

STRUCTURE OF THE FISHING INDUSTRY IN THE EUROPEAN COMMON MARKET

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BACKGROUND

Since the end of World War II, an effort has been made to integrate the western European economies at an accelerated rate. Several plans have been worked out for that purpose--some remain theoretical speculation, but others have been put into practice.

By the Treaty of Rome six western European nations--Belgium, France, Italy, Luxembourg, the Netherlands, and West Germany--agreed to establish a European Common Market on January 1, 1958. The first important agreements of the Treaty^{1/}, namely, the reduction of import duties and the extension of quota restrictions became effective on January 1, 1959.

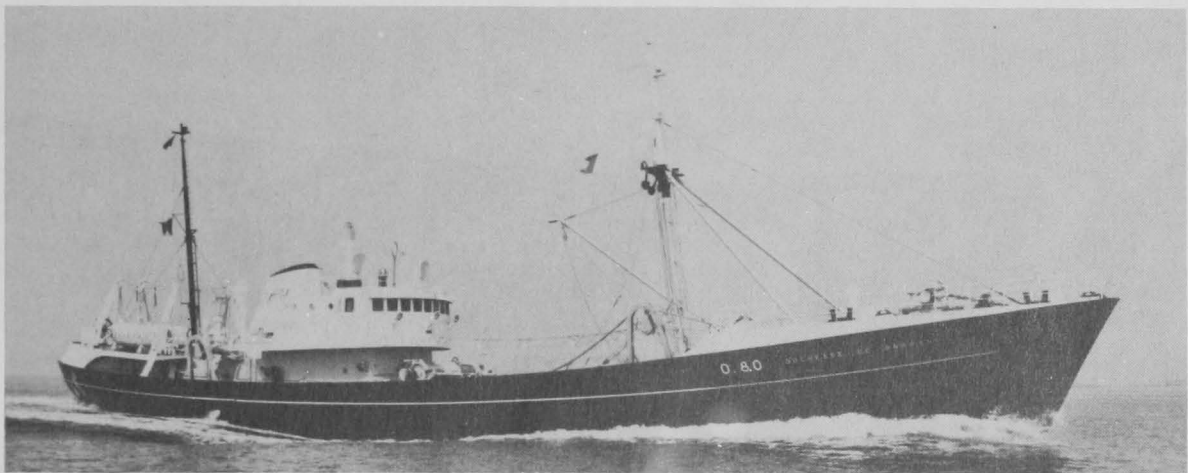


Fig. 1 - A modern Belgium distant-water trawler operating out of Ostend.

The Common Market plans the gradual removal of international tariffs and quotas and the development of a single tariff system between the Six, or Common Market Countries, and the rest of the world^{2/}.

The Treaty also provides for the free movement of persons, services, and capital; for common policies with respect to agriculture (and fishing industry), transport, and competition; and for coordination of national policies on many aspects of economic development.

A number of common institutions have been set up in order to implement the principles and the general provisions of the Treaty.

The establishment of the European Common Market is tied to a timetable. This means that at certain stages measures will be taken, so that after a transition period of 12 to 15 years the Common Market will become a complete reality.

The consequences of the Common Market for western European trade and industry are not fully foreseeable as yet. This also applies to the fishing industry of Western Europe.

The evolution of fisheries in the Common Market, however, can be visualized by examining its structural elements, such as catching capacity, production, consumption and foreign trade^{3/}.

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^{1/}Articles 14 and 33.

^{2/}Article 3.

^{3/}For this study the author has drawn certain data from "Introductory Report about the Fishing Industry in the European Common Market." The author wrote the report for the Professional Fisheries Council in Belgium. The statistical data, however, were revised and regrouped.

The fishing capacity in the Common Market Countries^{4/} can be determined to a limited extent by examining their statistics on fishing fleets and the number of fishermen.

FISHING FLEET

Generally speaking, the Common Market Countries exploit the same fishing grounds. The North Sea is the main source of supply, but more distant fishing grounds are also exploited.

But the fishing fleets of the Common Market Countries vary widely, and not all craft or all categories of vessels are of the same importance.



Fig. 2 - The fish auction, IJmuiden, Netherlands.

The Belgian fishing fleet consists of motor vessels (440 with 67,243 hp. and 25,446 gross registered tons) and steam vessels (6 with 6,420 hp. and 3,783 GRT). According to the engine power, which limits also the field of operation, the fleet is divided into seven categories^{5/}: from cutters (15 hp. and 5 GRT each) to deep-sea trawlers (1,450 hp. and 768 GRT each). On January 1, 1958, the Belgian fleet numbered 446 units--29,229 gross registered tons and 73,663 hp.^{6/}

During the past few years, the Belgian fishing fleet has increased in number, tonnage, and horsepower. It is striking, however, that the number of vessels of the smaller types has

^{4/}As Luxemburg has no fishing industry, it has been left out of the study, except for its foreign trade which is included with Belgium since a Belgium-Luxemburg Customs Union has existed for many years.

^{5/}Namely, cutters (less than 80 hp.), coastal motor trawlers (80-119 hp.), medium trawlers (120-239 hp.), deep-sea motor trawlers (240-349 hp.), deep-sea medium motor trawlers (350-499 hp.), deep-sea large motor trawlers (over 500 hp.), and large deep-sea steam trawlers (over 439 hp.)

^{6/}Source: Bestuur van het Zeewezen.

decreased. The increase in the number of units, tonnage, and horsepower is the result of adding larger and more powerful vessels to the fleet. Since World War II no new small vessels have been built, and this explains the unfavorable average age (24 years) of the smaller vessels.

In France, the fishing fleet consists of steam, motor, and sailing vessels. At the beginning of 1958 the French fleet consisted of 15,912 units with 250,011 gross registered tons^{7/}--28 steam trawlers with 11,471 GRT, 13,500 motor trawlers with 234,831 GRT, and 2,384 sailing vessels with 3,709 GRT.

Since the last war the number of steam trawlers and sailing boats has greatly decreased in France. The motor trawlers, on the other hand, have increased in tonnage as well as in horsepower. Recently the building of larger vessels has been strongly stimulated in France.



Fig. 3 - Unloading and boxing of fish at Boulogne, France.

In Italy there were 43,948 vessels as of January 1, 1958, with a tonnage of 147,913 gross registered tons--11,126 motor vessels and small motor boats (total 102,032 GRT) and 32,822 sailing boats (total 45,881 GRT)^{8/}. The number of sailing vessels are decreasing, but motor vessels have been partly modernized during the last few years.

The Netherlands fishing fleet includes a great variety of vessels, the classification of which varies from row boats to sailing vessels to motor trawlers of 800 hp. On January 1, 1958, the fishing fleet consisted of 669 vessels registered for sea fisheries with a total tonnage of 66,867 gross registered tons^{9/}. Included are steam trawlers, steam luggers, motor

^{7/}Includes Algeria--the number of vessels in Algeria totaled 1,123 units of which 1,068 were motor vessels and 65 sailing vessels.

Source: Ministère de la Marine Marchande.

^{8/}Source: "Il Giornale della Pesca" (September 5, 1958).

^{9/}Source: Directie van de Vissertjen.

trawlers, motor luggers, and motor cutters. A number of the vessels--mostly the smaller ones--are also registered for inshore fisheries and fisheries in Lake Ijssel. Also, there are motor boats, sailing boats, and row boats which almost exclusively operate in the inshore fisheries.



Fig. 4 - German distant-water trawler tied up at dock, Hamburg. Note overhead ice conveyor for icing-up vessels.

Since 1950, the number of steam vessels has decreased. On the other hand, motor trawlers and motor luggers increased. The motor cutters also grew in numbers and fishing capacity.

In West Germany the fishing fleet consists of trawlers, luggers, cutters, and open boats without motors. At the beginning of 1958, the German fishing fleet numbered 3,429 units, of



Fig. 5 - Lugger-type trawler, engaged principally in fishing for North Sea herring docked at Hamburg.

which 29 were motor trawlers with a total of 18,209 gross registered tons, 177 steam trawlers (total 94,303 GRT), 104 luggers (total 24,063 GRT), 1,443 cutters, and 1,676 open boats without motors^{10/}.

After World War II the German trawler fleet had to be almost completely rebuilt. At first it was prohibited to build vessels of more than 400 gross registered tons. Later this restriction was removed and larger and more profitable vessels could be built (to about 800 GRT). At the same time the development was characterized by a conversion of coal-burning vessels into oil-burning vessels. Since 1950, steam luggers have disappeared. The motor luggers increased in number, but the new vessels generally had to replace the obsolete ones. In the cutter fleet, the vessels became larger and the engine power was increased.

CATCHING CAPACITY

Generally speaking, the catching capacity of the fishing fleet in the Common Market Countries is now greater than before the war and continues to increase. Larger and faster vessels are built, not only for distant-water fisheries, but also for near- and middle-water fisheries. At the same time, the vessels are equipped with modern navigational aids.



Fig. 6 - Fish auction at Cuxhaven, Germany

GOVERNMENT AID TO FISHING INDUSTRY

This development of the fishing fleets is largely a result of government policy to encourage the expansion of fishery production.

In Belgium a loan of up to 70 percent of the value of the vessel (or the motor) can, in principle, be obtained for the building or purchase of a fishing vessel (or a motor)^{11/}. The Government allows a reduction in interest up to half of the normal rate of interest with a maximum of 3 percent, but demands a first mortgage on the vessel or motor. The loan is

^{10/}Source: *Jahresbericht über die Deutsche Fischerei*, 1957, pp. 105-111.

^{11/}Law of August 23, 1948.

generally repayable in 12 or 10 years, respectively, for vessels and motors built or bought in Belgium or abroad.

Further, four Royal Warrants^{12/} grant certain financial concessions to vessel owners: (1) financial aid for improving fishing equipment, (2) a subsidy to encourage research on fishing methods, (3) a premium to encourage the collection of data concerning costs and earnings, and (4) a premium to vessel owners and boys for each day spent at sea.

In France, three plans have affected the fishing industry: the first is a program for reconstruction, and the second and third are plans for modernization and development which include aid from the Government.

First, the shipyards are granted subsidies for the construction of vessels of more than 50 gross registered tons^{13/}; and second, a reduction in interest is granted to vessel owners obtaining a loan for the construction in France of a vessel of more than 20 gross registered tons, which reduces the rate of interest to 4.5 percent^{14/}. Finally, the Government made available additional funds to the "Credit Maritime Mutuel," so as to permit that organization to grant cheap loans to small fishing enterprises. The second and third plans for modernization and development include aid for processing and distribution as well as production.

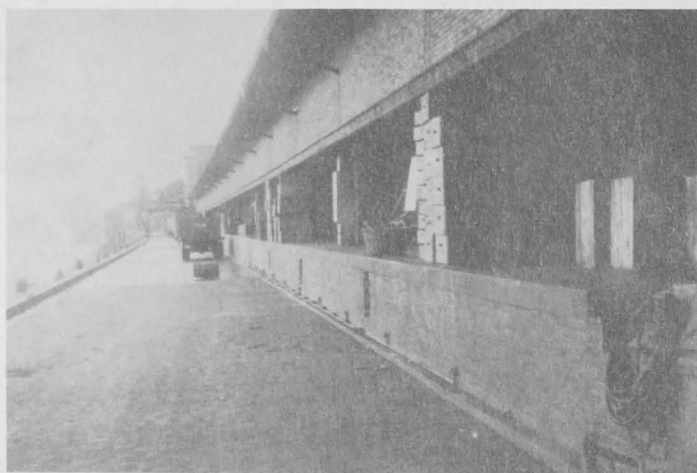


Fig. 7 - Dock and wharf buildings at Hamburg-Altona fish harbor, Hamburg, Germany.

In Italy loans for the development of fisheries may be granted from a special fund ("Fondo di rotazione")^{15/}. The loans are partly or completely guaranteed by the Government. In Italy there is also special assistance for the development of the fishing industry in the South^{16/}.

In the Netherlands Government aid to the fishing fleet is integrated in the Law on Material War Damage and the Special Finance Program for the Fishing Industry. The Law on Material War Damage^{17/} grants financial aid for repair or rebuilding of fishing craft. As postwar costs have risen considerably, provision is made in the law for special interventions, namely: (1) loans guaranteed by the Government and (2) "supplementary" financial aid. A

further provision applicable to the fishing industry is "facility credit," that is, credit with certain concessions as to interest rates and repayment^{18/}.

The Netherlands' Special Finance Program for the Fishing Industry^{19/} provides for financial aid on the basis of a fleet plan. Under this program the building of vessels can be financed by paying 25 percent in cash; obtaining another 25 percent on a mortgage; and supplying the balance of 50 percent as a loan from the Bank for Reconstruction. The latter loan is partially guaranteed by the Government.

In West Germany the Government grants loans for the building of fishing craft, allows a reduction in interest to 2 percent, grants subsidies for fuel, and subsidies for exploring new fishing grounds. From 1949 to 1951 the Government granted a coal subsidy and from 1951 to 1954 some reduction of taxes for firms and individuals who had interest-free loans for shipbuilding. Special aid is given deep-sea cutter and coastal fisheries.

^{12/}Royal Warrants of March 1, 1958.

^{13/}Law of May 24, 1951, and decree of November 25, 1951.

^{14/}Decree of March 18, 1954.

^{15/}Law of December 27, 1957.

^{16/}Law of July 29, 1957.

^{17/}This law dates from February 9, 1950, and took effect on February 24, 1950.

^{18/}This arrangement only applies to cases (rebuilding or repair) where credit is requested; it dates from August 9, 1954.

^{19/}The Program was in force on November 30, 1955, and is based on the report of the Commission for the Development of the Fishing Industry (Commission Tinbergen), which was submitted to the Government in May 1952.

NUMBER OF FISHERMEN

Because statistical data are lacking, the exact number of fishermen in the Common Market countries cannot be ascertained. Estimates indicate the following: Belgium about 1,800; France about 54,500; Italy about 123,000; Netherlands about 10,000; and West Germany about 117,000^{20/}.

In connection with the number of fishermen, it is interesting to mention the productivity per fisherman and per gross tonnage of vessel (table 1). No real significance, however, can be accorded these figures; they only indicate the general trend^{21/}.

West Germany ranks first for productivity per fisherman as well as for productivity per one gross tonnage of vessel. With regard to fisherman productivity, Belgium is second. For productivity per one gross tonnage of vessel, the Netherlands is second.

Table 1 - Productivity Per Fisherman and Per One-Gross Tonnage of Vessel in Common Market Countries in 1958

Country	Amount of Fish (Landed Weight) Produced Per	
	Fisherman	One Gross Tonnage of Vessel
 (Metric Tons)	
Belgium	32.0	2.0
France	8.5	1.9
Italy	1.6	1.3
Netherlands	26.4	3.0
West Germany	54.0	3.7

LANDINGS

In 1958, the total landings of fish and shellfish (including crustaceans and molluscs) of the Common Market Countries amounted to 1.6 million metric tons, landed weight. West Germany was the main producing country with about 631,300 tons, or 39.1 percent of the total landings; followed by France (28.8 percent), the Netherlands (16.3 percent), Italy (12.2 percent), and Belgium (3.6 percent).

Table 2 compares the combined fishery landings of the Common Market Countries with those of the most important fishing countries of the world.

On the basis of the average landings for 1953-57, the combined landings of the Common Market Countries are sixth in importance as compared with the other leading fishing countries of the world.

Table 2 - Landings in Most Important Fishing Countries of the World Compared with the Combined Landings for the Common Market Countries (Annual Average for 1953-57)^{1/}

Countries	Landings 1,000 Metric Tons
Japan	4,826
United States	2,716
China (Communist Mainland)	2,460
Russia	2,380
Norway	1,878
Common Market Countries	1,709
United Kingdom	1,070

^{1/}Yearbook of Fishery Statistics, 1958, vol. IX, Food and Agriculture Organization.

On the basis of the average landings for 1953-57, the combined landings of the Common Market Countries are sixth in importance as compared with the other leading fishing countries of the world.

CATCH TRENDS: During the five years of 1954-1958, the total fishery landings of the Common Market Countries decreased from 1,641,800 metric tons in 1954 to 1,614,800 tons in 1958, a decrease of 1.6 percent (table 3). The landings in that period reached the highest point in 1955 (1,733,100 tons).

The trend in fishery landings for each individual country is not the same as that for the six countries combined.

In Belgium the landings were highest in 1955, namely about 73,000 tons. After 1955 the landings dropped, but in 1958, they were slightly higher than in 1957. The French landings increased 7.6 percent from 1954 to 1956; after 1956 they remained at the same level. In Italy

^{20/}Source: Data from the Ministry of Agriculture, Brussels.

^{21/}I refer to the calculations of Dr. G. Meseck in "Jahresbericht uber die Deutsche Fischerei" 1957, p. 7.

Table 3 - Fishery Landings in the Common Market Countries, 1954-58^{1/}

Countries	1958	1957	1956	1955	1954
 (1,000 Metric Tons--Landed Weight)				
Belgium	57.6	56.4	62.2	72.9	66.2
France ^{2/}	465.8	465.1	478.1	458.6	444.4
Italy	196.5	204.7	208.0	208.0	207.6
Netherlands	263.6	252.8	249.8	264.1	286.9
West Germany	631.3	663.8	669.7	729.4	637.2
Total	1,614.8	1,642.8	1,668.5	1,733.1	1,641.8

^{1/}Excluding fresh-water fish and salmons, trouts, smelts, etc.
^{2/}Including Algeria.
Source: Yearbook of Fishery Statistics, 1958, vol. IX, Food and Agriculture Organization.

there were no important changes in landings from 1954 to 1956; in 1957 and especially in 1958, however, landings dropped off considerably. In the Netherlands the landings reached their lowest level in 1956; for 1957 and 1958 landings were higher, namely about 252,800 tons and 263,600 tons, respectively. In West Germany the peak year was 1955 (729,400 tons). After that year the German landings dropped off heavily--in 1958 the landings totaled about 631,000 tons, a decrease of 13.5 percent as compared to 1955.

COMPOSITION OF CATCH: In the Common Market, particularly roundfish and fresh herring are landed. Between 1954 and 1958, 43.7 percent and 19.5 percent of the total landings consisted of roundfish and fresh herring, respectively. The fact that roundfish and herring predominate in catches is in a way the crux of the productivity problem of the Common Market Countries. For, generally speaking, these species are, to say the least, not very popular with the consumer. Herring, moreover, is extremely seasonal in occurrence and much of the roundfish is caught far away from the main consumer centers^{22/}.

The composition of the catches in the member countries by species groups is shown in table 4.

Country	Flatfish	Roundfish		Herring		Sprat ^{3/}	Mackerel	Sardines	Shrimp ^{4/}	Mussels	Other	Total
		Large ^{1/}	Small ^{2/}	Salted	Fresh							
(1,000 Metric Tons)												
Belgium	12.0	26.8	4.1	-	10.2	1.3	0.4	-	2.3	-	6.0	63.1
France	13.2	128.5	114.4	0.3	48.9	2.0	34.9	33.5	3.1	5.8	77.8	462.4
Italy	0.5	6.4	80.3	-	-	-	-	68.0	0.6	2.9	46.3	205.0
Netherlands . .	19.8	24.3	5.9	77.7	44.3	2.0	13.6	-	5.0	57.3	13.6	263.5
W. Germany . .	8.7	173.8	161.7	45.7	219.8	4.8	7.8	-	5.5	7.3	31.2	666.3
Total	54.2	359.8	366.4	123.7	323.2	10.1	56.7	101.5	16.5	73.3	174.9	1,660.3

^{1/}Cod, hake, haddock, etc.
^{2/}Miscellaneous marine teleosteans.
^{3/}Including anchovy.
^{4/}Food shrimp.
Source: FAO Yearbook of Fishery Statistics, 1958, vol. IX.

Of the Common Market Countries, the two most important producing countries of roundfish are West Germany and France. For the years 1954-58, Germany supplied 48.3 percent of the large roundfish and 44.1 percent of the small roundfish landed in Common Market Countries. France supplied 35.7 percent of the large roundfish and 31.2 percent of the small roundfish. Fresh herring is mainly landed by West Germany; between 1954 and 1958 the West German landings accounted for 68.0 percent of the total landings of herring in Common Market Countries, followed by France and the Netherlands.



Fig. 8 - Conveyors used for unloading herring from fishing vessels at Hamburg-Altona fish harbor.

For the supply of salted herring, the Netherlands are of paramount importance (account for 62.8 percent of the total landings). Sardines are supplied by Italy and France only. For flatfish the Netherlands accounts for 36.5 percent of the total landings, while the landings by France and Belgium are at about the same level (12,000 to 13,000 tons). The Netherlands and West Germany take an important place in the Common Market for the production of shrimp while mussel fisheries are mainly carried on in the Netherlands.

^{22/}Source: "OECE-Fish Marketing in Western Europe Since 1950," Paris, p. 23.

EX-VESSEL PRICES

French ex-vessel or landed prices for fishery products from the sea are very high in comparison with those in the other Common Market Countries. For salted herring and mackerel, the Netherlands reports the lowest prices. For flatfish, large roundfish, fresh herring, and shrimp, German prices are the lowest.

At the coastal fish markets, ex-vessel prices are determined at auction sales. But as the prices at the point of landing depend on many factors, wide fluctuations are characteristic.

In order to obtain a certain stability of prices, Belgium, France^{23/}, the Netherlands, and West Germany have established a system of minimum ex-vessel or landed prices for certain sea products. The system only aims at giving a "bottom" to the market and works rather simply. The products which do not obtain the minimum price by auction sales are not sold for human consumption, but are disposed of at a much lower price to fish-meal factories. The difference between the minimum price and the price obtained from fish-meal factories is paid from a special fund (equalization fund). The fund is financed by a special levy on the value of the fish sold at auctions. In Belgium the minimum prices are fixed by a shipowners' union in deliberation with the Ministry of Agriculture. In the Netherlands they are fixed by the Marketing Board for Fishery Products; there are however also minimum prices (e.g. for sprat and for salted herring) which are fixed by the owners' associations. In West Germany the Government fixes the prices on the basis of the Fisheries Law of August 31, 1955.

INTERNAL TRADE, UTILIZATION, AND CONSUMPTION

The landings of fishery production in the Common Market Countries are supplemented by imports, while a part are destined for export. The organization and the supply of the domestic markets in each country varies widely from one country to another. Generally speaking, the fishery products reach the consumer through a chain of wholesalers, importers, or exporters; and retailers or hawkers.

In West Germany much attention is given to the vertical structure of the fishing industry; this is estimated of essential importance for the profitability of the industry. A vertical structure means that shipowners have financial interests in catching activities, in the whole-sale trade, in the processing industries, and even in the retail trade. In other Common Market Countries (the Netherlands and France, e.g.) efforts for a similar organization are continued.

The processing industries are more developed in one country than in another of the Common Market Countries, but generally the same industries are found in all the

countries. In the Common Market the processing industries can still be further developed. This is clear from the enormous amount of fish which is sold fresh. Table 5 shows the utilization of the landings.

In the Common Market about 60 percent of the landings are marketed fresh and not even 2 percent are frozen. In Italy and Belgium fish is mostly sold fresh--86.7 percent and 75.2 percent of the landings, respectively. The Netherlands leads all the other countries in the utilization of fishery landings for dried, smoked, or salted fish, and also for fish meal and oil. France leads in the amount used for canning.

^{23/}In France there is an arrangement on landed prices in a limited number of ports.

Table 5 - Percentage of Utilization of the Fishery Landings in Common Market Countries, 1958^{1/}

Country	For Fresh Market	For Freezing	For Curing	For Canning	For Reduction	For Other Purposes
Belgium ^{2/} . . .	75.2	7.8	12.5	2.9	1.6	-
France ^{3/} . . .	5/60.4	-	27.9	11.7	-	-
Italy	86.7	1.9	7.2	4.2	-	-
Netherlands . .	48.5	3.5	30.6	6.4	5.3	5.7
W. Germany ^{4/} .	-	-	-	-	-	-
Total	63.0	1.9	23.7	8.2	1.6	1.6

1/Source: FAO Yearbook of Fishery Statistics, 1958, vol. IX.
2/1955.
3/Includes Algeria.
4/Not available.
5/Marketed fresh and for freezing.

Table 6 - Per Capita Consumption of Fishery Products in Common Market Countries, 1955-56^{1/}

Country	Pounds
Belgium and Luxemburg	33.7
France	32.3
Italy	27.3
The Netherlands	28.6
W. Germany	35.0

^{1/}Source: *Fish Marketing in Western Europe Since 1950*, p. 54. Organization of European Economic Cooperation, Paris.

which can contribute to an increase are: good quality, ready-to-cook products, regular supply of reasonably-priced fish, and well-planned advertising.

FOREIGN TRADE

The Common Market's trade balance for fishery products shows a considerable import surplus--for the years 1956-58, the Common Market had an annual average import surplus of 189,200 tons. Table 7 shows the average imports and exports of fishery products per country for the years 1956-58.

The two main fish-importing countries in the Common Market are West Germany and Italy--during the years 1956-58, those countries imported on the average 122,900 tons and 123,500 tons, respectively. France also imports large quantities of sea products (91,000 tons). In West Germany the annual average exports were about 41,700 tons. Italy, on the contrary, only exported 1,600 tons, so that she has the largest import surplus of the Common Market (-121,900 tons).

The Netherlands is the most important exporter of marine products in the Common Market--for the years 1956-58, 151,100 tons on the average. Her imports only amounted to 21,100 tons. The Netherlands is the only country in the Common Market to report an export surplus on the trade balance for marine products.

During the last five years, from 1954 to 1958, the fishery products imports in the Common Market increased from 376,976 tons to 455,049 tons; an increase of 20.7 percent. The peak year for imports was 1958.

Table 8 - Common Market Fishery Imports and Exports by Commodity Groups and by Country, Annual Averages 1956-58^{1/}

Commodity Groups	Belgium	France	Italy	Netherlands	West Germany	Total
. (1,000 Metric Tons)						
Imports:						
Fresh fish ^{2/}	12.3	31.3	34.3	7.5	20.5	105.9
Fresh herring	6.5	3/	3/	3.0	69.3	78.8
Salted, dried or smoked herring	12.8	4.4	3.7	0.8	11.4	33.1
Other processed fish	3.2	0.6	57.9	0.4	1.7	63.8
Canned fish	17.5	23.4	24.1	3.7	19.4	88.1
Molluscs and crustaceans	25.1	31.4	3.5	5.7	0.6	66.3
Total	77.4	91.1	123.5	21.1	122.9	436.0
Exports:						
Fresh fish ^{2/}	7.5	2.0	0.4	16.2	20.3	46.4
Fresh herring	1.5	3/	3/	21.5	0.6	23.6
Salted, dried or smoked herring	0.7	0.4	-	49.0	2.3	52.4
Other processed fish	2.9	28.4	-	1.0	6.4	38.7
Canned fish	0.7	3.2	0.9	13.0	7.5	25.3
Molluscs and crustaceans	1.2	3.9	0.3	50.4	4.6	60.4
Total	14.5	37.9	1.6	151.1	41.7	246.8

^{1/}Source: National statistics.

^{2/}1, e. fresh and frozen fish, excluding fresh herring.

^{3/}Included with fresh fish.

The consumption of fish is at a low level in the Common Market Countries (table 6).

Italy has the lowest per capita consumption while West Germany has the highest. In Belgium the consumption is practically as high as in West Germany.

In the future the consumption of fish can increase in the Common Market. The chief factors

Table 7 - The Common Market's Fishery Imports and Exports by Country, Annual Averages 1956-58^{1/}

Country	Imports	Exports	Net Import (-) Net Export (+)
. (1,000 Metric Tons)			
Belgium	77.4	14.5	- 62.9
France	91.1	37.9	- 53.2
Italy	123.5	1.6	-121.9
Netherlands	21.1	151.1	+130.0
W. Germany	122.9	41.7	- 81.2
Total	436.0	246.8	189.2

^{1/}Excludes fresh-water fish, caviar, and fish meal.

Source: National statistics.

In 1958, the Common Market fishery exports were equal to those of 1954 (about 257,600 tons); in 1955, 1956, and 1957 they were at a lower level.

COMPOSITION OF IMPORTS AND EXPORTS: The composition of imports and exports in the Common Market as a whole is not the same; imports and exports vary also widely from one country to another.

About 24.3 percent of the imports of the Common Market consist of fresh fish (excluding herring), followed by canned fish, fresh herring, molluscs and crustaceans, processed fish and salted, dried or smoked herring.

About 24.5 percent of the exports of the Common Market consist of molluscs and crustaceans, followed by salted, dried or smoked herring, fresh fish, processed fish, canned fish, and fresh herring.

SOURCE OF IMPORTS--DESTINATION OF EXPORTS: The source of imports and the destination of exports of the Common Market as a whole and for each country separately vary considerably.

Table 9 - Common Market Fishery Imports by Country of Origin and Exports by Country of Destination, Annual Averages 1956-58^{1/}

Country	Imports		Exports	
	From Common Market Countries	From Other Countries	From Common Market Countries	From Other Countries
(1,000 Metric Tons)				
Belgium . .	55.8	21.6	9.3	5.2
France . .	39.5	51.6	12.4	25.4
Italy	21.6	101.9	0.3	1.3
Netherlands	8.0	13.1	107.3	43.8
W. Germany	27.8	95.1	20.5	21.2
Total .	152.7	283.3	149.8	96.9

^{1/}Source: National statistics.

As shown in table 9, 35 percent of the imports come from member countries and 65 percent from other countries. Belgium imports 72.1 percent of her imports from member countries. The Netherlands is the main supplier, followed by West Germany and France. The most important sea products imported from the Netherlands are molluscs and crustaceans, salted herring, and fresh fish. France imports 43.4 percent from member countries. Again the largest quantities, especially molluscs and crustaceans, are supplied by the Netherlands. In Italy and the Netherlands, respectively, 17.5 percent and 37.9 percent of the imports come from the Common Market countries. For Italy, France (processed fish) and West Germany are the important suppliers. For the Netherlands, West Germany (fresh fish) and Belgium are the principal suppliers. West Germany imports 22.6 percent of her imports from member countries, especially from the Netherlands (fresh and salted herring) and Belgium. Nonmember countries mainly supply Italy (82.5 percent of her total imports), the Netherlands (62.1 percent of her imports), and West Germany (77.4 percent of her imports).

About 60 percent of the exports of the Common Market Countries are destined for member countries and about 40 percent to other countries. Belgium sells 64.1 percent of her exports to the Common Market. France is the most important market for Belgium (especially for fresh fish). France exports 32.7 percent to member countries, with Italy her best customer. Italy is not important as an exporter. The Netherlands, on the contrary, sells more than 71.0 percent of her exports to member countries. Her principal markets are Belgium, France, West Germany, and Italy. West Germany has an outlet in the Common Market for about 49.2 percent of her exports, and her best customers are Italy and France. As an outlet for sea products, nonmember countries are important to Italy, France, and West Germany.



Fig. 9 - Trawl doors and other vessel supplies on dock at Hamburg.

TRADE BARRIERS

The import duties and quota restrictions still protect the national fishing industries in the Common Market. Import duties on fishery products are still rather high in the Common Market, except for Belgium and the Netherlands^{24/}. Moreover, they include many products.

^{24/}In Belgium and the Netherlands there are only duties on canned goods and on certain species of molluscs and crustaceans.

In France the import duties vary between 9 (certain species of molluscs and crustaceans) and 31.5 percent (fillets); in Italy between 0 and 27 percent (canned fish); in West Germany between 0 and 27 percent (certain species of molluscs and crustaceans). The imports are also subject to other duties, e.g. fiscal taxes (Belgium and the Netherlands); sales taxes (West Germany); taxes for sanitary control and inspections (in France); statistical levy (in Italy).

The Common Market countries have agreed to establish a common external tariff. For most of the fishery products there was an agreement on the external tariff by the signing of the Treaty; for other products--fresh fish and salted, dried or smoked fish--the level of the tariff would be fixed by negotiations^{25/}.

Recently an agreement was reached on the level of the external tariff for those products. For the Benelux-countries the external tariff includes a stronger protection, while for other countries, France in particular, the protection will be weaker.

On January 1, 1959, the quota restrictions were extended, but the imports are at the moment more liberalized in one member country than in another. The intra-Benelux fish trade is liberalized, but the Benelux-countries still have quota restrictions for fresh fish (excluding sprat), fresh herring, salted, dried or smoked herring, and shrimp. West Germany has import quotas for salted herring and herring fillets, dried fish, and shrimp; France has restrictions for fresh fish, canned fish, and certain species of dried fish.

CONCLUSION

In order to establish a Common Market for the fishing industry, certain adjustments inevitably will be necessary. The development of the fishing industry in the Common Market can, however, hardly be foreseen for the moment; many factors will have an influence, while uncertainty still prevails about the interpretation of many provisions of the Treaty of Rome. This is especially so for the provisions about the common policy for the fishing industry. The Treaty provides for three possibilities of a common policy: (1) common rules concerning competition; (2) coordination of the national market organizations; (3) a European market organization. Whichever possibility will be chosen, the aims of common policy will be tied to it. The aims are: (1) increase of productivity; (2) reasonable standard of living for those engaged in the fishing industry; (3) stabilization of the market; (4) a regular supply; and (5) reasonable prices to the consumers.

The extension of the Common Market for the fishing industry will further depend on the coordination of all regulations in the industry. Up till now the governmental and private regulations differ from each other. Moreover, numerous practices are not fully understood nor easily determined.

Uniform regulations together with an over-all European policy, however, will make possible complete understanding between the member countries, and at the same time allow fisheries to develop.

^{25/}Article 20.



FIRST OYSTERS IMPORTED FROM JAPAN FOR CULTIVATION

Professor Mitsukari of the Imperial University of Tokyo suggested in 1899 that oysters from Akkeshi Hokkaido, a northern island, would be best adapted for transportation to America. In 1902, four carloads of Japanese oysters were planted in Puget Sound on the west coast of the United States. The following year 12 carloads were planted, and the practice has continued, with success, on a much larger scale.

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