

# TRENDS AND DEVELOPMENTS

## Additions to the Fleet of U. S. Fishing Vessels

During October this year, 74 vessels of 5 net tons and over received their first documents as fishing craft--24 less than in October 1948, according to the Bureau of Customs of the Treasury Department. California led with 12 vessels, followed by North Carolina and Alaska with 8 vessels each. During the first 10 months of 1949, a total of 878 vessels were documented, compared with 1,060 during the same period in 1948.

Section	October		Ten mos. ending with Oct.		Total 1948
	1949	1948	1949	1948	
	Number	Number	Number	Number	Number
New England .....	3	1	30	43	52
Middle Atlantic .....	2	1	41	37	40
Chesapeake Bay .....	7	5	62	50	59
South Atlantic and Gulf .....	36	51	309	474	541
Pacific Coast .....	15	30	308	330	348
Great Lakes .....	2	6	35	42	51
Alaska .....	8	3	88	75	81
Hawaii .....	1	1	4	9	12
Unknown .....	-	-	1	-	-
Total .....	74	98	878	1,060	1,184

Note: Vessels have been assigned to the various sections on the basis of their home port.



## ECA Procurement Authorizations for Fishery Products

No fishery products were included among the procurement authorizations for commodities and raw materials announced by the Economic Cooperation Administration during November 1949. Authorizations for fishery products in November 1948 amounted to \$4,752,000.

The total authorized for fishery products since the beginning of the ECA program on April 1, 1948, through November 30, 1949, was \$33,961,911, somewhat lower than the total through October 31, 1949, due to several decreases in authorizations during the month. During November there was a decrease of \$43,000 in an authorization of \$162,000 for the purchase of whale and fish oil from the United States and Possessions for delivery to Korea; a decrease of \$1,000 in an authorization for salt fish procured from Canada for delivery to Italy; and a decrease of \$335,000 in an authorization for salt fish to have been procured from Newfoundland for delivery to Italy. The last transaction involved a decrease in quantity while the other two were due to adjustments in prices.

ECA on November 6 announced plans for publishing a directory of the names and products of American small business firms for the attention of overseas buyers. Names and products of small independent firms desiring to enter or continue to export trade under the Marshall Plan will be listed in a directory which will be distributed by ECA overseas missions to European importers and other buyers, and will serve as a ready reference to available American sources of supply. To compile the directory, ECA asked small business firms to register by December 10, 1949. This directory is another step in ECA's five-point program to give small firms greater opportunities to share in European recovery orders placed by foreign buyers in the United States. ECA was instructed by Congress to make available to prospective purchasers overseas information regarding products and services produced by small U. S. independent enterprises.

A series of four regional meetings for the extension of the small business field counseling service to various parts of the country were held in Dallas, Los Angeles, San Francisco, and Boston by ECA the latter part of November and the early part of December. Objective of the meetings was to obtain the cooperation of business and banking leaders and export specialists who will act as volunteer, unofficial counselors to small businessmen interested in examining the possibilities of exporting under the Marshall Plan.

Although Western Europe took further strides towards economic recovery and political stability in the second quarter of 1949, ECA on November 15 in its fifth report to Congress asserted that Europe's inability to convert her growing output and increased volume of trade into a reduction of the dollar gap remained a basic problem. The report, covering the period April 3 to June 30, 1949, pointed out that total exports of Marshall Plan countries were at a postwar high but that shipments to the United States fell off and dollar earnings declined.

The November issue of ECA's Recovery Guides stated that following devaluation of their currencies at the end of September, the ERP countries now have the opportunity to undertake further measures required to achieve equilibrium and freedom in world trade. The report continues:

"While these measures will take many and varied forms, they must all work towards:

- "(1) Reallocating resources and production away from the domestic market and towards the foreign market, and away from the soft currency areas and towards the hard currency areas, and
- "(2) Freeing world trade from tariff barriers, quota restrictions, exchange controls, price discrimination and inadequate production."



## Federal Purchases of Fishery Products

DEPARTMENT OF THE ARMY, OCTOBER 1949: Purchases of fresh and frozen fishery products by the Army Quartermaster Corps during October 1949 for the U. S. Army, Navy, Marine Corps, and Air Force for military feeding totaled 1,650,325 pounds (valued at \$559,252). This was a decline of 12 percent in quantity and 13 percent in value, compared with September 1949; and an increase of 9 percent in quantity, but a decline of 1 percent in value, compared with October 1948.

Purchases of Fresh and Frozen Fishery Products by Department of the Army (October and totals for ten months, 1949 and 1948)							
Q U A N T I T Y				V A L U E			
October		January-October		October		January-October	
1949	1948	1949	1948	1949	1948	1949	1948
lbs.	lbs.	lbs.	lbs.	\$	\$	\$	\$
1,550,325	1,516,239	14,513,157	14,188,555	559,252	566,426	4,835,617	5,063,245

Total purchases for the first ten months this year were 3 percent higher in quantity, but 5 percent lower in value, compared with the corresponding period the previous year.



## Fishery Biology Notes

"ALBATROSS III": Savings Gear Studies (Cruise 29): Studies of the size, number, and weight of fish of various species taken by the savings gear were continued on Cruise 29 (September 25-29, 1949) of the Albatross III, research vessel of the Service's North Atlantic Fishery Investigations.

Four mesh sizes were compared in these experiments, mainly on rosefish. Large numbers of rosefish were caught by the tows made on this trip.



THE ALBATROSS III, AT THE DOCK AT BOSTON, GETTING READY FOR A CRUISE.

This is the last cruise to be made by the Albatross III this year in the New England area.

"ALBATROSS III" TO OPERATE OFF NORTH CAROLINA: An increase of \$20,000 was appropriated for the continued operation of the Albatross III this winter. The added operating time will be spent in a series of cruises for two months in waters off the North Carolina coast and in hydrographic and oceanographic studies on the trip to and from Morehead City, N. C.

Around 120 one-hour drags are planned, and an extensive tagging program is being arranged to provide knowledge concerning the migration pattern of fishes south of Cape Hatteras.

RHODE ISLAND HARD CLAM INVESTIGATION: A preliminary report has been made by the Service's Clam Investigations on a study of the intensive quahaug (hard clam) fishery operated by tonging, raking, and power dredging methods in Rhode Island's Narragansett Bay. The industry and the State Conservation Department asked the Service to settle the controversy over the merits of tonging versus dredging.

About 1300 diggers conduct tonging the year round in every unpolluted part of the Bay. Power dredging, permitted only in part of Sakonnet River from December 1 to March 31, supports less than 35 boats.



TONGING

Tongers claim that power dredges tear up the bottom, kill seed and break many marketable-sized clams. Dredgers contend that their operations cultivate the bottom, prevent silting, and increase setting. The latter want additional beds (those which are too deep for hand tongers) opened for use of power dredges.

To resolve the issue, three experimental areas were selected: one to be dredged; the second, raked or tonged; and the third, a control area.

Removal of the same quantity of quahaugs from each quarter of the two test plots (not the control plot) showed that fishing intensity was constant for the two areas. Observations were made of breakage by the tonging and dredging method, and of age and size composition of catches. Time records showed catch per unit of effort. Tests were completed in late September 1949 and will be repeated in 1950.

During the last quarter of 1949, underwater photographs were taken in each test area and in the control plot to determine relative effect of each harvesting method on the bottom and on bottom life. Samples were taken to determine setting in each quarter of each tract to see if dredging or raking, or both, hurt newly set quahaugs or if the bottoms had been cultivated and setting improved.

SHAD INVESTIGATION PROGRAM: A tentative program for the investigation of the shad fishery under the additional appropriation recently granted by Congress was presented by the Service's Middle and South Atlantic Fishery Investigations and was approved by the Atlantic States Marine Fisheries Commission on December 9,

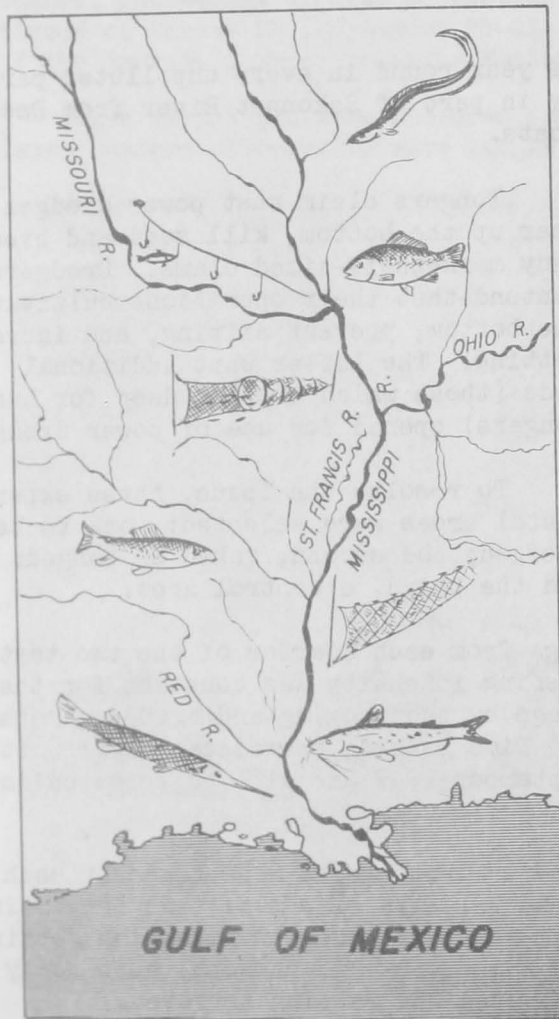
substantially as presented, with the suggestion that it include a complete compilation of all published or unpublished material dealing with shad.

Major features of this program include determination of the size of the stock at various stages of life; measurement of the effect of natural conditions, fishing intensity or other man-made conditions on the stocks; measurement of mortality rates; and surveys of streams where shad populations are not now well known, particularly in the Southern States. Proposals for restoration of badly depleted runs include design of fishways for dams, recommendations for pollution abatement, and recommendations for management of the fisheries.

The first season's work will be concentrated principally in the Hudson River, but with some activity on Chesapeake Bay and in New England.



## Missouri's Commercial Fish Catch, 1948



In 1948, the catch of fish taken from the Missouri sections of the Mississippi, Missouri, and St. Francis Rivers, was 962,718 pounds reports The Missouri Conservationist for September 1949. Of this amount, Missouri River fishermen reported 491,896 pounds; Mississippi River fishermen, 429,511 pounds; and St. Francis River fishermen, 41,311 pounds.

Carp composed the largest percentage of the take on the three rivers; 49.8 percent of the Mississippi catch, 64.0 percent of the Missouri catch, and 40.5 percent of the St. Francis catch. Buffalo ranked second in the catch on the three rivers. Flathead catfish ranked third in the Missouri and St. Francis Rivers, and fourth in the Mississippi. Drum ranked fourth in the Missouri and St. Francis catch, and third in the Mississippi River. Other species reported taken included bullheads, channel catfish, grindle, sturgeon, suckers, quillback, gars, eel, and paddlefish.

Although the hoop-net continued as the most-used type of gear on the three rivers, the trammel net is also used intensively on the Missouri River, where the catch by the latter gear almost equalled the hoop-net catch. More permits for commercial fishing were issued in 1948 than in 1947, and each type of gear, except the seine, was operated for a greater number of days in 1948 than in the previous year.



## New Philippine Import Restrictions Will Affect United States Exports of Fishery Products

An analysis of the effect of the Philippine import quota restrictions (as revised November 30, 1949) on United States fishery products made by the Office of International Trade, U. S. Department of Commerce, indicates that the new restrictions will result in a reduction in the Philippine importations of United States fishery products.

Table 1 - Effect of Applying the New Philippine Quota Restrictions on that Country's Total Value of 1948 Fishery Products Imports from all Countries

Commodity	Actual Value of Imports, 1948	Value of Imports Under New Import Restrictions
	U.S. \$ Value ..(in thousands of U. S. dollars)..	U.S. \$ Value Under New Quota
<b>Canned:</b>		
Abalone .....	126.0	25.2
Anchovies .....	729.0	145.8
Cuttlefish .....	1,158.5	231.7
Herring .....	501.5	100.3
Mackerel .....	6,510.5	1,302.1
Salmon .....	1,219.5	243.9
Sardines .....	3,195.0	1,597.5
<b>Dried, smoked, salted, or cured:</b>		
Codfish .....	50.5	10.1
Shrimp .....	201.0	40.2
All other dried .....	115.0	23.0
All other fishery products.	348.5	69.7
<b>Total .....</b>	<b>14,155.0</b>	<b>3,789.5</b>

Table 2 - Percentages of Certain U. S. Fishery Products Exported to the Philippines, January through October 1949 (based on quantity)<sup>1/</sup>

Commodity	% of Total Exports Consigned to the Philippines
<b>Canned:</b>	
Sardines .....	56
Mackerel .....	46
Squid .....	45
Herring .....	15
Salmon .....	6
Tuna .....	6
Other, except shellfish.	30
<b>Dried:</b>	
Shrimp .....	37

<sup>1/</sup>Based on U. S. Bureau of Census statistics.

Total imports of edible fishery products into the Republic of the Philippines during 1948 were valued at 28,310,000 pesos (approximately \$14,155,000), according to that country's official import statistics. The new quota, effective December 1, 1949, will permit imports of 50 percent by value of the canned sardines and 20 percent by value of all the other edible fishery products imported during 1948. On this basis Philippine imports during the 12 months beginning December 1, 1949, may total only \$3,789,500 from all sources (See table).

It is conceivable, under the new restriction, that United States exports of canned sardines to the Philippines will be held below 200,000 cases (9,000,000 pounds) annually, compared with exports during the first 10 months of 1949 of about 945,000 cases (42,534,593 pounds). (This estimate is computed by using 50 percent of the dollar value of U. S. exports to the Philippines in 1948 and a price of \$6.00 a case of 45 pounds for 48 one-pound oval cans in tomato sauce. Total canned sardines imported into the Philippines in 1948 from the United States were valued at 4,500,000 pesos or \$2,275,000.)

Canned sardines were also imported by the Philippines in 1948 from Canada (\$561,500), Mexico (\$320,500), and Portugal (\$38,000), therefore, United States exporters must successfully meet the competition from these other countries if they expect to exceed the 200,000 cases.

The dollar value of other fishery products imported into the Philippines from the United States in 1948 was \$9,455,000, and from other countries, \$1,505,000.

NOTE: Conversion to United States dollars has been made on the basis of one Philippine peso equals 50 cents U. S.

## New York State's Production of Salt-Water Fishery Products, 1948

The 1948 New York State commercial catch of fish and shellfish within the marine district and the State's offshore catch amounted to 308,770,150 pounds, valued at \$15,088,507 to the fishermen. Among the fish, the catch of menhaden for reduction purposes exceeded that of all other species. The leading food fish landed in the State was scup. Landings of the leading shellfish in the order of their importance were: oysters, hard clams, and surf clams.

New York State Marine Landings of Fishery Products, Quantity, and Value to the Fishermen, 1948 <sup>1/</sup>							
Leading Species	Quantity	Total Value	Average Price	Leading Species	Quantity	Total Value	Average Price
	lbs.	\$	¢ per lb.		lbs.	\$	¢ per lb.
<b>FISH:</b>				<b>FISH: (Cont.):</b>			
Cod.....	1,740,239	242,633	13.94	Scup (Porgy) ..	6,073,885	485,711	8.00
Flounder ..	1,522,341	121,787	8.00	Sea bass .....	2,307,454	369,233	16.00
Fluke .....	2,307,052	507,551	22.00	Squid .....	1,053,899	105,390	10.00
Haddock ...	1,773,899	212,867	12.00	Yellowtail ....	2,680,250	375,225	14.00
Mackerel ..	2,497,602	349,664	14.00	Other fish ....	7,105,664	899,734	12.66
Menhaden ..	126,162,900	1,261,629	1.00	Total fish ..	155,225,185	4,931,424	3.18
<b>SHELLFISH:</b>				<b>SHELLFISH (Cont.):</b>			
Clams:				Oysters .....	69,319,005	4,621,265	6.67
Hard ....	53,547,320	2,679,416	5.00	Scallop meats .	3,283,209	1,824,005	55.56
Surf ....	23,525,200	588,130 <sup>2/</sup>	2.50 <sup>2/</sup>	Other shellfish	2,403,601	381,602	15.88
Mussels .	1,466,630	62,665	4.27	Total shellfish.	153,544,965	10,157,083	6.62
Grand Total .....					308,770,150	15,088,507	4.89

<sup>1/</sup>Weights given are as landed. Weights for shellfish include shell, except for scallops. Only species with landings of over one million pounds are listed individually, with others groups under "other fish" or "other shellfish."  
<sup>2/</sup>Represents value after shucking.



## Pacific Oceanic Fishery Investigations

"HENRY O'MALLEY" SHAKEDOWN CRUISE (CRUISE NO. 1): The exploratory fishing vessel, Henry O'Malley, departed on a shakedown cruise on November 28 after spending a day in Pearl Harbor to obtain a small supply of nehu for live-bait fishing operations. This vessel, the first of three fishery research vessels to be completed for the Pacific Oceanic Fishery Investigations, returned on December 7 after a cruise of 11 days in the vicinity of the Hawaiian Islands, the Director of the Service's Pacific Oceanic Fishery Investigations announced at Honolulu.

Unfavorable weather conditions hampered operations the greater part of the voyage, but the fishery engineers and crew of the vessel were able to extensively test the equipment aboard and to determine necessary modifications. These changes in design will be incorporated into the equipment before the vessel departs on a long-range exploration for tunas in the region of the Hawaiian Islands and the Equator.

On this voyage, the vessel and gear were tested on a semicommercial scale to determine if the equipment is ready for a prolonged exploratory fishing voyage to the vicinity of the Line Islands and Canton Island in the counter-equatorial current region.

Four types of bait nets and equipment for catching live bait both at night and during the day have been constructed. These have been designed to catch bait in the western part of the Hawaiian Archipelago and the Line Islands where explorations will be conducted to find new sources of bait.

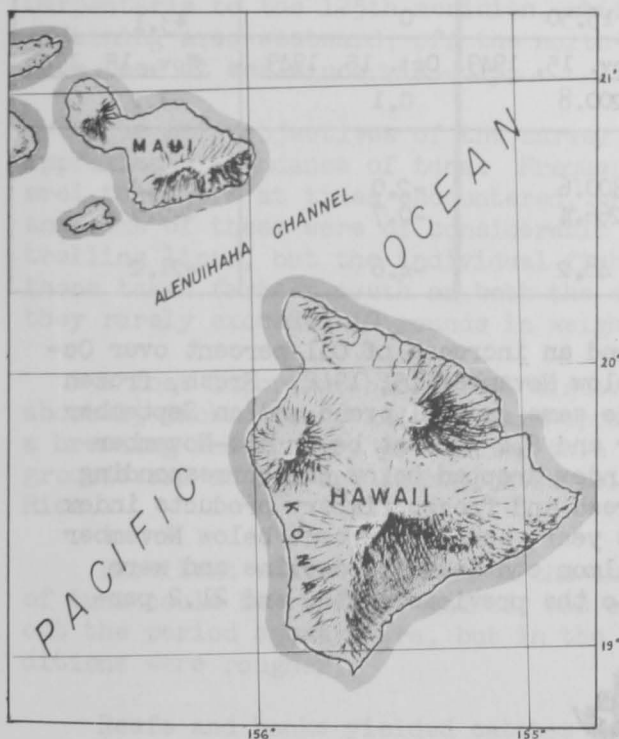
The vessel is fitted with pole and line gear similar to that now used in the local aku fishery except that the rigs can be operated by one man or teams of two and three men to catch large fish. Since it is known that tunas frequently are found at subsurface levels, the vessel has also been fitted with gear for trolling at depths down to 100 fathoms. This method of fishing which has been developed in the Pacific Northwest for catching salmon, if successful, would be a revolutionary development in the methods of catching tuna since lures resembling the action of live fish can be trolled at intermediate depths and only a few men are required to operate the gear. The Henry O'Malley is also fitted with a bathythermograph for determining the depth of the thermocline which is the junction level of the relatively warmer upper layer of the ocean and the colder layers at greater depths. It is quite possible that a greater amount of food exists in this area than above or below it and the temperature observations may indicate favorable depths for exploratory fishing by trolling methods. The vessel will later be fitted with a string of flagline gear similar to that used by the local aku boats to further explore the subsurface levels of the ocean for new tuna fishing grounds.

The Henry O'Malley is 128 feet in length, with a 29-foot beam and a draft of 15 feet. Propelled by a 560 hp. diesel engine, it also has auxiliary electric power supplied by two 125 kw. diesel electric generator sets for operating various types of auxiliary machinery and providing refrigeration.

"HUGH M. SMITH" SAILS: The biological and oceanographical research vessel left December 8 for a training and shakedown cruise in Hawaiian waters.

This 16-day cruise is being conducted for the purpose of testing various special equipment for catching tunas and other fishes, equipment for taking water samples from the depths of the sea, and special equipment used in collecting fish eggs and larvae and other biological materials, and for training the ship's personnel in the operation of this gear.

Tests will be conducted in waters south of Maui and off the Kona Coast of Hawaii. In the course of this cruise, observations will also be taken at a series of stations to the southwest of Hawaii extending offshore to a distance of 120 miles, for the purpose of obtaining information on the ocean currents of that region which are presumed to be related to the occurrence of tuna.





After completion of the trial cruise, it is expected to send this vessel on an extended oceanographic cruise to the equatorial region in the vicinity of the Line Islands shortly after January 1.



## Wholesale and Retail Prices

On November 15, 1949, the wholesale index for all foods was 151.5 percent of the 1926 average, 0.4 percent lower than on October 18 and 7.6 percent lower than on November 16 a year ago.

Canned pink salmon prices in November remained firm and were 32.3 percent lower than in November 1948. On the other hand, canned red salmon prices during the month were 5.0 percent higher than in October, but still 3.0 percent lower than in November a year ago.

Wholesale and Retail Prices				
Item	Unit	Percentage change from--		
		Nov. 15, 1949	Oct. 18, 1949	Nov. 16, 1948
<u>Wholesale: (1926=100)</u>				
All commodities	Index No.	151.5	-0.4	-7.6
Foods	do	152.8	-0.4	-8.9
<u>Fish:</u>				
Canned salmon, Seattle:		<u>Nov. 1949</u>	<u>Oct. 1949</u>	<u>Nov. 1948</u>
Pink, No. 1 Tall	\$ per doz. cans	3.94	0	-32.3
Red, No. 1 Tall	do	6.378	+5.0	-3.0
Cod, cured, large shore, Gloucester, Mass.	\$ per 100 lbs	15.50	0	+3.1
<u>Retail: (1935-39=100)</u>				
All foods	Index No.	<u>Nov. 15, 1949</u>	<u>Oct. 15, 1949</u>	<u>Nov. 15, 1948</u>
		200.8	0.1	-3.2
<u>Fish:</u>				
Fresh, frozen & canned	do	300.6	-2.0	-8.4
Fresh and frozen	do	266.4	-0.7	-0.5
Canned salmon:				
Pink	¢ per lb. can	48.2	-4.6	-21.2

Retail food prices on November 15 showed an increase of 0.1 percent over October 15 this year, but were 3.2 percent below November 15, 1948. Fresh, frozen and canned fishery prices did not follow the same general trend and on September 15 were 2 percent lower than in mid-October and 8.4 percent below mid-November 1948. This is the third month that this index dropped below the corresponding period a year ago. In mid-November, the fresh and frozen fishery products index was 0.7 percent lower than mid-October this year, and 0.6 percent below November 15, 1948. Retail prices for canned pink salmon continued to decline and were 4.6 percent lower on November 15 compared to the previous month, and 21.2 percent lower than mid-November 1948.

