish Marketing Methods Chief Problem: The chief problem in the fishing industry is considered to be improvement in marketing methods rather than production. There are periods of gluts and shortages. Queensland has set up a Government Fish Board to establish an orderly marketing system, and New South Wales is developing control through co-operatives.

Fish Canning Industry Developing: Although the fish canning industry is relatively small and statistics of production are not available, operations are being carried on in Australia. Crayfish, scallops, and whitebait are canned to

Australian Production of Fisheries

Item	Unit	Year ended June 30, 1945	Year ended June 30, 1939
Fish, fresh	lbs.	63,690,000	68,626,000
Oysters	"	6,438,768	9,984,240
Prawns	"	197,232	1,069,040
Total		70,325,000	79,679,280
Crabs	doz.	18,495	20,863
Crayfish (spiny lobsters)	"	127,775	163,757

some extent, particularly in Tasmania. Some fish is packed as "fresh fillets," probably mullet and garfish. Canned "salmon" is on the market, but this is reported to be a fish of the mackerel family.



Argentine Republic

CONSUMPTION AND DEVELOPMENT OF FISHERIES: Per Capita Consumption of Fish Extremely Low: Per capita consumption of fish in Argentina is probably the lowest of all countries for several reasons, according to the Canadian publication, Foreign Trade, of September 25. Chief among these is the low price and high quality of meat which is available in quantity to all classes of the population. The price of fish in Argentina is high compared with that of meat. Cod, for instance, costs about four times as much as meat, making it a luxury rather than a poor man's food, as is the case in other countries. Friday is not regarded as a fish day by the majority of the population, except in the Lenten season. The consumption of fish during this period is perhaps more a tradition than the observance of a regulation. There is an almost total lack of effort towards increasing the consumption of fish by means of publicity.

Fish consumption, therefore, is limited to the high-income groups, tourists, the patrons of first-class restaurants and hotels, and recent



immigrants who, in most cases, eventually adapt themselves to the use of Argentine foods. Fish is normally used as an hors-d'oeuvre or as an entree, but seldom constitutes the main course of a meal, even of a light lunch. For middle-class purchasers, the use of fish is a luxury and is limited to an occasional meal.

Buenos Aires and the other large cities of the Atlantic seaboard are the consuming centers for fish, its use being practically negligible in the interior. At Mar del Plata, center of the Argentine sea fisheries, there is a demand during the summer season for fresh fish at a fair price, but mostly by foreigners. To meet the demand, Argentina relies on domestic supplies and imports, of which only a very small part is fresh fish.

Consumption of fish in Argentina, estimated on an edible basis, was 76,446,000 pounds annually for the period 1937-42. The per capita consumption on the same basis was 5.7 pounds. In 1942, however, the per capita consumption decreased to 4.6 pounds, which was due to the sharp decrease in imports and to the relatively large exports.

Slow Development of Argentine Fisheries: In spite of a fairly long Atlantic coast line, vast river basins and numerous inland lakes, the fishing industry in Argentina has not experienced great development compared with the exploitation of other natural wealth. The fresh-water catch, for example, declined considerably during the 1939-46 period, falling off from 20,700 metric tons in 1939 to approximately 15,000 tons annually for the years 1944, 1945, and 1946. On the other hand, the salt-water catch increased from 34,600 to 41,345 metric tons during this period, this being only sufficient to neutralize the decline in fresh-water fishing.

Strictly speaking, there are no fishing communities in Argentina similar to those existing in other countries. The fact that the production of fish is restricted is more the result of lack of demand than the lack of available supplies. The sea fisheries of Argentina produce a variety of fish in good quantities and the present production could undoubtedly be increased to meet a much higher consumption. Although the main fishing grounds are close to Buenos Aires, the large consuming center, the demand for fish has not developed. There is also a lack of adequate cold storage and handling facilities for fresh fish.

Argentine Fish Catch

Year	Fresh-water	Salt-water		Total
		(In Metric Tons)		
1947	23,765	41,367		65,133
1946	15,910	41,245		57,255
1945	15,368	38,820		54,188
1944	15,907	41,081		56,988
1943	24,394	37,513		61,907
1942	26,287	31,342		57,629
1941	23,510	36,055		59,565
1940	20,686	33,958		54,644
1939	20,737	34,580		55,317

The principal fresh-water fisheries are those of the Paraná River, the River Plate Delta, and Uruguay, the Colorado, the Negro, the Chubut and several lakes and lagoons in the province of Buenos Aires and in the south. Among the fresh-water fish is the pejerrey, which is most in demand and generally considered as the premier fish of Argentina. The fresh-water pejerrey, which may attain 27 inches in length, is a larger fish than the salt-water variety to which it is considered superior. It is unknown outside of South America.

There is also a wealth of trout, shad, and other edible species, such as the dorado, the pati, the surubí, the pirapitá, the boga, the pacú, the tararira, catfish, etc., in Argentine rivers and lakes. In the lakes bordering on the Andes, there is also available trout, salmon, and salmon trout, but the distance from markets prohibits any commercial exploitation. There are also a number of larger lakes, the most important of which are Mar Chiquita, in the province of Cordoba, and Nahuel Huapi, in the territory of Rio Negro, where other species of sporting fish are found, which are of interest to the tourist trade of this region.

The local sea-fishing is still of comparatively minor importance. There are good fishing grounds with promising catches, but development is slow. This condition will remain so long as retail prices of fish continue at the present high level compared with the price of meat.

Extensive Coast Line is Rich in Marine Life: Argentina's Atlantic coast line extends over 1,600 miles, with the ocean shelves, estimated at approximately 400,000 square miles, rich in marine life. The Patagonian shelf is similar to that of the North Sea and, according to experts, it is even richer in edible species of fish. Actually, however, only whale and seal hunting, the latter in a small way, is carried on along the Patagonian coast, because of the lucrative trade in sealskins, whale oil, and the various byproducts obtained. There is little or no fishing in this region for eating purposes, except for immediate local use.

The principal Argentine sea-fishing center is located at Mar del Plata, south of La Plata estuary, but the area around Bahia Blanca, in the southern part of the Buenos Aires province, is rapidly becoming an important fishing center. Found in these areas are the pejerrey; the corvina and the pescadilla, both of which will reach 20 inches in length; the caballa or mackerel; the lenguado (sole); the anchovy; the prawn; the bonito (striped tunny); the congrio and the merluza. The merluza is the most common and is rich in vitamins A and D, but both the corvina and the pescadilla find a ready market with the cheaper trade. The bluefish and anchovy are the fish used most generally for canning purposes, although good quantities are also sold in the fresh state. The sea catch also includes the lemon fish, the brotola, the sea bream, and the flounder.

Commercial Shark Fishing Started in Recent Years: Shark fishing and the processing of shark really got under way commercially in Argentina in early 1945. The foreign demand for shark liver oil, rich in vitamin A, gave a great impetus to this industry. Some varieties of Argentine sharks, especially the cazon, have extremely high vitamin content, their only commercial superior being the soupfin, caught off the coast of California. According to official statistics, the Argentine shark catch rose from 7.5 metric tons in 1935 to more than 7,000 metric tons in 1944.

Shark fishing is carried out in Argentina along the Atlantic Coast, from Mar del Plata to the bay of San Julian, with its headquarters located at Mar del Plata. Two companies began working in Puerto Rawson in 1944, establishing plants there for the extraction of oil and the curing of shark meat. By 1945, four additional companies had initiated fishing activities there.

In Mar del Plata, there are some 24 factories processing shark products and byproducts, 15 of these being engaged in extracting shark liver oil. During 1944, there were 150 launches engaged in fishing from this center, including several 40-ton fishing smacks.

In addition to the oil extracted from the liver, the shark is used in its entirety, the meat, hide, fins, and byproducts (glue and gelatin) all having great commercial value. Shark meat, salted and dried, is canned as bacalao (cod), or converted into fish meal. The hide provides an excellent raw material for the shoe, handbag, belt, etc., industries.

The chief importer of Argentine shark liver oil is the United States, with purchases amounting to 250 tons in 1945. Shark liver oil is also exported in lesser quantities to Uruguay, Chile, Venezuela, and Brazil.

Whaling Industry: The whaling industry in the Argentine Republic goes back to the beginning of the present century and there is only one firm engaged at present in whaling activities. All operations are carried out in Antarctic waters and the stations for processing the whales and extracting the oil are located on the island of South Georgia, near which the whales gather during the hunting season, which lasts from October 15 to April 15. The whaling company, which began operations with sailing vessels and hand harpoons, has progressed to large tankers and power harpoons. At present, the fleet consists of two tankers of 7,000 and 9,000 tons, respectively, for the transport of the oil from South Georgia to the Argentine market. The 9,000-tonner is also fitted to accommodate over 300 men to and from the island. The company has eleven catchers of approximately 300 tons each, which hunt the whales and bring them to the factory in South Georgia. In addition to the extraction of oil, the factory carries out experiments in byproducts, such as the making of meat extracts, the processing of glands, etc. The island possesses a floating dock and a complete marine repair and machine shop.

The annual catch for the last two years has been between 9,000 and 10,000 metric tons. At present, a floating factory of 32,000 tons is being built in Belfast. Two 10,000-ton units are being built in the Victoria shipyards in Canada for general fleet work.

FISH EXPORTS NOW EXCEED IMPORTS: Introduction: Argentina was one of the largest fish importing countries in South America prior to 1942, according to an article appearing in the Canadian Foreign Trade of October 9. In that year, exports of fish more than doubled imports, placing the country on a net exporting basis for the first time. Exports of dry and preserved fish, fresh fish, and seafood have been made to many countries.

Canning Industry: The local canning industry is of comparatively recent growth. There are several factories in operation at the present time that pack most of the local fish in brine or in olive oil. The output of canned anchovy is already seriously affecting imports. In addition to the local catch, imported frozen salmon is normally canned by several factories, although the production is not very extensive. Similarly, canned frozen tunny is also produced in small quantities.

Fish canning is centered at Mar del Plata and Buenos Aires. In 1934, there were 12 fish canneries in Argentina and their production amounted to some 947 metric tons of canned fish; whereas, in 1939, the number of canneries had increased to 26, including those of less than 5 employees, which turned out 3,230 metric tons valued at 2.3 million pesos (approximately \$671,600).

The most recent available official statistics (1941) place the number of canneries, with 5 or more employees, at 32. Estimates, however, place the total number of fish processing establishments for 1946 as high as 180. These 32 can-

neries in 1941 employed 1,113 workmen with annual salaries of 592,000 pesos (approximately \$166,293) and processed 3,486.7 tons valued at 3.4 million pesos (approximately \$955,060). Anchovies remained the main fish item canned, but the industry is now preserving a great variety of other fish, including besugo (sea bream), corvina (croaker), congrio real (royal conger eel), lisa (mullet), merluza (hake), pejerrey, palometa (river bream), pez azul (bluefish), almejas (clams), camarones (small shrimps), and mejillones (mussels).

Cured Fish Industry: Cured fish production in Argentina in recent years has been as follows: 1940--50,706,000 pounds; 1941--57,320,000 pounds; 1942--61,729,000 pounds. The rise in production is attributable to the sharp decline in cured fish imports. Merluza and corvina are used in the preparation of a local cod-type dried and salted fish, while anchoita (small anchovy) tends to replace imported cured sardines. Local production is sufficient to meet the demand for cured fish and may even provide a small exportable surplus in the future.

Fish Exports: Other importers of Argentine fresh fish and seafood and dry and preserved fish, besides the United States, include: Brazil, Uruguay, Paraguay,

Argentine Exports of Fishery Products, 1938-47

Year	Dry and Preserved Fish		Fresh Fish and Seafood		Year	Dry and Preserved Fish		Fresh Fish and Seafood	
	To U.S.	Total	To U.S.	Total		To U.S.	Total	To U.S.	Total
	lbs.	lbs.	lbs.	lbs.		lbs.	lbs.	lbs.	lbs.
1947	127,593	502,073	28,147	382,171	1942	1,791,836	2,779,814	4,600	338,349
1946	25,969	724,940	1,496	172,773	1941	1,115,732	1,520,985	301,664	519,413
1945	3,245	830,650	2,156	165,246	1940	560,666	888,111	12,544	117,889
1944	35,959	1,649,142	3,740	241,795	1939	378,699	903,113	572	162,994
1943	4,994	3,228,997	9,185	311,496	1938	49,095	595,265	5,069	208,815

United Kingdom, Sweden, South Africa, Peru, Greece, Spain, Panama, Colombia, Switzerland, Venezuela, Portugal, Bolivia, Mexico, Italy, Norway, Cuba, Ecuador, Costa Rica, Guatemala, Dutch Guiana, Canada, and several others of minor importance.

Fish Imports Limited: Up until 1942, Argentina was a deficit country, that is to say, imports of fish were higher than exports. With the development of the local industry, however slow, imports are becoming limited to a few selected fish of which the most important individual items are herring, cod, canned sardines, and oysters. Imports also include lobsters, crabs, fresh fish, and fish in brine, of which European countries are the traditional suppliers.

In view of the available supply of fresh fish within easy distance of the principal consuming centers, imports of fresh, frozen, smoked, salted, and tinned fish are relatively large. This is due to the fact that certain species are not available in Argentine waters or that they are not yet exploited to any extent. Furthermore, there is practically no drying or salting of fish locally, although the canning industry has been showing considerable development during the past few years.

The principal suppliers of herring to Argentina are the Netherlands, as the more moist Dutch pack is generally preferred. During the period 1935-39, herring in brine or pressed was also supplied in smaller quantities by Finland, Spain, Iceland, Eire, Sweden, and the United States. However, during the war, supplies came mainly from the United States and also from Chile, Newfoundland, and Canada.

In 1941, European sources of supply of smoked herring were completely cut off and the only smoked herring which entered Argentina during the war years came from the United States, Newfoundland, and Canada in a lesser degree.

The importation of canned herring was discontinued during the war and has since been practically nil. The demand had always been negligible.

Cod is One of Most Staple Fish Imports: Cod is one of the most staple of Argentina's fish imports. A total of 6,331,717 pounds of whole dried cod was imported into Argentina in 1947, compared to 2,491,797 pounds in 1946, and 10,311,915 pounds in 1939. Two types of cod are imported: the ling (Scottish), averaging 36 inches in length and 11 inches at the widest point, and the Norwegian type averaging 24 inches. The ling is a dry salt fish, split, with fins and tails but without bones, outer skin, and head. The bulk of the Norwegian cod is the ordinary dry salt cod of uniform size.

Norway and Scotland have always shipped cod to Argentina in hermetically sealed tin boxes to protect the fish from heat and dampness during the long voyage and the period it is in storage before being released by the customs authorities. This is the only practicable method of shipping cod to this market.

Only the highest grade of cod is imported. There is no demand for small fish as in some West Indies markets.

There is a substantial demand for dried cod the whole year round in Buenos Aires and in Argentina generally. Before the war, the total consumption was in the neighborhood of 120,000 boxes per annum, but the high prices of today have cut down sales very materially.

There are two standard type boxes used for this market: one of wood containing 100 pounds net, not lined, and another containing 90 pounds net, lined with tin plate. Demand is mainly for the unlined boxes owing to the lower price. The type of cure is dry, hard, and salted. The fish is split, skinned, and trimmed but not boned. There is very little interest in the soft, dry, salt cure. Apart from the fact that the public does not like it even though it may be a better cure, there is the fact that it perishes more quickly than the hard cure.



Bizone Germany

GERMAN FISHING VESSELS: The first postwar German fishing vessel to be built in Hamburg left on its maiden voyage on September 28, 1948, according to the American Consulate General at Hamburg. The vessel has the following measurements:

Gross tonnage.....	399.41 metric tons
Loading capacity.....	3,260 baskets of fish
Bunker capacity.....	230 tons
Fish oil storage tanks.....	9.7 cubic meters
Overall length.....	42 meters
Machine power.....	650 h.p.
Speed.....	11 knots

The vessel carries a crew of 19, including the captain.

A second vessel was launched during the first week in October at Hamburg. Two other vessels are being built in Luebeck and should be ready to sail in November.

LOBSTER FISHING: Lobster fishing has been resumed in the Helgoland area. Prior to the war, the catch amounted to an average of 154,000 pounds annually. At present, because of equipment shortages and other difficulties, the annual catch amounts to approximately 33,000 pounds. Fishermen state that lobsters of 4 to 5 pounds are common with a record 17-pounder reported early this season.



British Honduras

FISHERIES ORDINANCE, 1948 PASSED: A law regulating the fisheries of the colony and imposing export duties on fish and shellfish was incorporated in "Fisheries Ordinance, 1948" which was passed by the Legislative Council on March 30, and brought into force by the Officer Administering the Government on September 24, according to an early October report from the American Consulate at Belize.

Under Section 6 of the Ordinance, Fish (Export Duty) Order, 1948 states:

There shall be raised, levied, collected, and paid an export duty on all fish taken within the waters of, and exported from, the Colony, such export duty to be paid by the exporter and to be at the following rates:

- (a) On crawfish (commonly known as crayfish, rock lobster, and shellfish), one and one half cents a pound on gross tail weight;
- (b) On other fish whether fresh, salted, smoked, or cured, one cent a pound.

In addition, under Section 9 of the Ordinance, the following regulations were imposed:

1. Crawfish. Minimum cape length $3\frac{1}{2}$ inches. Closed season, March 14 to July 14. Taking of crawfish in spawn or molting prohibited.
2. Scale fish. Minimum mesh diameter of nets or traps fixed at $1\frac{1}{2}$ inches if such nets or traps are constructed of twine; at 2 inches if constructed of material other than twine. Capture of scale fish in excessive varieties or quantities prohibited. Use of nets or traps within one-half mile of inhabited localities prohibited.
3. Turtle. Closed season, June 1 to August 31. Capture on-shore or within 100 yards of shore prohibited. Minimum size, green turtle, 30 pounds; hawksbill, 50 pounds; loggerhead, 20 pounds.
4. Fish exporters must keep records for delivery to Collector of Customs.



Canada

AUTHORITY OBTAINED FOR INSPECTION OF EAST COAST CANNED FISH: By amendments to the Regulations Governing the Inspection of Canned Fish and Shellfish and the Operations of Canneries, under the authority of the Meat and Canned Foods Act, the Canadian Department of Fisheries has obtained authority to enforce compulsory inspection of canned fish and shellfish in Quebec, New Brunswick, Nova Scotia, and Prince Edward Island, according to the Canadian periodical Foreign Trade of October 2.

The regulations establish higher standards of operation to be met by canneries before they are allowed to operate, higher standards for products for which grades already have been established, and new standards for canned products not previously graded.

British Columbia canned salmon and canned herring have been subject to compulsory inspection for some time.



Denmark

CHANGES IN FISHERIES LAWS CONTEMPLATED: The Ministry of Fisheries of Denmark is considering measures for the development of the fisheries, quality control of fishery products, and changes in the method of sale of fish, as well as changes in the nature of subsidies for construction of fishing craft, according to an address by the Prime Minister at the opening of the Rigsdag on October 5, 1948, as reported by the American Embassy at Copenhagen. In addition, the Prime Minister stated that the existing provisional fisheries laws will be extended with minor revisions because of the fact that the committee considering new fishery legislation will be unable to submit its findings until the autumn of 1949.



Ecuador

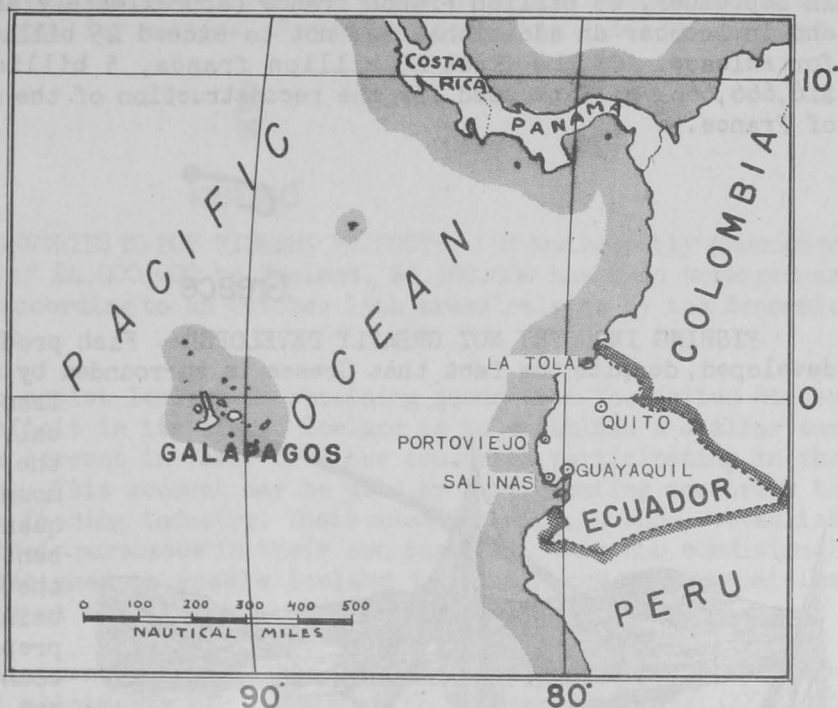
GRANTS FISHING CONCESSIONS TO FRENCH COMPANY: Authorization to sign a contract between the Ecuadorean Government and a French company, granting the company fishing rights, concessions, and permission to establish a cannery in the Galapagos, was given by an Executive Decree, according to press reports received from Ecuador the latter part of September.

In Registro Oficial No. 281 dated August 25, 1948, the Ecuadorean Government issued Executive Decree No. 1574 dated August 24, 1948, authorizing the Ministers of Defense and Economy to sign a contract with a French company which is to begin fishing and cannery operations within three months following its establishment in Ecuador. The Decree grants the French company, and an Ecuadorean company, which will be established at a later date, the right to fish in the territorial waters of Galapagos and specifically in the Archipelago of Colon. Likewise, these companies are granted the right of establishing installations, factories, refrigeration stations, plants to extract the byproducts and derivatives, and, in general, all other installations necessary to develop the industry on the mainland or in the Galapagos in the manner provided in the contract. It is intended to set forth

the rights of exploitation for the Ecuadorean company as soon as it is established. The concession to the French company is to run for a period of twenty years and on its expiration will be renewable for equal periods. In addition, the French company is granted additional unspecified rights to exploitation of natural resources based on future contracts. The concessions granted in the present contract do not affect the right which the Government of Ecuador holds to grant equal exemptions and benefits to any other analogous industry which may be established.

The company will enjoy the usual rights of new industries and others in Ecuador, including the free use of territorial waters, access to the national ports, use of specific zones belonging to Ecuador, freedom from custom duties and consular duties, and other additional duties. However, in exchange, the company will be subject to the payment of taxes of a general character which may now be in force and which may hereafter be created, and will be permitted to export only surplus production.

It is further specified that the company is obligated to submit to Ecuador its program of industrial activities; maintain in the company a permanent representative of the Ecuadorean Government to supervise the progress, development and accomplishment of the industrial works and the business of the company; to sell in the Ecuadorean market all its industrial and manufactured products at prices to be fixed by the Ministry of Economy after a reasonable and equitable profit for the company; not to export its products if the necessities of internal consumption have not been satisfied; establish refrigeration stations in the principal centers of distribution; grant participation in the profits of the company to the employees and workers in the manner and amount determined by law; collaborate strictly with the official Ecuadorean services in order to protect and conserve the source of natural wealth; establish courses of training for study in the industrial branches of fishing, refrigeration and canning; employ Ecuadorean workers in the various branches of its activities, with the exception of technical personnel which may be foreign and which may enter the country under the auspices of the company; to establish an Ecuadorean company in Ecuador within three months of the signing of the contract between Ecuador and the French company; and other restrictions.



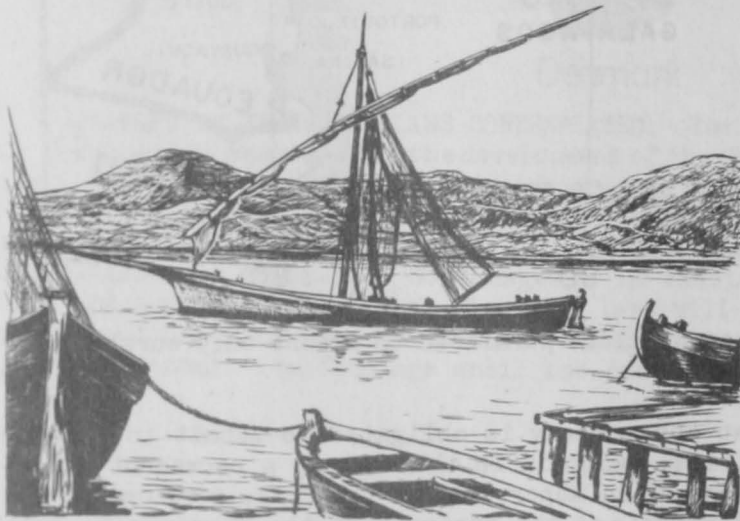
France

ECA COUNTERPART FUNDS FOR FISHING FLEET: Detailed plans to increase France's productive capacity with the use of 45 billion francs of the French counterpart fund were announced on October 4, 1948, by the Economic Cooperation Administrator. In September, 45 billion French francs (approximately \$150,000,000) were released and in October an additional sum not to exceed 45 billion francs is contemplated for release. Of the first 45 billion francs, 5 billion francs, approximately \$16,666,666, will be used for the reconstruction of the merchant and fishing fleet of France.



Greece

FISHING INDUSTRY NOT GREATLY DEVELOPED: Fish production has not been fully developed, despite the fact that Greece is surrounded by sea, according to October 2 issue of the Canadian periodical, Foreign Trade. Before the war, fish production amounted to 25,000 tons. This quantity barely covered 50 percent of the requirements of the population, the balance being imported as fresh and prepared fish, costing the country some 600 million drachmae (about \$6,000,000).



GREEK FISHING BOAT

Before the war, fishing operated by primitive means along Greek coasts, in some cases by destructive methods. The boats and fishing vessels used were poor and of small tonnage. The situation grew worse during the war. UNRRA

and the British ML Mission supplied motorized fishing vessels, fuel, and thread for net making. The Agricultural Bank of Greece provided some 70 million drachmae (\$7,000) to adapt these vessels to Greek conditions. The Ministry of National Economy signed an agreement with the Agricultural Bank of Greece for 43,000 million drachmae (about \$4,300,000) for the rehabilitation of fishing, 23,000 million (about \$2,300,000) of which were for the supply of fishing equipment and lumber for the making of fishing craft.

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FISHERIES EXPANSION PLANNED: Progress in the field of food processing and refrigeration will do much to increase food available to the population of Greece and for export, according to the Fourth Report to Congress on Assistance to Greece and Turkey for the period ended June 30, 1948, recently issued by the Department of State. A plan to provide loans to farmer's cooperatives, private companies, and individuals through the Agricultural Bank of Greece is now in full operation for projects involving rebuilding and expansion of cold storage for agricultural products, fishing, refrigeration and transportation, rendering plant, etc.

Technical advice which should lead to increased production has been furnished to the Greek Government, and it is hoped that reorganization of the administrative services furnished to the fisheries by the Government will also improve conditions in this industry. Twelve modern fishing vessels contributed by UNRRA and equipment intended to modernize existing craft had not been put into service when the Mission's work began. These vessels have now been sold, nine are in operation, and the others are being equipped for service. Further equipment is under procurement.



Iceland

ECA PARTICIPATING COUNTRIES TO BUY FISHERY PRODUCTS: Of the recently announced fourth quarter allotment of \$4,000,000 to Iceland, \$3,500,000 has been arranged as a conditional allotment, according to an October 15th press release by the Economic Cooperation Administration.

The \$3,500,000 is to assist Iceland in obtaining goods from the United States with whom Iceland has a deficit in its trade. Iceland is to establish a similar sum of its own currency in an account in favor of other countries participating in the European Recovery Program. This account may be used by participating countries to buy products of Iceland's fishing industry. These countries will, in turn, establish an amount comparable to their purchases in their own currency. Thus the conditional allotment to Iceland is designed to enable Iceland to obtain needed commodities from the United States and at the same time foster intra-European trade.

The fourth quarter allotment, plus a \$2,300,000 loan agreement in the April-June quarter, brings the total allotments of assistance to Iceland to \$6,300,000. It has not received any grants-in-aid.

* * * * *

EIGHT MORE TRAWLERS ORDERED: The Icelandic Government has placed and signed an order for eight large vessels at Aberdeen, Scotland, according to the English periodical, Fish Trades Gazette of October 16, 1948. The trawlers are each to be 183 ft. 6 in. in length, have a motor of 1200 h.p., and an estimated speed of 13 knots. Each vessel's fish hold will have a capacity of 840,000 pounds. The vessels are to be fitted with the most modern navigational equipment, including wireless telephones, direction finders, depth-sounding apparatus, and radar. Accommodation for the crews will incorporate the most modern ideas yet introduced into trawlers.

A member of the Icelandic Parliament stated that this was the second largest contract they had signed in Great Britain. The first contract, signed in October 1945, was for 30 trawlers, of which 28 have been delivered. One of the Icelandic vessels has broken the world's record for catch, securing 380 tons in seven days.



Korea

FISHERIES DEVELOPMENT RECOMMENDED: The waters surrounding the Korean peninsula contain rich fishing grounds that have favored the development of a valuable marine products industry, according to a report entitled, Korea 1945-1948, recently issued

by the Department of State. At the beginning of World War II, Korea's output of marine products ranked sixth in the world. Nearly half a million people found employment in the fisheries. In the late 1930's, the annual catch reached almost 2 million tons. Fully half of the catch, however, was of sardines, which by 1939 had moved from their schooling areas off the Korean east coast. At present, shortages of fishing boats and gear, preservation and refrigeration facilities, and processing plants and canneries have impeded the resumption of fishing on the prewar scale. Although many of the best fishing grounds are north of the 38° parallel and, therefore, inaccessible to south Korean fishing fleets, those below the 38° parallel offer excellent opportunities for rehabilitation of the fishing industry.

A restoration of fishing, preservation, and processing equipment would assure the south Korean economy of a valuable source of foodstuffs and an important export commodity. Marine products such as agar-agar, seaweed, fish, and fish oil are today among the few important south Korean export items. Expansion of the marine products industry is of primary importance for the recovery of south Korea's economy.



Mexico

LIMITS FISHING PERMITS: The following is an excerpt from a translation of a Decree from the Diario Oficial, Mexico, D. F., dated September 29, 1948, regulating the term of duration of "Via la Pesca" documents.

DECREE fixing maximum time limits for "Via la Pesca" clearances issued to vessels of foreign registry.

ARTICLE 1. The time limit for "Via la Pesca" clearances shall be fixed on the basis of net tonnage capacity of the applicant vessels of foreign registry. For such purposes, the following table of maximum time limits for those clearances shall be observed in all instances:

<u>Net Registered Tonnage</u>	<u>Maximum Time Limit for Clearance</u>
Up to 3 tons	10 days
Over 3 and up to 15 tons	25 "
Over 15 and up to 70 tons	50 "
Over 70 and up to 200 tons	70 "
200 tons and over	90 "

ARTICLE 2. Captains of the vessels in question shall return the used "Via la Pesca" clearances to the Fishery Inspectors assigned to the ports at which the vessels were unloaded, within the time limits fixed in the foregoing article. Failure to comply with this obligation shall be cause for the permit holder under whose authorization the captain operates to be liable to monetary penalties of up to \$10,000.00, depending upon the circumstances in each individual case, in accordance with the pertinent paragraphs of articles 60 and 64 of the Fishery Law, without prejudice to imposition, when such is in order, of the penalty provided in article 62 of this law. In addition, the individual directly responsible for the violation shall also be penalized, as provided in article 51 of the law.

ARTICLE 3. In accordance with article 59 of the law (Fishery Law of December 31, 1947) cited, imposition of such penalties is the responsibility

of the Ministry of Marine, through the Directorate General of Fisheries and Allied Industries.

TRANSITORY ARTICLE:

SOLE ARTICLE. This Decree shall enter into effect ten days after its publication in the Diario Oficial of the Federation.



Newfoundland

FISH OILS, 1947: Introduction and Summary: Newfoundland's production and export of fish oils in 1947 were confined, as usual, to the following principal types, in the order of importance: Whale oil, common cod oil, seal oil, refined cod liver oil, and herring oil, according to the American Consulate at St. John's.

The highlights of the 1947 season were as follows:

1. Whale oil production exceeded that of the record-breaking 1946 season, while exports of whale and sperm oils for the first time exceeded the million gallon mark; Newfoundland must now be ranked as an important producer and exporter of whale oils, and international negotiations on the subject may be expected to take this recent development into consideration.
2. Common cod oils again commanded extremely high prices, and production registered a 20% gain over 1946.
3. The once highly important, but recently dormant, seal fishery showed an accelerated rate of revival, with exports of seal oil more than trebling those for 1946.
4. Refined cod liver oil exporters remained uncertain of their position, inasmuch as common cod oil prices influenced fishermen to turn towards that commodity rather than sell their cod livers to refining factories.
5. Herring oil production remained low primarily because of the diversion of herring to fill a large relief order.

Production: Cod Oils: The production of cod oils is ultimately dependent upon the production of cod. In 1947, the total production of cod was 137,236,403 pounds (128,800,000 pounds salted and 8,436,403 pounds fillet), compared with 138,823,812 pounds (110,604,256 pounds salted and 28,219,556 pounds of fillets) in 1946.

Production of cod liver oil in Newfoundland is limited by the lack of a large home market and by a low vitamin D content. An additional important limiting factor is the small supply of oil due to the methods of production. While in other countries, liver oil is produced on board trawlers and later refined, in Newfoundland this has not been possible owing to the small size of schooners used (rarely above 200 tons and for the most part less than 100 tons). Consequently, cod liver oil factories in Newfoundland depend strictly on reliable supplies of shore cod, brought to shore as early as possible after the catching—practically within a few hours. Newfoundland's cod liver oil industry is thus run in conjunction almost entirely with the shore fishery, and factories are located in the coastal areas in which the shore fishing is best and most dependable.

The export market price of refined oil has been an important factor in determining the production each season of refined cod liver oil (medicinal) produced in relation to the amount of common cod oil produced (largely for tanners). In 1947, while cod liver oil prices were at satisfactorily high levels, the price of common cod oil was relatively so much higher that the ratio of refined oil produced fell off as compared with 1946.

In 1947, 415,622 gallons of cod liver oil were exported as compared with 505,680 gallons in 1946. Exports of common cod oil for 1947 stood at 714,799 gallons, compared with 599,030 gallons in 1946. Production of refined cod liver oil fell

off by more than 20 percent as compared with 1946, while production of common cod oil increased by about 20 percent. As was the case in 1946, the production of common cod oil was wholly insufficient to meet the demand, and export prices remained at high levels reached when ceiling prices in the United States were removed late in 1946.



sumed operations in 1946. The same managing interests also built a new plant at Belleoram, Fortune Bay. This was completed in 1946, but has not as yet come into production owing to inability to obtain necessary machinery.

Production of herring oil in 1947 remained low principally owing to the following two factors:

1. Large UNRRA orders for herring diverted herring from the oil processing plants.
2. Herring failed to strike against the Labrador coast.

Whale and Sperm Oil: The whaling industry has been prosecuted much more intensely in recent years than before the war. Six boats operated in 1947, compared with the same number during 1945 and 1946, four in 1944, three in 1943, and only one for each of the three prior years. Two companies were responsible for Newfoundland's exports of whale oils in 1947, as in 1945 and 1946.

A concern plans to build a new whaling plant in St. Mary's Bay, Southern Newfoundland, where whales may be found during November-May. If successful, this would make whaling a year-around industry.

The 1947 season was highly satisfactory. The total catch of whales was the second highest in recent years: 455 as compared with the record of 529 caught in 1946. The production of whale oil, however, reached a record level of 927,343 gallons, compared with 913,139 gallons in 1946. A portion of the whale oil consisted of sperm oil--61,235 gallons in 1947, as compared with 31,182 gallons in 1946.

The catch of whales would have been higher in 1947 had it not been for the extremely bad weather which hampered operations. There was no scarcity of whales.

Seal Oil: Newfoundland's seal fishery, during recent years, has partially regained the important role which it once played in Newfoundland's economy. Before and during the war, the seal fishery all but disappeared. Since the war, the seal fishery has been prosecuted with increasing vigor, auxiliary motor vessels being responsible for the greater part of the catch, rather than steamers as in earlier years.



The 1947 seal fishery for Newfoundland was about three times as successful as the 1946 season. During 1947, a total of 97,535 seals were caught, valued at \$350,974.33, compared with the 1946 catch of 34,241 seals valued at \$119,993. Seventeen vessels prosecuted the seal fishery during 1947, compared with 12 in 1946. Two of the vessels were steamers, while the remainder were motor vessels of various sizes.

Seal oil production in 1947 stood at about 480,000 gallons, compared with 155,870 gallons in 1946. During the 5-year period 1935-39, production of seal oil amounted to over 3,600,000 gallons, an average of over 720,000 gallons per year. Production during 1942-44 stood at less than one-tenth this figure, while production in 1947 amounted to two-thirds of the annual average during 1935-39. This marked increase reflects the degree of success with which auxiliary and motor vessels have met in prosecuting the seal fishery--and the highly satisfactory prices which seal oils are obtaining.

Consumption: Virtually the entire production of fish oils in Newfoundland is exported, the volume of home consumption being unimportant.

Exports: As was the case in 1946, the greater part of common cod oil exports went to the United States in 1947, by allocation. Similarly, most of the cod liver oil (medicinal) went to the United States, although not by allocation.

Exports of whale oil nearly doubled, as they had the year before, Canada taking almost the entire amount by allocation. Some relatively new markets opened up in 1946--Finland, Netherlands, and Czechoslovakia--were at least momentarily lost in 1947. Sperm oil exports fell slightly below 1946 levels, nearly all exports going to Canada by allocation.

Exports of seal oil more than trebled, reflecting the partial revival of the once important seal fishery. Canada was by far the largest market, by allocation.

Table 1 - Exports of Fish Oils from Newfoundland

Type of Fish Oil	1947		1946	
	Gals.	Value	Gals.	Value
Common Cod Oil	714,799	\$1,015,595	599,030	\$605,396
Refined Cod Liver Oil	415,622	796,466	505,680	957,911
Poultry Oil	5,633	11,680	4,847	6,546
Whale Oil	1,153,568	1,595,907	745,948	723,770
Sperm Oil	61,422	98,187	67,489	86,087
Seal Oil	498,247	761,207	158,122	148,946
Herring Oil	42,299	61,703	5,742	6,210
Dogfish Oil	-	-	58	72
Bream Oil	1,488	1,141	-	-
Total	2,893,078	\$4,341,886	2,086,916	\$2,534,938

Herring oil exports showed a substantial increase over the very low 1946 figure, but failed to approach the 1944 figure of more than 480,000 gallons. UNRRA orders accounted for most of the herring (which might otherwise have been sold to the oil processing plant), and in addition, the herring fishery was not as successful as in previous years.

With the exception of cod liver oil, fish oil exports were governed largely by international marketing arrangements.

Stocks: Stocks of common cod oil and cod liver oil at the end of 1947 were very low, as was the case in 1946. Herring oil stocks were likewise low. Stocks of whale and sperm oils were low, and stocks of seal oil were negligible.

Although production of common cod oil reached a level approximating that of prewar years, stocks were low owing to the steady demand for the product and to the very high prices obtained for such oil. Cod liver oil exporters also found ready markets at remunerative prices for the relatively small amount produced.

In the case of herring oil, production did not approach the high level established in 1944, even though some of the ground lost in 1945 and 1946 was regained. The comparatively small amount produced during the past three years has found a ready market at good prices, mainly in the United States.

The steady demand for whale and sperm oils, at very high prices, had made it possible to market such fish oils readily, reducing stocks to purely nominal figures. Sales have been very easy for these types of oils. Seal oil, too, has been marketed at extremely high prices, cutting stocks to a negligible figure.

Prices: Fish oil prices have been influenced and, in many instances, governed by international allocations and by price fixing.

Import restriction initiated by many countries during the early years of the war dislocated Newfoundland's fish oil trade, and for a while considerable difficulty was experienced in marketing the production. For a time, in 1945 and 1946, ceiling prices in the United States were the determining factor. With the removal of ceiling prices in the United States, prices were determined, for the first time in years, by normal factors of supply and demand. In 1945, common cod oil exports to the United States were priced at 78-85 cents a gallon, c.i.f., United States currency, but commanded considerably higher prices early in 1946. With the removal of price

controls late in 1946, the price jumped to over \$1.60 a gallon, c.i.f., United States currency—more than double the price in 1945, and probably 500 percent or more above prewar prices. (All prices quoted are average prices for average quality unless otherwise stated.)

The sale of cod liver oil, unlike common cod oil, has never been channelled through government corporations; sales have been made direct to private buyers. During 1947, refiners paid fishermen an average of \$1.41 a gallon, Canadian currency, slightly below the 1946 level. Exports of cod liver oil to the United States were priced at \$1.85-2.05 a gallon, c.i.f., United States currency. Top-grade (non-freezing) cod liver oil sold in 1947 for about \$2.65 a gallon, c.i.f., United States currency, well above 1946 levels.

During the past three years, whale, seal, and herring oils have about doubled in price. Whale oil averaged \$1.33 a gallon, Canadian currency, f.o.b., Newfoundland shipping point; a considerable amount of high grade whale oil sold for \$1.50 a gallon. This compares with 63 cents a gallon in 1945. Seal oil in 1947 sold for \$1.25 a gallon, Canadian currency, f.o.b., St. John's. A large quantity of low-grade seal oil sold in 1944 for 75 cents a gallon. In 1945, average grade seal oil brought 70-75 cents a gallon. Herring oil sold in 1947 for \$1.25 a gallon, Canadian currency, f.o.b., St. John's, nearly twice the 1945 price for a similar grade.

Marketing: The marketing of common cod oil up to May 1944 was effected through the Commodity Price Stabilization Corporation, Ltd., in the United States and Canada. In May 1944, this arrangement expired, and exporters were left free to make their own sales, but at fixed prices. In 1945, restrictions with respect to minimum prices were lifted, and sales became entirely a matter of negotiation between buyers and sellers. In 1945 and 1946, the Oils and Fats Committee of the Combined Food Board allocated 200 metric tons of common cod oil to Canada, the balance going to the United States. In 1947, the IEFC allocated 1,500 metric tons to the United States, 400 to Canada, and 100 to sundry markets.^{1/}

The sale of cod liver oil (medicinal) has never been subject to the same arrangements as common cod oil.

On the recommendation of the International Emergency Food Council, it was agreed by the Newfoundland Fisheries Board, after consultation with the trade, that Newfoundland's 1947 production of whale and seal oils should be allocated to Canada—as was the case in 1946. Herring oil of 1947 production, however, was not allocated to the United States, as in 1945 and 1946. Herring oil was allocated to Canada (i.e., herring oil of the 1947-48 producing season, June 1st to May 30th).

Based on the opinions of the exporters, Newfoundland seal oil is used primarily by tanneries (in the case of lower grade oils) and manufacturers of confectionaries. Herring oils are used largely in paints and varnishes. Whale oils are used in margarine and soap manufacturing. Cod liver oil, of course, is used medicinally, while common cod oils are used largely by tanneries.

^{1/}One ton equals 307 gallons. Allocations are made by production seasons beginning June 1 and ending the following May 30th.



Norway

ECA FUNDS AID FISHERIES: Fish will be served on many European dinner tables this year, according to the Economic Cooperation Administration mission in Norway. This fish would have remained out of intra-European trade had not ECA made possible the catching of it.

Without cotton, there would be no new nets for weather-beaten Norwegian herring and cod fishermen. Norway turned to the ECA for assistance on cotton imports from the United States. Approximately 350 tons of American raw cotton amounting to about one-half of the \$700,000 authorized for cotton imports were earmarked for fish nets.

The U.S. cotton for the nets was delivered to Italy, where it could be converted into yarn at a Milan factory. When the yarn was delivered to Norway, it was woven into nets in factories now rehabilitated by the purchase of ECA equipment. As a result of the new nets and larger catch, Europe will be eating more fish and Norway's export trade with almost every country in Europe is expected to reach its prewar \$100,000,000 annual level.

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FIND NEW ARCTIC FISHING BANK: A new hunting ground for Greenland sharks, a source of medicinal liver oil, has been discovered by fishermen from Aalesund, Norway, recently returned from a 4-month expedition north of the 76th parallel, according to the Royal Norwegian Information Service. Operating two deep-sea fishing craft, the men reported a successful season in these new waters and had aboard some 800 barrels of shark liver oil. The new field is said to lie off northwestern Greenland south of Ellesmere Island. The two boats arrived at the edge of the ice in early June and fished until September in front of the receding ice line north to Ellesmere Island. Radio telephone communication between the boats made it possible to plot the course of the fish schools.

The Greenland shark is hunted only for its liver. Once the liver is removed, the fish is dropped overboard, and the oil is extracted by a steam process aboard the vessel.

FOUR-YEAR RECOVERY PROGRAM: The Norwegian 4-year investment and recovery program to be carried out from 1949 to 1952 and presented to the European Branch of the Economic Cooperation Administration includes a program for the expansion and modernization of Norway's fishing and fish packing industry. This plan envisages an increase of 1.3 million metric tons (about 2,900 million pounds) in the fish catch, or 40 percent more than before the war; the building of 64 new freezers; the construction of 50 plants with wharves; increase in the output of herring meal from a present 110,000 tons to 135,000 tons and fish meal from 10,000 to 25,000 tons; and an increase in the production of canned fish from 46,000 to 100,000 tons. Whale oil production is slated to remain at the current level--180,000 metric tons.

SEALING: Sealing vessels have brought back to Norway this season 167,000 seal skins and 3,700 metric tons of blubber valued at \$3,800,000.

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COD LIVER OIL INDUSTRY: Production: During 1947, the catch of cod was exceedingly large, and the production of unrefined, steamed, cod liver oil for all of

Norway amounted to about 2,905,925 gallons, according to a report from the American Consulate at Bergen. The production of trawler cod liver oil and oil from coalfish was about 396,263 gallons during that year. The production during the 1948 season was the smallest for many years with the possible exception of the period of German occupation when, because of mines and other reasons, the catch was exceptionally small. It is believed that the production this year will fall far short of the demand.

The production figures given in Table 1 include only the production during the season from January 1 to June 29. During the rest of the year, sporadic fishing continues, and it is estimated that the figures should be increased from 30 to 40 percent to cover the entire yearly production.

Table 1 - Production of Cod and Cod Liver Oils, January 1-June 19

Jan. 1 - June 19	Production of Cod (All Norway)	Production of Cod Liver Oils		
		Steam Refined	Other	Total
		gals.	gals.	gals.
	Metric tons			
1948	133,712	1,467,624	109,606	1,577,230
1947	229,002	2,924,734	129,684	3,054,418
1946	182,070	2,639,372	96,662	2,736,034
1939	211,247	2,420,847	125,087	2,545,934

About 85 percent of the cod liver oil for medicinal purposes produced in Norway is derived from the liver of the cod (Gadus morrhua), but the liver of other fish such as coalfish (pollock) and haddock are also used. The oil exported from Norway is strictly controlled; only oil from the cod, coalfish, and haddock may be used for medicinal purposes. The highest quality oil exported under Control Standard "A" is that derived only from the cod, and is sealed with a yellow seal. This forms the largest part of cod liver oil produced for medicinal purposes. Other steam-rendered cod liver oil or oil prepared from the livers of mixed Gadus species is sealed with a white seal, and raw medicinal cod liver oil with a blue seal.

Norwegian scientists have given a pessimistic picture of future cod catches. However, it is believed by some experts that the catch could be increased by the introduction of more scientific methods. The modernization of the cod fishing has not kept pace with that in other branches of the fishing industry of Norway. It is understood that both the cod fishermen and the Government are opposed to modernization as this would give too much advantage to the large fishing companies at the expense of the small individual fishermen.

Stocks on Hand: At the end of the war, stocks of medicinal cod liver oil amounted to approximately 1,321,000 to 1,585,000 gallons. However, during 1946, the demand for cod liver oil in many countries was so great and such large quantities were exported that the stocks were exhausted by the end of the year. During 1947, exports continued in large volume and, in spite of the large catch in that year, the quantity of cod liver oil produced in Norway was not sufficient to meet the great demand from all countries. The stocks were again exhausted by the autumn of that year. The small production this year will not be sufficient to meet the continuing heavy demand and the stocks will again be exhausted.

Price: According to quotations from Pristidende, official weekly publication of the Norwegian Price Control Office, Oslo, Norway, No. 2 dated January 20, 1948, the market price of medicinal cod liver oil is as follows:

Table 2 - Cod Liver Oil Prices

Product	Grade		
	First barrel ^{1/}	Second barrel ^{1/}	Third barrel ^{1/}
Steamed medicinal cod liver oil:			
Finmark	\$35.21	\$33.40	\$31.79
Other parts of Norway	36.22	34.41	32.60
Raw medicinal cod liver oil	35.21	-	-
Pale raw medicinal cod liver oil	32.19	-	-

^{1/} 30 U.S. gallons per barrel.

The above prices are delivered, inclusive of packing, f.o.b. at the seller's nearest place for delivery on board ship or rail. In case the product is to be delivered at a place involving extra transport expenses, the seller may add these to the price.

The product is packed in ordinary tin barrels, which take about 233 pounds or 30 U. S. gallons of cod liver oil. When the product is packed in any other packing, the prices should not be higher than the above, but less by \$4.63 per barrel, plus the cost of the packing. The expenses for packing should not be higher than \$6.84 per 30 gallons of cod liver oil when delivered in half barrels, and \$3.42 per 30 gallons when delivered in casks or drums.

The prices are those fixed by the Norwegian Government for unrefined medicinal cod liver oil, f.o.b. producer's place of delivery, but do not represent the prices to the ultimate foreign purchaser. According to the latest figures, the fixed price for prime quality, steam-rendered, unrefined Lofoten cod liver oil is about \$36.22 per barrel, f.o.b. place of production. The price which the exporter receives for Lofoten medicinal cod liver oil, refined and uncongealable is about \$43.26 per barrel, f.o.b. port of embarkation. This includes cost of oil, cost of refining, plus inland freight, handling charges, profits, etc. The minimum price at which this cod liver oil can be sold is \$64.39 c.i.f. foreign port. The actual price at which this cod liver oil is sold at the present time is about \$80.48. The difference between this price and the export price, plus ocean freight, insurance, etc. is paid to the Government, and is understood to be used by the Government for stabilization of prices, assistance to fishermen, and to the fishing industry.

Exports: The following quantities of medicinal cod liver oil (steam-rendered and destearinated) and raw cod liver oil were exported from Norway during the period 1938-39 and 1945-47:

Table 3 - Total Exports of Cod Liver Oil

Cod Liver Oil	1947 (Jan.-Sept.)	1946	1945	1939	1938
	<u>gals.</u>	<u>gals.</u>	<u>gals.</u>	<u>gals.</u>	<u>gals.</u>
Medicinal	1,981,500	3,804,480	369,880	3,410,822	2,364,590
Raw medicinal	2,272	48,639	2,985	142,668	126,816

Table 4 - Export Values of Medicinal Cod Liver Oil

1947	1946	1939	1938	1937
\$11,028,109	\$8,555,106	\$2,163,802	\$1,435,794	\$1,779,575

About 72 percent of the cod liver oil exported from Norway during 1947 was shipped by firms located in Bergen.

Table 5 - Exports of Various Types of Liver Oils

Product	1947		1946	
	<u>gals.</u>	<u>value</u>	<u>gals.</u>	<u>value</u>
Cod liver oil:				
Steamed medicinal	2,592,481		2,796,187	
Raw medicinal	2,271		48,635	
Pale	2,375,408		1,514,462	
Light brown industrial	482,568		674,175	
Brown industrial	12,548		17,356	
Total cod liver oil	5,465,276	\$11,028,109	5,050,815	\$8,555,106
Greenland shark oil	159,840		109,448	
Seal oil	444,570		207,192	

Outlook: The outlook for future orders for Norwegian cod liver oil is uncertain. Up to the present time, there has been a market for the entire production of Norway and, because of the limited production this year, the production will

Table 6 - Leading Importers of Norwegian Medicinal Cod Liver Oil

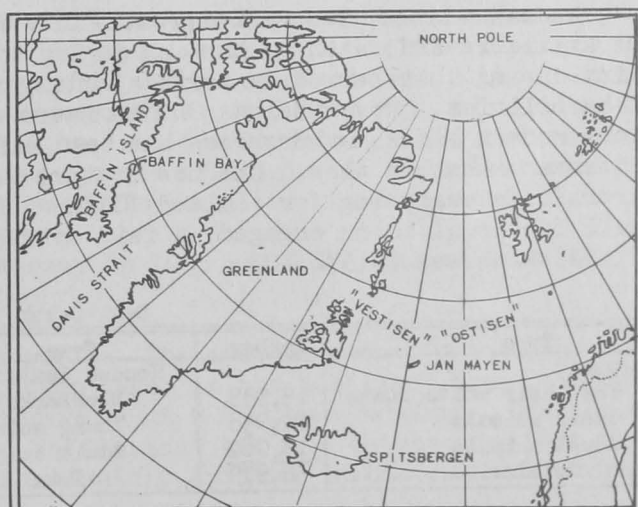
Country	1947	1946
	<u>gals.</u>	<u>gals.</u>
United States	353,545	350,956
Belgium	96,635	66,097
Bulgaria	79,781	14,424
China	86,808	15,560
Czechoslovakia	571,701	307,685
France	163,736	101,073
Italy	229,991	178,846
Netherlands	175,307	214,061
Poland	267,319	122,551
Sweden	409,286	352,330
U. S. S. R.	-	414,279

fall well below the demand. In recent years, the increase in production of cod liver oil from Iceland has caused keen competition for Norwegian cod liver oil.

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SEALING INDUSTRY IMPORTANT FACTOR IN ECONOMY: Sealing operations have been carried out by Norwegians on a limited scale and sporadically since pre-medieval times, according to the Canadian periodical, Foreign Trade. This industry was not important until the beginning of the nineteenth century, when a number of Norwegian sealers put out from the north and northwest coasts and cruised from Greenland and Jan Mayen Island to the far north in the neighborhood of Spitsbergen, and into the White Sea.

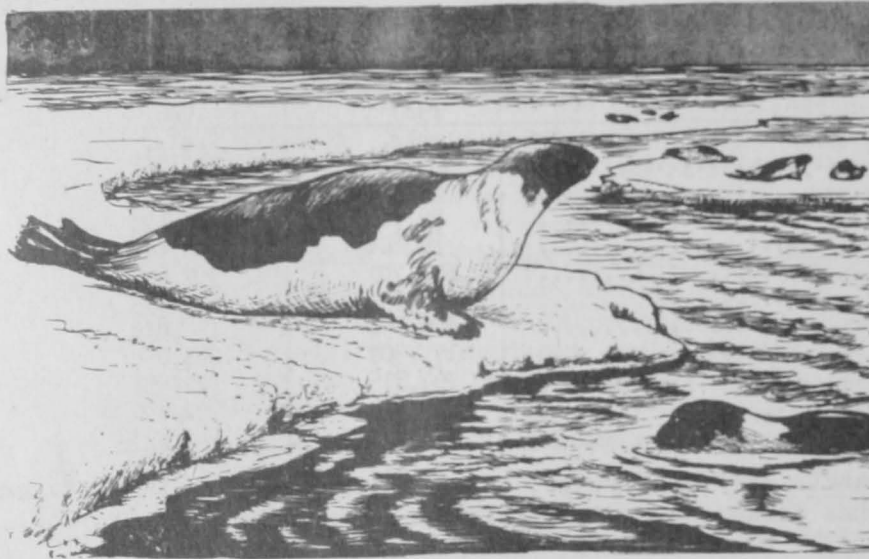
For the past hundred years, the principal fishing areas have been to the east and west of Jan Mayen Island, extending northward, and are known as "Ostisen" and "Vestisen" respectively. Sealing is also carried on in the Davis Straits between Greenland and Baffinland, as well as in other concession areas,



and, to a more limited extent than in former times, in the White Sea, where sealing was allowed under an agreement with Russia.

Harp Seal is Principal Type Taken: The main type taken is the harp seal, and nearly all caught in the "Ostisen" area are in this category. The 1925 catch from this area totaled 343,040 animals, of which 99 percent were harp seals. Numbers of hooded seal are, to a limited extent, found in this area but are mainly taken in the western area. It has been estimated that, during the 15-year period 1924-39, 61 percent of the catch from "Vestisen" was hooded seal, the remainder being harp seal.

As many as 169 Norwegian vessels have been engaged in one area, but vessels often operate in both the "Ostisen" and "Vestisen" areas in one season. Statistics



HARP SEAL

are not available for the period 1939 to 1947, but it is estimated that in the latter year about 16 ships comprised the fleet operating in both areas, making a total of 58 trips in all.

Most of the seals give birth to their young between February 20 and March 5, and as the so-called white coats are the more valuable prize, hunting begins in late February or early

March and continues until the middle of July. Usually, two trips are made by the ships in a season.

Annual catches have varied greatly in volume over the years for which statistics are available and, with no hunting during the war years and a considerable loss of ships during that period, no serious hunting has been carried out since the cessation of hostilities. Nevertheless, efforts were made in 1947 to organize the industry along modern lines, and progress has been made in obtaining new ships and equipment but advancement is slow. One new feature introduced since the war is the use of aircraft in searching for seals. Figures for 1947 indicate that even with the small number of ships engaged, a fair average catch resulted and the total value of the skins was \$1,572,103.

Seal Catch, 1947

Type		Number	Type		Number	Type		Number
Harps:			Hooded Seals:			Bearded Seals		516
Fast hair white coats	15,939		Bluebacks	23,991	Grand Total..		103,508	
Young animals	22,958		Young animals	4,989				
Adult animals	18,082		Adult animals	17,033				
Total.....	56,979		Total.....	46,013				

Exports of seal skins, untanned, in 1946 and 1947 totaled 353,206 pounds and 295,394 pounds, respectively. Trade in both years was somewhat intermittent, exports

being available during eight months only of the former and nine months of the latter year. Skins of all types are considered by Norwegian exporters as being suitable not only for fur but also for tanning purposes.

The industry had anticipated a much better catch in 1946, after the long wartime period of inactivity in the areas, but was disappointed. However, the 1947 catch showed a decided improvement. From preliminary information received, it would appear that the 1948 season has started badly, and it is estimated that the catch will be lower than in 1946.

From observations made by Norwegian sealers and others engaged in the scientific study of the sealing industry in prewar years, there are two size groups of gray seal. One has skin weights which generally are grouped around 9 to 11 pounds, and the other around 15 to 18 pounds. The dividing line between these groups may be fixed at a skin weight of about 13 pounds. Although these specific comparisons cover the period prior to 1934, it is probable that they apply in the postwar period.

Higher Prices Expected in 1948: The Norwegian sealing industry generally measures the skins by weight: white coats, $5\frac{1}{2}$ to $6\frac{1}{2}$ pounds; bluebacks, $6\frac{1}{2}$ to $8\frac{3}{4}$ pounds; saddlers, 17 pounds; and hooded seals, 22 pounds. In 1947, a majority of the fur skins sold in this country ranged in price as follows: white coats, \$12.09-13.10; bluebacks and the larger skins, \$16.12-17.13. Higher prices are anticipated for 1948. Export prices for the same classifications of skins, salted and cured, are \$7.05-8.06, and \$11.08-12.09, respectively. The tanners' skins are exported generally to the United States, where those used for fine leathers fetch \$3, while blueback and larger skins are priced at about \$2.

Oil Extracted in Herring Plants: Herring plants, particularly in the far north, are used for the extraction of the crude oil from the seal blubber. This oil is not refined, being exported in the crude state. The percentage of oil extracted from the blubber is 70 percent. All Norwegian seal oil is of one quality and color. It is medium pale with an acidity of 2 percent. In the past, the entire output has been sold in Europe and, as the volume produced is not sufficiently large to permit of the extension of sales beyond traditional markets, it is doubtful if any surplus will be available in 1948 for sale in North America. For the 1947 catch, Norwegian sealers received 19.7 cents per pound for blubber. After the extraction of the oil—and for the crude oil—the price to the exporter was 29.8 cents per pound. These prices apply to the oil derived from blubber landed by vessels returning from the first hunting trip in April and May. Following the second and final landing, in June and July, a slightly lower price was obtained as, with the warmer weather, the blubber becomes oxidized, and the oil is somewhat darker and poorer in quality. The price differential is, however, small.

Total exports of seal oil from Norway in 1946 and 1947 amounted to 207,212 gallons and 444,675 gallons, respectively.

Prospects for the Industry Unfavorable: The most important catches of seal have, since first they were recorded, been taken in the "Ostisen" area, although in many years, the "Vestisen" area may have produced larger catches. Sealing is also carried on between Greenland and Baffinland, but the catches in that area have not been recorded separately and are mainly included in the catches recorded for the "Vestisen" area.

The harp seal continues to be the main catch of the Norwegian fleet, as has been the case for many years. When the war was over, the industry was unprepared to take up where it had left off in 1940, due to losses of ships and equipment and to untrained personnel, and the prospects for 1948 are still unfavorable.



Republic of Panama

BAIT FISH PERMITS DISCONTINUED FOR CERTAIN PERIODS: The Ministry of Agriculture, Commerce, and Industries of Panama discontinued the issuance of 8-day bait permits in accordance with Decree No. 408 of April 27, 1946, which provides that such permits are valid only for fishing during the period January 15 to April 15 and June 15 to September 30 each year, according to a November 19 report from the American Embassy at Panama City. The refusal to issue permits is also due to the National Assembly's desire to thoroughly investigate bait fishing in order to enact regulations for conservation of the fisheries resources. Issuance of permits will be resumed January 15.



Poland

CENTRAL TRADING ORGANIZATION OF FISH INDUSTRY: The Polish Government is establishing a Central Trading Organization of the Fish Industry, according to the American Embassy at Warsaw.

According to the terms of the order, this organization will plan and administer the purchase and sale of all fishery products both domestic and foreign. Subject to approval by the Minister of Industry and Commerce it will fix prices for fishery commodities. The administration will have headquarters at Warsaw.

FISH CONSUMPTION: Efforts have been made to increase the consumption of fish on the part of the Polish population, according to an October report. This program has been accentuated by the recent shortage of meats. The head of the Seafishing Department of the Ministry of Navigation stated that the prewar consumption of fish in Poland was 6 pounds per capita. This year's consumption will amount to 7 pounds and next year's consumption to 8 pounds per capita. It is hoped that the consumption will soon increase to 22 pounds per capita. The price of fish will be reduced. It is expected that carp will provide 50 percent of the total fish supply.

Fishing Fleet and Fishermen: The Polish fishing fleet consists of 247 cutters, 1,148 motor boats, and 33 trawlers. The catch this year, particularly on the high seas, was considered very satisfactory.

Attempts are being made to increase the number of fishermen in the "Recovered Territories." At the close of the war, only 900 fishermen remained in Poland. At the present time, the fishing population is estimated at 4,000.

USE COD SKINS FOR WOMEN'S FOOTWEAR: The Polish coastal labor cooperatives have begun the tanning of cod skin for use in the production of women's footwear,

according to press reports. It is said that tanned cod skin is similar to ordinary animal skin in texture and has the appearance of lizard skin.

Experiments are also being made in using the skin of sea catfish in the production of fancy goods such as handbags, portfolios, etc.



Republic of the Philippines

NEW MODEL FISHERIES VESSEL: The David Starr Jordan, the vessel which it is hoped will be the answer to the Philippine fishing vessel operators' problems, was in Manila Bay the early part of October undergoing final outfitting, according to the Administrator of the Philippine Fishery Program of the Service. This vessel, which is the newest addition to the American fishery exploratory fleet, was ready to start explorations and demonstrations by the end of October.

Equipped with modern machinery and the latest navigational and fishing equipment, the vessel can be used to demonstrate how to long-line or bait-fish for tuna, to otter trawl, and to fish seine and gill-nets. It has a fish hold with a capacity of 20 tons of iced fish.

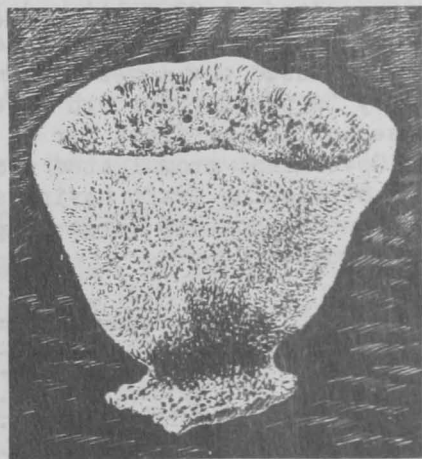
The vessel has a gross tonnage of 30 tons, is 48.7 feet long, has a breadth of 13.6 feet and a depth of 6.8 feet. It is driven and powered by a 135 hp. diesel engine, and an 8 hp. engine for bait-tank pumps, a standby generator for batteries and a main generator driven from the main engine. Aside from the complete steering and engine room controls installed in the pilot house and on the flying bridge, there are also a 250-fathom range fathometer, a direction finder and a radio-telephone.

SAMPLES OF SPONGES SENT TO U. S. FOR APPRAISAL: Philippine elephant-ear sponges were sent to the Service at Washington, D. C., for more definite appraisal of the quality and value. The samples were obtained from Manila and it is stated that five to ten thousand pieces a month of this variety can be obtained.

From these samples, it will be possible to determine the average quality of Philippine sponges and the probable price they would command in the current market.

According to an experienced sponge producer now residing in Jolo, the elephant-ear sponge, one of eight known varieties in the Philippines, compares favorably in the market with the same type taken elsewhere. Elephant-ear sponges used to sell at \$1.00 a pound before the war.

Moro as well as Japanese divers were employed and it formerly took only three to four working days a week to gather enough sponges to fill one exporter's needs. With the reported growing interest of American sponge dealers in Philippine sponges, one producer is planning on reviving his old trade.



THE ELEPHANT'S-EAR SPONGE

Difficulties in the exploitation of the sponge industry arise from lack of capital investment, irregularity of transportation and communication, and scarcity of supplies and equipment necessary for the gathering or diving for sponges, but it is expected that the prospect of a ready market and a good price coupled with modern methods in sponge processing, will eventually attract capital so that Philippine sponges may become a fair-sized export industry.



Siam

FISHERIES SURVEY: A 2-man mission has been sent to Siam by the Food and Agriculture Organization to make a rapid survey of the problems of the fishing industry in that country. One of the members of the commission is from the Division of Fisheries and the other from the Inland Fisheries Laboratory of the Indonesian Department of Agriculture and Fisheries. The mission will make a study of the inland and marine fisheries, and will pay particular attention to extension services for the development of fish culture, and the production of fresh-water, brackish, and marine fisheries, and problems of marketing and distribution.

The fisheries of Siam are relatively primitive and there appears to be much opportunity for development. The mission, however, will be able only to survey the problems and to furnish advice to the Siamese Government in working out a program for research and development.



Spain

SPANISH FISHING INDUSTRY, 1947: Fishing Fleet: The Asociacion de Industrias Pesqueras at Vigo, reported that the Spanish fishing fleet in 1947 totaled 37,832 units valued at 93 million dollars, according to the American Consulate at Vigo. However, in view of the greater abundance of meat and agricultural products which has decreased the domestic demand for fresh fish and since the fish canning industry is passing through a very difficult period, it is thought that Spain possesses a fishing fleet far in excess of its needs. It is probably for this reason the Government promulgated a decree on January 29, 1948, prohibiting the construction of fishing craft having a net tonnage of less than 150 tons. With the exception of about 15 large companies, the fleet is owned and operated by private individuals.

Table 1 - Composition of Fishing Fleet

Type	Number	Tonnage
Steam	1,181	87,134
Motor	6,642	88,249
Sail	12,847	36,955
Oars	17,162	21,547
Total	37,832	233,885

The larger tonnage ships are used for cod fishing off the banks of Greenland and Newfoundland and operate in the Cantabrian region which includes the northern coast in the Bay of Biscay, from the French border to the port of Luearca.

The value of the equipment of the fishing fleet which consists chiefly of nets, sinkers, auxiliary boats, floats, etc., is estimated at 25 million dollars.

The equipment of the Spanish fishing fleet is reported to be in a state of deterioration. In normal times, a large percentage of the equipment—cables, nets, ropes, hooks, bait, etc.—were imported from the United Kingdom and Norway, but owing to the self-sufficiency policy of the Spanish government and the shortage of foreign currency, the industry has been cut off from these sources of supply and has been compelled to revert to domestic substitutes which, in addition to being scarce and expensive, are of poor quality and require constant replacement, thus increasing further the high operation costs of the industry.

Catches: After almost ten years of progressive increases in the size of the catches, 1947 has seen a reduction in the amount of fish brought into port by the fishing fleet when compared with the corresponding figures for the previous twelve months. Prices, however, were higher than in the previous year.

The fishing campaign did not begin under very promising auspices, especially for the long range fishing fleet which makes its fishing ground the whole year round off the coast of Ireland and in the Gulf of Biscay. Stormy weather during the first part of the year caused the sinking of numerous units and rendered the fleet inactive for longer periods than in previous years.

In addition, the amount of the catches for this long-range craft, devoted to the fishing of hake, were much smaller, not only due to the non-appearance of fish but also to the presence in those waters of fishing craft of other countries, France, Norway, and the United Kingdom, which heretofore, due to war conditions, restricted their activities close to their home ports.

The abolition of ceiling prices and the higher prices obtained for fresh fish as a result of its scarcity, permitted the long-range fleet to operate profitably during the period under review.

Table 2 - Catches and First Sales Values, 1940-47

Year	Catch		Value		Year	Catch		Value	
	(In 1,000 lbs.)	(In 1,000 lbs.)	(In 1,000 \$)	(In 1,000 \$)		(In 1,000 lbs.)	(In 1,000 lbs.)	(In 1,000 \$)	(In 1,000 \$)
	Lbs.		U.S. \$		Lbs.		U.S. \$		
1947	1,249,251		185,575	1943	946,219		91,884		
1946	1,307,413		156,708	1942	999,423		91,557		
1945	1,195,579		114,600	1941	974,212		90,304		
1944	1,018,744		95,455	1940	951,812		66,282		

The composition of the catches, during the past two years, was as follows:

Table 3 - Composition and First Sales Values of Catches

Product	1 9 4 7		1 9 4 6	
	(In 1,000 lbs.)	(In 1,000 \$)	(In 1,000 lbs.)	(In 1,000 \$)
	Lbs.	U.S. \$	Lbs.	U.S. \$
Fish	1,156,788	167,244	1,210,147	142,604
Crustaceans	40,779	9,686	40,124	7,430
Shellfish	51,682	8,645	57,141	6,674
Total	1,249,249	185,575	1,307,412	156,708

As is usual, sardines, bonito, and hake constituted the bulk of the catches and all of these species showed a noticeable decline in the volume of the catch when compared with the previous twelve months, but in every instance, the average price per pound during 1947 was higher than in the preceding year. Of the preservable varieties caught in 1947, anchovies was the only one which was caught in larger quantities than in the previous twelve months, but most of the catch had to be disposed of in fresh condition for local consumption since there was little demand

on the part of the canning industry which was unable to absorb any appreciable quantities owing to lack of canning materials and the unsettled conditions in the principal consuming markets, Italy and Greece. Export to those countries was practically impossible even though existing commercial agreements call for the importation of a certain amount of anchovies from Spain.

Table 4 - Catches and First Sales Values of Principal Species (In thousands of pounds and thousands of dollars)

Species	1947		1946	
	lbs.	\$(U.S.)	lbs.	\$(U.S.)
Sardines	220,066	26,675	229,793	23,121
Anchovies	55,626	6,289	35,069	2,756
Bonito	35,649	9,845	55,072	12,211
Hake	96,405	32,385	152,700	31,014
Hake, small	119,644	24,116	126,766	20,110

The principal activities of the Spanish fishing fleet are centered in the two regions known as Cantabrian and Northwestern, where the two leading fishing ports of Pasajes and Vigo are located. The combined catch of these two regions equals to about 54 percent of the total volume of fish brought into ports, while the combined catches of the two ports represents about 21 percent of the total catches.

While the volume of the catches of these two ports is always about the same, the species brought into each of them are different. Pasajes is the home port for the large fishing boats that go to Greenland and Newfoundland for cod and also for a large number of the medium-sized craft that fish off the coast of Ireland, while Vigo is the center of the smaller vessels which fish the preservable varieties such as bonito, sardines, jurel (Paratractus), etc.

About 75 percent of the fish catch arriving at Vigo was disposed of in fresh state for consumption in the interior markets of the country. Shipment was made either by railway or truck and the transit time took at least twenty hours. Handling is not satisfactory and there is great wastage. The heads and entrails are removed from larger fish before shipment but the smaller species such as sardines, jurel, etc., are shipped round. Fresh fish is usually washed with fresh water and packed in boxes of about 110 pounds gross weight, a third of which is ice.

Fish Canning: Conditions of the fish canning industry were far from satisfactory in the year under report. There were the continued raw material shortages, but most damaging was the inability of the canners to enter the export markets in view of the unreal fixed value of the peseta. Formerly, this country shipped its canned fish to about fifty-seven world markets, Germany and Argentina being the largest consumers, each taking about 300,000 cases a year. The German market has been lost and the Argentine market is disappearing in view of the import restrictions imposed on foreign canned fish by that country in order to protect its own recently established fish canning industry. Faced with a most difficult situation the industry, through its Association, has petitioned the Central Government for assistance and has requested the adoption of the following measures:

1. Negotiation of an agreement with Argentina which would permit the importation of about 3,000 tons of Spanish fish each year.
2. Simplification of export license methods.
3. Authorization to use fifty percent of the foreign exchange received for exports to be used for imports of machinery, tinplate, and other requirements.
4. Timely and greater allocations of materials under Government control.

Spain is rapidly losing the predominant position it has enjoyed as an exporter of canned fish in favor of Portugal and other countries. A more favorable rate of exchange for the peseta would give the industry renewed impetus.

Spanish fish canneries have a normal annual production of about 3,000,000 cases (100-30 mm. cans) and an export surplus of more than 1,000,000 cases. The following table shows the quantities of canned fish that have been exported from this country since 1931. The gap between 1936 and 1941 corresponds to the period of the Spanish Civil War during which there was an embargo on exports, the total production having been consumed in the home market in substitution of other food-stuffs not then available:

Table 5 - Canned and Salted Exports, 1931-36 and 1942-47 (In thousands of cases and thousands of pounds)

Year	Sardines in Oil		Other Fish in Oil		Total Canned Fish		Salted Fish	
	Cases ¹	lbs.	Cases	lbs.	Cases	lbs.	Cases	lbs.
1947	136	5,375	160	6,674	295	12,048	96	8,432
1946	186	7,348	75	3,150	262	10,498	15	1,311
1945	99	3,930	188	7,837	287	11,767	40	3,403
1944	34	1,350	48	2,000	82	3,350	9	823
1943	90	3,573	59	2,480	150	6,053	288	25,372
1942	133	5,283	158	6,592	291	11,874	132	11,651
1936	231	9,155	65	2,730	296	11,885	7	654
1935	1,176	47,878	326	13,626	1,502	61,504	38	3,323
1934	1,136	44,990	389	16,246	1,525	61,236	41	3,632
1933	931	36,854	432	18,041	1,362	54,895	76	6,661
1932	897	35,510	622	26,017	1,519	61,527	93	8,195
1931	1,129	44,722	825	34,506	1,955	77,028	108	9,488

¹/ 100 - 30 mm. cans equals 1 case.

According to several leading canners, the primary causes for the decreased production in recent years are:

1. Lack of raw fish due to the non-appearance of usual sardine runs.
2. Government control over necessary supplies.
3. Lack of access to adequate supplies of tinsplate, wire, rubber, and other essential materials which are normally imported.

These factors, together with the inability to reduce mounting costs of production, resulting from labor and social laws, have severely hampered the industry.

The last normal year for the Spanish fish canning industry was 1935 when the peak was reached so far as volume of exports were concerned. In that year, the cost of production of a case of 100 cans of sardines in oil, one-quarter "club," 30 millimeters, 190/200 grams, (6.1/6.4 ounces) which is the standard used by the industry, was about \$6.15. In 1947, if the plants were able to work at full capacity, the production cost of the same unit would be about \$26.26. However, since the plants worked only at 5 to 10 percent of capacity in 1947, the cost of production was from \$34.40 to \$40.50 per case. The Portuguese canners who are presently Spain's chief competitors are able to quote sardines at \$14.00 a case f.o.b. Lisbon.



Venezuela

FISH CANNING INDUSTRY, 1947: The fish canning industry continued to operate on a satisfactory basis, although it felt the loss of several export markets, according to the International Reference Service of the Department of Commerce. Surplus exportable stocks at the end of the year were estimated at around 350,000 cases. Production of canned fish in 1947 amounted to 7,476 metric tons, compared with 7,740 metric tons in 1946.



International



EUROPEAN PROGRAMS OF FISHERY RECONSTRUCTION AND DEVELOPMENT: Introduction: In order to delineate the general lines of the present programs of European nations for further reconstruction and development of agriculture, including fisheries, up to about 1950-51, to appraise some of the problems and difficulties which may arise in carrying these programs through, and to indicate fields in which action might be taken on national, European, and world levels to deal with these problems, the Food and Agricultural Organization of the United

Nations, in June 1948, issued the report, European Programs of Agricultural Reconstruction and Development. The report does not cover non-food agricultural products, nor does it mention, except incidentally, the outlook for fisheries or the problems of the fishing industry.

The following are excerpts from this report which deal with the outlook and problems of the fisheries of Europe:

Characteristics of Europe's Fisheries: The European fishing industry was in a stage of rapid development between the two wars. In the principal countries of northwestern Europe, fishing operations became largely mechanized and activities were extended from the North Sea and Atlantic coasts to several sections of the Arctic Ocean. Nevertheless, in many countries, coastal and fresh-water fisheries, very often associated with agriculture, were still carried on with small craft and simple equipment. During hostilities, many of the larger units of the fishing fleets of Norway, Belgium, the Netherlands, Germany, France, and the United Kingdom were used for war purposes, and a great proportion of them were lost. Portugal and Spain continued to expand their national fishing fleets.

Large quantities of fresh fish were shipped from Norway and Denmark to Germany and from Iceland and the Faroes to the United Kingdom. In Iceland and Norway, the construction of freezing plants was intensified and has been continued. In some of the countries, fish consumption greatly increased during the war, when meat supplies were short, and fish has come to play a more important role in the diet. In Norway, technological developments immediately before the war enabled that country during the war to refine its own herring oil for the margarine industry.

Fisheries Production Plans: So as to take steps for modifying or better implementing the food output goals of two to three years hence, an attempt has been made in this report to present a set of projections centering approximately on 1950-51, with comparisons for 1934-38 and 1946-47.

Fish landings are expected to increase through 1950-51. Since the war, the reconstruction of fishing fleets has gone forward at a rapid pace, and in some countries, the fleet now equals or even exceeds the prewar size. Landings in 1947 about reached the level of prewar since increased production in several northwestern European countries, such as Iceland, Belgium, and Denmark, more than made up for the reduced production of other European countries, such as France and Germany. Postwar landings in Norway are now equal to those of the best prewar years. Heavier catches have been possible because of favorable climatic and oceanographic conditions; the increased stocks of fish in the waters of northern and western Europe have for the time being resulted in greater returns per unit of effort. The salting of cod and related species for export, which was virtually discontinued during the war, has been revived to some extent, but the producing countries continue to look for outlets for the fresh and frozen products. Here several market obstacles are encountered since most European countries are not equipped with the necessary refrigeration facilities for transport and storage. The figures for 1950-51 in Table 1 give only a first rough indication of intentions: they are still under examination and subject to substantial revision.

Table 1 - Fisheries Production Programs for 1950-51 & Comparisons with Prewar & 1946-47^{1/}

Country	1934-38	1946-47	1950-51	Country	1934-38	1946-47	1950-51
	(000 metric tons)	(000 metric tons)	as % of 1934-38		(000 metric tons)	(000 metric tons)	as % of 1934-38
Iceland	274	368	182	Poland	19	30	526
Ireland	12	21	200	Czechoslovakia	3	2	133
United Kingdom	1,039	1,032	110	Hungary	6	6	133
Norway	921	962	110	Rumania	10	8	120
Finland	35	49	143	Bulgaria	4	4	125
Sweden	127	210	157	Greece	35	22	143
Denmark	90	197	278	Albania	-	-	-
Netherlands	226	190	111	Yugoslavia	8	8	625
Belgium	59	70	238	Italy	200	160	125
Luxemburg	-	-	-	Spain	489	450	125
France	424	244	106	Portugal	235	285	136
Germany	620	280	65	Turkey	22	21	568
Austria	3	1	100	Total Europe	4,863	4,622	116
Switzerland	2	2	100				

^{1/}Prewar figures represent the 5-year average 1934-38, although in a few cases it has been necessary to use figures for a smaller number of years within that period.

Figures for Spain refer to years within the period 1931-35, and for Turkey to the years 1935-39.

Prewar figures have been adjusted to postwar boundaries.

Precisely similar assumptions are made in the projections for 1950-51.

Landings of fish in round weight. Figures for 1946-47 refer to the calendar year 1946 for most of the major producing countries. In some cases, as in Norway, "prewar" data are for calendar year 1938 only. All figures still under examination and subject to substantial revision.

- Negligible.

International Trade in Fisheries Products: Several of the important fishery countries of Europe have relatively small populations and their fishery industries depend largely upon export. Before the war, about 95 percent of the commodity export of the Faroe Islands consisted of fishery products; for Iceland the proportion was almost 90 percent; and for Norway, about 25 percent. New fisheries may play an even more significant part in the exports of these countries. The main consuming countries--such as the United Kingdom, Germany, France, Italy, Spain, and Portugal--normally have extensive fisheries, but they have always been partly dependent upon imports from other producing countries, although some of them, as a whole, may be net exporters. This is due to such factors as price, assortment of species, and time of fish landings. For example, Portugal imports substantial

quantities of relatively low-priced salted fish and exports about an equal quantity of canned fish. The United Kingdom imports fresh herring during the winter months, while it may have an exportable surplus of herring during the summer and fall.

Much of the present trade in fisheries products is conducted through bilateral barter and trade agreements. The Soviet Union is now taking substantial quantities of fisheries products from Norway and Iceland.

The programs for 1950-51 envisage a considerable increase in exports of fish compared with prewar. Such expansion depends mainly upon future possibilities in the very few important exporting countries. Expansion in their catching capacity indicates an expansion in trade, because most of these are countries with small populations.

Markets for European Exports: In respect of fish, vegetables, and fruit, and to a lesser extent potatoes and eggs, a number of European countries have programmed a substantial expansion of exports during the next few years. Added together, these exports would amount to a large quantity, in some items much larger than in any prewar years and larger than the imports programmed by deficit countries. Even allowing for projected exports to non-European countries, there is here a problem of unbalance. Previously, the United Kingdom and Germany were the principal importers, and, at the moment, there are disposal difficulties because the United Kingdom is taking less than prewar and Germany virtually nothing. The question arises whether these two markets are likely to revive and whether other new markets can be opened. FAO already has started some work in Europe on the fish problem and the fruit and vegetable problem.

Fish Consumption Goals: Fish consumption is scheduled for an increase in most countries. While many fisheries countries are optimistic about prospective catches, it must be emphasized that less favorable conditions affecting available stocks of fish in the sea and an adverse change in the present relatively favorable price situation could reduce landings.



THE CUBAN FISHING INDUSTRY

The Cuban Government beginning with 1946 has shown renewed interest in developing the country's fisheries. It has eliminated or suspended several taxes which discouraged production. It is erecting a plant at Batabano for curing and canning fish and byproducts. It has repaired vessels damaged by the hurricane of 1944. It is distributing a limited quantity of lines, hooks, and small fishing craft among fishing cooperatives which it fosters. It has also sought amicably to remove obstacles heretofore imposed by Mexico against fishing in its waters. But all these efforts hardly constitute a fraction of what needs to be done.

—Fishery Leaflet 308