

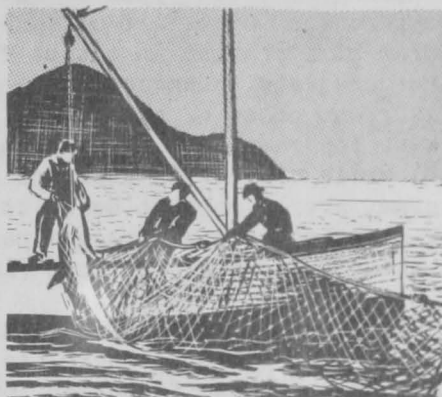


Australia

EXTENSION OF SOVEREIGNTY: The time has come when the fishing industry of Australia must recognize the necessity for scientific management of this important natural resource, according to an editorial on an article in Fisheries Newsletter, an Australian Government periodical.

The editorial states that after investigating Australia's eastern trawling industry, a scientist on the staff of the Fisheries Division concludes that whereas fishing intensity on these grounds is at the level of 4,500-5,000 trawler-tons, the level which the fishery can stand without impairment of the fish stock is only 3,250-3,500 trawler-tons. Thus, as pointed out in an introduction to his article, investigation has confirmed repeated warnings given in the Newsletter for several years past.

The only question to be decided is whether the necessary reduction of the intensity of fishing is to be brought about in an orderly planned way by Government action--taken with the understanding and cooperation of the industry--or whether competition for immediate gain is to be left to reduce the fishing fleet by driving its financially weakest units out of operation. There can be only one answer to this question. For the latter course--apart from leaving the way open for another cycle of boom and depression when fish stocks had recovered after failures had reduced the fleet--offers no permanent basis for the operation of the fishery.



SHARK FISHING OFF PORT STEPHENS HEADS, AUSTRALIA

Scientific management of our trawling resources requires the exercise of authority, for the permanent conservation of the fishery, outside the 3-mile limit. There is only one authority that can assume such power; that is, the Commonwealth Government.

The necessary legislation to enable the Commonwealth to do so has been drafted, and it is well that fishermen should thoroughly understand the need for it; not only for the immediate conservation of the trawling grounds, but to meet any similar need in future for the preservation of other Australian fisheries, and also for the protection of any Australian fisheries against possible over-exploitation by any overseas operators.

By the proposed legislation, Australia will not set any precedent. Since President Truman's declaration in September 1945, assuming similar powers for a similar purpose outside the 3-mile limit around the United States coast, Mexico,

Peru, and the Argentine have taken to themselves the same authority. New Zealand is considering similar action and, it is understood, will first consult Australia.

Australia must assume control of the waters of her Continental Shelf in order that any deep-sea fisheries management plan can be put into operation. Implementation of this by Act of Parliament would be non-controversial and a matter of first importance.



Canada

AUTHORIZES PURCHASES OF FISHERIES PRODUCTS: On March 25, 1948, the Canadian Privy Council authorized the Fisheries Prices Support Board to purchase not more than 190,000 cases of East Coast canned fish of the varieties designated below during the 12-month period ending March 31, 1949. According to information received, this purchase program represents a decrease of 25 percent in Government purchasing of these types of fish from the level of 1947 when large quantities were purchased on behalf of UNRRA and post-UNRRA relief programs. However, this program will provide an outlet for approximately half the expected product, at prices adequate to ensure the continuance of this sector of the industry during the current phase of adjustment, maintaining--to that extent--diversification of markets for raw fish. According to Canadian sources, the prices prescribed for 1948, while similar to those paid in the latter part of 1947 under the post-UNRRA program, are 10 percent below the levels established under the UNRRA program. They are also approximately 10 percent below the currently prevailing market prices for these varieties of canned fish.

It should be emphasized that the order of the Privy Council specifically contains a provision that in the purchase contracts a condition should be included that prices paid to fishermen for fish be comparable to those paid in 1947. Varieties designated for purchase, together with the prices authorized, are as follows:

Kind	Cans per case	Ounces per can	P R I C E S	
			Fancy (per case)	Standard (per case)
			\$	\$
Chicken haddie and flaked fish, flats	48	14	9.00	8.00
Finnan haddie, flats	48	14	9.50	-
Flaked fish, "	96	7½	9.50	8.50
Herring, talls	48	10	4.75	4.35
Herring, talls and flats .	48	15	5.35	4.75
Mackerel, talls	48	15	8.25	7.25
Mackerel fillets, talls, and flats	48	15	9.00	8.00

(Plus 50¢ per case if packed in wooden boxes metal strapped.)

Note: F.O.B. Supplier's nearest shipping point.

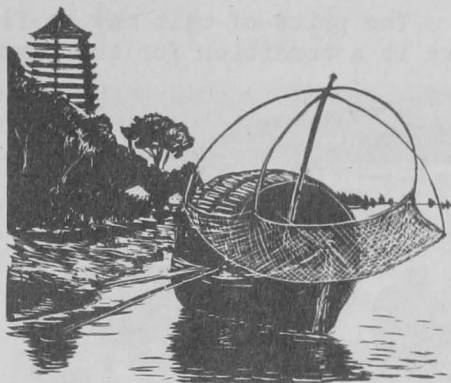
No indication is given as to the disposal of this fish.



China

ENFORCEMENT MEASURES FOR DEVELOPMENT OF FISHERIES: The National Economic Council (NEC) of China during January 1948 agreed upon pertinent enforcement measures for currency and finance, agriculture, communications, and commerce in regards to suggested enforcement measures for an economic reform plan for China, according to a report submitted by the American Embassy at Nanking, China. Those measures affecting China's fisheries are designed to develop fishery and marine products in seas, rivers, and lakes, to encourage farmers to raise fish, and to encourage the processing of marine products.

Among the enforcement measures for the development of the commercial marine fisheries are the following: to strengthen and supervise marine fisheries, improve fishing craft and equipment for purposes of increasing production, and strengthen the organization and training of fishermen and technical personnel. In addition, the measures call for the increase of culture of fresh-water fish, development of culture and breeding of salt-water fish, the development of processing enterprises for marine products, regulation of production and marketing of fishery products, and the development of fishing communities.



Iceland

ANTI-INFLATION LAW: The Icelandic Government passed on December 29, 1947, a law to control inflation. Among the provisions were several affecting the fisheries. They are, briefly, as follows:

For the motorboat fishery, the Government guarantees a price of 4.6 cents per pound for fresh fish based on drawn cod and haddock. Prices for other fish shall be in proportion. The National Federation of Icelandic Fish Producers are to be consulted in fixing these prices.

The freezing plants are guaranteed the difference between the selling price f.o.b. of cod fillets and 20 cents but the guarantee will not be more than $5\frac{1}{4}$ cents per pound. The Government may even pay for part of the storage of frozen fish caught during the winter season if the fish are exported before August 1, 1948.

For exporters of salt fish, there is a guarantee based on the difference between the selling price f.o.b. and 15.9 cents per pound. This is based on first class fully-cured large cod. For other classes and species, the guarantee would be less, but in proportion. The same applies to dried fish which may be exported.

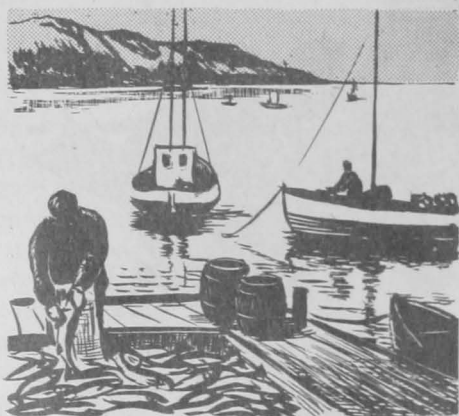
If depreciation of salt fish is caused by long delay and the exporter is not responsible, he can be reimbursed for the depreciation by the Government.

In order that the fisherman will receive a minimum price of 4.6 cents per pound for fresh fish which will be exported in a form other than frozen fillets or salted fish, the Government may guarantee the price of such exported fish.

Depending on the market outlook, the Government may issue rules and regulations affecting the processing of fish.

Fresh and salt fish producers, and owners of freezing plants can be required to submit reports on their activities. Likewise, statements may be required to show that share-fishermen and fish producers who sell their catch to others have received the minimum prices.

The price of bait may be fixed by the Government. The Government may also make it a condition for the payment of a subsidy for bait, that steps be taken



by the dealers to reduce the cost of bait. Resolutions concerning the use and saving of bait, if approved by a majority of fish producers at a port and confirmed by the Minister, are binding on all producers at that port. The maximum rent to be paid for fishing stations may be fixed by the Government. Stiff fines are authorized for violation of this section.

When the Government decides on the prices to be charged for fishing gear and for repairs of vessels, a representative from the operators and from the fishermen shall be called in and shall have a right to vote on such matters.

This law sets a maximum of 4 percent which can be charged for operating loans to the fisheries and to companies processing fish for export. Loans can be made up to 85 percent of the guaranteed prices.

On account of the failure of the herring fishery during 1947, companies and individuals who operated purse seines for herring in 1947 may also apply for loans from a guarantee fund of \$770,000.

The Minister of Fisheries shall appoint a committee of 3 to handle the loans or grants to the purse-seine herring fishery companies and operators which must have the approval of the Minister. Loan applications must include copies of the 1947 income tax return, 1947 balance sheet, 1947 herring operating account, and mortgage certificates on vessels and real estate. The Fisheries Fund of Iceland shall handle the loans and will receive an account of the operating costs from each vessel.

A sales tax to be levied excludes taxes on sales of fresh, frozen, canned, and salted fish including herring and on sales of gear, salt, oils, and vessel repairs.

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EXPORTS, 1947: Although Icelandic exports in 1947, which amounted to \$44,723,870, were approximately equal to those of the preceding year, there were a number of variations in the relative importance of items exported. Principal commodities sold abroad during both years, according to a report submitted by the American Legation at Reykjavik, were:

	1947		1946	
	Value	%	Value	%
Iced fish	\$ 6.6	15	\$ 9.5	21
Frozen fish	10.6	24	9.4	21
Salted fish	7.1	16	2.9	7
Cured herring	2.0	4	4.3	10
Herring and fish meal	2.5	6	1.8	4
Herring oil	8.0	18	4.2	9
Cod liver oil	3.5	8	4.3	10

Inasmuch as the catch was about the same in both years (except for the winter herring, of which very little was exported in 1947) differences in sales abroad were largely due to variations in the mode of preparation.

The greater part of an increase in the value of frozen fish and herring oil exports, however, was due to higher prices obtained, rather than increased production. The slightly greater amount of herring processed resulted in a lesser quantity salted and cured, while more white fish was salted instead of iced.

Frozen fillets and herring oil went almost entirely to the United Kingdom and the Soviet Union, while most of the salted fish was exported to Italy and Greece. All the iced fish was exported to Great Britain, and Czechoslovakia was the largest importer of fish meal. The United States and the Soviet Union purchased most of the cod liver oil production.



NET FACTORY FIRE: About one-fourth of all herring nets stored in Iceland were destroyed on March 19, when a fire broke out in one of the two main net factories in the country. The Director of the State Herring Plants stated that inasmuch as it is very difficult to obtain material for herring nets, the destruction of these nets may have serious consequences with regard to the summer herring season.

TRADE AGREEMENT WITH CZECHOSLOVAKIA: The Icelandic Ministry of Foreign Affairs has officially announced the signing of a trade agreement with Czechoslovakia in Prague on March 11. According to the terms agreed upon, Iceland will sell quick-frozen fish, herring, and fish meal, canned fish products, cod liver oil, and sheepskins.



Philippine Islands

FISH PRODUCTION, 1947: The commercial catch of fish was about one-third greater in 1947 than in 1946 despite a marked decline in the catch of herring, according to figures released by the Philippine Bureau of Fisheries and recently reported by the American Embassy at Manila. The total production for 1947 was 46,295,000 pounds, compared with 34,984,000 pounds for 1946.

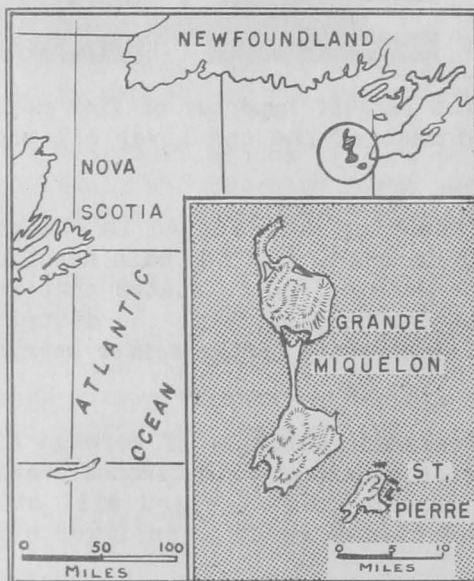
According to the Market and Inspection Service of the Philippine Bureau of Fisheries, 19,624,587 pounds of fresh fish valued at \$8,392,339 reached the Manila market in 1947, against 15,785,008 pounds valued at \$9,080,643 in 1946. The average price was \$4.64 cwt. in 1947 against \$5.77 cwt. in 1946. In addition, 6,160,000 pounds of iced fish and 5,128,180 pounds of frozen fish reached the Manila markets in 1947. There is no record of any refrigerated, iced, or frozen fish reaching the Manila market in 1946.

There were 612 commercial fishing boats licensed in 1947, of which 280 were powered; 358 in 1946, of which 127 were powered; and 52 in 1945, of which 40 were powered.

There were 2,903,032 pounds of fishery products valued at \$791,470 exported from the Philippines in 1947 against 2,550,469 pounds valued at \$654,845 in 1946. Exports of shells, which make up most of the total, increased substantially in 1947 and shipments of shell buttons were started in a moderate way. Shipments of trapang and skins (shark skins, alligator skins, etc.), a considerable factor in 1946, were negligible in 1947.



St. Pierre—Miquelon



FILLETING PLANT: The cold storage plant built in 1919 on St. Pierre, French island off the coast of Newfoundland, has been under repair for several months and is expected to go into the production of fish fillets for future export, according to a report of the American Consul at Halifax, Nova Scotia. Although constructed in 1919, the plant has been used only for storage of green fish or dry fish in casks pending exportation from St. Pierre to the United States, Puerto Rico, or elsewhere in the West Indies.

The cold storage plant is the property of the local administration at St. Pierre. It will probably be operated under a rental agreement by two companies.

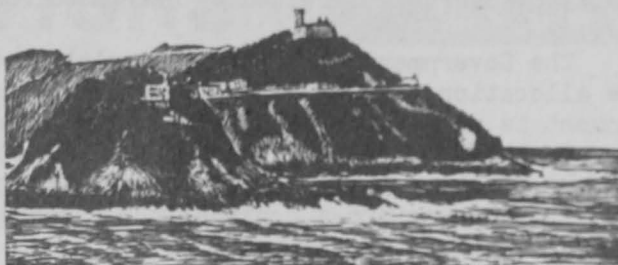
It is estimated that the cold storage plant will be able to produce 20 tons of frozen fillets daily, 30 tons of fish fertilizer, and 30 tons of ice. The capacity for storage of fillets will be around 1,600 tons. However, this last figure can be increased, if necessary.

The plant will provide employment for about 150 to 200 workers in addition to the crews of the fishing trawlers.



Spain

FISHERIES REVIEW, 1947: The Spanish fishing industry was adversely affected during 1947 by a number of causes, chief of which was the steadily advancing costs of operation, according to a consular review submitted to the American Embassy at Madrid, Spain. As the year closed, there were no signs evident that the peak had been reached. The industry had hoped for Government assistance which would result in the gradual but steady return to stabilized production but this was not realized in 1947. Inflation has retarded the return to normal conditions and has created a feeling of insecurity. Under these conditions, the outlook for 1948 was not favorable.



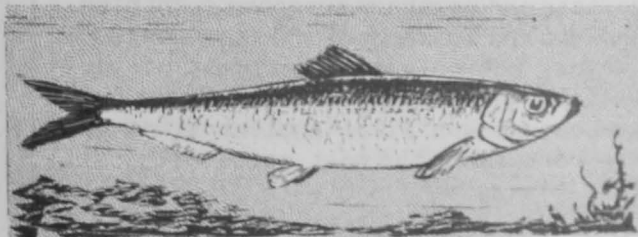
BAY OF SAN SEBASTIAN, SPAIN

Fishing Activities: The deep-sea fishing fleet, whose fishing grounds during the entire year are off the coast of Ireland and the Bay of Biscay was hampered by inclement weather the early part of the year and there were losses of numerous units through shipwreck.

Catches were significantly smaller due not only to the scarcity of fish but also to the presence of fishing vessels from other countries which, due to wartime restrictions, had previously kept to the littoral of their home ports. Statistics of the 1947 catch are not yet available, but estimates place the amount of fish brought into Spanish ports at about 50 percent lower than the previous year.

The revision of ceiling prices and the continued increasing demand for fresh fish to compensate for the lack of other foodstuffs in the domestic markets enabled the deep-sea fleet to operate profitably. Had it not been for these two factors and had the catches been as abundant as in previous years, the situation would have been reversed, since the total market value would not have paid for the heavy operating costs of the fishing ships and the result would have been the suspension of fishing operations.

It is reported that 1947 was not a profitable year for the smaller fishing craft which operate near their home ports. The activities of this branch of fishing fleet are seasonal and sardines and bonito (albacore) are the principal species that constitute the bulk of the catches. The equipment of these fleets is most primitive and accounts partly for the continuous decline in the quantities of fish caught. During the year, bonito was plentiful and brought good prices. The sardine catches, however, have been steadily



SARDINE (PILCHARD)

declining, although towards the end of the year, the situation improved slightly owing to larger catches of small sardines (pilchard), but this type is not suitable for canning.

Fish Canning: The shortage of tinplate and olive oil coupled with the loss of foreign markets continue to reflect the unfavorable situation of the fish pack-

ing industry in 1947. Normally, Spain ranked as one of the leading world producers of canned fish, producing almost 3,000,000 cases a year. The history of the industry during the past 10 years is stated to have been one of a losing fight against conditions arising out of the Spanish Civil War followed by World War II. The causes are various but originated from an almost complete lack of raw materials, chiefly tinsplate. During the past two or three years, the position of the industry was also adversely affected by decreased runs of sardines along the Spanish coast.

The Government control and regulation of the industry particularly as regards the allocation of materials are far from satisfactory. It appears that the Government is more interested in securing supplies of fresh fish for the home market than in the needs of the canneries. The fish canning industry in Spain is dependent upon export trade and the present economic policy of the Government of cutting off its export markets has weakened the structure of the whole industry which has now entered into a period of stagnation.

As the year closed, the position of the industry was unfavorable, and the outlook for 1948 was not very bright.



THE JAPANESE TUNA FISHERIES

During the last several decades, the tunas have assumed a position of major importance in commercial fisheries throughout the world. Much interest now centers in this group because of the tremendous demand in many countries for canned tuna products either for indigenous consumption or for their value as export items. Important fisheries consequently have been developed in North American and northern European countries. In Japan and in the Mediterranean region, however, not only are the tunas of considerable present-day importance but they have been taken since ancient times and have been among the most esteemed of all fish.



Japan is admirably situated for exploiting the large oceanic species, many of which perform wide migrations and enter its coastal and offshore waters at some time during their life histories.

--Fishery Leaflet 297