



Aden Protectorate

STATUS OF FISHERIES: For many generations fishing has been one of the important minor industries along the Aden coast, according to a May 6 report from the American Consulate at Aden. It is carried on by individual fishermen in primitive canoes and by groups of from eight to ten fishermen in sailing dhows. The market is principally to supply the needs of the local population, and large catches of sardines along the Gulf of Aden are sun dried and sold as fodder for the camels.

Excess quantities of fish, above those for local requirements, are sun dried and sold in the hinterlands and also shipped to Ceylon and India.

During the year, studies were conducted by various experts sent out from Great Britain under the Colonial Development Scheme, and while the year 1948 was an abnormally poor season for fishing, the long term outlook for the industry is considered as favorable. The most satisfactory fishing area is considered to be along the coast in the area near Mukalla and Ash Shihr. It may eventually offer employment to many people normally unable to obtain work in their place of residence.



Australia

DEVELOPS PELAGIC FISHING: Fishermen at Eden, New South Wales, Australia, and a small Sydney fishing company are pioneering what may become a major development of the state's fishing industry, according to the Canadian periodical, Foreign Trade, of May 14. This is the capture, in commercial quantities, of pelagic fish (sardines, mackerel, sprats, anchovies, and tuna). It is reported that this type of fishing could supply all the canned fish Australia needs and provide a basis for lucrative export industry.

Tuna exports might become one of Australia's substantial dollar earners. The trade in frozen and canned tuna could rise to more than 28,000,000 annually, and it is probable that the first big consignment of tuna will leave Australia in 1949.

The frozen and canned crayfish industry of Western Australia is currently earning one million American dollars per annum and is operated principally by the two floating plants which proceed around the Western Australian coast, going from one crayfish area to another.

PEARLING AND OYSTER CULTURE BEING STUDIED: The Australian pearling industry is rapidly expanding, but fishing facilities are improving only slowly. Late this

year, a 75-foot vessel left Sydney for Thursday Island, Torres Strait, to study the pearl-shell oyster and to begin the first Australian experiments with the cultured pearl.

At present, the pearl oyster is not cultivated in Australian waters as is the edible oyster in New South Wales. Scientists will develop their own oyster beds, adopting the Japanese method of growing the oyster on wire suspended from floating rafts. They will also study the oysters in their natural beds—their distribution, growth rate, how they breed, how to crop them, and how to conserve them.

Japan is the inspiration of another major Australian oyster experiment. This is with the Pacific oyster, a large edible variety suitable for smoking and canning. Scientists hope it will grow and breed successfully in the colder southern waters.



Belgium

FOREIGN TRADE IN FISHERY PRODUCTS, 1948: During the first half of 1948, Belgium imports of fish were maintained pretty much at previous levels, while fish exports dropped vertically, according to an April 29 report from the American Embassy at Brussels. The result was a sharp drop in prices to the Belgian producers. Because of the crisis in the Belgian fishing industry, Belgian fish imports were restricted in the second half of 1948. The difficulties of the fish industry were due to the fact that other countries, particularly France and the United Kingdom, were restricting their fish imports from Belgium. Recently, exports to the United Kingdom have been resumed.

FISHING FLEET: At the end of 1948, the Belgian fishing fleet consisted of 481 units as compared with 510 units just before the war. The average size of the ships is larger now than before the war so that the total tonnage at the end of 1948 was 29,938 metric tons as compared with 28,037 tons before the war. The fleet has been modernized and now has more power and more fishing capacity than ever before in Belgian history.

The Belgian Government owns five large fishing boats of which four have been rented to three Ostend businessmen at \$2,662 per boat per month. Two of the renters have not made any payment, and it is reported that the third is not making money and will follow the example of the other two. The Libre Belgique says that it is hoped that the Government will sell these boats.

TRADE AGREEMENTS: A supplementary agreement was signed between Belgium and Trizone Germany on January 12, 1949. This agreement provided for exports from Belgium of the following amounts of fish:

<u>Item</u>	<u>Value</u>
Fresh sea fish	\$325,000
Fresh and salted herrings	300,000
Other salted fish (sardellen)	110,000

A trade agreement has been signed between the Belgo-Luxembourg Economic Union and Portugal, for the period January 1 through December 31, 1949. This agreement

provides for exports from Portugal of \$182,000 worth of sardines in oil and other sauces.

NOTE: Values converted on basis of one Belgian franc equals 2.275 cents U. S.



Bizone Germany

LIFTING OF BERLIN BLOCKADE AIDS FISHERIES: The opening of zonal borders to goods traffic has averted the crisis in the German fish industry by creating additional markets in Berlin and (through unofficial channels) in the Russian Zone, according to a May 24 report from the American Consulate at Bremerhaven. In the week May 16-23, fish prices ex-vessel showed increases ranging up to 25 percent.

Before the blockade began, West Berlin consumed some 1,000 metric tons of fresh fish monthly, of which 700 tons were supplied by rail from Bremerhaven. For the next few months, Berlin is expected to consume almost 3,000 tons monthly, of which 1,000 tons will be drawn from Bremerhaven and will be delivered by truck. The increased consumption is attributed to the ending of fish rationing in Berlin and to the fact that Berliners have been without fresh sea fish for almost a year.



Canada

ARCTIC FISHERY INVESTIGATION MAY BE EXTENDED: The investigation of fisheries in Canada's Eastern Arctic waters (begun in 1947 in Ungava Bay) by the Calanus, the boat of the Fisheries Research Board of Canada, may be expanded to include the whole Eastern Arctic area, which covers all the waters of Hudson Bay, Hudson Strait, Foxe Basin and Ungava Bay, and the waters from Belle Isle north to Baffin Bay and the polar area. During its general investigation of the physical and biological oceanography of Eastern Arctic waters, the research party will look for marine resources for use by the Eskimo population, according to the July 1949 Canadian Fisheries Department Trade News.

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LOBSTER CANNING REGULATIONS CHANGED: Lobster canning in Canada is now allowed all year round on the Atlantic Coast as a result of a recent order-in-council which amends the regulations under the Meat and Canned Foods Act, according to the May 1949 Trade News of the Canadian Fisheries Department.

During the past number of years there has been a growing chilled lobster meat industry which has been allowed to put up fresh lobster meat in "slip-on" cover cans. These friction-top cans are not hermetically sealed as required under the canning regulations of the Meat and Canned Food Act, and thus this industry was able to put up the chilled lobster all year. The canning of hermetically sealed lobster, however, was allowed only when the lobster fishing season was open in each area. Now canning is allowed at any time of the year.

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PACKING CANADIAN "SPRING BLOATERS" FOR EXPORT: In order that Canadian exporters may ship a larger size spring herring outside Canada, the Canadian De-

partment of Fisheries has announced that an 18-pound box of "spring bloomers" packed in 1949 for export may contain not less than 60 and not more than 80 fish, according to that agency's July 1949 Trade News.

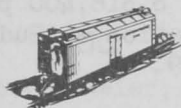
This order is an exception, for the 1949 pack only, to the regulations which provide that each 18-pound box of "spring bloomers" packed for export shall contain not less than 80 and not more than 120 fish.

This new regulation was put into force when it was found that some waste was occurring when packers could not keep within the 80 to 120 count without culling out larger fish.

TEST OF REFRIGERATOR CAR SUCCESSFUL: The Halifax, N. S., to Vancouver, B. C., test run of the Canadian mechanically refrigerated railway car of the Pacific Experimental Station, Fisheries Research Board of Canada, was completed successfully on July 18, according to the July 1949 Canadian Fisheries Department Trade News.

The shipment consisted of 34,000 pounds of mixed smoked haddock, cod, and kippers, and some scallops, and was consigned to a West Coast distributor. The temperatures inside the car ranged from -2° to -6.5° F. During its 3,000-mile run, the car was exposed to outside temperatures of 109° F. in the sun and 92° F. in the shade. The test demonstrated the car's practicability in keeping fish at a high quality level by maintaining low temperatures over long distances.

A similar successful test run was made in June from Prince Rupert, B. C., to Montreal, Que.



France

IMPORT DUTIES RESTORED ON CERTAIN FISHERY PRODUCTS: Import duties (suspended since July 8, 1944) have been restored in France on an extensive list of products, including certain fishery products, by an order of June 3, 1949, published in the French Journal Officiel and effective June 4, 1949, according to an American consular report.

The following are the fishery products on which import duties have been restored at the rates listed in the present French import tariff (French tariff item numbers in parentheses):

Fresh sea-fish (24)

Fish, simply salted, dried, or smoked except cod, including klippfish and halibut in fillets (25 A, ex 25 B, 25 C and E)

Mussels (ex 27 A)

Prepared or preserved fish (164)

Duties on the following fishery products (suspended since July 8, 1944) have been re-established at rates lower than those listed in the present French import tariff:

Cod, including klippfish and halibut in fillets, 35 percent (listed rate 70 percent) (ex 25 B)

French Morocco

FISHERIES REVIEW, 1948: Fishing Fleet: The fishing fleet in French Morocco, during 1948, consisted of 1,140 vessels for line fishing, 216 sardine-fishing boats, 53 trawlers (net fishing), and 31 sardine trawlers, according to an April 25 American consular report from Casablanca.

French Moroccan Fish Catch, 1948, By Ports	
Port	Quantity lbs.
Safi	54,379,745
Agadir.....	26,717,810
Casablanca	25,615,135
Mogadar	5,178,690
Port-Lyautey ...	4,429,915
Fedala	3,938,963
Rabat	1,600,225
Mazagan	1,203,382
Total	123,063,865

Fish Canning: Morocco had 116 fish canneries. If tin plate and oil and fat supplies were sufficient, it is estimated that the present fish canning equipment of Morocco would permit the annual production of 2 million cases of canned fish.

Exports: Exports of fishery products to the United States during 1948 consisted of 479,123 pounds of canned sardines, valued at \$156,234; and 1,092,582 pounds of other fishery products, valued at \$49,739.



Hungary

STATUS OF FISHERIES: Hungary's total yearly fish production was 15,432,200 pounds before the war, compared with 8,818,400 pounds at present, according to a June 17 report from the American Legation at Budapest, which quotes the Hungarian newspaper Kris Ujsag of June 14, 1949.

While the total yield of Hungarian fish ponds in 1945 was only 881,840 pounds, it grew to 1,763,680 pounds in 1946, and to 3,086,440 pounds in 1947. The estimate for this year is 5,070,580 pounds.

The fish stock of Hungary was reduced to a large extent during the War, but immediately after the end of the War reconstruction also began in this field.

Before the War about 50 percent of Hungarian fish production was taken over by the neighboring countries. While export possibilities are not so favorable at present, the demand for live carp on the home market has increased notably this year.

The improvement of the fish stock of Hungary's natural waters is also said to be taking place, but it cannot be controlled as well as in the case of fish ponds. Last year's total yield of lake Balaton, with an amount of over 2,645,520 pounds, exceeded the average of several previous years. The quality of free-water fish, however, is not yet quite satisfactory. For this reason it is the intention of the authorities to improve the quality of the fish stock of the rivers and lake Balaton.

The administrative system of Hungary's pisciculture has recently been reorganized. The present administrative system consists of the National Bureau for Fish and Reed Economy, and four national enterprises.



Iceland

SUMMER HERRING FISHERY: The summer herring fishery is operated off the north coast of Iceland during the summer months (July, August, and the first part of September), according to a July 6 report from the American Legation at Reykjavik. The State Herring Board determines the price of herring to be paid to the fishermen. The price of fresh herring to be delivered by Icelandic fishermen to the factories for processing into oil and meal was placed at 2 cents a pound, 1/10 of a cent lower than that paid last summer (1948). The price for salted herring (eviscerated, with head off) was established at \$9.22 per barrel. The price is the same as paid in 1948.

To date, approximately 200 Icelandic vessels have left their home ports to participate in the North Coast herring fisheries. The press as well as the Fishing Association of Iceland reported that approximately 400 foreign vessels have arrived to take part in the herring fisheries. Among the foreign vessels are Norwegian (350), Swedish (90), Danish, Finnish, German, and Russian ships.

The Icelanders are hoping for a very fruitful summer herring season. The past four summers have been virtual failures and have driven many of the fishing vessel owners into a dangerous financial position. The Government has been compelled to aid the fishing fleet in order to keep it in operation.



Iraq

RECEIVES MODERN TRAWLER: A motor trawler, Zubaida, ordered some time ago by the Agricultural and Industrial Bank in Iraq has now been launched in England. It is expected to arrive in Basra at the end of the summer, according to a May 5 report from the American consulate at Basra.

The trawler has a length of 90 feet, a beam of 20 feet, displaces 200 tons, a fish hold with a capacity of 3,500 cubic feet, a refrigerating plant capable of maintaining a temperature of 32° F. in Iraqi waters, and a range of 1,500 miles.

The trawler will be operated by the Basra Port Directorate for the account of the Iraqi Ministry of Agriculture. It will be manned by British officers and an Iraqi crew and will be based at the Port's dredger depot at Fao, at the mouth of the Shatt-al-Arab. The Port Directorate has undertaken to construct a small cold-storage plant at Fao to preserve the fish, and construction was started in June.

Fish will be transported to Basra by truck, part of the supply to be allocated to the Basra and Southern Iraq market and the remainder shipped by train to Baghdad. At the request of the Ministry of Agriculture and with the fish traffic in mind, the Port Directorate last year undertook the paving of the Fao road.

The arrival of the Zubaida and consequent introduction in the Persian Gulf of modern fishing methods should be of great benefit to the Iraqi populace and should strengthen the economic base of the nation.



Japan

1948-49 ANTARTIC WHALING EXPEDITION: Production: The 1948-49 Japanese Antarctic whaling expedition took a total of 1,138 blue whale units (1,645 whales), from which 54,500 metric tons of products were obtained. About 20,000 metric tons of this total were whale oil, and the remainder was blubber, meat, and miscellaneous products. The 1947-48 Antarctic whaling expedition took 1,014 blue whale units and realized about 47,000 metric tons of products, 17,000 metric tons of which were whale oil, according to various reports received from the Natural Resources Section of SCAP.

Whaling Expedition Commended: A representative of the Natural Resources Section, in an address given at a celebration of the return of the Japanese Antarctic whaling fleet, stated in part:

"We are here today to help you celebrate completion of the most notable Antarctic whaling expedition ever carried out by a Japanese fleet. Your performance on this expedition has been exceptional in many respects. I wish to comment particularly on those features which are of special significance to Japan's international position.

"Before World War II, Japanese whaling fleets operated with almost complete disregard for the regulations drawn up by the International Whaling Convention to protect the Antarctic whale herds from extinction. Nearly one-quarter of their catch was taken in violation of protective regulations established by this Convention.

"During the past three seasons, you have demonstrated that you can, and will, carry on whaling operations according to international agreements and with due regard for the preservation of the whale resources.

"You have set a magnificent example for the entire Japanese fishing industry by obtaining maximum production and utilization of aquatic products while observing all national and international regulations."

1948 JAPANESE AGAR AGAR PRODUCTION: The Japanese Ministry of Agriculture and Forestry reported that exports of agar-agar during the 1948 calendar year totaled 1,019,014 pounds.

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FISHERIES COOPERATIVES: Introduction: Cooperation of fishermen for the purpose of mutual assistance is an old movement in Japan, according to Preliminary Study No. 31 "Fisheries Cooperatives of Japan" of SCAP's Natural Resources Section issued in January 1949. As early as 1500 A. D. organizations were formed to build, cooperatively, landing docks, markers and beacons, as well as other facilities which were needed, but which could not be provided on an individual basis. The fishery cooperative associations became especially strong during the Meiji Era, 1868-1912, when practically autonomous power in fishing management was granted to them. Since about 1900, the cooperative associations began business activities such as selling the members' catch and purchasing material for their members. By 1933, there existed 3,778 cooperatives with a membership of 691,185 and 46 federations which established a link among the local cooperatives.

The Fisheries Organization Law of 1943 gave the central Government of Japan complete control of the entire coastal industry including the cooperatives. The law stipulated that "those who do fisheries and owners of fishery rights and who

lease fishery rights and do fisheries by virtue of same in the locality, also those who have close relations with the fisheries operated by the members, may be made members" of the respective cooperative. In actual practice, this law created for the cooperative in each village a monopolistic position and it gave to the directors of the cooperative exclusive power over fishermen. Denial of membership in the cooperative was equivalent to the denial of the right to fish. The new fisheries cooperative legislation of 1948 attempts to break up the monopolistic position of the old cooperative. In the future, any 7 fishermen may establish a production cooperative. The boundaries of these cooperatives may be overlapping. The cooperatives may compete each against the other.

General Provisions of the Fisheries Cooperative Legislation, 1948: The fisheries cooperative legislation enacted on November 27, 1948, by the Japanese Diet is composed of two separate laws. The Law Concerning the Consolidation of Fisheries Organizations or the Like in Compliance with the Enforcement of Fisheries Cooperative Association Law abrogates the Fisheries Organization Law (Law No. 27 of 1943) and provides for the dissolution of all fishing associations and manufacturers' associations organized in compliance with it. The Fisheries Cooperative Association Law authorizes the formation of fisheries cooperatives and establishes the legal basis on which they will be organized and operated.

The administrative authorities referred to in the law are the Minister of Agriculture and Forestry or the prefectural governor, as may be appropriate in the specific instance.

The effective date of both laws has been set by Cabinet Order as February 15, 1949.

Summary of 1948 Fisheries Cooperative Association Law:

SUMMARY OF FISHERIES COOPERATIVE ASSOCIATION LAW

The purpose of the Fisheries Cooperative Association Law is "advancement of the national economy by increasing fisheries productivity and improving the economic and social status of fishermen and marine products processors through the development of fisheries cooperative associations." The objective of each cooperative will be "to furnish direct service for the benefit of its membership consistent with the functions which it is authorized to perform."

The law authorizes three types of cooperatives and two kinds of federations:

- a. Fishermen's Cooperative Assns.
- b. Fishermen's Production Cooperative Assns.
- c. Federation of Fishermen's Cooperative Assns.
- d. Marine Products Processing Cooperative Assns.
- e. Federation of Marine Products Processing Cooperative Assns.

"Fisheries" is defined in the law as "a business to carry on gathering, taking, or culturing of marine animals and plants." "Marine products processing" is defined as "a business to carry on manufacturing food stuff, feed stuff¹, fertilizer, paste, oil, or hide with marine animals and plants as their raw materials or stuffs." "Fishermen" are defined as "individuals who operate fisheries and employees who engage in gathering, taking, or culturing of marine animals or plants on behalf of fisheries operators²." "Marine products processors" are defined as "individuals who operate marine products processing."

¹Feed stuff means livestock feed.

²This is a departure from established tradition in Japan. In the past, only those who owned boats or nets or held fishing rights were considered fishermen.

The law makes the following provisions for the various types of associations and federations:

a. Fishermen's Cooperative Associations

(1) Business: Fisheries cooperative associations may engage in one or more of the following functions:

- (a) Giving credit to members.
- (b) Accepting deposits of members.
- (c) Purchasing or selling goods cooperatively for business and family needs.
- (d) Operating common facilities needed for business and family use of members.
- (e) Transporting, processing, storing, or selling products of members.
- (f) Participating in activities contributing to conservation and propagation of marine animals and plants and exploitation of fishing grounds.
- (g) Establishing facilities such as docks, breakwaters, etc.
- (h) Offering disaster relief and life saving activities for its members.
- (i) Offering welfare and educational activities.
- (j) Bargaining collectively on behalf of members.
- (k) Participating in collateral activities required to accomplish any of the preceding items.

Cooperatives without capital stock cannot perform credit or deposit functions. Cooperatives may make their facilities available to non-members. However, this must be set forth in the articles of incorporation, and the

total volume of business with non-members cannot exceed that done with members. A fishermen's cooperative may operate fisheries in addition to the above functions, provided that:

- (a) Two-thirds of the fishermen's households of the area are represented in its membership.
- (b) A majority of its members are engaged in the fisheries operated by the cooperative.
- (c) The organization is a capitalized cooperative.
- (d) No member holds more than double the average number of shares per member.
- (e) A majority of the shares in the cooperative are held by members engaged in the fishery or fisheries operated by the cooperative.
- (f) Two-thirds or more of the persons engaged in the fisheries operated by the cooperative are members or reside in the home of members of the cooperative.

(2) Membership: Membership in fishermen's cooperatives is open to any fisherman residing in the area covered by the association who engages in fisheries a minimum of 30 to 90 days a year. The articles of incorporation of each cooperative must designate the exact number of days, not less than 30 or more than 90. The articles of incorporation of cooperatives whose area of operation is larger than one city, town, or village may limit membership to fishermen engaging in one specific type of fishery. Associate membership may be granted to marine product processors residing in the area of the cooperative who are not members of a marine products processing cooperative and to any fishermen's production cooperative or individual fishermen ineligible for full membership. Associate members do not have the right to vote but have all other membership privileges. No applicant for membership can be refused membership without due cause, and no special conditions for membership can be imposed on any applicant.

(3) Capitalization: The capitalization requirements (number and value of shares) for members will be determined by the articles of incorporation. All units of capitalization (share) will be of equal value. Each member of a capitalized fishermen's cooperative will possess one or more units of capitalization. The liability of a member will be limited to the amount of his investments. Shares cannot be held jointly by members, cannot be transferred without the consent of the cooperative, and cannot be owned by persons other than members or associate members.

(4) Elections and General Voting: Each member will be entitled to one vote. Voting by written proxy on previously publicized matters is authorized. No member can vote more than one proxy. Elections will be by secret ballot. One-fifth of the members may institute recall proceedings by means of a petition. All directors will be voted upon in a recall election.

(5) Secession and Expulsion: Members can secede from a cooperative at the end of any business year, if prior notice is given. The time of this notice will be determined by the articles of incorporation; however, it shall not be less than 60 days nor more than one year. Members may be expelled from a cooperative by resolution of the general meeting for the following reasons:

- (a) Failure to utilize the facilities of the cooperative for "an unreasonably long period of time,"
- (b) Refusal to fulfill their obligations such as "payment of investments and assessments, etc."
- (c) Violation of the articles of incorporation.

(6) Officers: Cooperatives will have a minimum of five directors and two auditors. Three-fourths of the directors must be members of the cooperative. The normal term of office will be one year; however, the articles of incorporation may establish two-year terms.

(7) Reserve Fund and Distribution of Profits: At the close of each business year the cooperative will set aside a reserve fund of one-tenth or more of the surplus funds, until this reserve fund reaches the amount prescribed in the articles of incorporation. The amount of the reserve fund prescribed in the articles of incorporation shall not be less than one-half the total amount of the capitalized stock of the cooperative. This reserve fund can be used only for the payment of losses. Cooperatives must set aside five percent or more of each year's surplus fund for conducting educational activities. After payment of losses, the reserve fund and the educational fund will be set aside, the remaining surplus will be distributed by paying a dividend not exceeding five percent on the units of capitalization, and any remainder will be distributed to the members in proportion to the extent they used the facilities of the cooperative during the business years.

(8) Organization: Geographical boundaries for the area of the cooperative's function will be determined by the articles of incorporation. Twenty or more fishermen are required to organize a fishermen's cooperative. Steps in organizing fishermen's cooperatives are:

- (a) Twenty or more fishermen must act as promoters.
- (b) The promoters will prepare a program showing the scope of business, area of functions, and qualifications for membership of the proposed cooperative.
- (c) The promoters will hold a preliminary meeting for organization. A public notice giving the date and place of the meeting must be given two weeks before the meeting.
- (d) At the preliminary meeting at least 20 fishermen will be selected from among those present to draft the articles of incorporation. All decisions made at the preliminary meeting will require the consent of the majority of the fishermen present.
- (e) Upon completion of the draft of the articles of incorporation by the drafters the promoters will hold a constituent general meeting. At least two weeks before the meeting a public notice of the draft of the articles of incorporation and the time and place of the meeting must be given. Approval of the articles of incorporation, adoption of a business plan, and other matters necessary for organization will be carried out at the constituent meeting. The draft of the articles of incorporation may be amended at the constituent meeting; however, this does not apply to the provisions regarding the area and qualifications for membership.
- (f) Immediately after the constituent general meeting, the promoters must apply to the administrative authorities for approval of the organization.
- (g) The administrative authorities must approve the application unless the organization is contrary to the Fisheries Cooperative Law.
- (h) If notification is not received from the administrative authorities within two months after date of application, the formation of the cooperative is approved automatically.
- (i) Upon approval by the administrative authorities, the promoters must surrender their duties to the directors. The directors must then collect the payment of the first quota of the capitalization from the members.
- (j) The cooperative becomes established upon registration at the location of its principal office.

b. Fishermen's production cooperative associations

- (1) Business: Operation of fishing enterprise.

(2) **Membership:** The qualifications for membership will be determined by the articles of incorporation. However, all members must be fishermen. Two-thirds of the members must be engaged in the fishing enterprise operated by the cooperative, and two-thirds or more of the persons engaged in the fishing enterprise operated by the cooperative must be members of the cooperative.

(3) **Capitalization:** Each member of a cooperative must possess one or more units of capitalization (shares). The number of units owned by any one member must not be more than twice the average number of units held by other members. The majority of the total units of capitalization of the cooperative must be possessed by persons engaged in the fisheries operated by the cooperative.

(4) **Officers:** Fishermen's production cooperatives must have three or more directors, all of whom must be members of the cooperative. A recall election of the officers may be initiated by a petition of one-third of the members.

(5) **Organization:** Seven or more promoters may form a fishermen's production cooperative.

(6) **Surplus Fund:** A production cooperative may pay 10 percent dividend on its stock. The remainder is distributed on the basis of labor contributed to the cooperative enterprise.

(7) All other provisions applying to fishermen's cooperative associations apply with modifications to fishermen's production cooperatives.

c. Federations of Fishermen's Cooperative Associations

(1) **Business:** Federations of fishermen's cooperative associations may, with necessary modifications, perform any of the business functions conducted by their member cooperatives. However, federations carrying on the functions of credit and accepting deposits may not carry on other activities. The business of credit of the acceptance of members' deposits may not be carried on by non-capitalized federations.

(2) **Membership:** Membership of federations shall be drawn from the following, as determined by the articles of incorporation:

- (a) Fishermen's cooperatives or federations having as their jurisdictional area the whole or part of the area in which the federation is to operate.
- (b) Fishermen's production cooperatives which have their official address in the jurisdictional area of the federation.
- (c) Any cooperative organization situated in the jurisdictional area of the proposed federation and authorized by other laws to perform functions similar to those performed by the cooperatives mentioned in the preceding two items.

(3) **Limitations:** Federations shall be limited in size by either of the following items:

- (a) The jurisdictional area of a federation must not be larger than one prefecture.
- (b) The number of cooperatives constituting the membership of a federation must not exceed 300.

(4) **Organization:** Two or more cooperatives may become the promoters of a federation.

d. Marine Products Processing Cooperative Association

(1) **Business:** Marine products processing cooperative associations may engage in any or all of the following functions:

- (a) Giving credit to members.
- (b) Accepting deposits of members.
- (c) Purchasing or selling goods cooperatively for business needs of members.
- (d) Operating common facilities needed for business purposes of its members.
- (e) Transporting, processing, storing, or selling products of members.
- (f) Inspecting products manufactured by members.
- (g) Offering welfare and educational activities.
- (h) Participating in collateral activities required to accomplish any of the preceding items.

The cooperative may, in accordance with the articles of incorporation, make its facilities available to non-members; however, this business with non-members must not exceed one-fifth of the total volume of the business of the cooperative. Cooperatives carrying on the functions of lending and accepting deposits may not conduct other activities.

(2) **Membership:** The qualifications for membership will be determined by the articles of incorporation; however, all members must be marine products processors.

(3) **Organization:** The organization of a marine products processing cooperative requires 15 marine products processors as promoters.

(4) All other provisions applying to fishermen's cooperative associations are applied to marine products processing cooperatives with the necessary modifications.

e. Federations of Marine Products Processing Cooperatives

(1) **Business:** Any of the activities performed by the member cooperatives may, with necessary modifications, be performed by the federation. However, federations performing credit and deposit functions cannot conduct other activities.

(2) **Membership:** The membership of federations will be drawn from the following as determined by the articles of incorporation:

- (a) Cooperatives or federations having all or part of the jurisdictional area of the federation being formed as their area of operations.
- (b) Any cooperative organizations within the jurisdictional area of the proposed federations and authorized by other laws to perform functions similar to those performed by the cooperatives mentioned in item (a).

(3) **Organization:** Two or more associations may become promoters of a federation.



Liberia

POSSIBILITIES OF THE FISHERIES: Fishing as an industry has not yet been developed in Liberia. The possibilities for such a venture seem excellent, for the present supply of fish comes from native fishermen who go out nearly every day in dugout canoes and return at the close of the day with a few fish, according to a March 10 report from the U. S. Economic Mission to Liberia. These are immediately taken up by customers who flock to the water's edge and who even wade out into the water to meet the canoes. The supply available does not even begin to satisfy the demands of the consumers.

There is a variety of fish in the waters of Liberia, which should, and could, supply the needs of the country. Among the fish and shellfish to be found are herring, mullet, red snapper, gripper, barracuda, tarpon, crabs, lobsters, crawfish and a few other kinds.

Native-made drag seines are used in the coastal waters of Liberia. In the fresh-water streams and lakes, traps and small nets are used. Purse seines are unknown. To help meet the demand for low-cost protein food, large amounts of canned and dried fish are imported.

One or two fishing boats, equipped with icing facilities and working with a fleet of canoes should be able to greatly increase the local take of fish for which a ready market exists.



MOROCCO

DANISH FISHING VESSELS TO OPERATE IN MOROCCAN WATERS: Negotiations are being conducted between the authorities of Morocco and private fishing interests in Denmark to operate Danish fishing vessels in Moroccan waters, according to a May 23 report from the American Embassy at Copenhagen.

It is expected that Danish fishing vessels will conduct experimental fishing in Moroccan waters in search of tuna, sardines, hake, and sole. Catches will be sold to canneries in Morocco which at present cannot be kept in continuous production due to the irregular catches of the local fishing fleets. If proposed operations prove successful and catches are adequate, a Danish export fish business may be established in Morocco eventually.

All proposed operations will be under Danish management. Two Danish vessels (39 and 49 gross registered metric tons, respectively) have been selected for the initial trial. Both ships, built in Denmark will be equipped with latest gear and equipment, including refrigeration plants, moored nets, floating trawls, and Danish seines. It is expected that these vessels will be followed by others at a later date.



New Caledonia and Dependencies

FISHERIES: Waters and reefs around New Caledonia contain an abundance of many varieties of fish, crustaceans, and mollusks, and there are thousands of

turtles in the area of the Huon Islands. The fishing industry in general, however, has been developed only sufficiently to supply the local market with fresh and dried fish, according to a May 1949 report from the International Reference Service of the Department of Commerce.

The one sea product shipped from the colony in significant quantities is the trochus shell, and the New Caledonia variety is considered among the finest obtainable anywhere. Searching for shells was prohibited during the war but was resumed in 1946. In that year exports amounted to 1,220 metric tons, compared with an average of 524 tons a year from 1932 to 1939. Shipments went mainly to France. Considerable activity is anticipated in this field.



Newfoundland

SEAL FISHERY, 1949: The total seal fishery of vessels based on Newfoundland for the 1949 season was considerably more successful than in 1948 and much more so from the viewpoint of Newfoundlanders, according to a June 15 report from the American Consulate General at St. John's.

The total number of seals caught by vessels of Newfoundland registry increased by 69.5 percent, the gross weight by 57.4 percent, and the net value by no less than 112.7 percent (see table).

Seal Fisheries Based on Newfoundland, 1948 and 1949 Seasons						
Vessel Registry	1 9 4 9			1 9 4 8		
	Seals Caught	Gross Weight of Seals Caught	Net Value of Seals	Seals Caught	Gross Weight of Seals Caught	Net Value of Seals
	No.	Lbs.	U.S.\$	No.	Lbs.	U.S.\$
Vessels of Newfoundland registry	130,625	6,688,156	476,805.58	77,012	4,249,554	224,203.73
Vessels of other registry	4,821	345,965	13,294.97	64,959	3,453,186	173,816.63
Total	135,446	6,924,121	489,805.55	141,971	7,702,740	398,020.36

In 1948, there were eight sealing vessels of foreign registry, either Canadian or United States, based on Newfoundland but in 1949 there were only two, both Canadian. In addition, there were a number of Norwegian vessels, estimated at nine by the Newfoundland Fisheries Board, operating in and around Newfoundland waters, but the details of this catch are not known.

Prices remained the same as last year, \$10.00 for young harps, \$5.00 for old harps, \$12.00 for young hoods, \$5.00 for old hoods, and \$6.00 for bedlamers. The great rise in the value of the catch was due primarily to the greatly increased number of young harps caught, the total figure rising from 69,574 in 1948, to 103,280 in 1949.

* * * * *

WHALE AND FISH OILS, 1948: Production: The production of cod oil in Newfoundland declined and that of herring oil increased in 1948, according to an April 13 report from the American Consulate General at St. John's.

The production of seal oil also fell sharply, as was to be expected from the decline in the catch by vessels of Newfoundland registry.

The most striking increase was in whale oil. The production of whale oil in Newfoundland in 1948 reached an all time high of 1,476,770 gallons, an increase of almost 60 percent over the preceding year, which was also a record year.

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

Wholesale Prices: Wholesale prices on whale and seal oils during 1948 as quoted by local dealers were \$440.00 per metric ton c.i.f. European ports in bulk and \$515.00 per ton c.i.f. European ports in packages.

Pure common cod oil remained between 20 cents and 21 cents per pound c.i.f. New York.

Table 1 - Newfoundland's Production of Whales & Whale Oil, 1941-48

Year	Whales Caught	Oil Produced
	No.	Gals.
1948	756	1,476,770
1947	455	927,343
1946	529	913,139
1945	393	621,300
1944	264	456,649
1943	152	296,448
1942	72	105,264
1941	72	89,040

Table 2 - Newfoundland's Exports of Fish Oils, 1947-48

Type of Oil	1948		1947	
	Gals.	Value	Gals.	Value
Common cod	303,535	\$ 436,074	714,799	\$1,015,595
Refined cod	257,131	507,455	415,622	796,466
Poultry	11,680	18,930	5,633	11,680
Sperm	31,570	31,949	61,422	98,187
Other whale	792,433	1,146,093	1,153,568	1,595,907
Herring	152,558	197,370	42,299	61,703
Seal	250,096	436,030	498,247	761,207
Bream (Rosefish) ..	2,316	1,776	1,488	1,141
Bream (")				
viscera	10,558	32,385	-	-
Squid	56	38	-	-
Shark	54	63	-	-
Total	1,811,987	\$2,808,163	2,893,078	\$4,341,886

Table 3 - Principal Importers of Newfoundland Fish Oils, 1947-48

Country	1948		1947
	Gals.	Value	Gals.
United States	511,205	\$828,537	774,862
Belgium	10,056	17,024	20,335
Canada	390,847	612,047	1,925,362
Denmark	14,519	14,519	-
France	149,077	257,174	2,287
Germany	680,752	964,114	-
Italy	27,600	60,900	-
Switzerland	8,316	10,746	108,176
United Kingdom	7	32	48,569

Note: In addition, during 1948, 35,785 pounds of cod stearine, valued at \$4,940, were imported by the United States, and 515 pounds of seal stearine, valued at \$618, by Canada.

Cod liver oil of medicinal grade averaged about \$2.50 per gallon c.i.f. New York while poultry oil averaged about \$2.08 per gallon.

Current Market Situation: The current market for fish oils is somewhat depressed as compared with last year. Cod liver oil, whose price is determined primarily by the Norwegian price, is off somewhat and there have been no sales of cod oil since December 1948, owing to the fact that the tanneries in the United States are working only part time and still have a carryover of cod oil from 1948. The market for whale oil is also depressed owing to the decrease in demand from Europe.

Table 4 - Stocks of Fish Oils on Hand in Newfoundland on January 3, 1949

Type of Oil	Quantity on Hand
	Short Tons
Whale oil, No. 3	559
" " , No. 4	76
Seal oil, No. 1	1,000
" " , No. 2	50
Cod oil	1,000
Cod liver oil	110
Herring oil	-

Outlook for 1949: Exporters have adopted a rather cautious outlook toward prospects for 1949. It is hoped that the market for common cod oil will become more active in about six weeks when current stocks in the United States have declined, but it is ex-

pected that prices will be lower. It is also expected that prices for cod liver oil and whale oil will fall somewhat.



Nigeria

STATUS OF FISHERIES, 1948: Efforts have been made to improve the fish industry because of its importance as a supply of food. Fish are now imported, and the country hopes to become self-sufficient in this respect, according to a March 18 report from the American Consulate General at Lagos. Some two years have been spent in training and educating Nigerians in the use of large-mesh nets for catching large fish and to impress upon them the importance of not removing small, immature fish from the waters. There are plans for enacting legislation forbidding the catching of immature fish. Encouragement has also been given to deep-sea fishing in the hope of giving the waterways some respite.

The one-year training offered by the Fisheries Department is free and consists of demonstrating improved methods and offering technical advice and assistance.

The present yield of Nigeria's waters, both inland and oceanic, is inadequate for her own needs. There is no possibility of exporting any fish, but through this training, it is hoped production may be increased to fulfill the country's needs. It is estimated that there are only 12,000 square miles of fishing ground along the coast and about 1,000 square miles along the waterways. The total annual catch from these sources should eventually be from 80,000 to 90,000 tons. Between 3,000 tons and 4,000 tons are now imported, most of which are dried fish.

On the basis of 80,000 to 90,000 tons a year for domestic consumption, there should be about six pounds of fish per adult which still leaves a large deficiency on the protein diet of the average Nigerian.

Trial ponds are now in the making for breeding fish, but these are too new to judge results as yet. Food for these ponds is being produced from palm kernel residue.

Production of commercial fish byproducts is also being encouraged; and the marketing of shark liver and fish swim bladder (for use in beer and wine cleansing and the manufacturing of glue) is proving profitable. Mangrove cutch is also being produced for tanning nets.

There are also experiments under way for the canning of fish in a newly erected experimental cannery near Lagos.

NOTE: Quantities in metric tons.



Norway

DANISH-NORWEGIAN TRADE AGREEMENT SIGNED: Negotiations between Danish and Norwegian trade delegations resulted in the drafting, on April 1, 1949, of a trade agreement for the period April 1, 1949-March 31, 1950. The agreement has been approved by the Danish and Norwegian Governments and was signed at Oslo on April 13, 1949, according to a May 23 report from Copenhagen.

Included among the Danish imports are the following Norwegian fisheries products:

Salted herring -	\$303,030	Oyster brood -	\$20,202
Fresh fish -	40,404	Fish glue -	10,101
Canned fish -	60,606	Crude whale oil -	9,500 M.T.
Shellfish -	80,808	Hardened whale oil -	2,500 M.T.

Included among the Norwegian imports are the following Danish fisheries products:

Fresh and live fish -	\$104,188
Fish products -	41,675

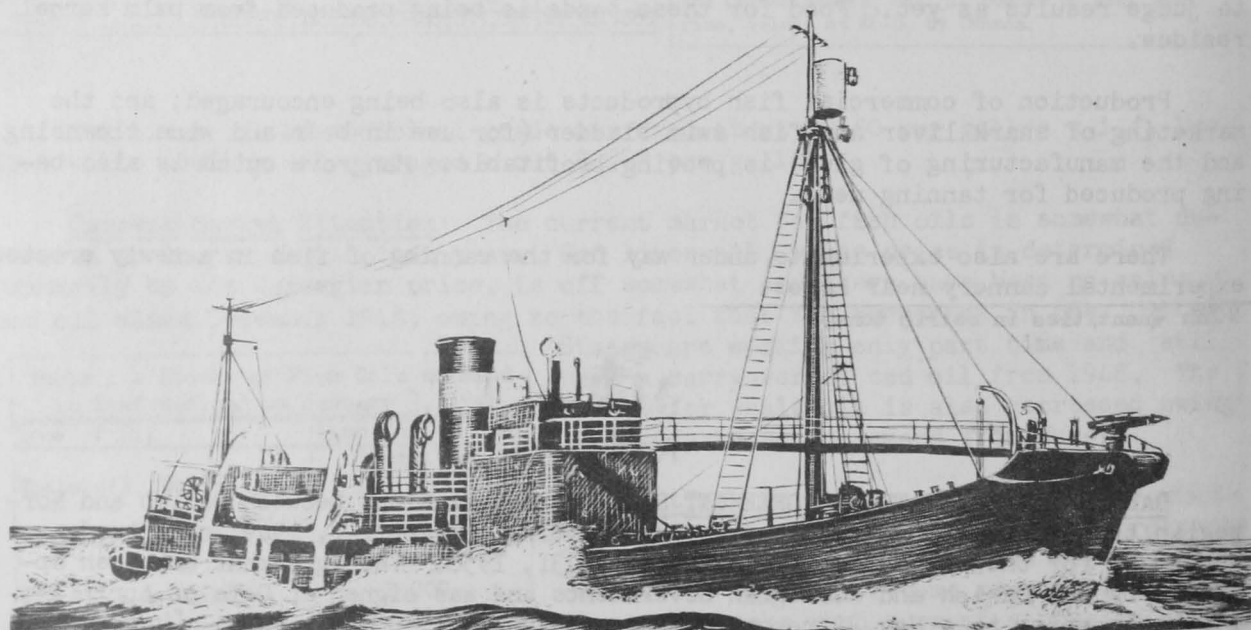
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NORWEGIAN-BRITISH TRAWLING DISPUTE: On Friday, July 15th, the Norwegian Government forwarded a memorandum to the British Government concerning a recent disagreement over territorial limits off the Norwegian coast, according to a July 23 report from the Norwegian Information Service. The disagreement arose early in May when the British trawler was detained by Norwegian authorities on the charge that it was fishing within the four-mile limit which Norway regards as its territorial boundary. A British protest was forwarded immediately, noting that the vessel was fishing outside the three-mile line which Britain regards as the limit of a country's territorial waters.

A Norwegian spokesman in London noted recently that it would be of the utmost importance were a Norwegian-British agreement reached. It could aid in setting a precedent for other countries which presently fail to agree on this same question.

* * * * *

PRODUCTION OF 1948-49 ANTARCTIC WHALING EXPEDITION: The total production of the ten Norwegian whaling expeditions, which have been operating in the Antarctic



TYPE OF MODERN CATCHER BOAT USED BY NORWEGIANS DURING THE 1948-49 ANTARCTIC WHALING EXPEDITION.

this season, amounted to 931,008 barrels (155,168 metric tons) of whale oil and 113,755 barrels (18,959 tons) of sperm oil, compared with 939,827 barrels (156,638 tons) of whale oil and 55,288 barrels (9,215 tons) of sperm oil last season when only nine Norwegian expeditions operated. (See Commercial Fisheries Review, July 1949, p. 52.) Average production this season is 93.2 barrels per whalecatcher per day, compared with 97.7 barrels last season, according to an April 21 report from the American Embassy at Oslo.

Results of the 1948-49 season were only on a par with those of prewar despite the addition of one more expedition and the use of more modern equipment.



Poland

FISHING INDUSTRY, 1948: A steady development in the Polish fishing industry was attained during the postwar years (including 1948) in the number of fishing boats, the employment of fishermen, and the signing of export agreements with foreign countries which did not exist before the war, according to a March 18 report from the American Consulate at Gdansk.

Fishing Fleet, Ports, and Fishermen: Most of the fishing industry in 1947 was centered in Gdynia, but in 1948, an effort was made to shift the greater part of the fishing industry to the district of Szczecin, and to smaller ports (Łeba, Darłowo, Władysławowo, Ustka, and Kołobrzeg) on the western part of the Polish coastline.

Polish Fishing Fleet and Fishermen, 1939, 1947, 1948					
Year	Fishermen	FISHING BOATS			
		Cutters	Motorboats	Sailing Cutters	Total Fishing Boats
	No.	No.	No.	No.	No.
1948	4,451	344	444	1,529	2,317
1947	3,704	246	350	1,426	2,022
1939	1,822	*	*	*	160
1938	1,955	*	*	*	*

*Not available.

Production: In 1948, a total of 38,174 metric tons of fish was caught in

the Baltic Sea, an increase of 4,804 tons over 1947. However, the plans for 1948 to reach a total of 42,000 tons of fish were only carried out by 91.2 percent. This was due to smaller catches in the second half of the year, and to bad weather conditions during that period. From January through May 1948, one boat caught an average amount of 21-26 metric tons of fish, whereas in November of the same year, the average of one boat reached only 5 tons. Accordingly, the first 5 months of the year yielded 66 percent of the total catches. In addition, 10,000 tons were produced on the high seas.

In general, 80 percent to 90 percent of the total catches are composed of cod. The balance consisted of eel, pike, and sander.

Exports: Before the war, the total catches of fish in Poland only amounted to a yearly average of 6,250 metric tons. This amount of fish was not even sufficient to supply the home market, and therefore a large amount had to be imported. This situation changed in the postwar years, however, so that by 1946 a certain amount of fish could be exported, mainly to Germany and Czechoslovakia. In March 1948, the Fish Central (Centrala Rybna) signed a contract to export 10,000 tons of cod to Germany (Russian Zone), and in August of the same year, another contract for 20,000 tons was signed with the same country. The export of fish

to Czechoslovakia and the export of salmon to England have also animated the Polish fish market and the canning industry which, until then, had not been of great importance.

Imports: Aside from the total amount of fish caught in 1948, another 27,355 metric tons were imported from Baltic countries in exchange for Polish coal, less than the 33,400 tons of fish imported in 1947

Plans for Expansion in 1949: It is planned to add 23 cutters (42.6 to 55.8 feet in length).

All cutters will be equipped with modern motors and modern navigational and fishing equipment. Apart from these cutters, another 8 cutters (43 feet in length) and 5 cutters (49 feet) are under construction, but will not be completed before 1950.

Before the war, Poland had only one refrigerated warehouse with a total space of 8,866 square feet, which was located in Gdynia. The major portion was used for the storage of fish, and the rest for the storage of ice. Aside from that, another small cold-storage plant with a freezing capacity of 1,200 metric tons of fish a year has been utilized. At the present time, a new refrigeration plant of a total space of 13,776 square feet is under construction, with a capacity for freezing 100 metric tons of fish every 24 hours which, according to the plans, will be completed in the first months of 1950. This plant also will contain a section for fish filleting.

Also, the construction of an ice plant is planned to be completed in 1950, capable of producing 150 to 170 metric tons of ice daily. Furthermore, a fish hall for the weighing, packing, and distributing of fish is under construction. It has been decided to replace the existing small factory for fish meal and fish oil by a larger one, with a capacity for handling 150 to 170 tons of raw material a day.

At Gdansk it is planned to build a fish refrigeration plant of 3,280 square feet as well as an ice factory, which will produce 15 metric tons of ice daily. Both will be completed in 1950.

In addition, several smaller fishing ports on the western Polish coastline are building cold storage, freezing, and ice plants together with other improvements and additions.

Economical and Social Sectors: In the Polish fishing industry, a great part of the turnover of fish is handled by the so-called social sector which comprises Government cooperatives and nationalized firms; a smaller part by the general sector, which comprises individual fishermen, supplied with Government cutters or their own equipment; and by the capitalistic sector which comprises private cooperatives.

Government Aid to Fisheries: In order to still augment the fishing industry, and secure the efficient participation of the fishermen, several arrangements have been made to provide more favorable living conditions for them. The entire coastline has been released for fishing settlements. Fishermen are allowed a certain amount of land and they can keep one cow and two hogs, to secure their living during bad fishing periods. No larger assignments will be made in order to prevent fishermen from becoming farmers. Also, credits are given for repair works, or new equipment, and fishermen are granted reduced income taxes.

There are some 150 Dutch fishermen under contract to the Polish Government, who are engaged in teaching modern methods of high-sea fishing to the Polish fishermen. They are stationed for the most part at Gdynia with smaller groups at the small fishing ports scattered along the Polish coast.



Portugal

DATA ON SARDINE PACKING: Oils Utilized: All Portuguese canned sardines are packed either in olive oil or peanut oil, according to a May 20 consular report from Lisbon. The percentage packed in one or the other oil varies, with the portion packed in olive oil being greater in the years in which the production of olive oil is more abundant and less in other years. At the present time, the percentage packed in each one of these oils may be calculated at about 50 percent.

Classification According to Type: The normal production of the canneries may be calculated more or less as follows:

Plain	- 85 percent of total pack
Boneless and skinless	- 13 " " " "
Boneless	- 2 " " " "

Almost the entire pack of boneless and boneless and skinless is destined for the United States market.

Classification According to Size of Containers: The distribution of the pack according to the sizes of the containers used is approximately as follows:

	<u>% of Total Pack</u>
$\frac{1}{4}$ Club, 30 mm. ($4\frac{1}{2}$ oz.)	75
$\frac{1}{4}$ Club, 22 mm. ($3\frac{3}{4}$ oz.)	15
$\frac{1}{4}$ American, 30 mm (7 oz.)	3
Various sizes	7

* * * * *

MOTHER-OF-PEARL SHELLS AND BUTTON INDUSTRY: Production: Production in Portugal of buttons and related articles manufactured from mother-of-pearl shells totaled 219,000 gross in 1947 compared to 224,000 gross in 1946, according to a March 25 report from the American Consulate at Oporto.

Imports: During 1947 imports of shells totaled 709,320 pounds. The United States supplied 683,890 pounds, Venezuela 21,635 pounds, and other countries 3,795 pounds.

Current Requirements: According to the trade, Portuguese current requirements for mother-of-pearl shells are between 250 and 300 metric tons per year, about 93 percent of which are required from the United States. The trade further reports that they are paying between \$120-\$165 per metric ton f.o.b. for mother-of-pearl shells and that freight and other charges from American ports to Portugal reaches about \$50 a ton.

Exports: Certain quantities of the button production are sent to the Portuguese colonies, and the balance distributed to the market in Portugal.

Outlook: Manufacturers of mother-of-pearl buttons report that much depends on their ability in the future to obtain the required official permission from the Portuguese government to import mother-of-pearl shells in quantities sufficient to keep their plants in production.

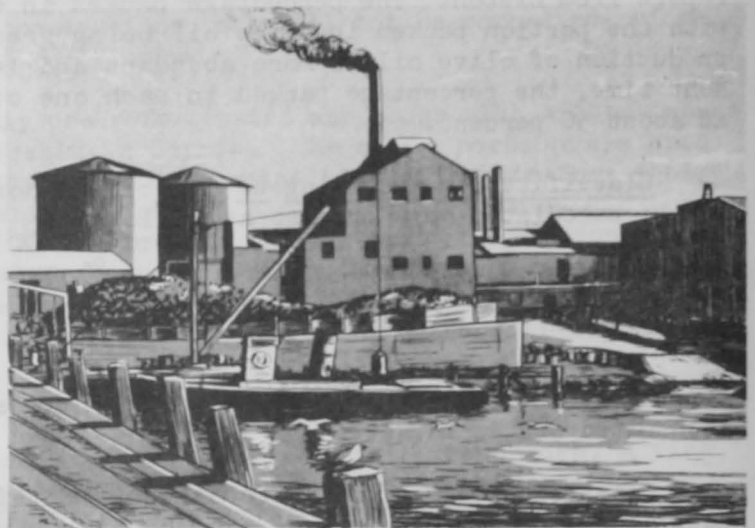


Union of South Africa

WHALING PRODUCTION, 1948-49: Only two South African firms are engaged in whaling, according to an April 13 American consular report from Capetown. One company operates South Africa's factory ship, the Empire Victory, the largest factory ship among the antarctic expeditions, together with 25 catchers and a floating workshop. This firm also operates two land stations at Durban which process chiefly sperm, fin, and humpback whales. Extensions have been made to existing workshops and the hydrogenation plant there is now in full production.

The other company has a whaling station, six whalers, plant, quarters and storage facilities at Saldanha Bay.

All whale oil and whale meat produced at the three shore stations is consumed within South Africa. All sperm oil



SHORE-WHALING STATION AT DONKERGAT, ONE OF TWO OPERATING IN THE UNION OF SOUTH AFRICA. THE SLIPWAY AND FLENSING STAGE ARE ON THE RIGHT, WITH THE BUILDING WHERE THE MEAT IS PROCESSED ON THE EXTREME RIGHT. THE BLUBBER IS BOILED DOWN IN THE CENTER BUILDING, AND THE OIL STORED IN TWO TANKS ON THE LEFT.

locally produced at the shore stations, except for an insignificant quantity used locally, is sold in the United Kingdom. On the other hand, all whale oil and whale meat caught by the South African antarctic expedition is sold to the British Ministry of Food.

Prices: Under South African regulations all whale oils produced under the South African flag must be sold to the South African Government at \$340 per long ton. The Government then sold some of the whale oil locally at \$376 per long ton and at \$360 per

Item	Antarctic Expedition	South African Shore Stations	Total
	No.	No.	No.
Whale catch:			
Baleen:			
Blue	686	•	•
Fin	1,371	•	•
Total Baleen ...	2,057	1,205	3,262
Sperm	529	810	1,339
Grand Total	2,586	2,015	4,601
Whale Products:	Long Ton	Long Ton	Long Ton
Whale oil	22,233	6,079	28,312
Sperm oil	4,567	3,554	8,121
Whale meat	3,477	8,332	11,809
Liver flakes	357	60	417
Whale bones	-	868	868
Total	30,634	18,893	49,527

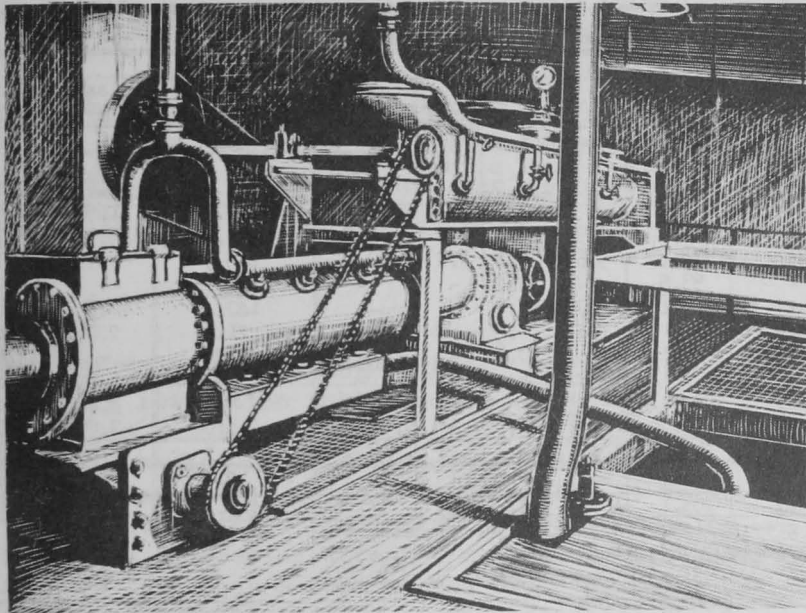
*Data not available.

long ton to the British Ministry of Food (price contracted for at the beginning of the season).

United Kingdom

DEVELOPMENTS IN COD LIVER OIL MARKET: The British Ministry of Food revoked the Cod Liver Oil and Veterinary Oil (Control) Order on July 1, 1949, according to a July 13 report from the American Embassy at London. Licenses for the manufacture of these oils are no longer required.

The cod liver oil situation is reported to be particularly satisfactory, with local refiners providing the greater part of the country's needs for medicinal and



COMPACT LIVER OIL PLANT CAPABLE OF BEING INSTALLED ON BOARD A VESSEL. USED IN BRITISH COD LIVER OIL INDUSTRY.

industrial cod liver oil, and leaving a surplus for export. Certain grades of cod liver oil have been imported in small quantities from Norway and Newfoundland, although the import duty placed on this oil some years ago encouraged the local refiners to develop their business to a point that imports are greatly reduced as compared with prewar figures. Exports since the war have not yet reached their prewar volume, although the increased prices have accounted for a considerable increase in the value of exports. Exports, in 1948, totaled 3,438 metric tons (valued at \$2,402,521) compared to 2,810 tons (valued at \$1,868,796) in 1947. Imports in 1948 amounted to 238 tons (valued at \$125,337) compared to 440 tons (valued at \$235,723) in 1947.

Cod liver oil refiners are established in Hull and Grimsby, the two ports at which the major part of the fish catch is landed. No figures of output are available, although it is indicated that some 56,000,000 pounds of fish livers are available from the total annual landings.

* * * * *

PRODUCTION OF HERRING OIL, 1948: The British Herring Industry Board states that herring oil production in the prewar period, 1934-38, probably did not amount to more than 100 to 200 long tons annually at the most, according to a May 24 report from the American Embassy at London. In 1947, the production amounted to about 650 long tons; and in 1948, to 1,000 tons. The available plant facilities would be able to produce some 3,000 long tons in 1949 providing that herring were caught in sufficient quantities.

The chief uses of herring oil are in margarine and fish canning, for the first grade product, and in industrial uses (i.e. leather dressing, candle making, paint, and linoleum manufacture) for the lower grades.

The Board has a long-term plan for the development of the industry and has a target of processing 175,000 long tons of herring a year and producing 20,000 long tons of edible oil and about 35,000 long tons of protein feeds.

U.S.S.R.

PRODUCTION OF FISHERY PRODUCTS: The U. S. S. R. has not published fishery products statistics for a number of years. However, the 1948 catch is estimated at 1,445,000 metric tons, the 1949 catch at 1,791,000 tons, while the plan for 1950 calls for a catch of 2,050,000 tons. These estimates are based on the announced five-year plan and adjusted by data as published in the Soviet newspapers from time to time. The latest published statistics available are for 1934.

U.S.S.R. Production of Fishery Products, by Species and Area, 1934										
Area	Sea and Coastal Waters							Total Sea & Coastal	Inland Waters	Total
	Caspian	Black-Azov	Northern	Ob	Far Eastern	Aral	Balkhash			
Species	(In thousands of metric tons)									
Fish:										
Herring	62.9	5.3	114.7	-	132.2	-	-	315.1	2.7	317.8
Vobla (Caspian roach)	204.8	11.8	-	-	-	3.4	-	220.0	1.5	221.5
Large chastik ¹	157.8	60.9	14.0	4.9	16.3	19.7	10.0	283.6	45.1	328.7
Small chastik ²	47.9	48.8	18.8	5.6	8.2	3.2	3.2	135.7	63.3	199.0
Cod	-	-	93.5	-	9.2	-	-	102.7	-	102.7
Salmon	1.1	-	3.8	7.0	128.5	-	-	140.4	.4	140.8
Sturgeon	15.1	4.5	-	1.4	.2	.2	-	21.4	2.0	23.4
Flounder	-	.7	2.1	-	10.8	-	-	13.6	-	13.6
Carp	-	-	-	-	-	-	-	-	1.6	1.6
Tulka ³	-	-	-	-	-	-	-	-	3.4	3.4
Other misc. fish	5.4	130.7	16.2	-	5.7	-	-	158.0	3.0	161.0
Total fish	495.0	262.7	263.1	18.9	311.1	26.5	13.2	1,390.5	123.0	1,513.5
Crabs	-	-	-	-	12.6	-	-	12.6	-	12.6
Grand Total	495.0	262.7	263.1	18.9	323.7	26.5	13.2	1,403.1	123.0	1,526.1

¹/Pike, pike-perch, bream, mackerel, grey mullet, ling, barbel, eel, bass, etc.
²/Goby, smelt, tench, perch, crucian, gudge, ruff, etc.
³/Clupea delicatula s. cultriventris.

It is reported that the Russians are now working the rich fishing grounds, formerly fished by the Japanese, in the Northern Pacific (Karafuto, Kurile Islands, Bokbalin Island, Kamchatka and the Siberian coast north and west of the Sea of Okhotsk), but are handicapped by lack of man power, boats, and supplies. The bulk of the catch from this great region is salmon and king crab (most of which is canned), and these would probably account for the increase in total catch, as the other regions seem to be producing about the same as in former years or somewhat less.



Uruguay

PLANS FISHERIES EXPANSION: Two Danish fishery cutters (44 and 34 gross registered metric tons) departed from their home port of Thyborøn, Jutland, on April 12, 1949, bound for Montevideo, Uruguay, according to a May 19 consular report from Copenhagen.

These ships were built in Denmark, one in 1946, the other 1948. They carry complete and modern fishing equipment and are manned by Danish crews, all expert fishermen. It is understood that the crews will remain with the ships to perform fishing operations out of Montevideo for two years. The crews will also assist in training local fishermen. It is reported that this entire program is covered by contract between Danish and Uruguayan private interests with the sanction of the respective governments.

On the Danish side, the hope is expressed that the expedition will result in the opening of new markets in Uruguay for Danish fishery equipment, refrigeration machinery, and other supplies.



Venezuela

FISH CANNING INDUSTRY, 1948: The Venezuelan production of canned fish in 1948 increased 1,799 metric tons compared to 1947, according to a June 2 report from the American Embassy at Caracas.

Venezuelan Production of Canned Fish, 1943-48						
	1948	1947	1946	1945	1944	1943
	(Metric Tons)					
Canned fish ...	9,278	7,479	7,742	6,023	4,198	2,000

The increase in 1948 was due to the construction of additional canneries. Most of the increased production was absorbed by the domestic trade.

SPINY LOBSTER CLOSED SEASON LENGTHENED: The Venezuelan Ministry of Agriculture issued a resolution published in Gaceta Oficial 22904, dated April 28, 1949, which prohibits fishing spiny lobsters (Palinurus argus) for the period June 1 to August 31, according to a May 12 report from the American Embassy at Caracas. The resolution also prohibits the transportation, sale, and possession at any time of lobsters which measure less than 8 centimeters from the point between the eyes to the end of the carapace, or of berried lobsters.



TYPICAL VENEZUELAN FISHING BOAT.

The current resolution differs from the previous resolution, which was repealed, by extending the closed season 15 days.



THE SHRIMP AND THE SHRIMP INDUSTRY OF THE SOUTH ATLANTIC AND GULF OF MEXICO

The shrimp fishery of the United States is centered primarily in the eight South Atlantic and Gulf States where almost 200 million pounds are taken annually. The shrimp ranks first in value among all the fisheries of the South and usually rates as the sixth most valuable fishery of the United States, including Alaska. There are three species of shrimp, all members of one family (Penaeidae) which are of commercial importance in this area. The common shrimp (Penaeus setiferus) yields at least 95 percent of the total catch whereas the grooved shrimp (Penaeus brasiliensis) and the sea bob (Xiphopenaeus kroyeri) produce the remainder.