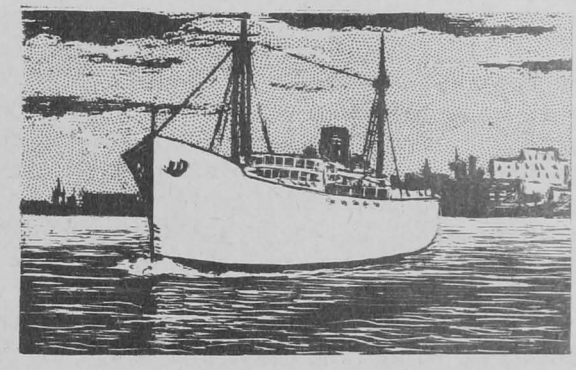
Canada

FISH EXPORT PROGRAM: In reply to a question in the Canadian House of Commons on May 10, 1948, as to what, if any, efforts are being made to stimulate the sale abroad of Canadian fish, the Parliamentary Secretary to the Department of Trade and Commerce gave the following reply, according to the American Embassy at Ottawa, Canada:

> "The trade commissioner service is so organized that trade commissioners are kept continuously posted on the supply position of various commodities in Canada, and are urged to promote the sale of all commodities, particularly those which are in excess of our immediate domestic requirement.
>
> "Having regard to the current supply position, special instructions were sent to the trade commissioners, in countries where particular types of fish would find a most ready sale. Washington has been advised of the availabilities of certain types of fish and the various U. S. government purchasing agencies have been acquainted with our supply position.
>
> "Recently an interdepartmental fisheries export committee was organized for the purpose of ensuring the best possible coordination of the efforts of the two departments - Trade and Commerce and Fisheries - and the trade, to market Canadian fish abroad. Steps have been taken to create a senior trade commissioner position who will specialize in the marketing of fish in the same manner as the agricultural and timber trade commissioners deal with their commodities."

The interdepartmental fisheries export committee referred to in the above statement was actually set up on April 9, 1948, and consists of representatives of the Departments of Fisheries and Trade and Commerce, with Mr. G. A. Newman, Assistant Director, Export Division, Department of Trade and Commerce, as Chairman. It is understood that special attention is being given by the committee at the moment to the decline in exports of Canadian fish as the result of currency restrictions in a number of foreign markets.

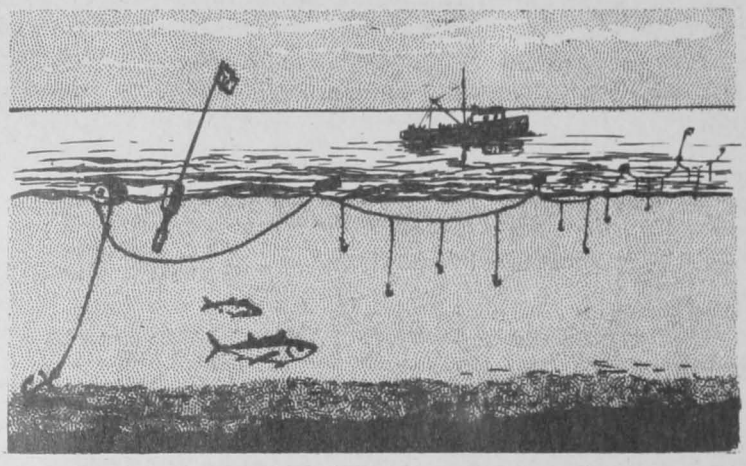


While not directly related to the setting up of the interdepartmental committee, it may be noted that, as a part of the same general effort to stimulate exports, resolutions adopted at the recent annual meeting of the Fisheries Council of Canada requested revision of the United States Customs Tariff on salt fish, canned salmon, and canned tuna. These resolutions, according to a report by the Canadian Fisheries Council, were referred to the Departments of Fisheries and Trade and Commerce. The latter Department is stated to have informed the Council that the items named have been noted for negotiation with the United States when-

ever the opportunity becomes available and that briefs from the industry for the guidance of that Department in preparing representations to the United States authorities would be welcomed.

* * * * *

LONG LINE TUNA FISHING IN BRITISH COLUMBIA: Under the supervision of the Dominion Department of Fisheries, three fisheries vessels will be used this season as survey ships in off-shore waters of British Columbia, according to the American Consulate at Victoria. The three survey boats are the Laurier, the Kitimat, and the Howie. These vessels will send out frequent broadcasts to provide fishermen with data regarding water temperature, location of tuna schools, depth of tuna schools, feeding habits of the tuna, and similar information.



TUNA FISHING--LONG LINE METHOD

The main purpose of this program is to provide employment for the Canadian halibut fleet, which, due to the short halibut season, is idle for a great portion of the year. The method proposed for tuna fishing is that used successfully by the Japanese for many years before the war in their tuna fisheries, that is, the long line method. As the halibut boats are already equipped for a type of long line fishing, they may not need to re-equip themselves completely at the end of the halibut season.

It has only been in the last two or three years that the British Columbia fishermen have done any tuna fishing. Up until this year, all tuna taken was caught by trolling. In 1947, approximately 900,000 pounds were taken, mostly albacore, with some skipjack. The prices varied from $500 to $600 per ton.

In addition to the survey vessels obtaining data, captains of fishing vessels are being furnished with special logs in which to record the same information. It is expected that after this year, when the information obtained by the survey ships and from the logs of the fishing boats themselves is tabulated and evaluated, the Department of Fisheries will be able to furnish specific information to fishing boats on the probable location of tuna schools, feeding habits of the fish, depth of water at which the tuna schools are running, and water temperatures at which good catches can be expected.

On May 4, 1948, the Chief Supervisor of Fisheries for the Dominion Government conferred with fishermen and heads of fishing interests in Victoria regarding the proposed long line tuna fishing methods, and the Canadian Government's decision to furnish three survey vessels to collect data on the fishing grounds off the coast of Vancouver Island and the Washington and Oregon coasts. The fishermen and heads of the fishing interests were very interested in the discussion, and expressed a desire to send fishing boats out to see what success they might have with the long line method. The high prices paid for tuna last year, compared with the relatively low price for halibut received this season, probably helped the fishing interests to decide to attempt tuna fishing by the long line method.

Great Britain

WHITE FISH AND HERRING INDUSTRIES BILL: The White Fish and Herring Industries Bill, which was introduced in the British House of Commons on March 10, was given its second reading in the House of Commons on April 29, according to the American Embassy, London, England.

The outstanding features of the bill are its provisions for:

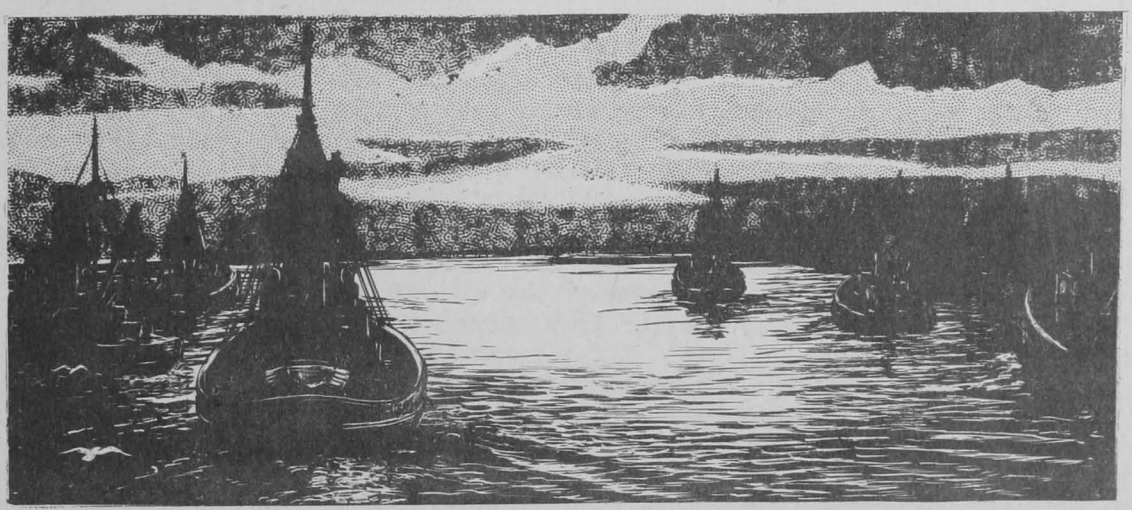
1. **The prevention of overfishing in the North Sea.**
2. **Grants for assistance to inshore fishermen in England, Wales, and Scotland.**
3. **An appropriation of $4,030,000 (£1,000,000) for financing projects for the conversion of herring to oil and other products.**

The first two clauses of the bill deal with the question of overfishing in the North Sea, and are drawn up in accordance with the Overfishing Convention of 1946. The Minister of Agriculture and Fisheries is empowered, under the bill, to fix the size of mesh to be used in fishing in British territorial waters, and to license British vessels to fish for white fish in the North Sea. Fishing without such license is to be prohibited. For the purposes of this bill, the limits of the North Sea are defined.

In regards to the second clause dealing with the limitation of the tonnage of the North Sea fleet, it is noted that the system would not be brought into force until after an appointed day which could not be fixed until Fishery Ministers were satisfied that other countries were taking equivalent measures. Also, certain classes of boats are exempt from the provision to have licenses.

Comments of the press, members of the House of Commons, and the fishing industry pointed out that, under the 1946 Convention, the number of fishing vessels of over 40 feet of each country fishing in the North Sea should not exceed 85 percent of the total fishing power in 1938, and that, at present, the British fishing fleet is not up to 85 percent of its 1938 capacity.

Other sections of the bill provide for loans and grants to a total of $6,045,000 (£1,500,000) to assist inshore fishermen in purchasing, improving, and recondition-



"AT DAWN THE HERRING FLEET STEAMS OUT TO SEA"

ing fishing boats and tackle. The Inshore Fishing Act of 1945 provided $5,239,000 (£1,300,000) for this purpose, but it is expected that this will be exhausted by September 1948, so that the additional funds will be required. In addition, the bill provides a sum not to exceed $403,000 (£100,000) to be used for loans over a period of five years to fishermen's cooperative societies for initial operation and development expenses. There are fifty such cooperatives in England and Wales, and three in Scotland.

The bill also would give the Herring Industry Board an additional appropriation of $5,037,500 (£1,250,000) for the development of herring fishing, $4,030,000 (£1,000,000) of which is to be used for the establishment of factories for the conversion of herring to oil, fish meal, etc. The first of these factories should be in operation by this summer.

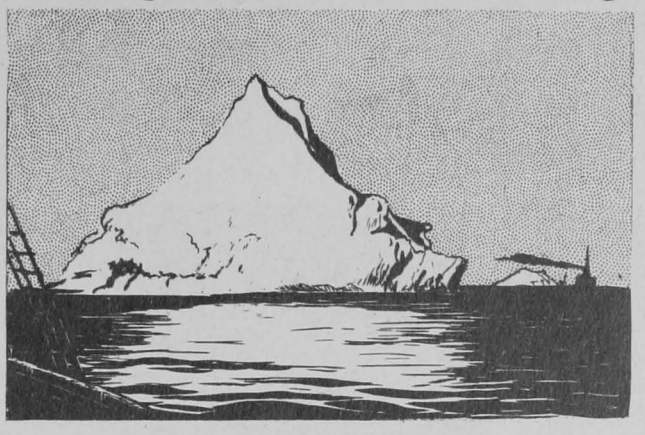
Press comments on the expansion plan for herring products are that it is anticipated that 175,000 metric tons of herring can eventually be used for the production of some 17,000 metric tons of oil used in the manufacture of margarine. While this amount is small compared to total consumption, it would save approximately $6,045,000 (£1,500,000) worth of imports at current prices. The press states that the Herring Industry Board has conducted experiments on the extraction of oil from herring, and has developed a process which is considered superior to any other now being used and which will make it possible to offer better prices to fishermen for herring for this purpose. It is stated that, at present, the price of herring for oil extraction is 1½ cents per pound as compared with 4½ cents per pound for fresh herring for consumption. The Herring Board is empowered to offer a flat rate for the total landings of herring at certain ports, a scheme which has been tried in the Western Isles and which has increased landings.

The subject of the fishing industry and its problems is one which has been receiving constant attention by members of the British House of Commons, and the debate on this bill, which was a lengthy one, was well attended. While a large part of the discussion was devoted to domestic measures and conditions, the first part of the debate emphasized the importance of international agreements with regard to overfishing in the North Sea, a matter which it is felt should be discussed in connection with plans for the Western Union of Europe. Some fear was expressed that Germany, with the help of the European Recovery Program, might embark on extensive fishing operations in the North Sea which, if not controlled by some international agreement, would prejudice the interests of the other countries looking to that area for fish.

The proponents of the bill pointed out that statistics of the fisheries between the wars showed that overfishing took place in the North Sea. The replenishment of stocks during the First World War, when there was little fishing in the North Sea, encouraged activity. Immediately afterwards, the stocks declined markedly, and by 1937, were considerably below the level of 1913. During the Second World War, the North Sea fish had a second chance to multiply and again increased in numbers, but even after three years, the weight of fish caught for a given effort and the percentage of smaller fish showed that the results of overfishing were already to be seen.

It was in 1946 that the British Government convened an international conference with a view to limiting the tonnage of vessels fishing in the North Sea, and in accordance with the view that overfishing could be controlled only through international agreement. The Convention drawn up by that conference of the twelve nations concerned prescribed new minimum sizes for mesh of nets. The standard

Advisory Committee, set up after the conference, proposed further measures, including a British proposal to limit the tonnage of British vessels fishing in the North Sea to 85 percent of the tonnage in 1938. The present bill introduced in the House of Commons is to implement the 1946 agreement.



ARCTIC FISHING GROUNDS

The discussions stressed also the importance of installing quick-freezing and cold-storage plants at the principal fishing ports, and there was considerable discussion of the need for providing British fishermen with boats and nets.

To the New England, Canadian, and Newfoundland fisheries, the depletion of the North Sea fisheries is a potential danger sign. It is not unreasonable to expect that, with steady improved fishing vessels and equipment, the twelve nations fishing the North Sea will look elsewhere for their fish, if the North Sea fisheries will not supply their needs. England, it is reported, is already operating in Arctic waters. A treaty to bring about fishery conservation and the protection of fishery resources in the North Atlantic is of extreme importance to the United States, Canada, and Newfoundland.

Greece

EXPANSION OF FISHING INDUSTRY: Expansion of the Greek fishing industry and establishment of the means for effective marketing and distribution of fishery products have been undertaken by the American Mission for Aid to Greece, according to the Department of State publication 3149 entitled Third Report to Congress on Assistance to Greece and Turkey. Experiments in refrigeration on the larger fishing vessels, conducted in collaboration with the fishing industry and the Greek Government, have been highly successful. Development of this innovation in Greek fishing will enable ships to stay out until fully laden and permit the exploitation of waters heretofore unworked because of the distance from markets. As the development work in extending fishing proceeds, plans are being laid to establish refrigeration in marketing centers and for inland transportation, thereby enabling the Greek fishing industry to make a greater contribution to the domestic food supply.

* * * * *

SPONGE MARKET, 1947: The sponge fishing industry in Greece comprises a fleet of approximately 375 medium and small vessels which maintain a crew of about 4,200 men, according to the American Embassy at Athens.

Statistical information supplied by the Bureau of Fisheries of the Ministry of National Economy places the production of sponges in 1947 at 331,000 pounds, grouped as follows:

Species	Quantities by Grades (All figures in pounds) A	B	C
Turkey cup and Turkey toilet	7,700	4,400	4,400
Zimocca	15,400	8,800	8,800
Honeycomb or Venise	121,500	88,000	72,000
Total	144,600	101,200	85,200

ELEPHANT EAR SPONGE - MEDITERRANEAN SEA

More than 67 percent of the annual catch originated from the African coast. Exports in 1947 totaled 125,600 pounds valued at approximately $800,000. Of this amount, 51,643 pounds, valued at approximately $270,000, were exported to the United States.

According to the Grecian Bureau of Fisheries, stocks on hand as of December 31, 1947, processed and unprocessed, amounted to approximately 198,000 pounds of undetermined species and grades. Prices, according to Piraeus sponge trade sources, are approximately as follows:

Species	Average Prices per Pound F.O.B. Greek Port, by Grades (In U. S. Dollars) A	B	C
Honeycomb from Greek Islands	$11-$13	$7-$8	$3.50-$4
Honeycomb, Mandruka-Bengazi-Bomba	$16-$17	$9-$10	$4.50-$5
Turkish solids	$14.50-$16.50	$7.25-$8	$3.50-$4.50
Elephant's ear	$18.20	$9.10	$4.60
Zimocca	$11.30	$6.80	$3.50

The local demand for sponges is very limited. The season's catch is usually sold pre-emptively to merchants who often finance the fishing expedition largely themselves. The sponges are then processed and stored by merchants for export purposes.

It is predicted that sponge fishing in 1948 will continue under the same conditions as in 1947 and that business prospects for the sale and export of sponges will improve.

Iceland

FISHERIES REVIEW, 1947: Introduction: Fisheries exports in 1947, which made up over nine-tenths of the total, suffered from the failure of the summer herring catch, although the winter herring season, which started off the West Coast in November, proved exceptionally good. It gave rise, however, to a costly transportation problem, as the processing plants (for the reduction of the herring into oil) are nearly all located in the North. New trawlers, imported from Great Britain, were used very successfully in the cod fisheries.

The principal difficulty encountered by Iceland, in connection with fish sales abroad, remained the high costs of Icelandic products, brought about by inflated wages and prices at home. In order to dispose of the country's quick-frozen fillets, a system of tie-in sales with herring oil was inaugurated in agreements with the United Kingdom and the Soviet Union, and as a means of maintaining the operation of the fisheries, the Government was forced to spend millions of dollars in a form of subsidy on fish sales connected with the "Guaranteed Minimum Price Law."

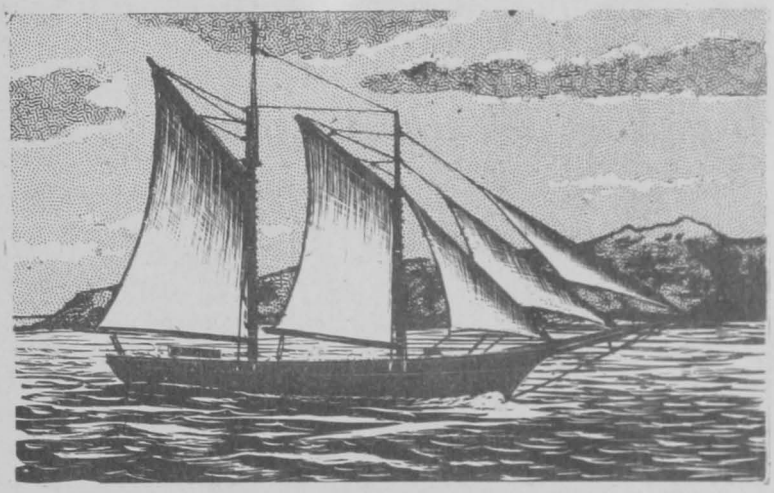
Production: Icelandic economy, being almost entirely dependent on exports of the country's fishery products, is particularly sensitive to the vagaries of the seasonal catch. The year 1947 showed a marked improvement over the preceding two years (Table 1). The over-all fisheries production was about 30 percent greater than in 1946, and only 7 percent less than the record year of 1944.

Table 1 - Total Fish and Herring Catch for Last Seven Years

Year	Herring[1]	Total[2]
	Metric Tons	Metric Tons
1941	96,270	291,553
1942	145,135	335,895
1943	181,958	381,497
1944	221,843	461,314
1945	59,209	283,069
1946	131,721	326,277
1947	217,000	431,170

1/ Given as whole fish. 2/ Gutted wet fish with head.

The relatively good fish production in 1947 was almost entirely due to an exceptional winter herring catch, as the summer herring season was a failure for the third consecutive year. The summer catch, which totaled 122,462 tons as compared with 130,702 tons in 1946, produced 20,203 tons of herring oil and 17,960 tons of fish meal.



OLD TYPE ICELANDIC FISHING SCHOONER

The winter herring fisheries, which developed in November off the West Coast of Iceland, exceeded the 1946 winter catch some hundredfold. The usual small quantity of lean winter herring is generally frozen for bait on the West Coast. It was decided, however, in view of the magnitude of the 1947 winter catch, and the great demand for herring oil, to process the fish for oil. The oil content of the winter herring was 15 percent, which, although somewhat less than that of the summer fish, was nearly twice that of the usual winter catch. Since all the processing plants are located off the North Coast, and all available fishing vessels (around 168) engaged in the fisheries, sufficient ships could not be found to take care of the transportation problem. Foreign vessels had to be chartered, at a cost of $460,000 in foreign exchange through the end of the year. The additional expenses involved in freight, storage, handling, and waste, increased

considerably the cost of production of the winter herring oil, and it is estimated that this cost amounted to around $520 per ton, as compared to an average of about $430 per ton for the summer production.

As a partial solution to the problem of processing winter herring in the future, it was decided to purchase a ship and convert it into a floating herring factory. However, these plans had not yet materialized by the end of the year.

Outside of herring, the catch of most types of fish (cod, haddock, and other white fish) was about the same in 1947 as in 1946 (Table 2).

Table 2 - Total Fish Production by Mode of Preparation

Mode of Preparation	1947 1/	1946 2/
	Metric Tons	Metric Tons
Fish on ice	74,678	90,680
Frozen fish	71,147	73,113
Dried fish	-	736
Canned fish	318	1,055
Wet salted fish	75,105	47,440
Home consumption	2,513	2,472
Fish frozen for bait	6,806	5,274
Herring to factories	200,603	105,507
Total	431,170	326,277

1/ Herring is given as whole fish.
2/ Gutted wet fish with head.

Less fish was iced and more salted in 1947 than in 1946, in anticipation of a better market for the latter product. The drying of fish for exports to southern Europe, which used to be very important in prewar years, was drastically reduced during the war because of lack of markets and has not been resumed in quantity since. This is due principally to the large expansion of the frozen fish industry started during the war, to the high labor costs involved in the drying of fish resulting from the inflation, and to the uncertainty of the market for this commodity. The smaller production of canned fish was also accounted for by the uncertainty of the market for this commodity.

Principal Developments: Principal developments in the fisheries in 1947 consisted in the continued expansion of the frozen fish industry and the acquisition of 18 new trawlers from the United Kingdom. These were the first of the 30 vessels of this type which Iceland is having built in Great Britain in connection with the "New Construction Program" undertaken by the Icelandic Government in 1944. The trawlers, which average 650 tons, and cost around $500,000 each, have proved very successful. They fish cod and other white fish on the high seas, and their annual catch averages around 12,000 to 13,000 tons, as compared to around 6,000 to 8,000 tons with the older trawlers.

Marketing: Exports of the country's fisheries, which constituted 92 percent of all exports, amounted in 1947 to $40,764,377. This was about 10 percent more than in 1946, but far short of Icelandic estimates at the beginning of the year, which had placed total exports as high as $130,669,000. Actual exports of principal fish products are shown in Table 3.

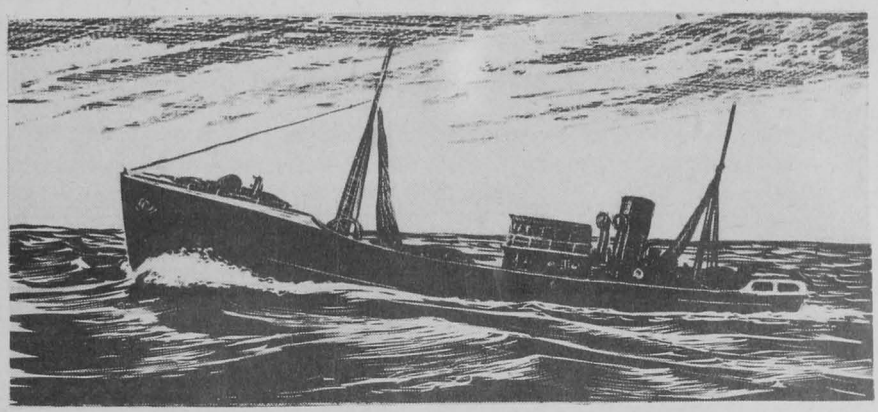
In spite of the optimism which prevailed in Iceland at the beginning of the year, the country encountered great difficulties in the marketing of its fish. This was largely due to the fact that the world demand for fish had declined, and that Icelandic prices were generally above those of competing nations, particularly

Norway. With wages and the cost of living up some 310 percent over 1939, the cost of production of Icelandic fish, even with the help of modernized equipment, had risen sharply. Iceland could not sell at these inflated prices in a buyer's market.

Table 3 - Fisheries Exports by Commodities

Item	Quantity		Value	
	1947	1946	1947	1946
	Metric Tons	Metric Tons	U.S. $	U.S. $
Fish, fresh	61,312	72,699	6,569,993	9,549,622
frozen	25,439	23,998	10,640,012	9,390,818
salted, cured	301	16	121,900	9,941
salted, uncured	26,622	10,908	7,139,737	2,748,812
salted, in bbls.	1	625	270	160,023
dried	-	108	-	76,667
canned	340	514	222,345	442,750
Herring, fresh & frozen	867	48	68,733	8,441
salted & cured	5,380	15,073	1,675,924	4,307,482
Fish meal	5,467	6,169	861,841	628,171
Herring meal	11,155	10,197	1,667,779	1,227,706
Oil, cod liver	5,407	7,745	3,521,011	4,386,297
herring	20,527	17,534	7,977,121	4,125,301
Roe, salted	1,539	1,398	297,711	414,813
Total	164,357	167,032	40,764,377	37,476,844

In order to keep up the production of the fisheries, the Government was forced to continue the "Guaranteed Minimum Price Law," which had been introduced as an emergency measure in 1946. According to this law, which was later incorporated into the Economic Bill passed in December 1947, the Government guarantees a minimum export price for certain types of fish, and the difference between this figure and the actual sales price is paid by the National Treasury. Although the Law did not cover herring, nor the fish caught by the big steam trawlers (which export their own catch), it is estimated that the loss to the Government, involved in this form of subsidy, amounted to around $3,500,000 in 1947. Sales of cod accounted for about 90 percent of this figure.



ICELANDIC STEAM TRAWLER

Trade negotiations were entered into in February with Iceland's two largest customers, the United Kingdom and the Soviet Union, and lasted until May. A system of tie-in sales was decided upon, whereby the United Kingdom and the Soviet Union would receive 40 percent each of Iceland's production of herring oil, and would purchase 2 pounds of frozen fillets for each 3 pounds of oil. The British further agreed to take up to 4,000 tons of fillets immediately without waiting for the herring oil. Actual sales under the Agreements amounted to 9,623 tons of herring oil and 6,098 tons of frozen fish for the United Kingdom, and 8,000 tons of oil and 5,333 tons of frozen fillets for the Soviet Union. Average prices paid by the British were $380 per ton for herring oil and $465 per ton for fillets. Prices

paid by the Russians averaged around $435 per ton for oil and $383 per ton for fish. In these sales only the British paid as much as the "guaranteed price" for the fillets and only the Russians paid as much as the production cost for the herring oil. Both countries made further purchases of these commodities much later in the year, at somewhat reduced prices (Table 4).

Table 4 - Fisheries Exports by Countries--1947
(Quantity and Value)

Country	Fish, fresh[1]		Fish, frozen[1]		Fish, salted[2]		Fish Meal[3]		Fish Oil[4]		Miscellaneous[5]		Total	
	Metric Tons	U. S. $	Metric Tons	U. S. $	Metric Tons	U. S. $	Metric Tons	U. S. $	Metric Tons	U. S. $	Metric Tons	U. S. $	Metric Tons	U. S. $
United States	-	-	1,086	364,558	518	219,369	420	57,453	2,152	1,470,776	116	99,364	4,292	2,211,517
Belgium	-	-	-	-	2,000	532,259	-	-	85	38,689	-	-	2,085	570,948
Czechoslovakia	-	-	1,350	607,567	95	27,844	6,264	1,070,151	1,782	447,489	26	27,868	9,517	2,180,919
Denmark	-	-	-	-	1,014	246,056	1,810	267,845	11	7,607	-	-	2,835	521,508
England	61,690	6,604,758	9,287	4,326,217	2,798	730,361	2,863	356,907	9,410	3,444,854	170	65,797	86,218	15,528,894
Finland	-	-	-	-	523	209,327	-	-	-	-	75	12,217	598	221,544
France	-	-	3,628	1,491,851	-	-	-	-	301	198,149	1,057	178,859	4,986	1,868,859
Germany	464	27,993	-	-	2,102	574,538	607	98,525	93	65,043	10	8,809	3,276	774,908
Greece	-	-	-	-	7,705	2,034,020	-	-	-	-	-	-	7,705	2,034,020
Holland	-	-	886	405,069	-	-	3,337	484,992	72	38,665	2	721	4,297	929,447
Italy	-	-	1,362	523,870	10,946	3,037,959	-	-	240	144,534	-	-	12,548	3,706,363
Norway	-	-	-	-	-	-	-	-	1,331	695,132	-	-	1,331	695,132
Palestine	-	-	-	-	43	17,942	953	157,875	22	16,114	4	10,762	1,022	202,693
Sweden	-	-	-	-	2,149	599,740	-	-	99	71,301	400	103,818	2,648	774,859
U.S.S.R.	-	-	7,840	2,921,159	2,087	602,966	-	-	10,285	4,829,608	-	-	20,212	8,353,733
Other Countries	-	-	25	5,699	324	105,450	368	35,872	51	30,171	19	12,401	787	189,033
Totals	62,154	6,632,751	25,464	10,645,987	32,304	8,937,831	16,622	2,529,620	25,934	11,498,132	1,879	520,616	164,357	40,764,377

1/ Includes herring
2/ " salted and cured herring
3/ Includes herring meal
4/ Cod liver and herring oil
5/ Canned fish and salted roes

In addition, Great Britain, as in previous years, purchased practically all of the Icelandic iced fish production. Most of the wet salted fish was exported to Italy and Greece (in part through U. S. Mediterranean Relief), and Czechoslovakia was the largest importer of herring and fish meal. Nearly all of the cod liver oil production went to the United States and the Soviet Union, while most of the cured herring was exported to the Soviet Union, Sweden, and Finland (Table 4).

Icelandic fish exports to the United States declined by more than 60 percent in 1947 (Table 5).

Table 5 - Exports to United States

Product	1947	1946
	U. S. $	U. S. $
Cod liver oil	1,468,000	3,382,000
Frozen fillets	364,000	1,245,000
Salted herring	217,000	327,000
Herring & fish meal	57,000	633,000
Canned fish	96,000	227,000
Other	101,000	83,000
Total exports	2,303,000	5,897,000

An additional sale of about $700,000 worth of herring meal (from the winter catch) was negotiated in December 1947.

Following a suggestion in May by the United States and Great Britain, negotiations were entered into with Iceland concerning the possibility of shipping Icelandic iced fish to the Bizonal Area in Germany. A tentative agreement to ship 70,000 tons of fish was reached, and a few small deliveries of herring made in 1947, although no final settlement had been arrived by early in 1948.

Fisheries Chief Industry: Almost all of Iceland's industry is related to the country's fisheries, and consists chiefly in the quick freezing of cod and other white fish, the processing into oil of herring and cod, and the canning of various fish.

The great development of the quick-freezing industry in recent years, which resulted from the demand for frozen fish during the war, continued throughout 1947. Three more quick-freezing plants were completed in 1947 in addition to the 65 operating at the beginning of the year, and eight others were under construction and expected to be completed in 1948. The total production capacity of these plants in 1947 rose to 1,092 tons per 20 hours, and will reach 1,218 with the completion of the new plants in 1948. The production figure for 1947 is already 50 percent above that of January 1945, and still other plants are in the planning stage. It is estimated that the total production of plants completed and remodeled since 1945 will have increased 110 percent by the beginning of 1950.

The production costs for these quick-frozen fillets entail selling the fish at prices somewhat above the world market unless a loss is to be sustained. The required price has largely been obtained recently through "tie-in sales" or in "clearing agreements."

Two new herring processing plants were completed in 1947, bringing the total to 17, with an over-all production capacity of 9,868 tons per day. This represented an increase in production of 2,025 tons per day over 1946. Canning decreased somewhat in 1947.

Fishing Fleet: By the close of 1947, Iceland owned some 732 vessels totaling 60,338 gross tons, which represented an addition of 56 vessels (17,462 tons) over the total for 1946. The principal item in this increase was 13 new trawlers (10,123 tons) from the United Kingdom. Eighteen of these trawlers had, in effect, arrived by the end of the year, although only thirteen were actually registered.

Most of Iceland's fleet consisted of small motor-powered craft. Only six vessels exceed 1,000 tons.

The fishing fleet, which accounted for 74 percent of the over-all total (by tonnage) increased from 30,849 tons for 1946 to 44,849 tons by the end of the following year (Table 6).

Table 6 - Icelandic Fishing Fleet by Type and Use - 1947

Fishing Vessels	Steam Vessels	Motor Vessels	Total No.	Tonnage (Gr. Tons)
Trawlers	37	-	37	18,268
Others (over 100 gr. tons)	11	40	51	8,454
Others (under " " ")	-	618	618	18,127
Total	48	658	706	44,849

Labor: One of the principal problems regarding employment in recent years has been the movement of the workers away from the fisheries toward other occupations in the larger cities (principally Reykjavik). This tendency is the direct result of the increase in the standard of living ashore (particularly in the larger towns), and the system whereby wages are raised in accordance with the price index. One of the main aims of the economic legislation towards the end of the year was to promulgate measures to counteract this tendency, particularly in regard to the fisheries, upon which the very livelihood of the nation depends.

Japan

ALLOCATION OF WHALE OIL: The Department of Army has allocated to Japan about 18,000 metric tons of whale oil, the full quantity of oil produced in the 1947-48 Japanese Antarctic whaling expedition, according to the Natural Resources Section of the Supreme Commander for the Allied Powers. Last year, from a total 12,260 metric tons of whale oil produced by the 1946-47 Japanese Antarctic whaling expedition, the International Emergency Food Council allocated 7,163 metric tons of oil to the United States Military Government in Bremen, Germany.

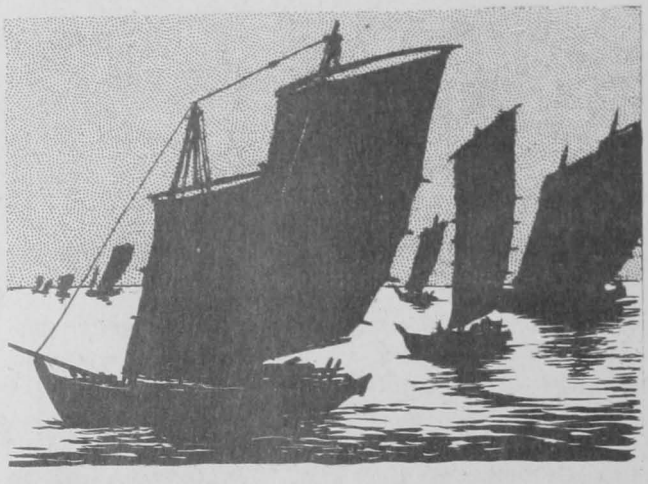
* * * * *

EXPORT OF FROZEN TUNA TO BE RESUMED BY JAPANESE: A press release from the Public Information Office of the Far East Command states:

> "The Japanese will resume the export of frozen tuna with the first contracts, amounting to 1,500 short tons of albacore tuna, expected to be validated by the Supreme Commander for the Allied Powers during May, Foreign Trade officials in SCAP's Economic and Scientific Section announced on May 19, 1948.
>
> "It will be the first tuna export from Japan since prewar days. Trade officials stated that licenses to export 3,000 tons during the period June-August will be granted by the Japanese Government and validated by SCAP. This figure represents about 40 percent of Japan's prewar tuna trade.
>
> "Twenty Japanese firms have been selected by the Japanese fishing industry to act as shippers, representing 49 fishing companies, which will bring in the tuna."

* * * * *

RADIO BUOYS AUTHORIZED: Radio buoys strung along heavy duty fishing lines in Japanese fishing waters have been authorized by the Civil Communications Section, General Headquarters, SCAP, a spokesman for the U. S. political advisor in Japan said on June 21, in Tokyo.



FISHING BOATS - JAPAN

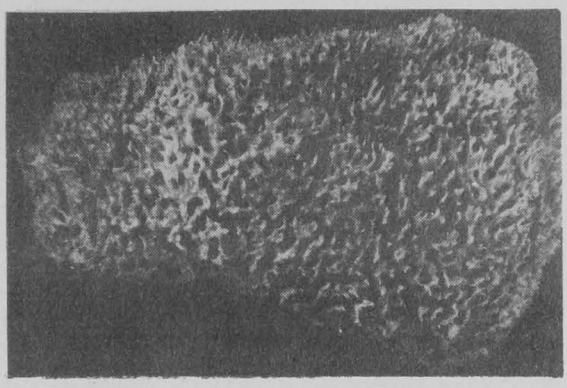
Passing ships, strong currents, and high seas sometimes break these lines which are often 30 miles long. The radio buoys will continue to send their signals automatically for about 24 hours, thus allowing fishermen to locate drifting lines, the spokesman explained.

Heavy duty lines usually represent the pooled life savings of several fishermen and at present prices would cost between 5 and 10 million yen. In "deep line" fishing, lighter lines are dropped downward as much as 150 feet from the heavy duty line and are hooked and baited.

The buoys are powered by six-volt batteries and have a range of 30 to 40 miles. They will operate on 2545 kilocycles and each will send a different signal, thus allowing each buoy to be individually identified. Each buoy contains a copy of the SCAP approved license.

Lebanon

SPONGE INDUSTRY: While sponge fishing currently exists in Lebanon only on a small scale, efforts are being made to modernize the industry, increase production and take fuller advantage of the heavy world demand for sponges than has been done in the past, according to the American Legation at Beirut. Small boats of native divers whose sole piece of equipment is a pair of iron nippers still flock to the sponge beds off Tripoli, Tyre, and Sidon during the spring-summer fishing season, but these individual divers are now feeling competition for the first time from modern methods.



HONEYCOMB SPONGE - MEDITERRANEAN SEA

In may of this year, a Tripoli firm of local sponge dealers commenced operations in the sponge beds with fishing equipment purchased early this year from an American sponge company. Should this equipment prove effective, as seems likely, the primitive sponge-gathering methods of Lebanese fishermen will be outmoded, and this country's production will become an increasingly important factor both in world sponge markets and as a badly needed source for foreign exchange.

Sponge production in the Lebanon is confined to the honeycomb variety (Grades A, B, and C) and a type referred to by trade circles as "fine" (Grades A, B, and C). Estimated 1947 production of these species was 2,640 pounds compared with 1,760 pounds in 1946.

The increase in sponge production in 1947 was reportedly due to an increase in demand for sponges from the United States and the United Kingdom. Prices rose here from 1946 levels, and local exporters increased wages to divers, with a corresponding increase in production.

Exports from Lebanon were approximately 50 percent honeycomb and 50 percent "fine" varieties last year. It is estimated that about one-half of the quantities exported were destined for the United States, with 25 percent going to the United Kingdom and 25 percent to Switzerland and France.

Trade circles estimate that there remains from last year's production about 220-250 pounds of all grades still available on the local market.

Present wholesale prices of sponges on the Beirut market, by species and grade, are as follows:

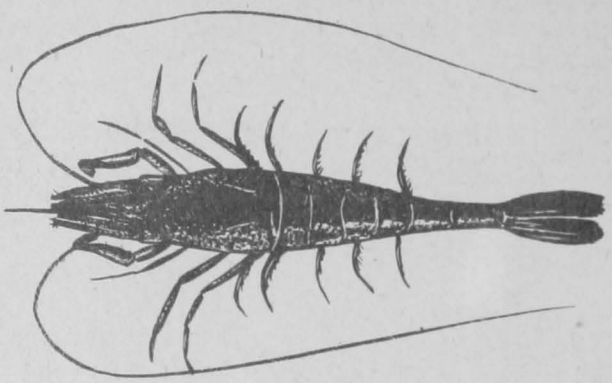
Wholesale Sponge Prices

	Fine	Honeycomb
Grade	per lb.	per lb.
A	$8.70	$6.25
B	6.25	4.89
C	4.30	3.10

These prices represent a decrease of approximately 10 percent from the local wholesale sponge prices of a year ago. Trade circles report that this drop in price is due to the absence of demand on the Beirut market resulting from the present availability of large quantities of sponges in Greece.

Mexico

FISHING AND SHRIMPING, JANUARY-MARCH 1948: The fishing industry developed favorably during the first quarter of 1948, according to the American Embassy at Mexico City, Mexico. Shrimp fishing was active and the catch abundant in January and February, and although March saw a price decline and the tapering off of the catch, a successful season was assured, as over a million pounds were exported to Los Angeles at favorable prices in February. In addition to the operations in the waters of the Pacific and the Gulf of California, there was active fishing for shrimp off the coast of Veracruz state in the Gulf of Mexico. The catch was said to be valued as high as $100,000 monthly, of which 95 percent was exported to the United States. There were no developments in other lines of fishing and limited supplies were reflected by continued high prices for fresh fish in Mexico City and other consuming centers of the Republic.



CALIFORNIA SHRIMP

Republic of the Philippines

FISHERY ADVISOR NAMED: Hugh W. Terhune, Administrator of the Philippine Fishery Program of the Fish and Wildlife Service, has been appointed Honorary Advisor on Fisheries to the Philippine Government by Dr. Elipidio Quirino, President of the Philippine Republic. This was disclosed on July 7 by Albert M. Day, Director of the Fish and Wildlife Service.

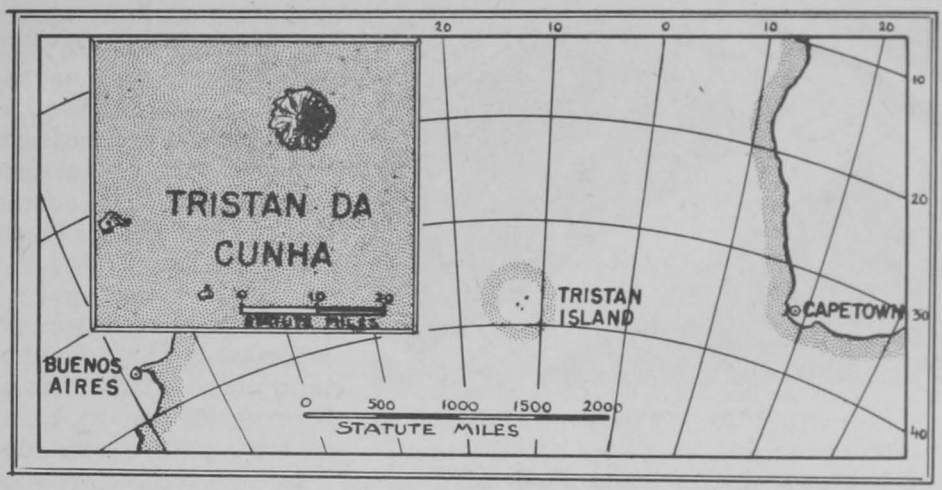
Mr. Terhune began his Government service in 1924 as a member of the former Bureau of Biological Survey in the Department of Agriculture. In August 1946, he was appointed to organize and administer the Philippine Fishery Rehabilitation Program, the only part of the Philippine rehabilitation program authorized by Congress on April 30, 1946, which is concerned with the production of food.

Now in operation in the Philippine Islands, the fishery program is producing direct results in the rehabilitation and modernization of the Philippine fishery industries. New fishing grounds are being explored, and knowledge necessary for the conservation and management of the fishery resources by the Philippine Government is being developed.

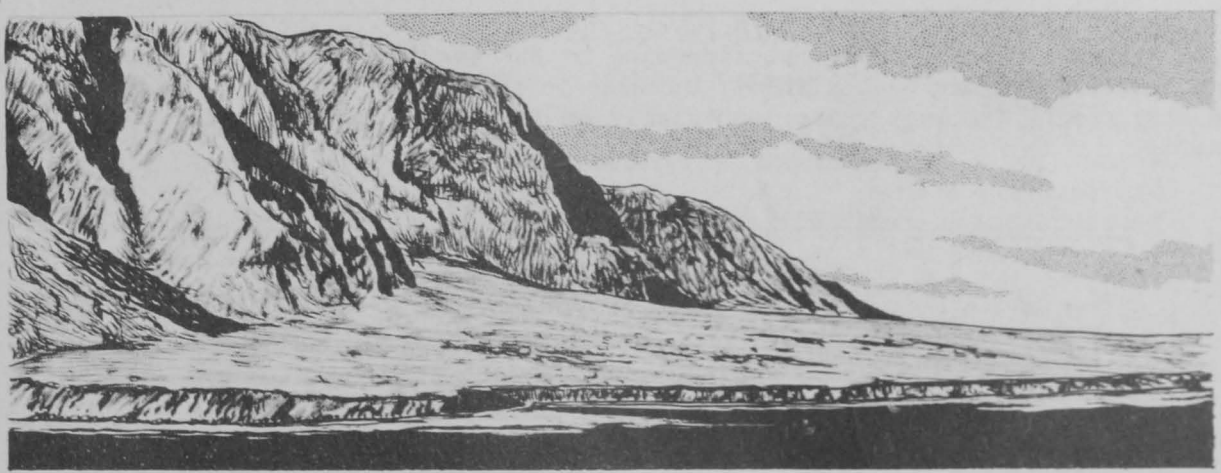
A well-equipped biological, oceanographic, and technological laboratory in Manila and an experimental fish processing plant, both of which were constructed under Mr. Terhune's direction, are being operated under the fishery program. A fleet of three research and experimental fishing vessels, which are the most modern and well-equipped of their types, is also functioning. The program is carried out under Mr. Terhune by 117 employees, 51 of whom are American.

Tristan da Cunha

DEVELOPMENT OF A CRAWFISH INDUSTRY: Concessions have recently been obtained by a South African Fisheries Corporation in the waters surrounding Tristan da Cunha, which promised to have an influence upon the South African crawfish industry. As a result of a recent scientific expedition to this island, crawfish were found in abundance and the announcement has now been made that a $400,000 crawfish industry will shortly be established at Tristan da Cunha, according to the American Consulate General at Cape Town, South Africa. The industry is anticipating an annual production of 50,000 cases of frozen crawfish tails representing some 1,600,000 crawfish. The abundance of crawfish in the waters surrounding Tristan da Cunha gives assurance that this target should be met. Further fishing grounds under concession are located at Inaccessible, Nightingale, and Gough Islands in the general vicinity of Tristan da Cunha. The actual crawfish ground at Tristan da Cunha is said to be 45 miles long and 1½ miles wide.



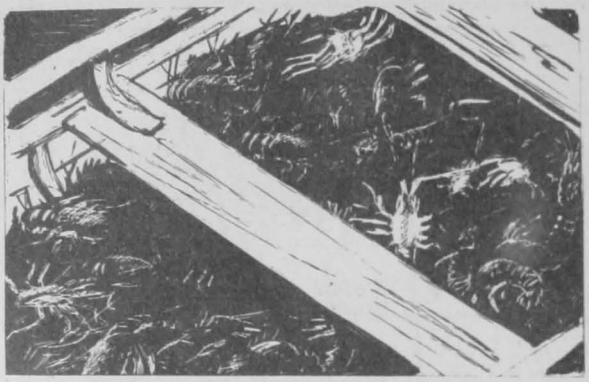
It is proposed that the Islanders of Tristan da Cunha, hitherto almost completely isolated from modern civilization, be educated as fishermen and that 14-feet standard dinghys with parent vessels be used. According to the South African Shipping News and Fishing Industry Review, 200 fishing days a year may be expected at Tristan da Cunha which greatly exceeds the number of fishing days in South African waters.



EDINBURGH, TRISTAN

It is proposed to establish two cold storage factories, one on the site of the present settlement at Tristan, and a second and larger one at Sandy Point on the presently uninhabited side of the Island.

The Fisheries Development Corporation, according to reports, is proposing, in connection with this new venture, a wide program of social services, economic reorganization, and education, as well as its own medical installations. The company further plans to employ an agricultural expert for the purpose of increasing and expanding the Island's food production to compensate for the decrease in agricultural labor as the Island men are increasingly absorbed into the fishing industry.



SPINY LOBSTERS

In view of the conservation program enforced by the South African Government which limits the quantity of crawfish which may be taken in its coastal waters, the recent development of the crawfish industry in South West Africa and, in particular, now around Tristan da Cunha may mean a marked increase in the available supply of frozen crawfish tails which have, in recent years, had such a favorable market in the United States. The Tristan da Cunha crawfish appears especially suitable for the American market inasmuch as it possesses a larger tail than the crawfish caught around the waters of the Union of South Africa.

Additional exploration of crawfish grounds are meanwhile being conducted around the Islands of Ascension and St. Helena, reports to date having been exceedingly optimistic.

Union of South Africa

GROWTH OF FISHING INDUSTRY IN 1947: The following data shows the growth of South Africa's fishing industry, according to the American Consulate General at Cape Town. There has been a steady increase in the activity of the local fishing industry during the last years, especially on fish and shellfish other than the crawfish.

Growth of Fishing Industry in 1947

	1947	Prewar
	lbs.	lbs.
Fish Catch	100,000,000	90,000,000
Crawfish tails, frozen: Production	1,900,000 1/	2,228,520
Fish Canneries: Production		
Crawfish	4,100,000 2/	4,500,000
Other fish	10,000,000	420,000
Fish Meal	4,000,000	3,000,000
Fish Oils:	U.S. gals.	U.S. gals.
Seal oil	29,167	-
Vitamin oil	83,333	-
Fish body oil	208,333	-

1/ This amount fixed by regulation as maximum that can be exported.
2/ Ceiling of 4,100,000 lbs. for crawfish canneries imposed in 1947.

The above data supplements a previous report on South Africa's fisheries appearing in this publication for March 1948, pages 33-35.

* * *

ERRATA: Estimated South African production of fish, vitamin and seal oils shown in the March 1948 issue of Commercial Fisheries Review should have been designated in "imperial gallons" instead of "pounds" as shown.

International

1947 WORLD FISH PRODUCTION: Fish landings in Europe during 1947 practically reached the prewar level, and in some countries (e.g., Iceland, Belgium, and Denmark) production was considerably in excess of prewar, according to the April 1948 issue of Economic Review of Food and Agriculture of FAO. Export supplies from northwestern Europe in 1947 are estimated to be approximately equal to the average for the years immediately preceding the war. With continued reconstruction and expansion of the fishing fleets, it is expected that supplies in 1948 will be even greater than in 1947. There may be some difficulties in marketing fresh and frozen fish, however, because of inadequate refrigerated transport and storage facilities. In North America, fish production was maintained in 1947, although the Canadian supply was about 10 percent below 1946. United States and Alaskan catches equaled the 1935-38 average. Latin-American production has increased steadily during and since the war. In the Far East, efforts are being made to raise the low level of production. Most of the Japanese production in 1947 was retained for domestic consumption, and it is expected that the same conditions will obtain in 1948.

FREEZING FISH AT SEA

It is believed the refrigeration plant on the Pacific Explorer has a larger capacity than that installed on any vessel of United States registry. Although there are refrigerated ships having a far greater cubic capacity, they are designed for transporting meat or produce and few, if any, are expected to hold the cargo space at temperatures lower than 15° F. This vessel was designed to hold cargo at 0° F. or lower and has freezer space for stowing about 130 tons of tuna. It was believed, during design, that the refrigeration plant capacity was in excess of the needs, but this was not found to be true under tropical conditions.

--Fishery Leaflet 278