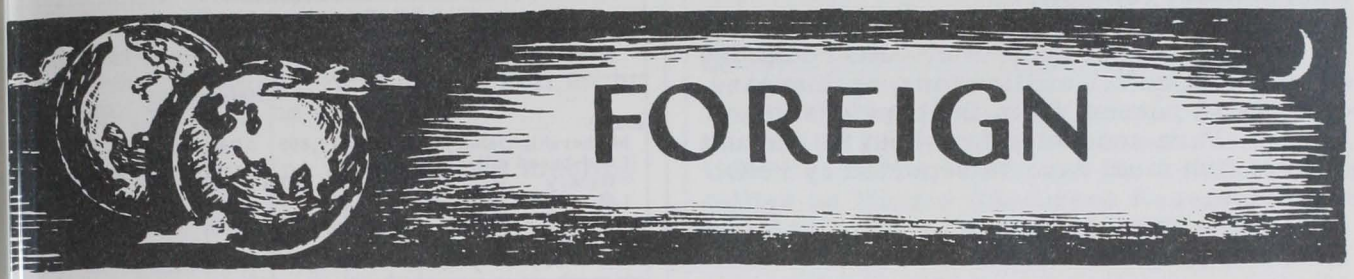


## International

ISH MEAL

### WORLD PRODUCTION, JANUARY 1965 WITH COMPARISONS:

The high level of fish meal production in Peru was the dominant factor in world fish meal production in December 1964 and January 1965 as output in the United States and several other countries declined seasonally. World output in January 1965 showed a modest decline from the same month in the previous year due to lower production in Chile, South Africa, Norway, Iceland, West Germany, and Denmark.

World fish meal production in 1964 was considerably above that in 1963. The increase was due largely to expanded production in Peru. Higher production in 1964 was also reported in Norway, South Africa, Chile, Iceland, Angola, and Denmark. The increase was partly offset by lower production in Canada and the United States.

Most of the principal countries producing fish meal submit data to the International Association of Fish Meal Manufacturers monthly (see table).

World Fish Meal Production by Countries, January 1965, December 1964, and Year 1964 with Comparisons

| Country | Jan. | | Dec. | Jan.-Dec. | |
|---|---|---|---|---|---|
| | 1965 | 1964 | 1964 | 1964 | 1963 |
| | (Metric Tons) | | | | |
| nada | 5,441 | 3,405 | 5,621 | 56,215 | 77,436 |
| nmark | 5,887 | 8,799 | 5,161 | 109,687 | 100,001 |
| nce | 1,100 | 1,100 | 1,100 | 13,200 | 13,200 |
| rman Fed. Rep. | 4,635 | 6,757 | 5,116 | 73,900 | 73,997 |
| herlands | 1/ | 800 | 1/ | 2/6,700 | 6,800 |
| n | 1/ | 1/ | 1/ | 1/ | 3/21,687 |
| den | 590 | 1,070 | 622 | 7,600 | 6,636 |
| ed Kingdom | 7,259 | 7,736 | 5,720 | 74,813 | 75,331 |
| ed States | 2,512 | 1,667 | 6,610 | 189,553 | 4/232,133 |
| ola | 1/ | 5,548 | 6,985 | 59,701 | 31,829 |
| and | 4,200 | 5,736 | 9,253 | 127,739 | 87,730 |
| way | 5,894 | 8,607 | 10,172 | 185,901 | 131,546 |
| u | 194,104 | 195,551 | 180,979 | 1,552,214 | 1,159,233 |
| Afr. (incl. W. Afr.) | 8,744 | 14,302 | 1,075 | 4/257,440 | 238,269 |
| gium | 375 | 375 | 375 | 4,500 | 4,500 |
| ile | 12,855 | 21,848 | 9,836 | 144,456 | 92,715 |
| rocco | 1/ | 270 | 1/ | 5/18,450 | 6/19,000 |
| Total | 253,596 | 283,571 | 248,625 | 2,882,069 | 2,372,043 |

ta not available.
ta available only for Jan.-Oct. 1964.
ta available only for Jan.-Nov. 1963.
vised.
ta available only for Jan.-Nov. 1964.
timated.
Japan does not report fish meal production to the International Association of Fish Meal manufacturers at present.

* * * * *

### PRODUCTION AND EXPORTS FOR SELECTED COUNTRIES, 1963-64:

Member countries of the Fish Meal Exporters' Organization (FEO) account for about 90 percent of world exports of fish meal. The FEO countries are Chile, Angola, Iceland, Norway, Peru, and South Africa/South-West Africa.

Table 1 - Exports of Fish Meal by Member Countries of the FEO, 1963-64

| Country | Oct. | | Nov. | | Dec. | | Jan.-Dec. | |
|---|---|---|---|---|---|---|---|---|
| | 1964 | 1963 | 1964 | 1963 | 1964 | 1963 | 1964 | 1963 |
| | (1,000 Metric Tons) | | | | | | | |
| Chile | 9.3 | 2.8 | 12.4 | 1.2 | 1/11.6 | 3.8 | 137.8 | 86.8 |
| Angola | 4.8 | 3.6 | 4.2 | 1.8 | 4.0 | 7.0 | 56.0 | 30.0 |
| Iceland | 10.9 | 10.2 | 10.9 | 14.7 | 12.4 | 17.6 | 124.3 | 99.1 |
| Norway | 12.8 | 12.1 | 14.4 | 15.9 | 9.1 | 18.1 | 179.4 | 102.1 |
| Peru | 84.4 | 83.3 | 109.7 | 90.4 | 123.8 | 104.7 | 1,416.5 | 1,159.3 |
| So. Africa (including S.-W. Africa) | 25.5 | 40.9 | 18.7 | 18.3 | 13.7 | 13.4 | 226.5 | 198.8 |
| Total | 147.7 | 152.9 | 170.3 | 142.3 | 174.6 | 164.6 | 2,140.5 | 1,678.0 |

The FAO countries produced 2.3 million metric tons of fish meal in 1964 or about 70 percent of total world production estimated at 3.3 million tons.

Table 2 - Production of Fish Meal by Member Countries of the FEO, 1963-64

| Country | Oct. | | Nov. | | Dec. | | Jan.-Dec. | |
|---|---|---|---|---|---|---|---|---|
| | 1964 | 1963 | 1964 | 1963 | 1964 | 1963 | 1964 | 1963 |
| | (1,000 Metric Tons) | | | | | | | |
| Chile | 10.7 | 0.9 | 9.6 | 3.7 | 9.8 | 13.1 | 147.0 | 92.7 |
| Angola | 5.4 | 3.6 | 5.2 | 3.0 | 5.0 | 7.4 | 57.0 | 31.5 |
| Iceland | 13.1 | 0.9 | 3.2 | 0.8 | 9.3 | 8.7 | 127.7 | 87.7 |
| Norway | 15.8 | 7.8 | 13.1 | 12.1 | 10.2 | 9.6 | 185.9 | 132.2 |
| Peru | 130.5 | 76.8 | 181.7 | 116.1 | 181.0 | 139.7 | 1,552.2 | 1,159.2 |
| So. Africa (including S.-W. Africa) | 16.0 | 17.0 | 9.0 | 3.8 | 1.0 | 1.2 | 257.4 | 238.0 |
| Total | 191.5 | 107.0 | 221.8 | 139.5 | 216.3 | 179.7 | 2,327.9 | 1,741.3 |

1/Estimated.
Note: Because of rounding, some totals do not add.

International (Contd.):

Total fish meal exports by FEO countries in 1964 totaled 2.1 million tons, an increase of about 28 percent from the previous year. In 1964, Peru accounted for about 66 percent of total fish meal exports reported by FEO countries.

SALMON

## JAPAN AND U.S.S.R. SALMON CATCH IN 1964:

The Japanese Fisheries Agency on February 8, 1965, released Japan's 1964 salmon catch data compiled in preparation for the Ninth Annual Meeting of the Northwest Pacific Fisheries Commission (Japan-U.S.S.R.), which convened March 2. According to the Agency's tabulations, Japan's 1964 salmon catch totaled 105,035 metric tons.

Aboard a Japanese fishing vessel in North Pacific, pulling in a gill net and removing salmon.

Japan and U.S.S.R. Salmon Catch by Species, 1964

| Fishery | Red | Chum | Pink | Silver | King | Total |
|---|---|---|---|---|---|---|
| | (Metric Tons) | | | | | |
| Japan: | | | | | | |
| Mothership fishery | 14,125 | 17,896 | 3,048 | 8,250 | 1,130 | 44,44 |
| Land-based gill-net fishery | 160 | 14,797 | 15,716 | 4,252 | 789 | 1/35,71 |
| Land-based long-line fishery | 12 | 3,184 | 7,296 | 13 | 54 | 10,5 |
| Japan Sea & Pacific coastal fishery | 6 | 4,870 | 9,293 | 50 | 94 | 14,3 |
| Total | 14,303 | 40,747 | 35,353 | 12,565 | 2,067 | 105,0 |
| U.S.S.R.: | | | | | | |
| Far Eastern coastal fishery | 2,692 | 27,794 | 14,678 | 1,118 | 1,431 | 47,71 |

1/Includes 9,012 metric tons taken in Area A (north of 45° N. latitude).

The Agency also announced that the 1964 Soviet Far Eastern coastal salmon catch totaled 47,715 metric tons (26 percent below that country's catch target of 65,000 tons), a postwar record low. The Russian salmon catch in 1963 totaled 81,130 metric tons. (Suisan Keizai Shimbun, February 16; Hokkai Suisan, February 15, 1965.)

FOOD AND AGRICULTURE ORGANIZATION

## THIRD INTERNATIONAL TECHNICAL MEETING ON FISHING BOATS:

The needs of developing countries for smaller fishing craft (under 100 gross tons) especially adaptable for fishing their own local waters will be the theme of the Food and Agriculture Organization's (FAO) 3rd International Technical Meeting on Fishing Boats, to be held at Göteborg, Sweden, October 23-29, 1965. The meeting is in conjunction with the 3rd Swedish International Fishery Trade Fair, also to be held at Goteborg, October 29-November

In an interview, Chief of FAO's Fishing Boat Section and technical secretary for the Göteborg meeting said:

"The importance of these smaller craft is simply that they so greatly outnumber the larger boats in the world's fisheries. The small boats pose many interesting and difficult technical problems. They are products of local development, designed both from tradition and from a need to meet local conditions while making use of local materials. What we hope to accomplish at Göteborg is to come up with ideas and recommendations that will enable us to set better standards for the small boats." Naval architects and marine engineers so far have devoted little time to such smaller craft. Yet they have an importance

nternational (Contd.):

hat cannot be overlooked if fishing is to prog-ess in the developing nations, as well as in leveloped nations, he said.

The prospectus for the Göteborg meeting alls for a review of technical progress in val architecture and marine engineering. elegates will review current developments fishing vessel design and prospects for the ture, the social and economic background fecting fishing in the developing nations, the aworthy aspects and workability of small aft, powering and engineering, as well as a eakdown of design problems covering ves-ls of 20 gross tons and under, and those of to 100 gross tons. Mechanization of na-e craft with outboards will also be studied.

The head of FAO's Fishing Boat Section inted out that since 1947 when the first in-rnational meeting on fishing boats was held Göteborg, FAO has undertaken a number missions to help developing countries im-ove the designs of their fishing vessels. veral thousand vessels had been built from AO designs and, although this was not a eat number, a wealth of experience has en gained, much of which would be reviewed ring the coming meeting. A number of spe-alized meetings on fishing-vessel design ve been held in various parts of the world, said. Among the FAO-sponsored meetings re: the 1st FAO Fishing Boat Congress, ld in Paris and Miami in 1953; the 2nd Con-ess in Rome in 1959; the FAO Research ssel Forum at Tokyo in 1961; the Indo-cific Fisheries Council/FAO Symposium Mechanization of Fishing Craft at Seoul in 62; and the FAO Fishing Vessel Stability eting at Gdańsk, Poland, in 1963. In addi-n, the 1st and 2nd FAO Fishing Gear Con-sses, held at Hamburg in 1947 and London 963, dealt with certain aspects of fishing-sel design.

About 300 participants from some 30 coun-es are expected to attend the Göteborg eting. About 35 technical papers will be sented, several of them by FAO experts. od and Agriculture Organization, Rome, bruary 1965.)

te: See Commercial Fisheries Review, Sept. 1964 p. 64, Aug. 963 p. 67.

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## ADVISORY COMMITTEE ON MARINE RESOURCES RESEARCH MEETS IN ROME:

How to promote a more rational exploitation of the world's ocean resources was discussed by 15 fisheries scientists from 11 nations at the 3rd Session of the Advisory Committee on Marine Resources Research, Food and Agriculture Organization (FAO), held in Rome, March 1-8, 1965. Set up in 1963, the Committee's principal function is to help FAO in establishing a worldwide program of research into the resources of the sea. Another of its functions is to advise on how to improve international cooperation in using the living resources of the sea.

Speaking before the Committee's opening session, Dr. B. R. Sen, FAO's Director-General said that international cooperation was a "must" if the living resources of the sea are to be rationally exploited. He cited the declining Antarctic whale stocks as an example of what can happen in other important fisheries unless the nations agree to a truly international long-term planning of the world sea harvest.

"In the 12 months since this Advisory Committee last met," the Director-General said, "we have seen the International Whaling Commission fail to achieve agreement for the conservation of these severely depleted stocks, with the result that once again they will be overexploited by the powerful whaling fleets of several nations. The case of the Antarctic whales is important to me in its own right, as we see a large food resource being destroyed." Perhaps more important, he said, was that failure to secure rational exploitation in this case might weaken other international efforts aimed at securing wiser management of the world's marine resources.

Some countries are presently attempting to convene an extraordinary meeting of the Whaling Commission to deal with the problem, he added. If such an extraordinary meeting were held and again failed to solve the Antarctic whale problem, FAO was willing, at the request of member governments, to call an emergency meeting of the countries directly concerned, the Director-General said. He also told the Advisory Committee's 15 scientists that he would propose to FAO's next Conference, which is to be held in November 1965, the establishment of a permanent com-

International (Contd.):

mittee on fisheries and a major strengthening of FAO work in fisheries.

One of the proposed committee's principal tasks, he said, would be periodically "to conduct general reviews of fishery problems of an international character and to suggest measures for their solution."

Strengthening of FAO's work in fisheries was necessary, he said, "to cope with the enormously increased demand on FAO resulting from the situation in world fisheries."

"The situation is becoming more and more complex; it requires not only a rational planning for long-term development, but in certain cases emergency action."

Following Dr. Sen's remarks, Roy Jackson, Director of FAO's Division of Fisheries told the meeting that expansion of the organization's work in fisheries was imperative if FAO was to be of maximum use to the fishing nations, particularly the developing ones.

"The problems are still arising faster than we can even begin to consider them, let alone solve them. This is our present situation," he said.

Among the priorities, he said, were the need for more research on stocks and fish population dynamics, studies on the growing pollution of marine waters, strengthening FAO's field program in fisheries, and the launching of the World Program of Marine Resources Research, proposed last year by Dr. Sen.

At the 1965 Session the Committee also reviewed the fisheries aspects of the pollution of marine waters and the work of FAO's various regional fisheries councils and commissions, and advised FAO on its proposed program of work in fisheries research and management for 1966/67.

The 3rd Session of the Committee was preceded by a meeting held February 25-28 of the Committee's working group on direct and more speedy estimation of fish abundance.

The Advisory Committee meets once a year and reports its findings to the FAO Director-General. Its members are from Argentina, Australia, Canada, the Federal Republic of Germany, Ghana, India, Japan, the Netherlands, Poland, the United Kingdom, the United States, and the Soviet Union. The scientists are appointed to the Committee by the FAO Director-General on the basis of their expert knowledge, and not as representatives of their governments.

In addition to its FAO role, the Committee acts as the advisory group on the oceanographic aspects of fisheries to the InterGovernmental Oceanographic Commission of the United Nations Educational, Scientific, and Cultural Organization (UNESCO). (Food and Agriculture Organization Rome, February 1 and March 1, 1965.)

Note: See Commercial Fisheries Review, April 1964 p. 42.

FISHERY TRADE FAIR

## THIRD SWEDISH INTERNATIONAL FAIR TO BE HELD AT GOTEBORG:

The 3rd Swedish International Fishery Trade Fair will be held at Goteborg, October 29 to November 7, 1965, in the Swedish Trade Fair's exhibition halls (Svenska Massan).

ternational (Contd.):

Products on display at the fair will be:

(1) Fishing boats, lifeboats, liferafts, wheelhouses;

(2) Engines, pumps, winches, steering gear, propellers;

(3) Anchors, chains, fittings, cordage, tarpaulins;

(4) Telephones, radios, direction-finders, electrical equipment;

(5) Trawls, drift nets, and similar equipment;

(6) Oilskins, boots, vests, gloves;

(7) Freezing and refrigerating machines, gutting and cutting machines;

(8) Conveyors, loading tables, packing machines, forklift trucks, scales;

(9) Fuel and lubricants, paints and varnishes.

The 1st and 2nd Swedish International hery Trade Fairs were held at the same e and premises in 1961 and 1963, respecely.

The Food and Agriculture Organization O) of the United Nations will, in conjunc- with the Fair, hold a conference on fishcraft problems. About 300 representaes from 30 countries are expected to parpate in the FAO conference, which is duled for October 23-29, 1965. Similar erences have previously been held in s in 1953, and in Rome in 1959. (United s Consulate, Goteborg, February 18, .)

HWEST PACIFIC FISHERIES COMMISSION

ANESE AND SOVIET PRECONFERENCE WS ON SALMON AND B NEGOTIATIONS:

he U.S.S.R. is alarmed at the decline of almon catch in the northwest Pacific. was a major point of a Soviet fishery iator who outlined Soviet views for the nese newspaper Hokkaido Shimbun prior e opening on March 1, 1965, of the ninth al meeting of the Northwest Pacific Fisheries Commission. (The Commission sets salmon and king crab catch quotas in western Pacific waters covered under a Japanese-Soviet treaty. Treaty waters north of 45° N. latitude are designated Area A; those south of 45° N. latitude are designated Area B.)

A catch of salmon aboard a Japanese high-seas mothership operating in the North Pacific Ocean during the salmon season.

Discussing salmon fishing, the Soviet negotiator in his article in the Japanese newspaper painted a pessimistic picture of the continuing decline of salmon resources: the combined Japanese and Soviet catch in Northwest Pacific Treaty waters in 1964 (about 155,000 metric tons) was less than half that of 8 to 10 years ago; the spawning migration of salmon was "insignificant;" and finally, the the pink salmon catch in treaty waters (55,000 tons in 1964) was less than a quarter of that of a decade ago. This he found "alarming."

Soviet Salmon Catch in the Northwest Pacific, 1962-1964

| Species | Year | | |
|---|---|---|---|
| | 1964 | 1963 | 1962 |
| | (Metric Tons) | | |
| Red salmon | 2,692.1 | 3,442.0 | 4,649.0 |
| Chum salmon | 27,794.6 | 33,565.7 | 33,992.0 |
| Pink salmon | 14,678.8 | 35,766.7 | 16,284.0 |
| Silver salmon | 1,118.3 | 7,353.1 | 4,680.0 |
| King salmon | 1,431.3 | 1,003.3 | 960.0 |
| Total | 47,715.1 | 81,130.8 | 60,565.0 |

Referring specifically to salmon fishing in the B-area, the Soviet negotiator cited his belief that the catch was small and costly, and the salmon runs declining steadily. Thus one task of the fisheries talks will be "to prevent the danger of extermination of salmon resources."

International (Contd.):

The Soviet negotiator also said that the regulation of crab fishing on the Asian Continental Shelf and the proper control of herring fishing in the Hokkaido-Sakhalin area were "pressing problems." (United States Consul, Sapporo, Japan, February 25, 1965.)

Japanese preconference views on the negotiations were summarized in the Japanese periodical Tokyo Shimbun, January 19, 1965. The main points were as follows:

The Japanese Government, with industry support, will insist on a Japanese salmon catch quota in 1965 for Areas A and B combined of 120,000 metr . tons (the same as in 1963, but up 10,000 tons from 1964). In support of their position the Japanese cite the theory of alternating lean and good salmon seasons which indicates 1965 will be a good year. (United States Embassy, Tokyo, January 25, 1965.)

Note: See Commercial Fisheries Review, April 1965 p. 72; July 1964 p. 42; June 1964 p. 60.

NORTH PACIFIC FUR SEAL COMMISSION

## 8TH ANNUAL MEETING CONVENES IN TOKYO:

The 8th annual meeting of the North Pacific Fur Seal Commission was held in Tokyo, February 22-26, 1965, with the four governments which are Parties to the Interim Convention on Conservation of North Pacific Fur Seals participating. The Convention entered into force in 1957 on ratification by Canada, Japan, the Soviet Union, and the United States. It was the first meeting held by the Commission since the Convention was amended by a Protocol which was ratified by the four governments in 1964.

At the meeting the Commission reviewed and approved the research and management work done in 1964 on the fur-seal herds of the Commander, Robben, and Pribilof Islands. The seal herds of Robben Island and the Commander Islands continue to show a favorable increase in numbers. The herd on the Pribilof Islands is considered to be nearing optimum size, but uncertainties regarding that conclusion still remain. No further reduction of the female component of the Pribilof herd is planned, but a kill of females limited to the estimated annual surplus will be continued. Efforts are being directed toward refinement of seal population research. The commercial harvest of seals in 1964 was 18,873 from Robben Island and the Comma er Islands and 65,432 from the Pribilof Islands. This compares with 14,656 and 86,2 respectively, taken in 1963.

During 1964, Japanese and Canadian sci tists visited the Pribilof Islands to observe and participate in the research work being carried out in the United States.

The Commission has as its major resp sibility investigation of the fur seal popul tions of the North Pacific Ocean and deter nation of the measures which will make p sible the maximum sustained yield from t resource. (Fisheries Attache, United Sta Embassy, Tokyo, February 19, 1965.)

The Commission is composed of repr sentatives from the member countries. T are William M. Sprules, Special Assistan the Deputy Minister of Fisheries of Cana Tomoyoshi Kamenaga, Chief, Production vision, Fisheries Agency of Japan; A. S. Babaev, Chief Specialist, State Committee on Fisheries, U.S.S.R.; and Ralph C. Bake Assistant Director for Resource Development, U. S. Bureau of Commercial Fisher United States. Kamenaga as Chairman of the Commission presided at the meetings. The Commission meeting was preceded by meeting of the Commission's Standing Sci tific Committee which began February 15.

The Soviet Commissioner was elected Chairman of the Commission and the Unit States Commissioner was elected Vice Cha man. The term of the newly elected offic will extend through the next annual meetin which will be held in Ottawa, Canada, begi ning February 21, 1966. The Standing Sci tific Committee will meet one week earli to consider the results of the preceding y investigations and to prepare its report f the Commission.

Note: See Commercial Fisheries Review, April 1964 p. 48.

GENERAL AGREEMENT ON TARIFFS AND TRADE (GATT)

## TWENTY-SECOND SESSION MEETS IN GENEVA:

Further reduction of import restrictio was an important item on the agenda of th 22nd Session of the Contracting Parties t GATT scheduled to meet in Geneva, Marc 2-26, 1965. The agenda also called for a cussion of trade expansion in the less dev oped countries.

ternational (Contd.):

Two countries, Malta and Malawi, have hered to the GATT since the 21st Session, inging the total number of contracting par- s to 64.

The GATT is the principal international rum in which trade policy problems are scussed and resolved among the world's ding nations. The GATT, whose members e responsible for over 80 percent of world de, is the multilateral trade agreement ch replaced the old bilateral trading sys- existing prior to World War II. The Ken- y Round negotiations for the lowering of de barriers is also taking place within the nework of the GATT. (U. S. Department tate, March 1, 1965.)

See Commercial Fisheries Review, May 1964 p. 41.

OF THE SEA

RTAIN INTERNATIONAL NVENTIONS RATIFIED BY LY AND NEW ZEALAND:

On January 18, 1965, New Zealand depos- its ratification of the Convention on the ntinental Shelf. The Convention entered in- force June 10, 1964.

On December 17, 1964, Italy deposited its cession to the Convention on the Territorial and the Contiguous Zone, and the Conven- on the High Seas. Those Conventions en- ed into force September 10, 1964, and Sep- ber 30, 1962, respectively.

The Conventions ratified by New Zealand Italy were formulated at the United Na- s Conference on the Law of the Sea at eva on April 29, 1958. (Department of e Bulletin, February 22, 1965.)

See Commercial Fisheries Review, Mar. 1965 p. 83; Jan. p. 59; Dec. 1964 p. 39; Nov. 1964 p. 70; Oct. 1964 p.

CO INTERGOVERNMENTAL NOGRAPHIC COMMISSION

ESTABLISHES WORKING GROUP MUTUAL ASSISTANCE:

The Intergovernmental Oceanographic mission (IOC) of UNESCO at its Third ion, which met June 1964 in Paris, passed solution recognizing the urgent necessity mutual assistance between its Member es in developing their national programs der to study the oceans as a whole more oughly. (IOC programs are carried out through cooperative action by Member States rather than by centralized action.)

At the June 1964 meeting, IOC decided to establish a Working Group on Mutual Assist- ance to carry out the following tasks, among others: (1) Encourage sister-relationships between universities and government agencies in advanced countries on the one hand and de- veloping countries on the other. (2) Obtain and arrange to report information on the availability of reliable, easily operated, and relatively inexpensive oceanographic instru- ments; also report on standard methods and procedures. (3) Study and advise on curricula and methods for educating marine scientists and technicians. (4) Help Member States to obtain needed financial and technical assist- ance for development of marine sciences. (5) Arrange for places on research vessels for the training of marine scientists and techni- cians of developing countries. (6) Encourage regional collaboration between institutions working in neighboring areas. (Pacific Science Association Information Bulletin, Vol. 16, No. 6, December 1964.)

Note: See Commercial Fisheries Review, July 1964 p. 44.

UNITED NATIONS SPECIAL FUND

DEVELOPMENT PROJECTS TO AID FISHERIES IN ARGENTINA, GHANA, PAKISTAN, CENTRAL AMERICA, AND EAST AFRICA:

The Governing Council of the United Na- tions Special Fund held its Thirteenth Session in New York City, January 11-18, 1965, and approved five new fishery development proj- ects. The Food and Agriculture Organization will serve as the executing agency for the projects.

The projects may offer an opportunity to United States firms to compete internationally in providing consultative services, or equip- ment and materials.

Following are summaries of the five fish- ery development projects approved:

Argentina (SF/R. 10/Addendum 2): Fishery develop- ment project: Fund allocation $1,509,400; recipient gov- ernment counterpart contribution $1,572,000; duration 5 years.

Argentina's fisheries landings of a little over 100,000 metric tons a year are thought to be only a fraction of the country's marine potential.

The immediate objectives of the Special Fund project in Argentina are to: (1) conduct an extensive exploratory fishing survey; and (2) provide advisory services to help

International (Contd.):

the Argentine Government and industry overcome institutional and other problems which have been hampering fisheries development.

Purse-seine fishing for anchovy, mackerel, and other pelagic species will be emphasized at the start of exploratory work. The introduction of purse seines may provide an immediate solution to the raw material shortage at Argentine fish meal plants and canneries. Other resources that may be studied by exploratory fishing are shrimp, bottomfish, squid, and octopus. Echo-sounding surveys with vertical and horizontal sonic equipment will be made during exploratory fishing.

For this project, the Special Fund will provide an exploratory fishing vessel equipped with fishing gear; additional research equipment; and an international expert team consisting of two biologists, one or two master fishermen, an economist, and a Project Manager who will be a fisheries industry expert with considerable background in technology. Additional consultative services will be made available to cope with special problems in different fields. Several fellowships for Argentine students will also be provided.

The Argentine Government will provide an exploratory fishing vessel, additional research and support personnel, and maintenance expenses for the project.

Ghana (SF/R.10/Addendum 17): Fishery research unit: Special Fund allocation $1,413,600; counterpart contribution $850,000; duration 5 years.

The Special Fund project in Ghana will assist in the development of fisheries through the establishment and operation of a marine research unit. The unit, which will be operated initially by an international team of experts in cooperation with specialists from Ghana, will be concerned mainly with practical problems of application. Emphasis will be on the biological and technological studies required for efficient exploitation of such resources as tropical sardines, horse mackerel, tuna, and some bottomfish species. Oceanographic work of the unit will be limited to relatively simple measurements having direct bearing on the availablity, abundance, and distribution of exploitable fish stocks.

In view of the need to study tropical sardines and other resources on a regional basis, consideration will be given during the course of the Ghana project to setting up a regional scheme involving other West African countries.

For the implementation of the Ghana project, the Special Fund will provide laboratory equipment, fishing gear, and other equipment; several student fellowships; and a team of international experts consisting of a Project Manager, several biologists, an oceanographer, two fishing experts, and an economist experienced in practical fishery problems. In addition, consultative services will be made available to cope with special problems.

The Government of Ghana will contribute a professional counterpart staff and clerical services; land and buildings; an experimental fishing vessel; maintenance of the vessel; and miscellaneous services and facilities.

After termination of Special Fund assistance, the Government of Ghana will assume full responsibility operate the research unit and participate in a regio fishery scheme that might be developed by that time.

Pakistan (SF/R.10/Addendum 40): Survey for the development of fisheries in East Pakistan: Special Fund allocation $1,505,800; counterpart contribution $1,145,000; duration 5 years.

The aims of the Pakistan project are to: (1) carr out exploratory fishing trials and biological studies; (2) develop a core of skilled Pakistan fishermen; (3) examine current Pakistan practices of marketing a distribution, and initiate experiments for their imp ment; and (4) develop an efficient system of record fisheries statistics.

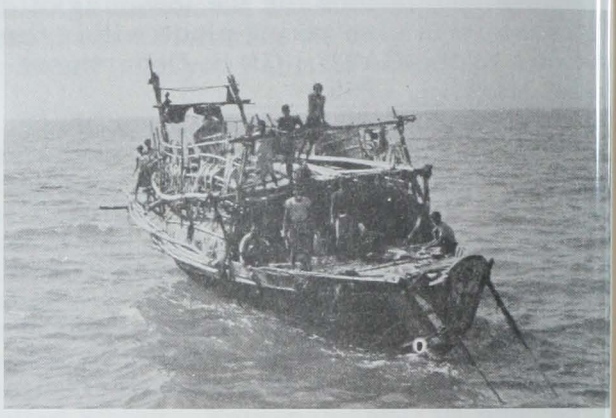

Fig. 1 - East Pakistan stake-net fishing during the winter season in the Ba Bengal.

Trial fishing will take place mainly in the Bay o Bengal and the lower reaches of the main river sys tems. Two vessels will be used and a number of di ferent fishing techniques will be tried, including tra ing, purse-seining, gill-netting, and long-lining. If potential of the salt-water fisheries turns out to be limited, the project will concentrate upon the probl of Pakistan's fresh-water fisheries.

For the implementation of this project, the Spec Fund will provide an exploratory fishing vessel; fis gear and other equipment; some land vehicles; and international team of experts consisting of a Proje Manager, two fishery biologists (one of them exper enced in hydrography), two master fishermen, a ge technologist, one marketing expert, one statistician and consultants on special problems. A limited nu of fellowships will be given to selected Pakistan m bers of the counterpart staff to provide training ab in highly technical fields.

The Pakistan Government will contribute a coun part staff, an exploratory fishing vessel with crew, shore facilities, some equipment, and all operating maintenance expenses.

Central America Regional (SF/R.10/Addendum Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua: Fishery development project; Special F allocation $1,828,900; counterpart contribution, equ lent of: $2,170,000; duration 6 years.

national (Contd.):

sheries in Central America are concerned mainly the shrimp and spiny lobster export industry; are no important fisheries in the region supply- e domestic market. The underdeveloped state of sheries is mostly due to lack of experienced fish- dministrations in most of the countries concerned, icient knowledge of available resources and meth- exploiting them, and lack of modern marketing ms.

Special Fund fishery development project in l America will aim at increasing the production nsumption of fish and fishery products on a re- basis. There will be four main fields of activ- ) strengthening of fishery administrations; (2) oment and management of various fisheries; (3) vement of processing and marketing; and (4) a l resource survey.

offshore fishing survey will be carried out with ered vessel. Fishing survey operations will be in Pacific waters, with particular emphasis on water shrimp stocks and finfish resources on the ental Shelf. (Pertinent information from the fish- rveys of the Caribbean Fishery Development t, which is a separate regional scheme supported Special Fund, will be made available to the Cen- merican project.)

the implementation of this project, the Special will provide three medium-to-small vessels and g gear; a chartered vessel for an offshore survey; hicles and other equipment; several student fel- ps; an international team of experts; consultant es; and subcontracts for highly specialized stud-

contribution of the Central American Govern- will include counterpart staff and crew; mainte- expenses; and miscellaneous services and facil-

gional--East Africa (SF/R.10/Addendum 69)-- Uganda, and the United Republic of Tanzania: Victoria fisheries research; Special Fund alloca- 63,400; counterpart contribution, equivalent of 0; duration 5 years.

purpose of this Special Fund project is to assist evelopment and management of fresh-water es in East Africa through biological investiga- nd economic surveys. The project is aimed at ng the activities of the East African Fresh-wa- sheries Research Organization, which has car- t biological research on Lake Victoria and in reas since 1947. The Organization is jointly ed by the Governments of Kenya, Uganda, and ted Republic of Tanzania.

loratory fishing and biological research under cial Fund project will be concentrated on Lake ia. Economic surveys and marketing studies spread over a broader area.

help carry out the project, the Special Fund will a team of international experts, including a bi- , a hydrobiologist, a statistician, a master fish- and an economist. The Special Fund will also a fully equipped research vessel, some field and laboratory equipment, and several fellowships for African students.

The East African Governments involved will contribute a counterpart staff, laboratory and shore facilities, and a small fishing vessel. After conclusion of Special Fund support, the African Governments will assume full responsibility for continuing the research programs with their local staff.

It is expected that the results of the studies during and after the period of Special Fund support will speed up investment in the fresh-water fisheries of the region, and make an early contribution towards economic growth in East Africa.

Fig. 2 - In Lake Victoria, Kenya, a floating screen of papyrus rushes (about 200 feet long) is poled out into the lake a short distance from shore. Two ends are drawn together forming a trap out of which surface fish cannot escape.

More detailed summaries of the above projects may be obtained from Trade Opportunities Staff, BDSA-6192, Room 4203, U. S. Department of Commerce, Washington, D.C. 20230. Telephone WO 7-4674 (Area Code 202). Inquiries should contain the project number for the "Summary" desired.

Note: See Commercial Fisheries Review, January 1965 p. 60.

## SOCIALIST COUNTRIES FISHING VESSEL CONGRESS HELD AT LENINGRAD:

The 2nd Socialist Countries Fishing Vessel Congress held at Leningrad, Nov. 17-24, 1964, was attended by more than 300 persons from the U.S.S.R., Poland, East Germany, Rumania, Bulgaria, and Hungary. About 220 participants were from the Soviet Union and 36 from Poland. There were no observers or guests. The first Congress was held at Leningrad in 1956; the third is expected to be held before 1969.

Some 59 papers and other communications were discussed at the Conference which was organized in three sections: (1) Fishing techniques and economics, covering the entire field of fishing vessel operations; (2) General operational problems, including unloading at sea, fish processing at sea, etc.; (3) Technical mat-

International (Contd.):

ters, including construction of vessels, engines, etc., application of computers to construction, noise prevention, etc.

Considerable discussion was focused on the desirability of developing single vessels or fleet operations. All agreed fleet operation was necessary in distant waters where shore bases were unavailable. But there was no answer to whether single vessels or fleets were more economical. Fleets were deemed best from the technical standpoint and with regard to quality of fishery products. In the economic considerations there must be included the loss of vessels while unloading at sea and the difficulties encountered when many vessels are fishing in the same area. Unloading at sea has not been solved satisfactorily. There was general discussion on motherships carrying fishing craft on board. That approach is needed for fishing distant waters lacking shore bases. Poland plans to build one or more vessels of that type.

No binding decisions were reached at the Congress. A final protocol was signed but each country was left to draw its own conclusions from the papers presented and the discussions. The protocol covered modern ocean-fishing fleet developments with regard to vessel engines, machine rooms, mechanical processing of fish on board, facilities for locating fish and control of fishing equipment, noise prevention, static balance of vessels, use of computers, exchange of information by Socialist countries. The third Congress to be held prior to 1969 was also covered in the protocol.

The Soviet Union agreed to publish the Conference papers and a summary of the discussions held.

## Australia

SPINY LOBSTERS TOO HIGH-PRICED FOR SYDNEY RESTAURANTS:

Lobsters (spiny) were omitted from the menu of most restaurants and night clubs in Sydney, Australia, during the latter part of 1964 because they were too high-priced. According to the president of the Master Fish Merchants Association, it was impossible to sell lobsters even at a small profit to cover expenses without being accused by customer of "robbing the public."

Night clubs shared part of the blame for prices termed fantastic that were paid for lobsters at the local market auctions. Low-cost meals for club members were said to b subsidized with profits made from gamblin machines, and as a result night clubs did n care what they paid for lobsters which was considered unfair competition to other busi nesses.

The financial position of many retail fis stores in Sydney was described as critical cause of the scarcity of fresh fish and the h prices for shrimp and lobsters which made difficult for some stores to meet overhead e penses. (Australian Fish Trades Review, J uary 1965.)

* * * * *

WHALE OIL OUTPUT, 1964:

Australia's output of sperm whale oil in 1964 rose to an estimated 5,160 short tons from 4,551 tons in 1963, even though the nu ber of operating land stations had been reduced from 2 to 1.

Operations in 1964 were restricted to the catching of sperm whales. In 1963, there ha been some humpback whaling in Western Au tralia; however, results were poor with onl about 717 tons of oil produced. (Foreign Ag culture, March 29, 1965, U. S. Department Agriculture.)

Australian whaling operations have declined drastically since the 1959/60 seaso when over 16,000 tons of whale oil were pr duced. The decline is due in large part to scarcity of humpback whales which were o abundant off Australia during their annual mi gration from the Antarctic to warmer wate for breeding.

By the end of 1962 all whaling stations o the Australian East Coast had closed. The West Coast whaling station at Carnarvon closed in August 1963. That left only the W Coast station at Albany open in 1964.

Note: See Commercial Fisheries Review, Nov. 1963 p. 56 an Aug. 1963 p. 81.

## nada

HERIES TRENDS, 1963-64:
anadian sea fisheries landings (includes foundland and excludes seaweeds) during totaled 2,221.4 million pounds (valued at 2.7 million) as compared with 2,198.4 ion pounds (valued at C$117.1 million) g the same period in 1963, an increase ) percent in quantity and 13.4 percent in , according to the December 1964 Monthview of Canadian Fisheries Statistics.

- Off the British Columbia coast, a Canadian purse-seiner wing the net tighter around a good catch of herring.

- Filleting cod at a fish plant in St. John's, Newfound-

he landings and ex-vessel values of the ipal species were:

| ies | Landings Jan.-Dec. | | Value Jan.-Dec. | |
|---|---|---|---|---|
| | 1964 | 1963 | 1964 | 1963 |
| | . (1,000 Lbs.) . | | . . (1,000 C$) . . | |
| ic Coast: | | | | |
| . . . . . | 568,756 | 609,547 | 20,680 | 20,993 |
| dock. . . . . | 106,346 | 90,984 | 6,224 | 4,918 |
| ock . . . . . | 56,947 | 56,581 | 1,831 | 1,716 |
| ring. . . . . | 309,982 | 252,683 | 3,306 | 3,087 |
| rdfish . . . . . | 11,683 | 14,465 | 3,494 | 2,974 |
| sters . . . . . | 41,842 | 44,375 | 24,218 | 21,281 |
| lops . . . . . | 16,683 | 16,219 | 7,273 | 6,255 |
| ic Coast: | | | | |
| but . . . . . | 1/35,755 | 2/37,275 | 1/8,840 | 2/8,249 |
| ring. . . . . | 503,501 | 572,579 | 6,146 | 6,481 |
| con . . . . . | 118,593 | 119,339 | 28,841 | 22,758 |

ding 8,168,000 pounds (C$2,039,000) landed in U.S.
ding 11,341,000 pounds (C$2,528,000) landed in U.S.

* * * * *

VESSEL INSURANCE UNDER FISHERMEN'S INDEMNITY PLAN:

The Canadian Federal Government has raised the upper limit on vessels which may be insured under the Fishermen's Indemnity Plan to $15,000. Previously the limit covered only vessels costing up to $12,500. There is no change in the lower limit of $250.

Under the Plan, in the event of total loss, insured fishermen are paid an indemnity of 60 percent of the value in the Atlantic provinces and 70 percent in British Columbia. In the event of partial loss, indemnity against the cost of repairing the vessel in excess of 30 percent of the appraised value is paid in Newfoundland, Nova Scotia, and Quebec; 20 percent is paid in New Brunswick and Prince Edward Island, and in excess of 15 percent of the appraised value on the Pacific Coast. (Bulletin of Fisheries Council of Canada, February 1965.)

* * * * *

FISHING VESSEL SUBSIDY INCREASE EMPHASIZES IMPORTANCE OF PACIFIC TRAWLING:

The Canadian Federal subsidy for steel trawlers of over 100 gross tons operating out of Pacific and inland ports was increased from 35 to 50 percent on April 1, 1965. (The 50-percent subsidy rate was already in effect for such steel vessels on the Atlantic Coast.) At the same time the Canadian Federal subsidy for wooden fishing vessels of over 100 gross tons was increased from 35 to 40 percent in all areas.

The Canadian Minister of Fisheries pointed out that the increased emphasis on steel trawlers operating out of Pacific ports arises from the extension of fishing off that coast to more distant waters. The subsidy increase is designed to encourage Canadian fishermen to trawl for the extensive groundfish resources off the Pacific Coast. Heavy catches of cod and other species have been made in those waters by Russian and Japanese fishermen in recent years, the Minister said.

A change in the administration of the Canadian fishing vessel subsidy program also was effective April 1, 1965. The assistance program for wooden fishing vessels of over 100 tons was transferred from the Canadian Department of Transport to the Department of Fisheries. The assistance program for steel trawlers over 100 tons will continue to be handled by the Canadian Maritime Commis-

Canada (Contd.):

sion, Department of Transport. (Canadian Department of Fisheries, Ottawa, March 4, 1965.)

* * * * *

GOVERNMENT SPONSORS NEW COMMUNITY FISH PROCESSING CENTERS IN NEWFOUNDLAND:

A Canadian program in excess of C$500,000 to help the Province of Newfoundland provide additional community processing and storage centers for salt fish and collection depots for fresh fish was announced jointly March 8, 1965, by the Federal Fisheries Minister and the Newfoundland Minister of Fisheries Plans for the new facilities are part of a Federal-Provincial program to accelerate fisheries development in Newfoundland and Labrador.

New community salt fish centers for Newfoundland are to be built at Foxtrap, Conception Bay; Mount Arlington Heights, Placentia Bay; Thornlea and Dildo in Trinity Bay; and Upper Jenkins Cove, Twillingate. The fresh fish collection depots are planned for Plate Cove East, Bonavista Bay; Chance Cove, Trinity Bay; Sagona, Hermitage Bay; Lamaline East on the Burin Peninsula; and Seal Cove, Connaigre Bay. In addition to those new facilities, plans are being made to enlarge the salt fish center at L'Anse au Loup in Labrador.

These community facilities are expected to be completed in 1965. The cost of the buildings, including related marine works, will be borne by the Canadian Federal Government, with the Province undertaking responsibility for making building sites available and assuring normal maintenance and operation. (Canadian Department of Fisheries, Ottawa, March 8, 1965.)

* * * * *

GOVERNMENT RELOCATION PROGRAM FOR NEWFOUNDLAND FISHERMEN:

A Canadian Federal-provincial government program to encourage the relocation of from 4,000 to 5,000 households in many small Newfoundland fishing settlements to more suitable communities within the province was announced jointly in March 1965 by Canada's Federal Government Fisheries Minister and the Minister of Fisheries of Newfoundland.

The program is a long-term plan for th centralization of fishermen in Newfoundla and will affect only those isolated commun ties in which at least 90 percent of the hou holds agree to move. It will provide for p ment of a grant of C$1,000 to each househ plus $200 for each member of the househo as well as actual travel and removal expe for the household and their effects to a de nated growth point within the province. T major share of the cost will be borne by t Federal government. The offer of assist is to be in force for 5 years starting Apr 1965.

The program is to be carried out grad ly, with assistance to the households invo expected to average about $2,400. The to program will cost several million dollars large number of isolated settlements are pected to be abandoned through the resett ment plan during the next 5 years.

While the object of the program is to c tralize fishermen, the terms of the plan w apply to all households in a settlement re gardless of occupation, Payment of remo expenses and grants to nonfishing househo and fishing households not wanting to cont in fishing, would be for relocation in any proved locations within the province. Tho wishing to continue in fishing as an occup would be eligible only when moving to ap proved fishing settlements where employ opportunities are offered either afloat or shore.

For some years past the Government Newfoundland has provided financial assis ance of up to $600 per household to encou fishermen to move to more suitable loca within the province, where agreement to has been reached by all members of the munity. Under the program some 90 set ments have been abandoned, while gradua assisted abandonment of some 60 additio settlements has also taken place. After a donment of a settlement, the land is to re to the Crown to prevent year-round rese ment, although seasonal fishing or other ations can be carried out, but with no add al public facilities.

Field administration of the new progra to be the responsibility of the Provincial ernment. A standing committee with rep sentation from both governments will be pointed to give general supervision to im mentation of the program. A study is to

da (Contd.):

to establish the immediate and long-absorptive capacity of selected "growth s" and the probable costs of extending ng facilities to meet the needs of a sig-nt increase in population.

e decision of the two governments (Fed-nd provincial) to speed up the resettle-plan is considered basic to the success-velopment of the Newfoundland fisheries, llowed submission of a report made by Federal and provincial officials who met in St. John's. They included rep-atives of the Department of Fisheries nada, Treasury Board, the federal De-nts of Public Works and Labour, the ic Development Board and ARDA. New-nd representatives were from the cial Departments of Fisheries, Public Highways, Municipal Affairs, and e and Economic Development.

e plan stemmed from the realization by ederal and provincial governments that unities for improvement of income and standards of fishermen would continue mited so long as fishermen remained sed in several hundred small fishing ments. Many of those settlements have as 10 or 15 households, the fishermen all boats and are dependent on fish g close to shore, as well as being hand-d by short fishing seasons, local curing with salt, and restricted market op-ities. (Department of Fisheries, Ot-March 5, 1965.)

* * * * *

NING HARP SEAL HERDS
CTED BY ST. LAWRENCE
I QUOTA IN 1965:

p seal hunters were subject to a Ca-catch quota in the Gulf of St. Lawrence for the first time. A catch quota of was placed on young seals in District Gulf's main sealing area, and the kill-old seals in breeding patches was pro-. The action was based on scientific e accumulated over the last 10 to 15 which indicated that the harp seal herds Gulf of St. Lawrence were being re-by an excessive harvest.

enforce the quota and other sealing tions, the Canadian Department of Fish-stationed fishery officers aboard each vessel at the hunt as well as at the drop points where planes landed the seal pelts taken. A government helicopter patrolled the seal whelping grounds near Prince Edward Island, the center of sealing operations this year.

The sealing season in the Gulf opened on March 8, 1965, and a strict watch was kept on daily operations. With favorable weather prevailing, it became apparent that the 50,000 quota would be taken very quickly, so the season for taking young seals was closed March 11, 1965.

Canadian Fisheries Department officials in the Maritime Provinces who supervised and carried out the protection program in the Gulf said they considered the operation to have been effective. They were pleased also with the cooperation received from the masters of sealing ships and from aircraft operators who engaged in the hunt.

An overall check on March 12 showed all seal catching operations in the Gulf of St. Lawrence had ended.

Some of the sealine ship masters continued sealing operations in international waters on the "Front," the North Atlantic area off Labrador and the east coast Newfoundland. In that area, the Canadian Department of Fisheries, through its Newfoundland Area headquarters, surveyed the seal fishery with air patrols and also by stationing observers aboard sealing vessels. (Canadian Department of Fisheries, Ottawa, March 16, 1965.)

Seal hunting in the North Atlantic waters of the "Front" is an international operation. The problem of pursuing additional seal conservation measures in that area has been brought before the International Northwest Atlantic Fisheries Commission, which is concerned with the investigation and conservation of the major fisheries in the Northwest Atlantic. Canada hopes that harp and hood seals can be brought within the responsibility of the Commission by a protocol amendment to the Convention under which the Commission operates. A number of countries have already ratified the protocol amendment on harp and hood seals.

Note: See Commercial Fisheries Review, March 1964 p. 45.

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SEALING OPERATIONS IN
GULF OF ST. LAWRENCE, 1965:

Invitations were extended by Canada's Fisheries Minister to representatives of three hu-

Canada (Contd.):

mane and conservation societies to view the sealing operations and observe the effectivness of the new seal protection regulations in the Gulf of St. Lawrence during the week of March 15, 1965. The Ontario Humane Society Canadian Society for the Prevention of Cruelty to Animals, and Canadian Audubon Society sent representatives. Sealing in the Gulf of St. Lawrence area opened on March 8, and on the Front on March 12.

Following serious consideration given to the whole matter of sealing on the Atlantic Coast, the Canadian Fisheries Minister in fall 1964 instituted more restrictive regulations which were to become effective with this year's operations.

In the opinion of experts the method presently used for killing seals, when properly executed, does not subject the animals to undue pain.

In recent years, helicopters have been used in sealing operations. This year, as last last, it is unlawful to use a helicopter or other aircraft for sealing except under an aircraft sealing license issued by the Minister. The main commercial sealing operations take place on the Front area, which includes all the waters of the Strait of Belle Isle and the Atlantic Ocean east of a straight line between Amour Point on the coast of Labrador and Flowers Cove, Newfoundland, and in the Gulf area, which includes all the waters and territories west of a straight line between Amour Point on the coast of Labrador and Flowers Cove, Newfoundland.

The Gulf area itself is further divided, for regulation purposes, into three districts. In District 2 of the Gulf an annual quota has been set of 50,000 seals. That district includes all the waters and territories south of 50° N. latitude and west of a line from Cape Ray to Cape North. In District 2, helicopters and other aircraft can be used in sealing under a sealing license issued by the Minister. In the other two Gulf districts, and on the Front area, helicopters and other aircraft may be used from land bases for spotting only. (Canadian Department of Fisheries, Ottawa, February 22, 1965.)

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## LARGE STERN TRAWLER FOR NOVA SCOTIA FIRM:


Fig. 1 - The Acadia Albatross, one of Canada's newest and m... modern stern trawlers, is an all-welded steel vessel strengthe... for navigation in ice. Main specifications are: length overa... 152 feet, breadth molded 33 feet, and gross tonnage about 6... tons. The vessel was launched in Lauzon, Quebec, Novembe... 23, 1964, for a Nova Scotia fisheries firm.

Fig. 2 - The Captain of the Acadia Albatross in the vessel's wheelhouse. In front of the Captain is an instrument conso... which includes radar, loran, echo-sounders, and radiotelp... Propulsion is to be marine diesel engine and controllable p... propeller controlled directly from the wheelhouse.

Note: See Commercial Fisheries Review, March 1965 p. 70.

## ylon

SCOTTISH GROUP TO HELP VELOP FISHERIES:

A group of 100 Scottish firms associated n Scotland's fishing industry has signed a liminary agreement with the new Fisher- Corporation of Ceylon to provide it with ut £30 million (US$84 million) over 10 rs to develop Ceylon's fisheries. The ttish group will also provide technical ipment and expert guidance, and will help rain the local staff in Ceylon.

he Ceylon corporation, which was estab- d in October 1964, hopes to spend about million (US$322 million) on fisheries lopment through similar negotiations with foreign groups and with its own re- ces of about £30 million. A French com- is also interested in the project.

eylon is about the same size as Ireland ea, has about twice the population, and rts £4 million (US$11.2 million) worth hery products annually. Up to a few s ago, before restrictions were placed mports, the value was twice that amount.

he preliminary agreement was signed er this year by the Ceylon corporation rman, and by a British Treasury official representative of the group in Scotland. al agreement was being prepared for ture sometime in spring 1965. (The Skipper, Dublin, No. 12, January 1965.)

MEAL INDUSTRY HURT BY OVETA SHORTAGE:

choveta, the industrial fish of Chile, re- d beyond the range of the Chilean purse- fleet for most of the last half of 1964. an purse-seiners have a limited range. essels work close to shore off northern where the Continental Shelf is narrow. since the vessels do not usually carry ey must deliver anchoveta shortly after re caught.)

June 1963 anchoveta practically disap- d from the northern coast of Chile and t return until December 1963.

In 1964 anchoveta were caught through the off-season months of June, July, and August, but fishing was erratic and the anchoveta lean. The abundant supply anticipated with the opening of the main fishing season around mid-September 1964 failed to materialize and fishing continued spotty through November. The northern fleet, numbering well over 200 purse-seine vessels, ranged as far south as Mejillones Bay in search of the elusive anchoveta, but without much success. In early December 1964 limited numbers of anchoveta reappeared off the northern coast but the fish were small and had a low oil content. Fishing through January 1965 was also poor.

In early 1965 some 35 fish reduction plants with a combined capacity of almost 1,100 metric tons of raw fish an hour were in production or nearing completion in northern Chile (Tarapaca Province); 18 months earlier there were only 13 fish meal plants in northern Chile and their combined capacity was only about 284 tons of fish an hour. Over the same interval the Chilean anchoveta fleet has tripled its fishing power. Yet during that time the industry has had only 5 months of good fishing. During 1964 it is doubtful that the industry ever operated at maximum capacity. With normal operations, Chilean export earnings in 1964 from fish oil and meal could have reached US$25 million; actual shipments, however, were valued at slightly less than $15 million. (United States Embassy, Santiago, February 20, 1965.)

* * * * *

SARDINE CANNING INDUSTRY:

Chile now has only one plant canning sardines under government sponsorship--it is the Industria Pesquera Cavancha in Iquique. Its entire production is marketed domestically.

Boxes of sardines and anchovies destined for a canning plant in a small fishing village on the Chilean coast.

Chile (Contd.):

The Chilean Government is also financing the construction of a new cannery at the Empresa Pesquera de Tarapaca S. A., also located in Iquique. The new cannery, expected to begin operations in May or June 1965, will include 4 production lines, 1 of which will can Spanish sardines with a capacity of about 300,000 cases a year.

There are also several privately owned firms in Chile which can sardines. (United States Embassy, Santiago, March 9, 1965.)

## Denmark

FISHERY LANDINGS, UTILIZATION, AND EXPORTS FOR 1964 AND OUTLOOK FOR 1965:

Landings: Denmark's fishing industry set new records in 1964 with landings of 865,000 metric tons valued at 546 million kroner (US$79.2 million), an increase of 3 percent in quantity and 15 percent in value over the previous year. Landings of plaice, herring, and salmon were above those in 1963, and pond trout production set a new record.

The value of Danish landings in foreign ports was about the same as in 1963, but that of landings by foreign vessels in Danish ports was higher. The average price per pound for the total 1964 catch was up 10 percent from the previous year because of higher prices paid for food fish, herring in particular, and industrial fish. The quantity of fish used for processing continued to increase in 1964, especially for herring and plaice fillets.

Table 1 - Disposition of Danish 1964 Fishery Landings with Comparsons

| Item | 1964 | 1963 |
|---|---|---|
| | . . .(Metric Tons) . . . | |
| Processed for consumption: | | |
| Fillets: | | |
| Flatfish | 20,000 | 18,000 |
| Cod & codlike | 22,000 | 20,800 |
| Herring | 36,000 | 28,500 |
| Canned (sterile) | 11,000 | 11,600 |
| Smoked | 5,000 | 4,100 |
| Other | 9,000 | 1/ |
| Total | 103,000 | 1/ |
| Fish meal and oil: | | |
| Fish and fish waste used | 2/500,000 | 2/470,000 |
| Meal produced | 112,000 | 96,000 |
| Oil produced | 33,000 | 28,000 |
| Fish ponds and animal farms: | | |
| Fish and fish waste | 130,000-150,000 | 130,000-150,000 |
| Ensilage: | | |
| Fish and fish waste | 7,000 | 2/6,000 |

1/Not available.
2/Estimated.

Disposition of Catch: The Danish Fisheries Minister estimates that about 25-30 percent of Denmark's fishery catch is used for food and 70-75 percent is for industrial use (fish meal and oil, fish and fur-animal feeding, and ensilage). Landings of Norway pout and sand eels all go for industrial use. All 80 percent of the 1964 landings of herring and brisling, more than 90 percent of the haddock landings, and 25 percent of the mackerel landed were for industrial use.


Fig. 1 - Hvide Sande, a small fishing port on Jutland west coast.

Despite the relatively good prices offered in 1964 for iced and boxed drawn haddock, fishermen claimed they could not take the time required for the extra effort in landing haddock as food fish.

Exports: SUMMARY: Denmark's total exports of fishery products and byproducts in 1964 were up 4 percent in quantity and 7 percent in value from 1963, in spite of a substantial decline in shipments to the United States.

Denmark's fishery exports, especially fresh and frozen, would have been still greater in 1964 if additional supplies had been available. Export gains were recorded in 8 major categories except canned shellfish

nmark (Contd.):

Table 2 - Danish Fishery Products Exports[1] to all Countries, 1963-1964

| Product | 1964 | | | 1963 | | |
|---|---|---|---|---|---|---|
| | Quantity | Value | | Quantity | Value | |
| | Metric Tons | Kr. 1,000 | US$1,000 | Metric Tons | Kr. 1,000 | US$1,000 |
| h, frozen, & cured: | | | | | | |
| sh fish | 199,338 | 358,722 | 51,990 | 200,519 | 314,100 | 45,523 |
| zen fish | 49,579 | 181,245 | 26,268 | 46,538 | 152,097 | 22,043 |
| ted fish | 5,890 | 18,857 | 2,733 | 9,945 | 26,881 | 3,896 |
| oked fish | 631 | 9,170 | 1,329 | 517 | 7,322 | 1,061 |
| ned products: | | | | | | |
| h | 6,141 | 22,556 | 3,269 | 5,507 | 20,474 | 2,967 |
| lfish | 1,181 | 9,676 | 1,402 | 1,952 | 12,738 | 1,846 |
| preserved products: | | | | | | |
| h | 1,533 | 9,481 | 1,374 | 1,663 | 9,291 | 1,346 |
| lfish | 861 | 5,845 | 847 | 168 | 2,625 | 380 |
| products: | | | | | | |
| meal, fish oil, solubles, silage, and trout food | 109,216 | 110,228 | 15,975 | 93,261 | 83,979 | 12,171 |
| Total | 374,370 | 725,780 | 105,187 | 360,070 | 629,507 | 91,233 |

cludes direct shipments from Greenland and direct landings by Danish vessels in foreign ports.

ted fish. In 1964, exports of fresh and en fillets--up 32 and 22 percent, respecly--accounted for 30 percent of all fish- exports by value.

Danish fishery products were exported to countries in 1964.

EXPORTS TO COUNTRY ECONOMIC OUPS: The European Common Market EC) accounted for 42 percent of the value Danish fishery exports in 1964, and the ropean Free Trade Association (EFTA) k 37 percent.

West Germany continued as the largest porter, accounting for 27 percent of the ue of Denmark's total fishery exports in 4. The United Kingdom was in second ce with 18 percent of the total. The shipnts to West Germany consisted mainly of sh herring, herring fillets, and eels. Exts to the United Kingdom were mainly

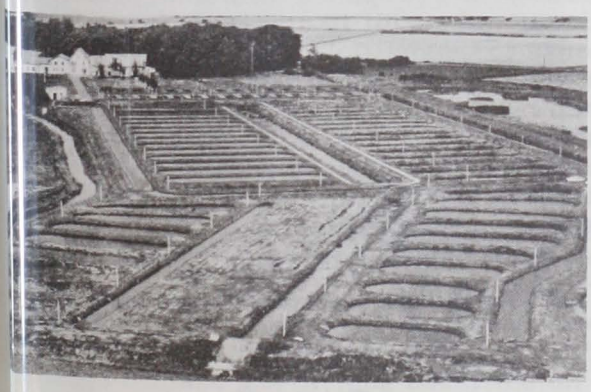

Fig. 2 - A pond trout enterprise in Denmark.

fresh flatfish (including direct landings), frozen flatfish fillets, and pond trout. Sweden continued to take substantial amounts of a variety of Danish fish, including salmon, pond trout, plaice and other flatfish, fresh and frozen fillets, and fish offal for Swedish fur-animal farms.

Exports to the East Bloc in 1964 rose 17 percent from the previous year, despite a 7 percent drop in exports to East Germany. Larger fish meal shipments to Poland accounted for most of the increase in shipments to the East Bloc.

Table 3 - Value of Danish Fishery Products Exports by Areas and Major Countries, 1963 and 1964

| Destination | 1964 | | 1963 | |
|---|---|---|---|---|
| | Kr. 1,000 | US$ 1,000 | Kr. 1,000 | US$ 1,000 |
| By areas: | | | | |
| Common Market (EEC) | 306,000 | 44,350 | 260,000 | 37,700 |
| European Free Trade Assn. (EFTA - including Finland) | 268,000 | 38,850 | 225,000 | 32,625 |
| East Bloc countries | 35,000 | 5,075 | 30,000 | 4,350 |
| Other countries | 117,000 | 16,950 | 114,500 | 16,600 |
| Total | 726,000 | 105,225 | 629,500 | 91,275 |
| Major importers by country: | | | | |
| West Germany | 196,000 | 28,400 | 159,000 | 23,050 |
| United Kingdom | 132,000 | 19,150 | 109,000 | 15,800 |
| Sweden | 79,000 | 11,450 | 59,000 | 8,550 |
| Italy | 44,000 | 6,375 | 39,000 | 5,650 |
| Switzerland | 40,000 | 5,800 | 36,000 | 5,200 |
| United States | 33,000 | 4,775 | 46,500 | 6,750 |

EXPORTS TO THE UNITED STATES: Danish exports of fishery products to the United States in 1964 were down 29 percent in value and 36 percent in quantity from 1963 due mainly to a drop in exports of frozen cod fillets (blocks). Contributing to the drop in cod fillet sales to the United States were (1)

Denmark (Contd.):

a lower catch in Greenland, and (2) strong demand and better prices in England and on the European Continent.

In the face of strong competition in the U. S. market, there were declines in the exports of frozen trout because of imports from Japan, and in canned shrimp because of supplies from U. S. canners and other foreign sources. The only substantial gain in shipments to the United States was in exports of flatfish, accounted for mainly by a sharp rise in sole exports.

landings in Denmark by foreign fishermen an (2) rationing of Danish herring landings.

On March 11, 1965, the Danish Fisheries Minister submitted to the Folketing (Parliament) a proposal which would enable him to establish minimum prices for exports of fis and fishery products after consultation with an Export Committee. The 8-man Export Committee would consist of representatives from all segments of the fishing industry.

The Danish fishing industry is supporting the proposal to regulate minimum export prices. It is thought that competition betwe

Table 4 - Danish Fishery Products Exports to the United States[1/], 1963-1964

| Product | 1964 | | | 1963 | | |
|---|---|---|---|---|---|---|
| | Quantity | Value | | Quantity | Value | |
| | Metric Tons | Kr. 1,000 | US$1,000 | Metric Tons | Kr. 1,000 | US$1,0 |
| Fresh & frozen: | | | | | | |
| Fillets: | | | | | | |
| Cod | 4,895 | 15,336 | 2,223 | 8,934 | 27,919 | 4,04 |
| Other fillets | 678 | 2,397 | 348 | 769 | 1,283 | 18 |
| Pond trout | 524 | 3,868 | 561 | 784 | 6,103 | 88 |
| Flatfish[2/] | 237 | 2,103 | 304 | 130 | 726 | 10 |
| Norway lobster | 199 | 3,930 | 570 | 212 | 4,368 | 63 |
| Other | 2 | 77 | 11 | 13 | 141 | 2 |
| Cured products: | | | | | | |
| Salted & smoked[3/] | 81 | 255 | 37 | 105 | 207 | 3 |
| Canned products: | | | | | | |
| Herring & sprat | 572 | 2,790 | 404 | 556 | 2,977 | 43 |
| Shrimp | 117 | 1,189 | 172 | 175 | 1,654 | 24 |
| Mussels | 59 | 367 | 53 | 57 | 350 | 5 |
| Other | 33 | 208 | 30 | 40 | 227 | 3 |
| Semipreserved products | 15 | 195 | 28 | 20 | 240 | 3 |
| Fish solubles | 400 | 382 | 56 | 400 | 344 | 5 |
| Total exports | 7,812 | 33,097 | 4,797 | 12,195 | 46,539 | 6,74 |

1/Does not include shipments to Puerto Rico or to the United States Army in Europe.
2/Mostly turbot, brill, plaice, and sole.
3/Mostly cod, herring, salmon.
Note: Exports shown include direct shipments from Greenland in 1964 as follows: cod fillets 2,618 tons, flatfish fillets 199 tons, oth fillets 391 tons, salted cod 25 tons, and halibut 2 tons. Data on direct shipments from Greenland in 1963 are not available.

EXPORTS TO THE U. S. ARMY IN EUROPE: Danish fishery exports to the U. S. Army in Europe in 1964 totaled 93 tons valued at Kr. 721,000 ($104,000) and consisted mainly of pond trout (69 tons), flatfish fillets (17 tons), and cod fillets (6 tons). Most of the deliveries to the U. S. Army in Europe were intended for resale in post exchanges and commissaries.

OUTLOOK FOR 1965: Danish exporters of fishery products look forward to 1965 with guarded optimism. But they express concern over (1) the possibility of rising prices for raw fish, and (2) increasing competition from large integrated fishery complexes in other countries. Measures are being debated to increase the supply of raw fish. Processors favor (1) relaxation of restrictions on direct

Danish exporters, especially in the Commo Market, has caused reactions which could di rupt the trade. It has not been possible to achieve regulation on a voluntary basis. Vi lations of the proposed minimum price regu lation could result in an exporter losing hi license to export fish and fishery products f varying periods. The proposed regulation would not apply to Greenland or the Faroe I lands but Greenland products exported fro Denmark would be covered. (Regional Fis eries Attache for Europe, United States Em bassy, Copenhagen, March 10 & 17, 1965.)

Notes: (1) See Commercial Fisheries Review, April 1965 p. October 1964 p. 53, and March 1964 p. 50.

(2) For additional details request copy of MNL-5--"D mark's Fishing Industry, 1964," from: Fishery Market News Service, U. S. Bureau of Commercial Fisheries, Room 510, 1815 N. Fort Myer Drive, Arlington, Va. 22209.

## land

VERNMENT ASSISTANCE FOR
HING INDUSTRY REQUESTED:

A Finnish committee representing several
shermen's associations as well as fur farm-
s submitted a report on March 3, 1965, to
Finnish Minister of Agriculture (the Cab-
member responsible for fishing ques-
s) requesting government assistance to
mote fishing and the marketing of fishery
ducts in Finland. The committee proposed
a central organization be established to
rtise domestic fishery products, and that
money be appropriated for fishing har-
roads leading to harbors, supports for
ransportation of fish, and loans to fisher-
. The committee also recommended that
ng gear, landings, and processing equip-
be exempt from sales taxes.

Fig. 1 - Selling fish on the Helsinki dock.

- Finnish fishermen lifting Baltic herring fyke net in the
u Archipelago area.

lthough Finland has a long coastline on
Baltic Sea and many lakes, fishing has
r played a very important role in the na-
l economy. Finnish fishermen, for the most part, have not had the equipment to go beyond the Baltic Sea to more productive areas. Finnish fish consumption, which amounts to about 18 kilograms (40 pounds) annually per capita, has been supplied to an increasing extent by imports, particularly in the cities. Employment in fisheries has dwindled as young people have moved to more lucrative occupations. Between 1953 and 1963 the number of households in Finland which claimed fishing as their main occupation declined from 4,880 to about 3,600. (United States Embassy, Helsinki, March 11, 1965.)

## Ghana

NEW NORWEGIAN-BUILT
STERN TRAWLER DELIVERED:

A Norwegian-built stern trawler, the Shama, was delivered to Ghana during February 1965. It was the eleventh large trawler aquired by the Government-controlled Ghana Fishing Corporation.

The Shama is the first of 7 trawlers being built in Norway for Ghana under an arrangement planned by the Norwegian Development Assistance which called for Norwegian experts to be sent to that country with the vessels.

All of the 7 vessels have an overall length of 231 feet 7 inches, and will be powered by diesel engines generating 1,960 hp., coupled to reversible propellers. (United States Embassy, Accra, February 21, 1965.)

Note: See Commercial Fisheries Review, August 1964 p. 65, June 1964 p. 52.

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TRAINING PROGRAMS TO PROVIDE
OFFICERS FOR NEW FOREIGN-
BUILT FISHING VESSELS:

On January 22, 1965, the Governments of Ghana and Norway signed an agreement at Accra providing for the establishment of a center in Ghana to train Ghanaian deck officers and engineers to man Ghana's fishing fleet. Under the terms of the agreement, Norway will provide equipment and training specialists, and Ghana will be responsible for building and furnishing the training center and paying the salaries of the specialists employed in teaching. Estimated total cost of establishing the training centers is ₤G100,000 (US$280,000).

Under another training program in Oslo, Norway, 17 Ghanaians are studying and work-

Ghana (Contd.):

ing in Norwegian shipyards in order to qualify as trawler engineers. The Oslo training course began in mid-October 1964.

In addition to 7 stern trawlers from Norway, Ghana has also ordered 10 stern trawlers and 2 fish-carrier vessels from Japan, 6 stern trawlers from Great Britain, and a number of vessels from the Soviet Union. Ghana has technical service agreements with all of those countries calling for help in operating the new vessels initially.

On January 30, 1965, the 244-foot trawler Subin, the 2nd of the 12 vessels ordered in Japan by Ghana, docked in Tema Harbor on its maiden voyage. The vessel, which has a capacity of 700 metric tons of fish, cost about $1.4 million. Total cost of the 12 vessels ordered from Japan is reported to be about $15 million. (United States Embassy, Accra, February 7, 1965; World Fishing, October 1964; and other sources.)

Note: See Commercial Fisheries Review, Feb. 1965; p. 60; Jan. 1965 p. 72; Aug. 1964 p. 65.

## Iceland

### EXPORT STOCKS OF PRINCIPAL FISHERY PRODUCTS, DECEMBER 31, 1964:

Iceland's stocks of frozen groundfish (fillets and blocks) for export to the United States totaled 1,327 metric tons as of December 31, 1964. (United States Embassy, Reykjavik, March 16, 1965.)

Icelandic Export Stocks[1] of Principal Fishery Products, December 31, 1964

| Item | Quantity | Value | |
|---|---|---|---|
| | Metric Tons | Million Kr. | US$ 1,000 |
| Groundfish, frozen: | | | |
| For export to U. S. | 1,327 | 29.2 | 678.0 |
| For export to other countries | 1,624 | 28.1 | 652.5 |
| Stockfish | 5,180 | 145.0 | 3,366.9 |
| Herring: | | | |
| Salted | 2/ | 52.5 | 1,219.1 |
| Frozen | 3/4,160 | 3/25.6 | 594.4 |
| Industrial products: | | | |
| Fish meal: | | | |
| Herring | 16,005 | 105.6 | 2,452.0 |
| Other fish meal | 1,112 | 6.8 | 157.9 |
| Herring oil | 27,349 | 227.0 | 5,270.9 |

1/Includes only stocks intended for export.
2/Not available.
3/Includes 467 tons of frozen herring fillets valued at Kr. 4.5 million (US$104,490).
Note: Icelandic kronur 43.06 equals US$1.00.

United States imports of frozen groundfish fillets from Iceland in 1964 totaled 17,812 metric tons of groundfish blocks and slabs, 4,669 metric tons of cod fillets, 2,791 metric tons of haddock fillets, and 548 metric tons of ocean perch fillets.

A report in the British Fishing News, January 8, 1965, said that only 30 Icelandic trawlers were operating this year whereas years ago the Icelandic trawler fleet numbered 48. A declining catch rate by Icelandic trawlers was also reported.

* * * * *

### FISHERY LANDINGS BY PRINCIPAL SPECIES, JANUARY-AUGUST 1964:

| Species | January-August | |
|---|---|---|
| | 1964 | 1963 |
| | (Metric Tons) | |
| Cod | 262,181 | 211,21 |
| Haddock | 36,971 | 35,06 |
| Saithe | 17,917 | 10,48 |
| Ling | 3,635 | 4,63 |
| Wolffish (catfish) | 7,894 | 12,42 |
| Cusk | 2,794 | 4,92 |
| Ocean perch | 20,904 | 26,00 |
| Halibut | 800 | 83 |
| Herring | 350,375 | 283,78 |
| Shrimp | 202 | 34 |
| Capelin | 8,640 | 1,07 |
| Lobster | 2,466 | 4,61 |
| Other | 7,038 | 5,65 |
| Total | 721,817 | 601,05 |

Note: Except for herring which are landed round, all fish are drawn weight.

* * * * *

### UTILIZATION OF FISHERY LANDINGS, JANUARY-AUGUST 1964:

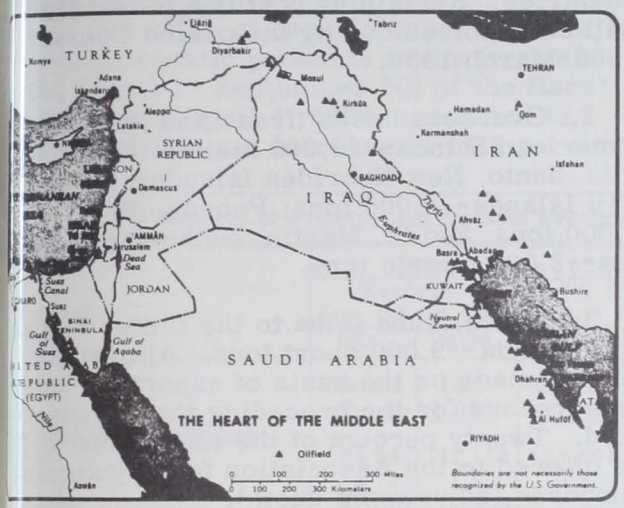
| How Utilized | January-August | |
|---|---|---|
| | 1964 | 1963 |
| | (Metric Tons) | |
| Herring[1] for: | | |
| Canning | 93 | 2 |
| Oil and meal | 302,897 | 188,67 |
| Freezing | 13,402 | 21,86 |
| Salting | 33,983 | 67,34 |
| Fresh on ice | - | 5,61 |
| Groundfish[2] for: | | |
| Fresh on ice | 23,748 | 21,36 |
| Freezing and filleting | 158,371 | 141,78 |
| Salting | 84,635 | 68,35 |
| Stockfish (dried unsalted) | 80,667 | 66,97 |
| Canning | 24 | |
| Oil and meal | 2,923 | 2,81 |
| Capelin for: | | |
| Freezing | 133 | 18 |
| Oil and meal | 8,507 | 88 |
| Shrimp for: | | |
| Freezing | 166 | 26 |
| Canning | 36 | 8 |
| Lobster for: | | |
| Fresh on ice | - | |
| Freezing | 2,466 | 4,61 |
| Home consumption | 9,766 | 9,91 |
| Total production | 721,817 | 601,05 |

1/Whole fish. 2/Drawn fish.

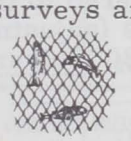
## iq

ANS TO DEVELOP ITS
MMERCIAL FISHERIES:

The Government of Iraq plans to develop commercial fisheries. Primary emphasis ld be on resources in the Persian Gulf, the possibility of fresh-water commercial ing would also be explored.




According to the Director of Hydro-biology d Fisheries of Iraq's Ministry of Agricul- re, the government will allot ID500,000 S$1.4 million) for this fishery project in next Five Year Plan. It is expected that finite plans for the fisheries project will be rmulated after surveys are made.



## ly

C SETS ITALIAN DUTY-FREE
PORT QUOTAS IN 1965 FOR
OZEN TUNA AND SALT COD:

A total of 36,000 metric tons of chilled or zen tuna destined for the canning industry y enter Italy duty-free in 1965. The quota s set by the Commission for the European mmon Market (EEC) and announced by the lian Minister of Foreign Commerce, De- nber 30, 1964. The EEC also set a 1965 lian duty-free import quota of 34,000 tons r "merluzzi" (cod) consisting of "stockfish" d "baccala," salted, either in brine or dried, adless or in pieces. (La Pesca Italiana, me, January 7, 1965.)

* * * * *

UNA VESSEL LAUNCHED:

In Venice on December 19, 1964, the tuna ssel Albacora was launched for an Italian firm in Milan. The new vessel of 860 gross tons has these dimensions: length overall 66.6 meters (218 feet), width 10.6 meters (35 feet), depth 5.2 meters (17 feet). It is equipped with a 1,300-hp. engine. (La Pesca Italiana, Rome, January 7, 1965.)

## Japan

FROZEN TUNA EXPORT
TARGETS FOR 1965/66:

At an executive meeting on February 25, 1965, the Japan Export Frozen Tuna Producers Association drafted plans for the business year April 1965-March 1966 for submission to the special general session of the Association on March 8. Reportedly, the Association has set up the following frozen tuna export targets:

1. Direct exports to the United States and Canada: albacore 30,000 short tons; yellowfin 30,000 tons; loins 7,500 tons; and reserve 15,000 tons.

2. Transshipments: Indian Ocean 4,000 short tons (transfer of quota from Japan proper will be recognized); transshipments to Italy 60 percent of the Atlantic tuna fleet's average yearly catch for the past three years, plus 18,000 metric tons to be made available to those who consume their quota; Atlantic Ocean transshipments to the United States, catch of 150 vessel trips (30 additional trips may be supplemented at discretion of executive committee).

3. Exports to overseas bases: 4,000 short tons, plus a supplementary quota of 4,000 tons. (Note: This quota far below actual quantity exported to overseas bases. The Producers Association customarily sets a minimum export target at the beginning of the business year and subsequently increases quota allocation as necessary.)

4. Swordfish exports to the United States: 10 million pounds (8.45 million pounds to be allocated on basis of past performance record, 1.5 million pounds to be made available to firms that have consumed their quota, and reserve quota of 50,000 pounds). (Suisan Tsushin, February 26, 1965.)

* * * * *

Japan (Contd.):

EXPORT VALIDATIONS OF FROZEN TUNA AND TUNA LOINS TO UNITED STATES, JANUARY 1965:

Japan's export validations of frozen tuna and frozen tuna loins to the United States in January 1965 totaled 11,391 short tons, an increase of 65 percent compared with 6,903 tons shipped in the same month in 1964. Frozen tuna and tuna loins authorized for shipment direct from Japan in January 1965 were

Japan's Export Validations of Frozen Tuna and Tuna Loins to U. S., January 1965 with Comparisons

| Item | January 1965 | | | January 1964 | | | Total |
|---|---|---|---|---|---|---|---|
| | Direct | Trans-shipped | Total | Direct | Trans-shipped | Total | 1964 |
| | (Short Tons) | | | | | | |
| Albacore, round | 2,686 | 5,844 | 8,530 | 1,004 | 2,100 | 3,104 | 59,497 |
| Yellowfin: | | | | | | | |
| Round | - | 459 | 459 | - | 162 | 162 | - |
| Gilled & gutted: | | | | | | | |
| 20/100 lbs. | 678 | 182 | 860 | 1,393 | 286 | 1,679 | - |
| 100 lbs. up | 112 | - | 112 | 373 | - | 373 | - |
| Dressed with tail | - | 378 | 378 | - | 547 | 547 | - |
| Fillets | - | - | - | - | - | - | - |
| Total | 790 | 1,019 | 1,809 | 1,766 | 995 | 2,761 | 38,839 |
| Big-eyed: | | | | | | | |
| Gilled & gutted | - | - | - | - | - | - | - |
| Dressed with tail | - | 28 | 28 | - | - | - | - |
| Fillets | - | - | - | - | - | - | - |
| Total | - | 28 | 28 | - | - | - | 362 |
| Bluefin, fillets | 2 | - | 2 | - | - | - | 1 |
| Skipjack, round | - | 277 | 277 | 5 | 808 | 813 | 3,593 |
| Loins: | | | | | | | |
| Albacore | 645 | - | 645 | 155 | - | 155 | 3,805 |
| Yellowfin | 100 | - | 100 | 70 | - | 70 | 3,496 |
| Total | 745 | - | 745 | 225 | - | 225 | 7,301 |
| Grand total | 4,223 | 7,168 | 11,391 | 3,000 | 3,903 | 6,903 | 109,593 |

Source: Japan Frozen Food Exporters Association.

41 percent above the quantity exported in January 1964. Authorized transshipments in January 1965 were 84 percent above those in the same month of the previous year. On a species basis, albacore tuna exports were up 175 percent and tuna loins increased 231 percent, but yellowfin and skipjack exports were down 34 percent and 66 percent, respectively. (Fisheries Attache, United States Embassy, Tokyo, February 19, 1965.)

* * * * *

FROZEN TUNA AND SWORDFISH EXPORT QUOTAS:

The Japan Export Frozen Tuna Producers Association, at a special general meeting on March 19, 1965, set the following frozen tuna and swordfish export quotas for the 1965 business year which began in April.

1. United States and Canada--110,000 short tons; all other countries--70,000 metric tons. Allocations will be made on the basis of actual performance in the preceding year. Thirty percent of the allocations will be offered to the Association, which will be set aside for adjustment purposes (adjustment quota). For market stabilization purposes, during the period April-September 1965, exports will be restricted to not more than 45 percent (49,500 short tons) of the quota to the United States and Canada and 60 percent (42,000 metric tons) of the quota for all other countries. Remaining portions of the quota will be exported during the period October 1965-March 1966.

2. Overseas bases (fresh and frozen tuna) American Samoa--25,000 metric tons; Espiritu Santo, New Hebrides Islands--6,000 to Fiji Islands--9,000 tons; Penang, Malaysia--6,000 tons; and St. Martin, Netherlands Antilles--2,000 metric tons.

3. Frozen tuna loins to the United States and Canada--9,000 short tons. Allocations will be made on the basis of export performance record for the preceding three-year period. Twenty percent of the allocations will be offered to the Association for adjustment purposes (adjustment quota).

4. Frozen swordfish exports to North and South America will be limited to 5,500 short tons. Allocations will be made according to the actual performance record for the preceding three-year period. Ten percent of the allocations will be offered to the Association for adjustment purposes (adjustment quota). (Suisan Tsushin, March 20; Suisancho Nippo, March 22, 1965.)

Note: See Commercial Fisheries Review, May 1964 p. 56.

* * * * *

FROZEN TUNA EXPORT PRICE TRENDS:

The market in Italy for Japanese frozen yellowfin tuna in early March 1965 was reported firm. Dressed yellowfin exported to Italy brought US$435 a metric ton c.i.f., and shipments of mixed yellowfin-albacore $42[illegible] ton c.i.f.

On the other hand, frozen gilled-and-gutted yellowfin delivered to Puerto Rico were quoted at $340 a short ton, while yellowfin exported from Japan proper to California were selling at $345-350 a short ton c. & f.

Beginning March 10 the cost of shipping frozen tuna from Japan to the U. S. west coast was reduced from $57.75 to $47.50 per short ton. The reduction in freight cost is said to

Jan (Contd.):

le heightened buying interest in the United Stes. (Suisan Tsushin, March 11, 1965.)

* * * * *

PORTS OF FISHERY AND AQUATIC DUCTS, APRIL 1-SEPTEMBER 30, 1964, TH COMPARISONS:

The total value of Japan's exports of major hery and aquatic products in the first six nths (April 1 - September 30) of the fiscal r beginning April 1, 1964, amounted to 1 43.3 million, an increase of 11.8 percent r the same period in 1963. Frozen and h fishery products accounted for 34.1 per- t of the total value of the items shown, canned fishery products 41.5 percent, cultured pearls 18.5 percent, whale oil 3.2 percent, salted and dried products 1.8 percent, and agar-agar 0.8 percent.

Exports of frozen and fresh fishery products during the period increased 85.2 percent in quantity and 47.7 percent in value as compared with the same period in 1963, canned fishery products were up 36.6 and 28.4 percent, cultured pearls 6.5 and 10.8 percent, and salted and dried products 13.9 and 21.1 percent, respectively. But exports of whale oil were down 79.3 percent in quantity and 79.0 percent in value. (Fisheries Attache, United States Embassy, Tokyo, February 17, 1965.)

Note: See Commercial Fisheries Review, August 1964 p. 68.

* * * * *

Japan's Exports of Fishery and Aquatic Products, April 1-September 30, 1964 with Comparisons

| Product | Fiscal Year 1964 Exports Apr. 1-Sept. 30 | | FY 1964 Export Target | | Fiscal Year 1963 Apr. 1-Sept. 30 | | Oct. 1-Mar. 31 | | Total Actual Exports | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Qty. | Value | Qty. | Value | Qty. | Value | Qty. | Value | Qty. | Value |
| | Metric Tons | US$ 1,000 | Metric Tons | US$ 1,000 | Metric Tons | US$ 1,000 | Metric Tons | US$ 1,000 | Metric Tons | US$ 1,000 |
| zen Fish & Shellfish: | | | | | | | | | | |
| una | 86,081 | 31,168 | 177,804 | 61,627 | 62,032 | 22,251 | 72,130 | 27,451 | 134,162 | 49,702 |
| arlin | 3,123 | 1,900 | 6,800 | 4,320 | 2,354 | 1,596 | 3,573 | 2,247 | 5,927 | 3,843 |
| lmon | 847 | 900 | 1,500 | 1,940 | 544 | 644 | 599 | 794 | 1,143 | 1,438 |
| rout (Rainbow) | 938 | 805 | 1,500 | 1,415 | 763 | 717 | 692 | 649 | 1,455 | 1,366 |
| hrimp | 529 | 777 | 1,500 | 2,174 | 499 | 691 | 846 | 1,222 | 1,345 | 1,913 |
| ther | 71,184 | 10,741 | 55,000 | 13,530 | 17,029 | 4,475 | 32,092 | 8,099 | 49,121 | 12,574 |
| Total frozen | 162,702 | 46,291 | 244,104 | 85,006 | 83,221 | 30,374 | 109,932 | 40,462 | 193,153 | 70,836 |
| ha, fresh | 8,357 | 2,577 | 55,500 | 16,095 | 9,157 | 2,706 | 11,055 | 3,248 | 20,212 | 5,954 |
| er Products: | | | | | | | | | | |
| lted & dried | 2,142 | 2,634 | 4,200 | 5,800 | 1,881 | 2,175 | 2,561 | 3,892 | 4,442 | 6,067 |
| gar-agar | 323 | 1,093 | 350 | 1,260 | 190 | 664 | 209 | 687 | 399 | 1,351 |
| hale oil | 23,949 | 4,609 | 118,700 | 24,990 | 115,562 | 21,946 | 108,326 | 22,963 | 223,888 | 44,909 |
| | Lbs. | | Lbs. | | Lbs. | | Lbs. | | Lbs. | |
| rls (cultured) | 79,562 | 26,556 | 157,073 | 51,300 | 74,676 | 23,976 | 78,437 | 26,656 | 153,113 | 50,632 |
| | 1,000 Cases | | 1,000 Cases | | 1,000 Cases | | 1,000 Cases | | 1,000 Cases | |
| ned Fish: | | | | | | | | | | |
| una | 3,343 | 19,127 | 4,450 | 37,513 | 2,130 | 17,876 | 1,938 | 15,990 | 4,068 | 33,866 |
| lmon | 568 | 19,606 | 1,395 | 43,962 | 338 | 8,051 | 1,171 | 39,518 | 1,509 | 47,569 |
| ab meat | 245 | 5,225 | 438 | 11,004 | 225 | 5,514 | 249 | 6,210 | 474 | 11,724 |
| rdines | 24 | 188 | 100 | 780 | 158 | 1,179 | 22 | 184 | 180 | 1,363 |
| ury | 504 | 3,031 | 1,650 | 10,680 | 594 | 3,697 | 923 | 5,858 | 1,517 | 9,555 |
| rse mackerel | 415 | 2,807 | 600 | 3,948 | 251 | 1,686 | 178 | 1,414 | 429 | 3,100 |
| ther | 1,528 | 9,553 | 2,590 | 17,251 | 1,155 | 8,382 | 1,735 | 11,053 | 2,890 | 19,435 |
| Total canned | 6,627 | 59,537 | 11,223 | 125,138 | 4,851 | 46,385 | 6,216 | 80,227 | 11,067 | 126,612 |
| tal value of all products | | 143,297 | | 309,589 | | 128,226 | | 178,135 | | 306,361 |

(1) Value based on f.o.b. prices in Japan.
(2) Latest data are for first six months of fiscal year beginning April 1, 1964.
(3) Actual fiscal year 1963 exports revised.

Japan (Contd.):

PROGRESS OF NEGOTIATIONS ON CANNED TUNA IN BRINE EXPORTS TO U.S.:

Japanese canned tuna in brine exports to the United States have been suspended since December 1964 as a result of the dispute involving tuna packers and exporters and the failure of the two groups to conclude a new one-year export agreement (old agreement terminated November 1964).

On March 15, the directors of the Japan Tuna Packers Association, following negotiations with the exporters, agreed on a new sales procedure. As a result, hopes were held for an early settlement of the four-month dispute.

Points of agreement reached were: (1) Seventy percent of the total quantity of canned tuna in brine for export will be consigned to the Tokyo Canned Tuna Sales Company (representing packers) for sale to exporters on the basis of their past performance record. (2) Remaining 30 percent will be offered as an adjustment quota under a sales method to be determined by the Packers Association. (3) The period of sales will be determined through mutual consultations between packers and exporters although, as a rule, sales will be conducted on a quarterly basis. Depending on market conditions, sales period may be further divided as in the past.

However, on the same day, despite the accord on sales policy reached between the packers and exporters, the Exporters Association submitted for approval by the Ministry of International Trade and Industry (MITI) a new Exporters Agreement which provided for an 80-percent past-performance quota and a 20-percent adjustment quota. In view of the discrepancy between this provision and the quota allocation agreed to between the packers and exporters, the Packers Association, on March 20, formally requested the Exporters Association to revise the Agreement. According to the Exporters Association, there was insufficient time to incorporate the changes agreed upon but the Association would, in practice, honor the points of agreement reached with the Packers Association.

On March 17, the Japan Export Trade Deliberation Council (highest government-industry advisory group on marine products export) met and approved the enactment of the "Ministerial Ordinance Related to Restrictions on FY 1965 (April 1965-March 1966) Canned Tuna Sales Procedure" submitted by the Fisheries Agency. Objective of the ordinance is to regulate sales of export canned tuna put up by packers who are not members of the Packers Association. In FY 1964 (April 1964-March 1965) the quantity of tuna packed by nonmember firms reportedly totaled about 91,000 cases.

The new ordinance, if approved by the Government, is scheduled to go into effect April 1. However, in view of the fact that the packers and exporters have not completely reached agreement on the Exporters Agreement, MITI is not expected to immediately act on the ordinance. (Suisan Tsushin, March 23; Suisan Keizai Shimbun, March 18; Nihon Suisan Shimbun, March 17, 1965.)

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RESEARCH VESSEL RETURNS FROM EASTERN PACIFIC TUNA SURVEY:

The Japanese Government research vessel Shoyo Maru (602 gross tons) returned to Tokyo, March 16, 1965, after a 157-day cruise to the eastern Pacific Ocean. The vessel made 27 long-line sets and averaged less than one fish per 100 hooks. The poor results were attributed to low water temperatures and to the vessel fishing in waters outside of the regular tuna fishing grounds.

Shoyo Maru, Japanese Government fishery research vessel.

The vessel also tested the effectiveness of whole saury bait as against half-a-saury bait. On 18 trials, the tuna hook rate for whole bait was 0.4 fish per 100 hooks as compared to 0.38 for half-a-bait. In the case of spearfish the hook rate was 0.52 versus 0.38. The tests indicated that the two types of saury bait did not differ greatly in effectiveness. However, the results were held to be inconclusive. Further tests with half-a-saury bait in proven tuna grounds were recommended. The vessel found fairly large concentrations of saury in

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ers not far removed from the tuna fishing unds. (Suisan Keizai Shimbun, March 19, 5.)

See Commercial Fisheries Review, November 1964 p. 89.

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NA MOTHERSHIP TO BE T TO SOUTH PACIFIC:

large Japanese fishing company planned spatch the tuna mothership Yuyo Maru 0 gross tons) to the South Pacific on May 65. The mothership was expected to be mpanied by 55 tuna long-line vessels and main on the fishing grounds for about days. The production target is 8,000 ic tons of tuna, spearfish, and shark.

nother Japanese fishery firm, which op- es the tuna mothership Nojima Maru 0 gross tons), decided not to operate a mothership fleet this year. (Suisan Tsu- March 22, 1965.)

* * * * *

RSE-SEINER TO FISH TUNA F GUAM IN NOVEMBER 1965:

large Japanese fishing company is study- plans to send the 240-ton purse-seiner yo Maru to the waters off Guam in early ember 1965 to test fish for skipjack tuna. Kenyo Maru, which is equipped with a r block, was sent to the New Zealand rs in March 1964 but the trip ended in re due to the lateness of the tuna season unfamiliarity with fishing grounds. The el, converted into a purse-seiner in 1962, mainly been employed in the skipjack fish- off northeastern Japan. (Shin Suisan Shim- Sokuho, March 19, 1965.)

* * * * *

ERNMENT OFFICIAL STRESSES D FOR REDUCING TUNA FLEET:

he vice-president of the Japan Federation una Fishermen's Cooperative Associations KATSUREN) met with State Minister Kono arch 19, 1965, to explain the Federation's to overcome the stagnant conditions fac- he Japanese tuna fishery. The Minister tively agreed to NIKKATSUREN's plan, gain emphasized the importance of re- ng the size of the tuna fleet. NIKKAT- EN was to meet March 24 to complete those sections of its stabilization plan dealing with sales expansion and management improvement, but planned to further study the problem of fleet reduction. (Nihon Suisan Shimbun, March 22, 1965.)

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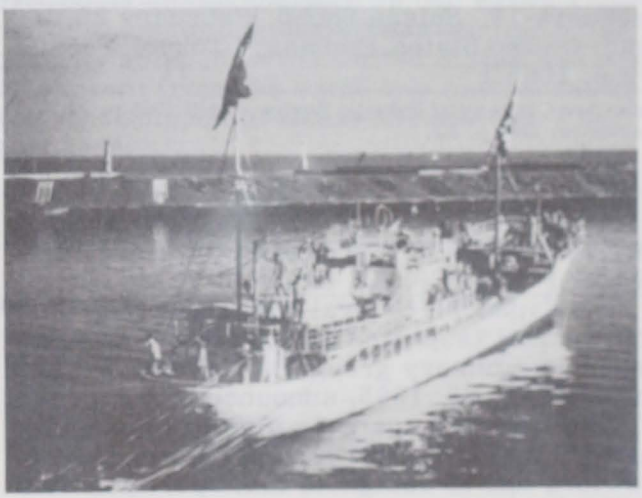
PRELIMINARY PLAN REVEALED TO REDUCE TUNA FISHING EFFORT:

The Japan Federation of Tuna Fishermen's Cooperative (NIKKATSUREN), on February 26, 1965, revealed the general outline of its preliminary master plan to reorganize the Japanese tuna fleet in an effort to overcome the economic difficulties confronting the fishing industry. NIKKATSUREN hopes to confer with the Fisheries Agency over its plan, which calls for reducing the tuna fleet in two phases. In the first phase, holders of tuna fishing rights who lend their rights to others and who do not themselves engage in fishing would be removed from the tuna fishery; vessels transferred from other fisheries to the tuna fishery would be suspended; and commercial fishing by government research vessels would be prohibited and such vessels be made to engage only in research activity for which they were originally intended. In the second phase, a more positive fleet reduction would be effected if the situation warranted such action.



Japanese tuna long-liner leaving Yaizu (principal tuna port) for the Indian Ocean.

NIKKATSUREN's plan also includes the following programs: (1) gear research to develop labor-saving devices which would help solve the labor shortage problem confronting the industry; (2) formation of small-scale fishery operators into corporations to strengthen Japan's competitive position in foreign mar-

Japan (Contd.):

kets; and (3) regulation of production and sales of albacore tuna for export to the United States in order to stabilize prices. (Nihon Suisan Shimbun, March 1; Minato Shimbun, February 27, 1965.)

* * * * *

EXPORT OF TUNA FISHING VESSELS TO SOUTH KOREA APPROVED BY CABINET:

The sale and export to South Korea of 11 tuna fishing vessels (valued at $1.4 million) was approved by the Japanese Cabinet on February 9, 1965. Purchase negotiations for the vessels were made in spring 1964, and the vessels completed in summer 1964. The Japanese Government considers that approval for exporting the vessels is an "exception" to the Cabinet order which limits exports of Japanese fishing vessels to Korea to less than 20 tons and with a vessel age of over 5 years. The vessels are 140-ton refrigerated carrier vessels which can also serve as tuna vessels.

South Korean firms are ordering new Japanese "refrigerated vessels" in increasing numbers. In addition to the 11 vessels, several Korean fishing firms have placed orders for a total of 27 such vessels with three Japanese trading firms. (Suisan Keizai Shimbun, February 19; Suisan Shuho, February 25, 1965; United States Embassy, Tokyo, February 6, 1965.)

Note: See Commercial Fisheries Review, April 1965 p. 72; September 1964 p. 82.

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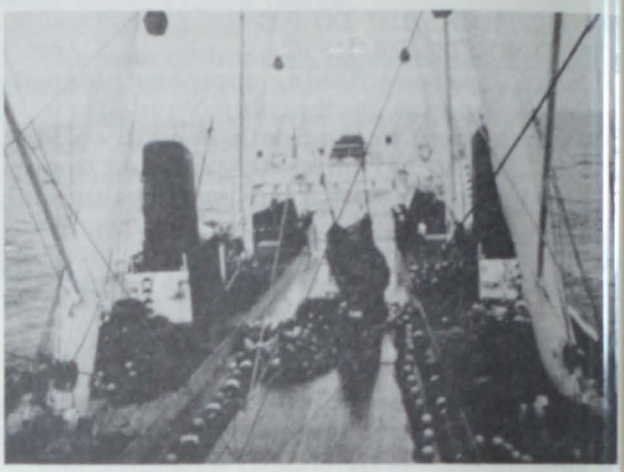
ELEVEN LARGE TRAWLERS TO FISH IN GULF OF ALASKA IN 1965:

The Japanese Central Fisheries Coordination Council (supreme government-industry fisheries advisory group), at the 49th Session on February 26, 1965, announced its approval of the Fisheries Agency's plan to license in the Gulf of Alaska in 1965 the operation of 11 trawlers and to designate that operation as a licensed fishery. Previously, the Gulf trawl fishery had been designated an experimental fishery.

Gist of the Council's recommendations:

1. Experimental fishing operations conducted since September 1963 in the Gulf of Alaska waters have shown that the area will support a commercial fishery. Thus, trawl operations in the Gulf of Alaska waters will henceforth be licensed on a commercial basis and a total of 11 large trawlers approved for operation.

2. The operational area in the Gulf of Alaska will include the waters between the meridians 175° W. and 135° W. longitudes north of 50° N. latitude, excluding the Bering Sea



Aft deck view of Japanese stern trawler which in April 1964 was fishing Pacific ocean perch in Gulf of Alaska.

3. Trawlers between 550-3,500 gross tons will be licensed for operation. They will each be permitted to fish with one small trawler of over 200 gross tons but under 550 tons. In the event that they do not directly engage in fishing, they will be permitted to fish with two small trawlers.

4. Licenses will be effective up to January 31, 1966.

5. Halibut, salmon, and king crab will not be taken. Those taken incidentally will be returned to the sea immediately. Catch of herring under 20 centimeters (7.9 inches) must not exceed in numbers 10 percent of the total catch of herring. Should it exceed 10 percent, vessels must immediately move away from the area. Marine plants and animals must not be taken in waters within three miles off foreign territory. The possession on board vessels of long lines and gill nets is illegal. The responsible person on board the vessel must report to the government inspector the vessel's daily catch in accordance with provisions to be stipulated separately. (Suisan Keizai Shimbun, February 27; Nihon Suisan Shimbun, March 1, 1965.)

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HERY ACTIVITIES IN
RING SEA AND NORTH PACIFIC:

The stern trawler Tenyo Maru No. 3 (3,500 ss tons) departed Hakodate, Hokkaido, for eastern Bering Sea on February 24, 1965. trawler, which is scheduled to remain on fishing grounds for about six months, unarly August, will replace the stern trawlaiyo Maru No. 82 (2,890 gross tons) fishin the Bering Sea as of mid-February. Taiyo Maru will be diverted to the Gulf of ska.

The 1,451-ton trawler Akebono Maru No. as scheduled to depart for the Gulf of ska on March 8. That trawler previously ated in the eastern Atlantic Ocean off ca.

The 14,000-ton fish meal factoryship Hoyo u operating in the Okhotsk Sea was schedto return to Japan in early April and to art for the Bering Sea around April 20. Hoyo Maru, under a special fisheries ement concluded between Japan and the et Union, is processing into fish meal duction target for 1965--5,000 metric ) Russian-caught Alaska pollock. The oryship is fishing with a fleet of 30-40 ssian trawlers.

The king crab factoryship Dainichi Maru 59 gross tons) and Tokei Maru (5,835 ss tons), each accompanied by 5 catcher els, departed Hakodate on March 1 for the eastern Bering Sea. They were expected to arrive on the crab fishing grounds on March 12. The two fleets will experiment with crab pots for the first time this year. The Dainichi Maru is equipped with 150 crab pots and the Tokei Maru 130 pots. They will test the pots, on the average, for a period of about one week per month. (Suisan Keizai Shimbun, February 21, 24, and March 2, 1965.)

Japanese fish meal factoryship Hoyo Maru.

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CANNED SHRIMP EXPORTS, JANUARY-FEBRUARY 1965:

Japan's exports of canned shrimp in January-February 1965 totaled 40,253 cases (converted to 24 ½-lb. cans), a 14-percent decrease as compared with 59,040 cases shipped in the same period a year earlier. The quantity shipped to the United States was down 21 percent from the same two months in 1964, and that shipped to Great Britain was 7 percent less.

Table 1 - Japan's Exports of Canned Shrimp, by Country of Destination, January 1965

| Cans Case | Size | U. S. | Great Britain | Canada | France | Other Countries | Total |
|---|---|---|---|---|---|---|---|
| | | (No. of Actual Cases) | | | | | |
| /2-lb. | Small | 3,000 | 150 | - | 500 | 155 | 3,805 |
| /2-lb. | Tiny | 2,870 | - | - | - | 815 | 3,685 |
| /4-lb. | " | - | 2,106 | - | 400 | - | 2,506 |
| /4-lb. | " | - | 1,019 | - | - | - | 1,019 |
| /2-lb. | Broken | 4,600 | - | 1,000 | - | 107 | 5,707 |
| /4-lb. | " | - | 6,551 | - | - | - | 6,551 |
| /4-lb. | Mixed | - | 9,350 | - | - | - | 9,350 |
| | | (No. of Standard Cases of 24 1/2-lb. cans) | | | | | |
| Total 1/Jan. 1965 | | 10,470 | 13,448 | 1,000 | 700 | 1,077 | 26,695 |
| Exports Jan. 1964 | | 7,467 | 12,520 | 1,720 | 3,720 | 1,596 | 27,023 |

ze of can indicates total weight of contents in can. Totals don't add because of conversion to standard cases.
ce: Japan Canned Crab Sales Co. (Sales agent for canned shrimp.)

Japan (Contd.):

Table 2 - Japan's Exports of Canned Shrimp, by Country of Destination, February 1965

| No. Cans per Case | Size | U. S. | Great Britain | Canada | France | Other Countries | Total |
|---|---|---|---|---|---|---|---|
| | | (No. of Actual Cases) | | | | | |
| 24 1/2-lb. | Small | 2,500 | - | - | 250 | 388 | 3,13 |
| 24 1/4-lb. | " | - | 2,000 | - | - | - | 2,00 |
| 24 1/2-lb. | Tiny | 400 | - | - | - | 1,450 | 1,85 |
| 48 1/4-lb. | " | - | 1,500 | - | - | - | 1,50 |
| 24 1/2-lb. | Broken | 4,750 | - | - | - | 20 | 4,77 |
| 48 1/4-lb. | " | - | 300 | - | - | - | 30 |
| | | (No. of Standard Cases of 24 1/2-lb. cans) | | | | | |
| Total 1/Feb. 1965 | | 7,650 | 3,800 | - | 250 | 1,858 | 13,5 |
| Exports Feb. 1964 | | 15,570 | 6,014 | 6,650 | 2,450 | 1,333 | 32,0 |

See table 1 for footnotes.

Of the total canned shrimp exports in January, the United States took 39 percent and Great Britain took 50 percent. The remainder went to Canada, France, and other unspecified countries.

Japan's canned shrimp exports in February were down to about one-half of the previous month's. The United States took 56 percent and Great Britain 28 percent of that month's exports. Canada did not receive any Japanese canned shrimp during February 1965. (Fisheries Attache, United States Embassy, Tokyo, March 24, 1965.)

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FISH MEAL IMPORTS AND EXPORTS, 1963-64:

Japan is a net importer of fish meal with imports far in excess of exports. Japanese imports of fish meal in 1964 totaled 102,277 metric tons, an increase of 21 percent from the previous year. Peru and the South Africa Republic were the principal suppliers, accounting for 97 percent of the total in 1964. United States shipments of fish meal to Japan in 1964 totaled 1,429 metric tons with a value of $187,000.

Japan's exports of fish meal in 1964 amounted to 6,202 tons valued at $834,000, compared with exports of 3,599 tons valued at $464,000 in 1963. In 1964, the principal buyers of Japanese fish meal were the Ryukyus, Taiwan, and the Philippines, with combined shipments accounting for 68 percent of the total. In 1963, Taiwan, Hong Kong, and

Japan's Fish Meal Imports, 1963-64

| Country of Origin | 1964 | | 1963 | |
|---|---|---|---|---|
| | Quantity | Value | Quantity | Va |
| | Metric Tons | US$ 1,000 | Metric Tons | US 1,0 |
| Peru | 83,474 | 11,128 | 60,316 | 7,9 |
| Australia | 133 | 13 | 379 | |
| South Africa Rep. | 15,741 | 2,140 | 18,208 | 2,3 |
| S.-W. Africa | 711 | 96 | 1,357 | |
| Angola | - | - | 3,678 | |
| Communist China | 99 | 15 | - | - |
| Thailand | 30 | 4 | - | - |
| Argentina | 126 | 13 | - | - |
| New Zealand | 253 | 25 | 254 | |
| Netherlands | - | - | 20 | |
| United States | 1,429 | 187 | 101 | |
| Samoa | 281 | 42 | - | - |
| Total | 102,277 | 13,663 | 84,313 | 11,0 |

Source: Japanese Oils and Fats Import Council.

Singapore were the leading buyers of Japan fish meal. (Fisheries Attache, United State Embassy, Tokyo, March 5, 1965.)

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JOINT SOVIET-JAPANESE OKHOTSK SEA FISH MEAL OPERATION SUCCESSFUL:

A large Japanese fishing company and All-Soviet Food Import-Export Corporatio concluded an agreement in December 1964 calling for the delivery in February-Marc 1965 of 30,000 metric tons (with a maximu limit of 36,000 tons) of Russian-caught Okho Sea Alaska pollock to the Japanese firm's 14,000-ton fish meal factoryship Hoyo Ma (formerly Renshin Maru) for processing in 5,000 tons of fish meal. The Hoyo Maru d

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ted Japan for the Okhotsk Sea in late Jan-
y to rendezvous with the Russian trawl
t, which in mid-February was reported
otal 30-40 trawlers. The average daily
very (totaled over 700 metric tons) of
ska pollock to the factoryship far exceed-
expectations, and on March 19 the Hoyo
ru ended operations after exceeding its
er target of 36,000 tons by 300 tons and
rned to Hakodate March 23. The factory-
was scheduled to leave for the eastern
ring Sea around April 24.

The newest joint venture with the Soviet
on, which is to run for a period of three
rs, was a success due to the production
get being reached far earlier than expected
the firm price of fish meal in Japan. The
oryship's production was expected to sell
about 64,000 yen (US$150) a metric ton.

Two other large Japanese fishing compa-
s are reported to have undertaken studies
engage in a similar type of joint operation
h the Soviet Union. The two firms are said
e carefully looking into this matter so as
e able to be in a position to most effec-
ly use their factoryships on a year-round
sis. Both firms operate fish-meal factory-
ips in the eastern Bering Sea during the
mmer season. During the winter season
se same vessels (Tenyo Maru 11,581 gross
s, and Soyo Maru 11,192 gross tons, and
okuei Maru 10,357 gross tons) are employ-
as refrigerated carriers in the Antarctic
ale fishery. However, the two firms feel
t the international whale catch quota may
l be greatly reduced this year as a re-
rce conservation measure. In such an
nt, they will need to reassign some of
ir vessels now employed in the Antarctic
le fishery. Their plans which are opposed
the Hokkaido trawl fishermen, are said to
looked upon favorably by the Fisheries
ncy due to the expanded demand for fish
al in Japan. Also from the standpoint of
l Government policy, such a plan, if ef-
ed, would help control the outflow of dol-
s. (Suisan Tsushin, March 15, 17, 20, 23;
san Keizai Shimbun, March 14, 1965; and
er sources.)

: See Commercial Fisheries Review, March 1965 p. 83.

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SHING VESSEL FLEET STATUS IN 1963
D CONSTRUCTION TRENDS IN 1964:

Recent fishing vessel construction trends
Japan have been dominated by (1) the ex-
pansion of the trawler fleet, and (2) the increasing importance of fishing vessel exports. On the negative side is the proposal to reduce the number of bonito and tuna vessels in the Japanese fleet.

Fig. 1 - Older type of Japanese trawler operating in the Bering Sea.

Following is a Japanese fishing fleet report published by The Japan Times, March 12, 1965:

Fishing Fleet Status, 1963: Japan's fishing fleet consisted of almost 400,000 vessels with a combined tonnage of about 2 million gross tons as of December 1963, according to the Japanese Fisheries Agency.

About 190,000 marine motor vessels account for the greater part of Japan's fish catch.

Small coastal vessels of under 5 tons make up 87 percent of the total number of vessels. But offshore fishing vessels of over 50 tons account for 67 percent of the fleet's total gross tonnage.

After World War II, which destroyed Japan's fishing fleet, the building of fishing ves-

Japan (Contd.):

Table 1 - Size of Japanese Fishing Fleet, December 1963

| Vessel Type | Number of Vessels | Total Gross Tonnage |
|---|---|---|
| Ocean vessels: | | |
| With engines | 192,515 | 1,909,522 |
| Without engines | 185,196 | 155,663 |
| Total ocean vessels | 377,711 | 2,065,185 |
| Inland vessels (operating on rivers and lakes): | | |
| With engines | 3,600 | 4,733 |
| Without engines | 17,624 | 8,928 |
| Total inland vessels | 21,224 | 13,661 |
| Grand total | 398,935 | 2,078,846 |

sels was given priority in order to alleviate the prevailing food shortage.

Japan's basic program to restore its fishing fleet was completed in 1953. Then, the efficiency of the fleet was greatly increased in the 10-year period from 1953 to 1963. The use of diesel engines spread to vessels of all types. Also, there was sharp expansion in the distant-water fleet.

Fig. 2 - Japanese whale catcher in the North Pacific.

Between 1953 and 1963, the number of Japanese offshore fishing vessels of over 500 tons increased from 33 vessels (totaling 109,065 tons) to 240 vessels (totaling 691,042 tons). In 1953, the 500-ton vessel class included only 9 trawlers all of which were under 600 tons. By 1963, there were 39 offshore trawlers with an average tonnage of 1,659 tons. The long-line tuna fleet of 41 vessels (totaling 40,092 tons) in 1963 was nonexistent in 1953. The whaling fleet in 1963 included 57 vessels of over 500 tons as compared with only 1 such vessel in 1953.

Fishing Vessel Construction Trends, 1964: Approval of the Japanese Fisheries Agency is required for the construction of any marine fishing vessel of 15 meters (49 feet) or longer. The average Japanese fishing vessel with a 15-meter hull has an approximate gross tonnage of about 15 tons.

Table 2 - Japanese Vessel Construction Permits Issued in 1964

| Vessel Classification | Number of Vessels | Total Tonnage |
|---|---|---|
| Steel vessels | 503 | 109,503 |
| Wooden vessels | 338 | 13,351 |
| Total | 841 | 122,854 |

Japanese fishing vessel construction permits issued in 1964 (table 2) indicate a general shift to steel vessels. The catcher vessels carried on motherships used to be made of wood. The last 2 years, a number of those wooden catcher vessels have been replaced with vessels made of steel or light alloys.

Trawler construction is becoming increasingly important in Japan. Japanese shipyards began building large trawlers in the 1950's and by the end of 1964 had launched 18 trawlers in the over 2,000-ton class, 17 trawlers of 1,000-2,000 tons, 8 trawlers in the 1,000-ton class, and a number of smaller trawlers in the 300-1,000 ton class.

Fig. 3 - A 1,000-ton cargo vessel used by Japanese to transport iced fish to Japan. Takes on fish from fishing vessels at sea.

Export orders are increasing at Japanese shipyards. In January 1965, a Japanese shipbuilder launched the first of eight 19,000-ton fish factoryships for the Soviet Union. Japan has also built tuna motherships for the Soviets, trawlers for Rumania and Ghana, and survey ships for Thailand and Indonesia. Japan is building several steel vessels of 100 to 300 tons for countries in southeast Asia. Japanese technicians have also advised on the construction of wooden fishing vessels in a number of developing countries.

Note: See Commercial Fisheries Review, Apr. 1965 p. 86; Feb. 1965 p. 60; Dec. 1964 p. 94; Nov. 1964 p. 97; Oct. 1964 p. 57; July 1964 p. 65; May 1964 p. 61.

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SHERMEN'S WAGE SCALE:

The Japan Seamen's Union is negotiating a v wage agreement for crew members of a fishing vessels belonging to the Nambu na Cooperative Association in northern Ja-n. Wage scales proposed by the Seamen's ion are:

Base Pay and Bonus Distribution to Crew Members

| Position | Monthly Base Pay | | Bonus |
|---|---|---|---|
| | Yen | US$ | Percent |
| pper-fishing captain | 44,000 | 122 | 2.5 |
| shing captain | 34,000 | 94 | 2.0 |
| pper, chief engineer, d chief radio operator | 24,000 | 67 | 1.5-1.6 |
| st mate, first engineer, ck chief, refrigeration chief, & chief cook | 18,000 | 50 | 1.2-1.3 |
| cond mate, second engi-eer, and assistant re-frigeration chief | 17,500 | 49 | 1.1-1.2 |
| ck workers, engine rew, and cooks | 15,000 | 42 | 1.0 |

Table for Computing Bonus for 90- to 100-day Trip

| Vessel Size | Value of Landings | | Bonus |
|---|---|---|---|
| Gross Tonnage | Million Yen | US$1,000 | Percent |
| nder 100 tons | 7-8 | 19-22 | 3.6 |
| " " " | 8-9 | 22-25 | 5.8 |
| " " " | Over 15 | Over 41 | 16.1 |
| 180 tons | 10-12 | 28-33 | 6.0 |
| " " | 15 | 41 | 10.4 |
| 240 tons | 15 | 41 | 10.0 |

In addition, the Union's proposal includes ovisions for pay and allowances for crew embers on shipboard duty or on shore leave, y for crews in reserve status and those on ndby status at their homes, and compensa-n for duty-connected as well as nonduty-nnected deaths.

Japanese fishermen engaged in the bottom ng-line sea bream fishery in the South Pa-fic off New Zealand are paid a guaranteed inimum wage ranging from 42,000 to 60,000 n (US$117-167) a month, depending on catch d trip length. Fishermen sailing on vessels h catch targets of 300 metric tons of sea eam are guaranteed a minimum monthly ge of 50,000 yen ($139) if trips are com-eted within 90 days and 42,000 yen ($117) r trips up to 120 days. Those sailing on ssels operating under a catch share system ereby landings (after deducting operating penses) are shared between management d crew at the ratio of 60:40, are guaranteed minimum wage of 60,000 yen ($167) if the lue of one share falls below that amount. Shares allotted to crew members of vessels operating under this system are: fishing captain--2.0; skiff captain--1.1-1.2; and skiff crew--1.0. (Suisan Keizai Shimbun, February 12; Minato Shimbun, February 4, 1965.)

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FISHERY WHITE PAPER ISSUED BY GOVERNMENT:

The Japanese Cabinet approved on February 12, 1965, the Fishery White Paper prepared by Japan's Ministry of Agriculture-Forestry. The report revealed that Japan's fishery production during fiscal year 1963 (April 1, 1963-March 31, 1964) totaled 6,700,000 tons, a decrease of 2.5 percent from the preceding fiscal year. But there was an increase of 13.2 percent in value US$1,342 million) because prices rose 17 percent.

In order to meet growing demand with short supplies, Japan imported 490,000 tons of ma-

Fishermen are hauling yellowtail into fishing boats. Fishing for that species begins in winter on the Kumanonada fishing grounds.

Japan (Contd.):

rine products valued at $60 million, or more than double the imports for the previous fiscal year. Exports of marine products declined 10 percent to about $283 million.

The number of fishermen in Japan, which has been decreasing in recent years, dropped further to 626,000 as compared with 667,000 in fiscal year 1962. The departure of fishermen from sea coast villages for more lucrative urban jobs has been the principle cause of this decline, the paper points out.

The number of fishing enterprises also decreased 2.5 percent in fiscal year 1963 down to a total of 221,000. The decrease was mostly confined to small enterprises, but medium-scale enterprises showed an increase.

The sharp rise in prices of fish boosted fishermen's incomes by 15 to 25 percent while income from cultivating pearls and other marine life nearly doubled. The labor shortage in the fishing industry resulted in a 25-percent increase in wages, but they were still considerably lower than those paid to urban factory workers.

The white paper concludes that Japan's fishing industry needs to make further efforts for conservation and development of marine resources, enhancement of fishing productivity, and modernization of fishing operations. (Japan Report, Consulate General of Japan, New York, N.Y., February 15, 1965.)

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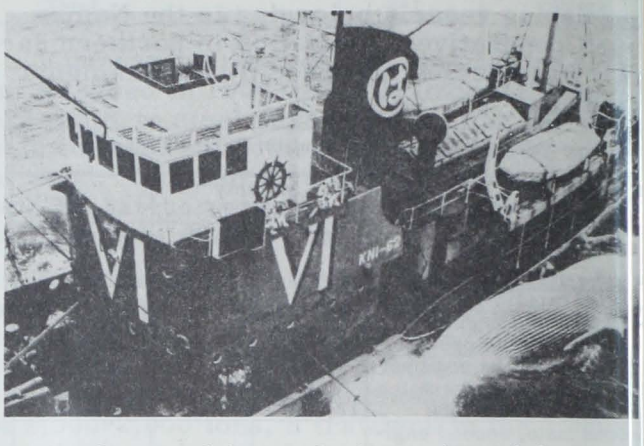
## ANTARCTIC WHALE CATCH FOR 1964/65 SEASON AS OF MARCH 1, 1965:

Japan's 7 whaling fleets operating in the 19th international Antarctic Whaling Expedition of the 1964/65 season harvested the equivalent of 3,453.2 blue-whale units as of March 1, 1965, or 83 percent of the Japanese 4,160 blue-whale unit quota for the season. The full blue-whale unit quota was expected to be met by April 20.

Japanese 1964/65 Antarctic Whale Catch as of March 1, 1965

| Fleet | Fin | Sei | Catch | Target Catch |
|---|---|---|---|---|
| | (No. of Whales) | | (Blue-Whale Units) | |
| Kyokuyo Maru No. 2 | 570 | 1,220 | 488.4 | 638 |
| Kyokuyo Maru No. 3 | 502 | 1,553 | 509.8 | 638 |
| Nisshin Maru | 640 | 1,319 | 539.8 | 630 |
| Nisshin Maru No. 2 | 748 | 1,115 | 559.8 | 600 |
| Zunan Maru | 752 | 722 | 496.4 | 622 |
| Zunan Maru No. 2 | 393 | 1,515 | 449.0 | 622 |
| Total | 3,605 | 7,444 | 3,043.2 | 3,750 |
| Nisshin Maru 1/ | 420 | 1,200 | 410.0 | 410 |
| Grand total | 4,025 | 8,644 | 3,453.2 | 4,160 |

1/Quota attained February 28.



Japanese whaling catcher boat towing a whale.

During the 1963/64 season, the Japanese Antarctic whaling fleets caught 5,722 fin whales and 1,522 sei whales by February 15, 1964. (Suisan Tshushin, March 4, 1965.)

Note: See Commercial Fisheries Review, April 1965 p. 74; May 1964 p. 62.

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## WHALE CATCH FROM COASTAL AREAS, 1964:

Japan's whale catch from coastal areas by five fishery firms in 1964 was up 7 percent from the previous year's catch. Sperm whale accounted for 64 percent of the total whale catch, the same as in 1963. Despite the higher 1964 catch, whale oil production was 7 percent below the 1963 oil yield. (Fisheries Attache, United States Embassy, Tokyo, March 5, 1965.)

Japanese Coastal Whale Catch and Oil Production, 1963-64

| Year | Catch | | | | | | Oil Production | | |
|---|---|---|---|---|---|---|---|---|---|
| | Fin | Blue | Sei | Hump-back | Sperm | Total | Blue | Sperm | Total |
| | (No. of Whales) | | | | | | (Metric Tons) | | |
| 1964 | 7 | 120 | 875 | 1 | 1,800 | 2,803 | 1,663 | 6,050 | 7,7 |
| 1963 | 2 | 67 | 855 | 3 | 1,694 | 2,621 | 1,775 | 6,502 | 8,2 |

Source: Japan Aquatic Oil Association.

## Republic of Korea

ST TUNA FISHING VESSEL
DER FRENCH-ITALIAN CONTRACT:

he first tuna fishing vessel (under a con-
t calling for a total of 99 vessels of vari-
types to be supplied to Korea by a French-
an consortium) was to be delivered in ear-
March 1965 to the Korea Marine Industry
lopment Corporation. The vessel will
o an area near Samoa for tuna fishing.

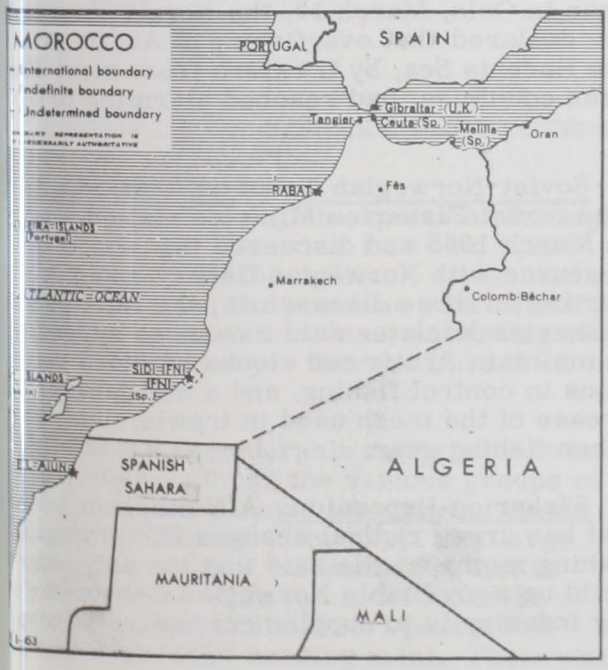
me 40 fishing vessels are scheduled to
livered to Korea by the consortium by
nd of 1965. (United States Embassy,
, March 9, 1965.)

See Commercial Fisheries Review, December 1964 p. 105.

## Morocco

CNED FISH SALES TO CUBA INCREASE:

orocco's 1964/65 fishing season (June 1-
31) started off well and compared favor-
with the previous season when a record
established for fishery exports. For the
5 months of the current fishing season
-October 1964), exports of Moroccan
ed fish were up slightly over the same
od of the 1963/64 season. Sardines are
r Morocco's leading fishery export, but
ge tuna catch resulted in a 20-percent
ease in exports of canned tuna through
ber 1964.




France has been a major importer of Moroccan fishery products but two major shifts have occurred in Morocco's marketing pattern. Sales to the sterling zone are off sharply since shipments to Ghana, a major importer of Moroccan sardines, are down presumably as a result of competition from the developing West African fishing industry.

The more important change in the marketing pattern for Moroccan fishery products is in sales to Cuba. In the period of June-October of the 1964/65 fishing season Morocco shipped to Cuba 347,755 cases of canned fish, mainly sardines, as compared with only 143,655 cases for the entire 1963/64 season. (United States Embassy, Rabat, February 12, 1965.)

## Norway

WINTER HERRING AND COD FISHERIES, EARLY MARCH 1965:

Winter Herring: The cooperative Norwegian Herring Sales Organization reports that some 2 million hectoliters (186,000 metric tons) of winter herring had been landed in Norway as of March 8, 1965, compared to 1.6 million hectoliters (148,800 tons) at the same time last year. With better weather conditions, the catch might have been at least 4 million hectoliters (372,000 tons). Almost 1.7 million hectoliters (158,100 tons) of the 1965 catch have gone to herring meal and oil plants--an increase of 52 percent over last year, while the catch is up only 35 percent.

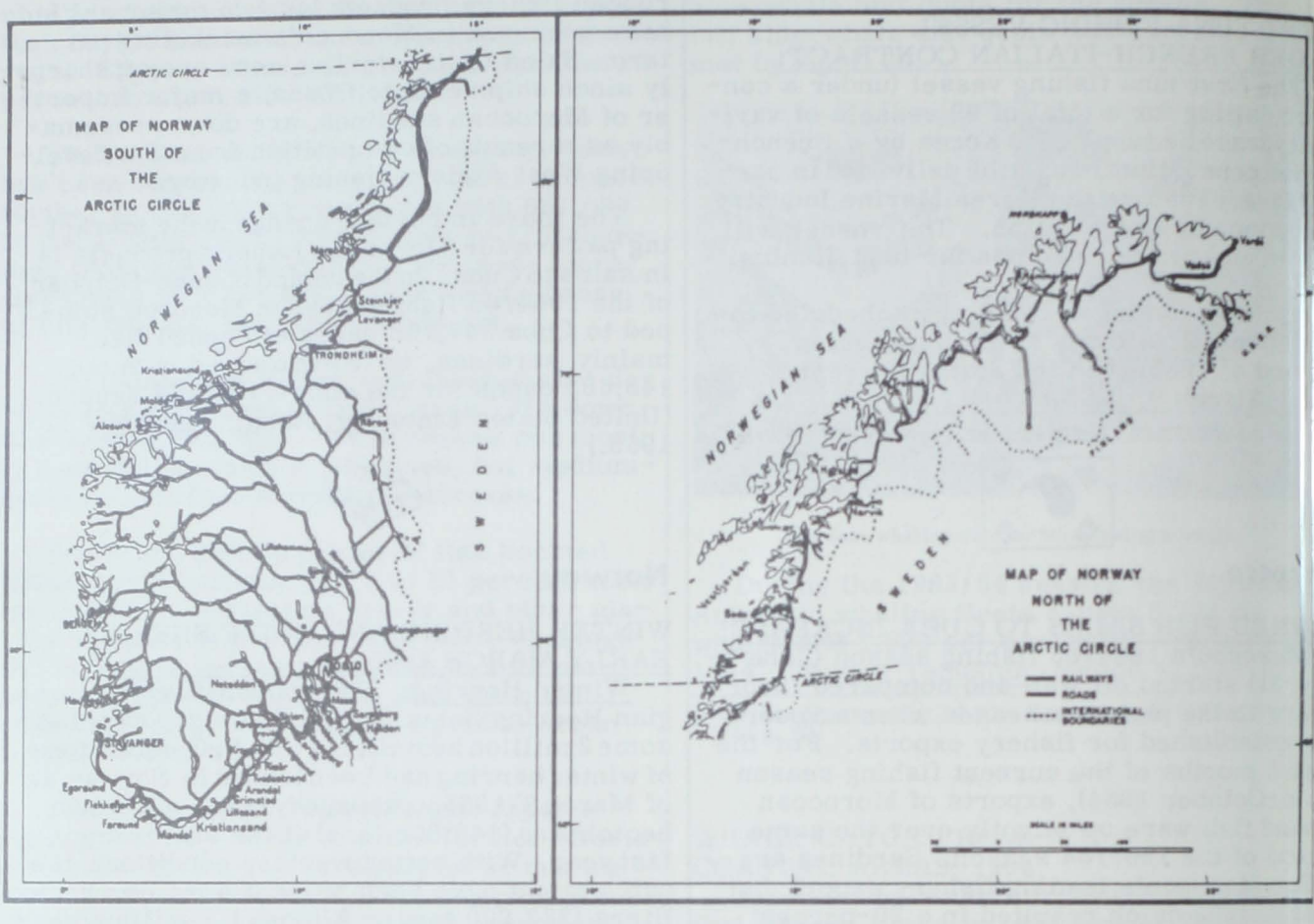
North Norway reported a disappointing winter herring catch of only 640,000 hectoliters (59,520 tons) as of early March.

Cod: The Lofoten cod fishery, also in North Norway, has been plagued by stormy weather, causing heavy damage to fishing gear. As of early March 1965, the Lofoten cod catch totaled 7,074 metric tons.

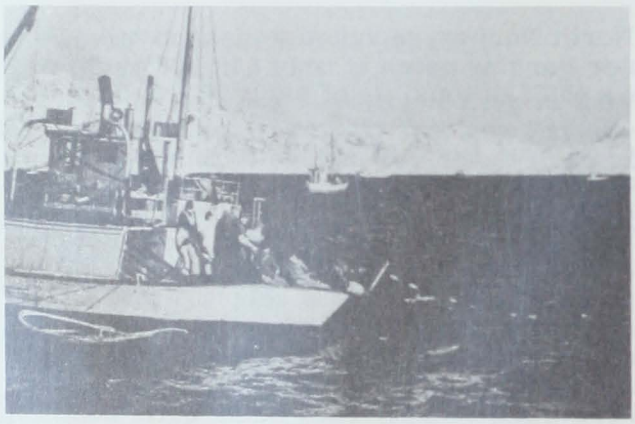
According to a Norwegian oceanographer, it is doubtful whether mature Arctic cod will follow their traditional route to the Vestfjorden spawning banks. They seem quite content to gorge on herring in the waters around Skomvaer and Røst. And, judging from all indications, the cod are likely to spawn in those waters.

Only 5,067 fishermen, manning 1,617 vessels, were participating in this year's Lofoten

Norway (Contd.):




fisheries. Unless there was a notable improvement in the catch, many were expected to leave.



Norwegian vessel fishing cod in Lofoten area.

The Norwegian Fisheries Minister has expressed grave concern about the future of the Lofoten cod fishery which, until a few years ago, afforded good earnings for up to 25,000 North Norway fishermen. At a press confer ence in Oslo, March 12, the Norwegian Mini ter declared that overfishing of Arctic cod i the Barents Sea, by trawlers from most Eur pean countries, had reached alarming propo tions.

Soviet-Norwegian Talks on Arctic Cod: The Soviet Fisheries Minister visited Nor in March 1965 and discussed the Arctic cod resource with Norwegian fishery experts. porting on those discussions, the Norwegia Fisheries Minister said measures suggeste to maintain Arctic cod stocks included regu tions to control fishing, and a mandatory in crease of the mesh used in trawls, nets, an other fishing gear.

Fisheries Expansion: A Norwegian scien tist has urged radical changes in Norwegian fishing methods. He said that the only way build up a profitable Norwegian fish-proces ing industry is to supplement the traditional

Norway (Contd.):

coastal fisheries with offshore fishing. This would require a fleet of large freezer trawlers which could exploit the most productive fishing grounds on a year-round basis. The development of deep-sea fishing, based on freezer trawlers, would also help to make the coastal fisheries more profitable, he declared. (News of Norway, March 18, 1965.)

* * * * *

FIRST WEEK OF WINTER HERRING SEASON YIELDS EXCELLENT CATCHES:

A total of 150,000 metric tons of winter herring was landed in the first week of Norway's winter herring fishing season. This compared with 40,000 tons in the same period of the 1964 season. About 120,000 tons of the new season catch went to the fish oil and meal industry.

Predictions made by the Norwegian Fish Research Organization for the 1965 winter herring fisheries have so far been very accurate. Extensive shoals of herring approached the Norwegian coast at the time and at the points expected (the Kristiansund area and the Lofoten area). For the whole winter herring season the catch was originally forecast at 400,000 tons, or 25 percent more than in 1964. From the results of the first week of fishing, that estimate may be on the low side unless weather conditions cut down fishing. (United States Embassy, Oslo, March 1, 1965.)

* * * * *

EXPORT VALUE OF FISHERY PRODUCTS AND BYPRODUCTS AT RECORD HIGH IN 1964:

The value of Norwegian exports of fishery products in 1964 was at a record 1,094 million kroner (US$154 million), an increase of 7 percent from the previous year although the quantity exported was less, according to a report from Norway's Central Bureau of Statistics.

There were considerable shifts in the quantity distribution among the various groups of products, which reflected the varying yields of Norway's different fisheries. The large catches of herring in the North Sea and in Northern Norway resulted in an increase of 77 percent in quantity and 86.7 percent in value for exports of herring meal. There was a similar increase in quantity and value for exports of fish meal processed from other species of fish.

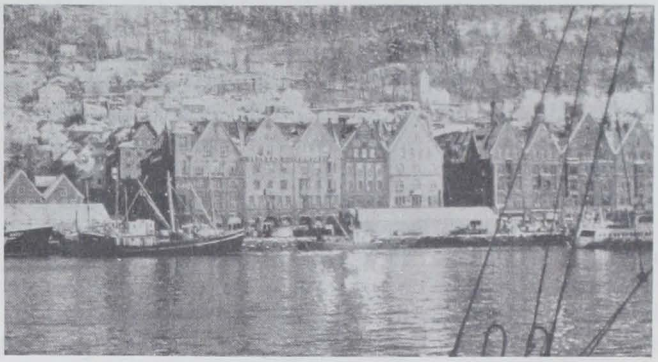


Fig. 1 - The harbor in Bergen, one of Norway's important fishing ports.

The 1964 exports of other herring products were below the previous year indicating Norway's difficulty in holding on to traditional markets for fresh and salted herring. This may be partly explained by the failure for several years in succession to fill orders received in advance. But herring catches were then small and the demand could not be met.

The lower 1964 Norwegian exports of stockfish and klipfish were attributed to marketing difficulties. Exports of stockfish in 1964 totaled 23,431 metric tons, a decrease of 21.6 percent, while exports of klipfish dropped by 13.2 percent to 26,484 tons.

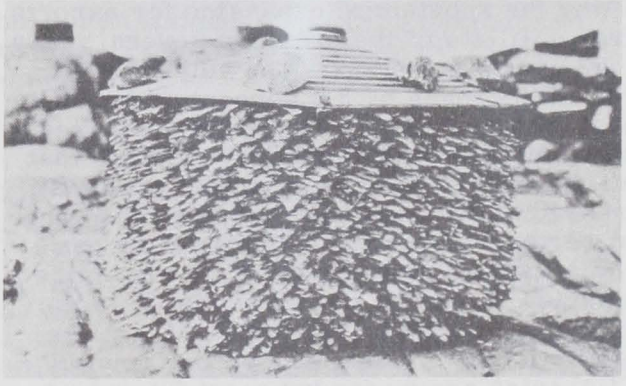


Fig. 2 - Klipfish carefully stacked for drying in the sun.

The most significant development in Norway's export trade has been the virtually complete collapse in the sale of Norwegian products to the Brazilian market. Despite protests from the Norwegian authorities against what they consider discrimination against Norwegian products in favor of Dan-

Norway (Contd.):

ish exports, it has not been possible to reach a solution.

The difficulties started in the late 1950's when Norway followed a request from the United Nations Economic Council and the World Bank and relinquished its bilateral trade agreement with Brazil to use a clearing basis for further trade with the country. Denmark did not take the same action and continued to trade with Brazil on a barter basis. As economic difficulties in Brazil increased and the reserves of foreign exchange dwindled, Norwegian products were included in the gradually tightening restrictions placed on the use of foreign currency for imports. Meanwhile, Danish exports were able to continue fairly steady because of the bilateral trade agreement. During 1964 this led to a virtual stop in Norwegian exports to Brazil, and although diplomatic negotiations with Brazilian authorities showed some promise, that problem has not yet been solved.

Norway's 1964 exports under the product group "fresh, frozen, salted or smoked fish, crustacea and molluscs" valued at 645.5 million kroner ($90 million) decreased 2.2 percent. In this case the decrease resulted from the failure of the cod fisheries at Lofoten and on the coast of Finnmark. This was serious enough to offset the 1964 record catch of coalfish.

The lack of raw materials is also the reason why the substantial expansion for exports of frozen fillets of the previous several years did not continue in 1964. The volume of exports did increase by 3.8 percent, but that increase was considered negligible compared to the almost explosive developments in that industry. In 1963, exports of frozen fillets increased 20 percent from the previous year. That segment of the fisheries industry has become increasingly important to the entire Norwegian economy, and particularly to the economy of northern Norway. Along the coast of that Arctic part of the country the fisheries are by far the most important source of income with many towns and townships built around the only factory there--the fish-freezer plant.

The development of Norway's frozen fish industry is considered particularly important, with the availability of raw materials the only limitation for further expansion in that field. (The Export Council of Norway, Oslo.)

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## EXPORTS OF CANNED FISHERY PRODUCTS, JANUARY-SEPTEMBER 1964:

Norway's leading canned fish export item in January-September 1964 were smoked small sild in oil and smoked brisling in oil.

Table 1 - Norwegian Exports of Canned Fishery Products by Ty
January-September 1964

| Products | January-September 1964 | | |
|---|---|---|---|
| | Quantity | Value | |
| | Metric Tons | Kr. 1,000 | U$ 1,0 |
| Smoked brisling in oil | 4,119 | 27,455 | 3, |
| Smoked brisling in tomato | 840 | 4,580 | |
| Smoked small sild in oil | 7,468 | 31,464 | 4, |
| Smoked small sild in tomato | 1,654 | 5,813 | |
| Unsmoked small sild in oil | 279 | 948 | |
| Small sild packed otherwise | 318 | 1,155 | |
| Kippered herring (Kippers) | 2,462 | 10,772 | 1, |
| Mackerel | 541 | 2,495 | |
| Roe, unclassified | 1,117 | 4,607 | |
| Soft herring roe | 1,073 | 5,271 | |
| Fish balls | 392 | 1,010 | |
| Other canned fish | 73 | 523 | |
| Shellfish | 1,247 | 12,889 | 1, |
| Total | 21,583 | 108,982 | 15, |

Table 2 - Norwegian Exports of Canned Fishery Products1/ by Country of Destination, January-September 1964

| Country of Destination | January-September 1964 | | |
|---|---|---|---|
| | Quantity | Value | |
| | Metric Tons | Kr. 1,000 | US$ 1,00 |
| Finland | 206 | 1,079 | 1 |
| Sweden | 627 | 2,867 | 4 |
| Belgium-Luxembourg | 500 | 2,403 | 3 |
| Ireland | 226 | 892 | 1 |
| France | 208 | 835 | 1 |
| Netherlands | 134 | 483 | |
| United Kingdom | 5,182 | 24,767 | 3,4 |
| West Germany | 569 | 2,123 | 2 |
| Czechoslovakia | 1,089 | 3,870 | 5 |
| South Africa Republic | 1,347 | 5,357 | 7 |
| Iraq | 74 | 280 | |
| Japan | 10 | 48 | |
| Canada | 635 | 3,912 | 5 |
| United States | 7,106 | 38,352 | 5,3 |
| Australia | 1,232 | 5,102 | 7 |
| New Zealand | 363 | 1,570 | 2 |
| Other countries | 1,420 | 5,274 | 7 |
| Total2/ | 20,928 | 99,214 | 13,8 |

1/Does not include exports of canned shellfish.
2/Totals are slightly larger than the combined exports of can fish (excluding shellfish) shown in table 1.
Note: Norwegian kroner 7.16 equals US$1.00.

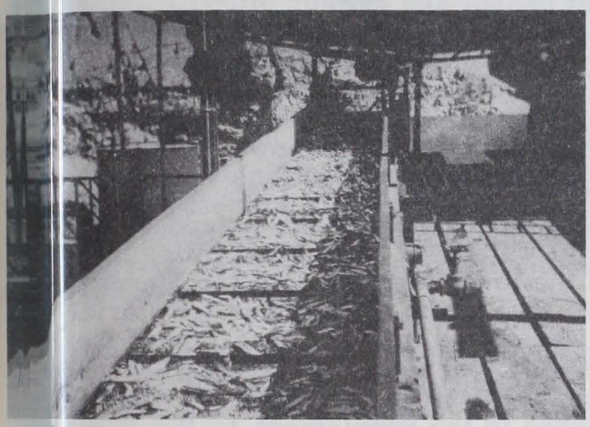
The United States and the United Kingdom were the leading buyers of Norwegian can fishery products. (Norwegian Canners Export Journal, January 1965.)

Note: See Commercial Fisheries Review, Feb. 1965 p. 76.

## Peru

FISH MEAL PRODUCTION IN 1965 MAY BE CURTAILED BY CONSERVATION MEASURES AND LABOR DISPUTE:

The Peruvian Government, with the support of the fish reduction industry, has decreed that the month of August 1965 will be closed to anchoveta fishing along the entire coast. Government officials and the industry apparently agree with the conclusion of the Peruvian Marine Institute that a reduction in fishing pressure is necessary to sustain an adequate brood stock.



Anchovetas being transported into plant by conveyor belt at Chimbote

The Institute is uncertain whether the reduced supply of anchoveta is a result of oceanographic and biological factors, or is due to overfishing. But the Institute concludes, in a recently published report, that the industry's installed fish-catching and meal-producing capacity is greater than can be sustained by the present level of anchoveta stocks. Under present circumstances, the Institute believes that fishing pressure should be limited so that the annual anchoveta catch does not go beyond that of 1964 and should preferably be closer to that of 1963 when about 7 million metric tons of raw fish were taken.

Closing the fishery during the seasonably slack month of August is not likely to cut total output more than 3 or 4 percent. The real significance of the regulation lies in the fact that the Government and the industry have accepted the need for some action to conserve the anchoveta resource.

Editor's Note: Of more immediate importance is the decline in output caused by the labor dispute in northern Peru during February 1965. A report in Oil World Weekly, February 19, 1965, stated that Peruvian fish meal production in February 1965 might amount to only 60,000 to 80,000 metric tons, as compared with 125,000 tons in the same month of 1964.)

Peruvian fish meal production for 1965 cannot be accurately predicted at this point. It is expected, however, that output in Peru this year will at least match 1963 output of 1 million tons but a repeat of the 1964 performance, when over 1.5 million ton of meal were produced, is unlikely. (United States Embassy, Lima, Feb. 28 1965.)

## Poland

NORTH SEA 1964 HERRING SEASON PROFITABLE:

Poland's 1964 herring fishing season in the North Sea grounds was considered exceptionally good. Daily catches were as high as 54 metric tons per vessel. (Polish Maritime News, No. 75, November 1964.)

* * * * *

TRAWLER FISHES GEORGES BANK FOR HAKE:

A Polish freezer trawler fished Georges Bank in the Northwest Atlantic for the first time in October 1964 when operations were confined to fishing for hake. The crew was assisted by fishermen from Soviet vessels who were acquainted with the area and showed the Polish fishermen how to operate their trawls. (Polish Maritime News, No. 75, November 1964.)

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NORTH SEA AND NORTHWEST ATLANTIC FISHERIES, 1964:

As of mid-October 1964, a 40 vessel fishing fleet out of Gdynia, operating in the North Sea and Northwest Atlantic, caught a total of 64,000 metric tons of fish. This compares with 53,000 tons caught by the same fleet during all of 1963.

Polish freezer trawlers fishing on the Newfoundland and Labrador grounds call at the Port of Ostend, Belgium, on their return trip and sell part of their frozen cod fillets there. (Polish Maritime News, No. 75, November 1964.)

* * * * *

Poland (Contd.):

POLISH FISH-FREEZING BASE ESTABLISHED AT OSTEND (BELGIUM):

A seasonal land base to freeze fresh herring landed by Polish trawlers was established at the Port of Ostend, Belgium, in late 1964. It was expected that by the end of 1964, about 400 metric tons of herring from the North Sea would be frozen there. The frozen herring when returned to Poland was to be used for canning. (Polish Maritime News, No. 75, November 1964.)

* * * * *

THREE NEW FISHERY MOTHERSHIPS TO BE BUILT:

A contract for building 3 new motherships for Polish fishing fleets was negotiated in September 1964, between a Gdansk shipyard and the Polish organization "Deep-Sea Fishing Motherships" of Szczecin. The contract calls for the first vessel to be delivered in 1966, the second in 1967, and the third in 1970. They will be of the B-67 class, with the keel of the first vessel scheduled to be laid in April 1965.

Motherships built for Polish fishing fleets will be of the same basic dimensions as those built for the Soviet fisheries--9,200 tons deadweight, 13,600 gross tons, overall length of more than 538 feet, and draft of 25.6 feet. They will be propelled by 7,200 hp. engines for a speed of 15.5 knots, and will be adapted to requirements of the Polish fisheries. Equipment aboard the vessels will include 5 processing lines for preparing fish for freezing, for producing fish meal, cod-liver oil, and icemaking.

Plans are for the new motherships to operate in fishing grounds in the Central and North Atlantic, areas not previously fished by Polish vessels. (Polish Maritime News, No. 75, November 1964.)

## Portugal

NEW LISBON FISH MARKET:

February 1965 marked the opening of an auction center at Lisbon's new dockside fish market. Total cost of the entire Lisbon fish market complex when completed will be about US$7.7 million.

The market will cover an area of some 15,000 square meters (17,940 square yards), almost half of which will be used for the unloading, sale, and distribution of fish. The new market will have the capacity to handle a daily volume of 600 metric tons of fish which is more than double the largest catches heretofore delivered to Lisbon. Under construction at the new market are a freezing and cold-storage plant, administration buildings, pier improvements, and a fuel supply area. (United States Embassy, Lisbon, February 1965.)

## Sierra Leone

TERRITORIAL WATERS EXTENDED TO 12 MILES:

Effective January 14, 1965, Sierra Leone on the West African coast extended her territorial waters to 12 nautical miles measured from the low-water mark of the Sierra Leone coast. The claim to extended territorial waters was stated in "An Act to Amend the Fisheries Act" passed by the Sierra Leone House of Representatives November 27, 1964, and published in the Supplement to the Sierra Leone Gazette, Vol. XCVI, No. 4, January 14, 1965. (United States Embassy, Freetown, March 4, 1965.)

## Somali Republic

JOINT UNITED STATES-SOMALI FISHERIES VENTURE EXTENDED RISK AND EQUITY GUARANTY BY AID:

A loan of about $600,000 to the joint United States-Somali fishery firm in the Somali Republic, approved by the U. S. Agency for International Development (AID) in late 1964, is the first direct AID loan made to a private borrower in the country. AID also issued to the company the first extended risk guaranty to be provided outside Latin America, and the first equity guaranty to be issued anywhere.

The investment guaranty, under AID's extended risk program, insures the company for 50 percent of the equity investment of the United States firm against any risks, not to exceed $111,161. The loan is repayable in United States dollars within 15 years, including a three-year grace period.

Somali Republic (Contd.):

The loan will finance purchases of United States equipment needed to build the first fish-freezing plant in the Somali Republic (near Alula at Ros Filuch). Most of the fishery products processed at the plant will be marketed in Italy through a New York fishery marketing firm.

The United States-affiliated company will benefit from the Development Loan Section services set up with AID assistance in Credito Somalo, an autonomous bank of the Somali Government. Credito Somalo has loaned the company $500,000, using a portion of an earlier United States loan to the bank to help provide risk capital for private business in the Somali Republic. The United States counterpart of the jointly-owned firm has contributed $22 2822 in equity and the Somali partners were to contribute an equal amount in Somali shillings. Financing, including the equity, the Credito Somalo loan, and the AID loan, total the equivalent of $1.5 million.

AID has provided technical assistance to the Somali fishing industry and promoted a joint United States-Somali fishing venture for a number of years. Credito Somalo also has been in the promotion, assisted by United States technical advisors made available by AID. (International Commerce, vol. 71, no. 11, March 15, 1965.)

Note: Commercial Fisheries Review, January 1965 p. 86.

## South Africa Republic

PELAGIC SHOAL FISH CATCH, JANUARY-OCTOBER 1964:

The combined pelagic shoal fish catch in the South Africa Republic and Territory of South-West Africa in January-October 1964 totaled a record 1,143,265 short tons (consisting principally of pilchards, maasbanker, mackerel, and anchovy).

South Africa Republic: In October 1964, a catch of 27,235 tons of anchovy (the best in any single month since the commercial anchovy fishery was started in April 1964) raised the total catch for that species to 78882 tons and the total catch for all pelagic shoal fish off the Cape in January-October 1964 to 440,398 tons.

South-West Africa: The October 1964 shoal fish catch for the few factories still to reach their quotas at Walvis Bay and Luderitz was 41,820 tons. This brought the total South-West African pelagic shoal catch in January-October 1964 to 702,867 tons. (South African Shipping News and Fishing Industry Review, December 1964.)

## Sweden

PACKAGED FROZEN FISH MARKET TRENDS:

Fish is the most popular packaged frozen food product sold in Sweden, and on a per capita basis the Swedes are the leading European consumers of packaged frozen food.

Swedish consumption of packaged frozen fishery products amounted to 10,543 metric tons in 1962 and 11,980 metric tons in 1963, most of which was cod. Sales of frozen cod on the Swedish market in 1963 amounted to about 8,000 tons and accounted for almost 20 percent of overall packaged frozen food sales in Sweden. Imports--mostly from Norway and Denmark--probably accounted for about half of the frozen cod sales in Sweden in 1963.

In Sweden, consumer packs of raw frozen fish fillets are usually marketed in packages of 1-pound or 10-ounce size (approximately); institutional packs range up to 10 pounds.

Although cod products are dominant, a wide variety of other packaged frozen fishery products are sold in Sweden; at least 20 different species are marketed and over 100 different packs are offered. Freeze-dried shrimp are now being produced by one Swedish firm on a small scale, according to reports.

Precooked frozen fish is of growing importance in Sweden both as an individual item and as an element in precooked dinners. Cod is the principal species used in precooked dishes such as baked fish and potatoes, minced fish fingers, and rissoles. Haddock is used for precooked fish balls and fish souffle.

The fast-growing Swedish market for frozen food products of all kinds should continue to expand for a number of years. (The Swedish per capita consumption of packaged frozen

Sweden (Contd.):

food products is still only about 27 percent of that in the United States.) Consumption of packaged frozen fishery products should increase in Sweden, but--since frozen fish is already in a dominant position--the future emphasis in the Swedish market may be on developing other frozen food products.

Sweden imposes an import duty of about 9 U. S. cents a kilo (about 4.1 cents a pound) on frozen fish from countries outside the European Free Trade Association (EFTA). The frozen fish import duty is reduced by 50 percent on shipments from EFTA countries. Sweden also imposes a "price regulation" tax of 3 percent of the purchase value on all imported fishery products. The "price regulation" tax is thought to apply regardless of the country of origin. (Foreign Trade, Canadian Department of Trade and Commerce, March 20, 1965.)

Note: See Commercial Fisheries Review, February 1964 p. 81.

## United Kingdom

DEMAND INCREASES FOR FROZEN FISHERY PRODUCTS:

Frozen fish production in Great Britain in 1963 increased only 1 percent from the previous year as against a 17-percent increase in demand. But for the first time the production of consumer-packaged frozen fishery products in 1963 exceeded production of institutional-packed fish. The consumer demand for frozen fishery products in Great Britain continues strong and frozen fish production is expected to increase. This is especially evident as more of the large British freezer trawler-owned groups enter the market wi their own brands.

Fish frozen at sea in blocks of 100 pounds are thawed out in a thawing plant at Grimsby prior to filleting.

The trend toward freezing fish at sea ha raised some speculation about the future o the major British trawling ports of Hull, Grimsby, and Fleetwood. It was questione whether those ports can handle the influx c frozen fish landed with the facilities they n have. Another question was whether dock workers could adapt to the completely diff ent methods required for unloading frozen fish as compared with the more suitable d facilities at commercial ports such as So hampton. (United States Embassy, Londo March 11, 1965.)

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TRADE WITH UNITED STATES IN FISHERY PRODUCTS, 1963:

Total United Kingdom purchases of fis products from the United States in 1963 a mounted to 4,200 long tons as compared w 17,500 tons in 1962. The value dropped b US$616,000 to $6.7 million. But more sa on (fresh, chilled, and frozen) was purcha from the United States during the year, ac counting for a 500-percent increase over

The potential market in the United King for fishery products from the United State limited to specialty items such as salmon freeze-dried shrimp. Supplies in the Uni Kingdom of live eels have been short in re cent months and British firms have looke United States producers for supplies. (Un States Embassy, London, March 11, 1965.

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FISH MEAL PRODUCTION, 1964:

Fish meal production in the United Kin dom in 1964 totaled 78,000 long tons com pared with 74,000 tons in 1963, accordin the British Ministry of Agriculture, Fis ies, and Food. Fish meal in the United K dom is produced from groundfish and he (Foreign Agriculture, March 8, 1965, U. Department of Agriculture.)

* * * * *

IMPORT SURCHARGE ON INDUSTRIAL GOODS REDUCED:

The British Chancellor of the Exche announced February 22, 1965, that the Br Government would cut the temporary imp ad valorem surcharge on industrial goo

Uted Kingdom (Contd.):

Dercent as of April 26, 1965. A rate of 15 pcent had been in effect since the temporary scharge was established October 27, 1964.

Announcing the reduction to the British se of Commons, the Chancellor of the Exchequer said, "We have now decided that ugh progress is being made to enable us educe the charge after it has been in op- ion for 6 months... ." The Chancellor s that the remaining 10 percent will be "under review." (EFTA Reporter, Feb- y 22, 1965.)

Editor's Note: Fish and fish preparations are exempt from the import surcharge. Also ded from the surcharge are fishing ves- s of 80 gross tons or more and fishing ves- s of the kind commonly known as Danish- seiners.)

See Commercial Fisheries Review, January 1965 p. 95.

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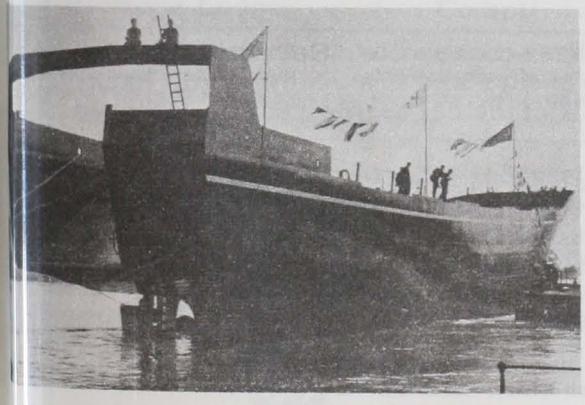
EZER-TRAWLER "CAPE KENNEDY" ERS SERVICE:

he Cape Kennedy, a 227-foot stern trawl- esigned to freeze fish at sea, entered ice in March 1965 for a large British ing company, joining her sistership, the s Valiant, which began operating in the mer of 1964.



- Stern view of Cape Kennedy showing stern ramp. Taken aunching in 1964.

ke her sistership, the Cape Kennedy will a crew of 26 and have a storage capa- or about 400 tons of frozen fish. How- to increase efficiency, some changes made in the Cape Kennedy, including fications in unloading equipment.

Fish-processing machinery is housed between decks on the Cape Kennedy while the engines and main tanks are below the lower deck.

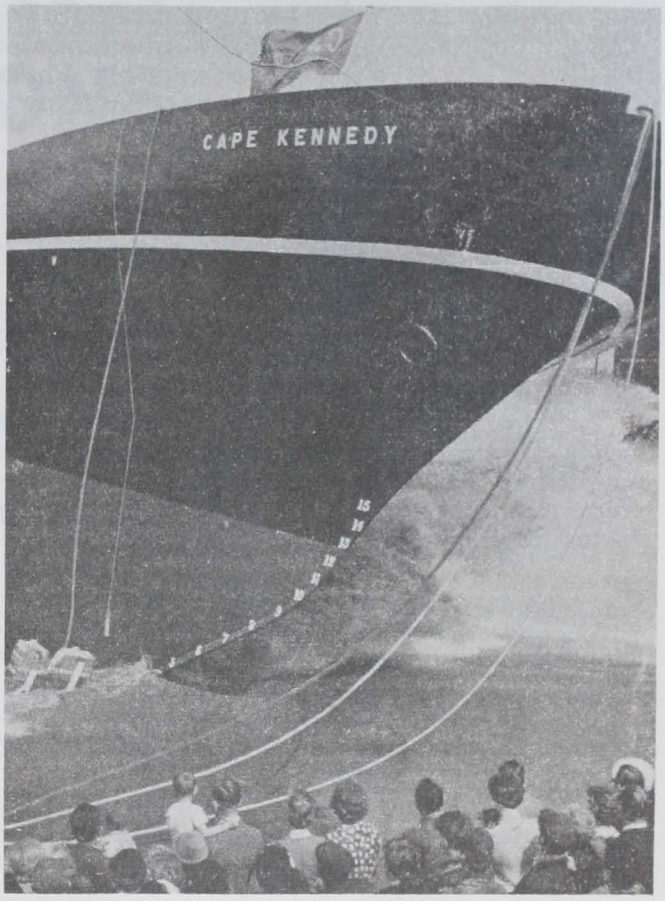



Fig. 2 - Bow view of Cape Kennedy during launching ceremony in 1964.

Two tall gantries which span the vessel are used to work the fishing gear. The mid-ship gantry is used for handling the net on the upper deck, while the after one at the head of the stern ramp lifts the cod end and spills the catch through a hatch to the fish-processing deck below.

After gutting and washing, the fish are taken by conveyor belts to plate freezers where they are frozen into 100-pound blocks. (The vessel is equipped with 10 plate freezers, each of which can freeze about $3\frac{1}{2}$ tons of fish a day.) After freezing, the fish blocks are "posted" through slots in the deck to the fish room below which can be maintained at -20° F.

The British firm operating the Cape Kennedy and Ross Valiant has reported plans to

United Kingdom (Contd.):

order a number of other freezer-stern trawlers as replacements for its fleet of distant-water trawlers. For the near- and middle-distance British fisheries, the same firm is pioneering the use of smaller semiautomated trawlers (with 5- and 10-men crews). Those smaller stern trawlers make shorter trips and store their catch in ice.

Note: See Commercial Fisheries Review, March 1965 p. 94; Sept. 1964 p. 98; July 1964 p. 79, April 1964 p. 76; and Sept. 1963 p. 92.

## Yemen

FISHERIES TRENDS, 1964:

Change may soon come to the modest fisheries of Yemen, which borders on the Red Sea and has access to the Indian Ocean. The development of Yemen's fisheries is one of the stated objectives of Soviet assistance to Yemen. (A Soviet-Yemen loan agreement fo 65 million rubles was announced in Marc 1964.) The assistance program may pro a Soviet-built fish processing and freezi plant in Hodeida, the leading fishing port Yemen. That project coupled with the ac sition of several modern fishing ves could revolutionize the traditional fisher of Yemen.

Meanwhile, there was little change du 1964 in the actual operation of Yemen's r er primitive fisheries. The demand for in the coastal area continued to support a of small fishing boats. There were ab 1,000 fishermen in Hodeida, which was r than in all the other fishing ports combi Fish preservation was mainly limited t ing and most of the catch was sold in co ports, with only a small portion going t inland area to Aden. (United States Emb Taiz, March 10, 1965.)

Note: See Commercial Fisheries Review, Dec. 1961 p. 9

### TUNA RECIPE FOR TEEN-AGE COOKS

The Tuna Research Foundation has come up with a grand recipe for the teen-age cook. It features canned tuna in zingy individual spaghetti casseroles that are a snap to fix.

Even a beginning teen cook can fix up these casseroles. Convenient canned tuna needs no more than a twist of the can opener and it's ready to go. Packaged spaghetti dinner provides the other half of the casserole recipe. Chopped olives add a touch of contrasting color.

Keep the ingredients for Tuna Teen Casseroles on your pantry shelf and the recipe tacked up on the door. Then, if you're delayed while shopping, daughter (or son) can save the day at home.

TEEN'S TUNA CASSEROLE

1 package complete spaghetti dinner with mushrooms (package thin spaghetti, can tomato and mushroom sauce, can grated cheese)

1 can ($6\frac{1}{2}$ or 7 ounces) tuna in vegetable oil

$\frac{1}{2}$ cup chopped pimiento stuffed olives

Cook spaghetti according to package directions. Drain. Open can of spaghetti sauce with mushrooms; add tuna with oil, and chopped olives. Add to drained spaghetti and mix well. Divide among 4 individual casserole dishes. Open can of grated cheese and sprinkle over top of each casserole. Bake in 375° F. oven 15 minutes. Makes 4 servings.