

## RECENT NMFS SCIENTIFIC PUBLICATIONS

NOAA Technical Report NMFS CIRC-371. Sokoloski, Adam A. (editor) "Ocean fishery management: discussions and research." April 1973. 173 p. For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402. Price: \$1.50.

(No abstract)

NOAA Technical Report NMFS CIRC-374. Cook, David G., and Ralph O. Brinkhurst. "Marine flora and fauna of the Northeastern United States. Annelida: Oligochaeta." May 1973. 23 p. For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402. Price: 35 cents.

### ABSTRACT

The manual includes an introduction on the general biology, an illustrated key, an annotated systematic list, a selected bibliography, an index to the marine Oligochaeta of the East Coast of North America. The Families Naididae, Tubificidae, Enchytraeidae, and Megascolecidae are treated.

NOAA Technical Report NMFS CIRC-379. Thorson, Lee C., and Mary Ellen Engett. "Fishery publications, calendar year 1969: lists and indexes." April 1973. 31 p. For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402. Price: 45 cents.

### ABSTRACT

The following series of fishery publications of the National Marine Fisheries Service, National Oceanic and Atmospheric Administration (until October 1970 the Bureau of Commercial Fisheries of the U.S. Fish and Wildlife Service) in calendar year 1969 are listed numerically (with abstracts) and indexed by author, subject, and geographic area: Circular, Data Report, Fishery Industrial Research, Fishery Leaflet, and Special Scientific Report—Fisheries.

NOAA Technical Report NMFS CIRC-380. Engett, Mary Ellen, and Lee C. Thorson. "Fishery publications, calendar year 1968: lists and indexes." May 1973. 24 p. For Sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402. Price: 35 cents.

### ABSTRACT

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### Monthly Fishery Market Review

## Groundfish Supplies up in April

Total supplies of groundfish during April were considerably higher than a year ago, with substantial gains in imports and heavier beginning inventories. Particularly strong demand during the month contributed to higher wholesale and retail prices.

Supplies of blocks generally declined during the month as imports continued to be below a year earlier. With lower supplies and increasing demand from stick and portions producers, block prices increased across the board. Inventories of sticks and portions fell during the month and prices increased.

Supplies of shellfish were greater during April than in the same month in 1972. Demand appeared relatively strong as inventories generally fell. Prices for spiny lobster and shrimp rose while scallops and American lobster prices declined.

The cumulative picture for January through April for groundfish fillets shows total supplies up 13 percent, consumption up 1 percent and inventories on April 30 more than double what they were a year ago. Price changes were mixed according to species, with increases generally ranging between 10 percent and 40 percent.

Block imports for January-April were 28 percent below a year ago, consumption increased slightly and end-of-period inventories dropped 37 percent compared with a year earlier. From

January 1 to April 30, inventories of block were reduced by 43 million pounds. During the same period last year, the net drawdown was 9 million pounds.

January-April results for shellfish showed heavier total supplies for all major species, compared with a year ago, due chiefly to heavy carryover inventories. U.S. landings of shrimp, scallops, and American lobster were substantially higher than a year earlier. There were declines in shrimp and spiny lobster imports, but imports of scallops and American lobster were heavier. Consumption of all major shellfish increased significantly.

## GROUND FISH

Domestic groundfish landings in April were 45 percent below the previous year, and the total for the year through April was down 16 percent (Table 1). Heavy April imports more than offset the decline in landings. For January through April, haddock imports were 56 percent higher than a year ago, cod 12 percent higher. Flounder imports moved up 48 percent, but imports of ocean perch dropped about 20 percent. For April the combination of a 24 percent increase in imports and an 87 percent gain in beginning inventories resulted in a 41 percent rise in the quantity available for consumption. During

Table 1.—Groundfish (fillet weight, in million pounds) supplies, April 1973. Groundfish include cod, flounder, haddock, and ocean perch.

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change 1972-73	JAN-APR 1973	JAN-APR 1972	Percent Change 1972-73
	--- Million Pounds ---				Percent	--- Million Pounds ---		Percent
Beginning Inventory	50.8	44.4	34.8	18.6	+ 87	52.4	45.0	+ 16
Landings, Total	3.8	5.5	3.2	5.8	- 45	17.5	20.8	- 16
Imports	16.5	24.8	25.5	20.5	+ 24	88.8	74.5	+ 19
Total Supply	71.1	74.7	63.5	44.9	+ 41	158.7	140.3	+ 13
Ending Inventory	44.4	34.8	31.6	14.2	+123	31.6	14.2	+123
Consumption	26.7	39.9	31.9	30.7	+ 4	127.1	126.1	+ 1

Table 2.—Groundfish prices, April 1973.

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change 1972-1973	JAN-APR 1973	JAN-APR 1973	Percent Change 1972-1973
	---- Cents Per Pound ----				Percent	Cents Per Pound		Percent
<b>COD:</b>								
Ex-vessel <sup>1</sup>	24.7	24.3	20.0	18.3	+ 9	23.3	22.7	+ 3
Wholesale -								
1 lb. Canadian	57.0	57.9	61.5	56.0	+10	58.3	54.0	+ 8
5 lb. Canadian	51.4	53.3	58.0	56.0	+ 4	53.0	52.9	-
Retail <sup>2</sup>	179.5	184.5	184.0	131.5	+40	183.4	134.7	+36
<b>FLOUNDER:</b>								
Ex-vessel <sup>3</sup>								
Yellowtail	34.91	28.85	32.37	19.62	+65	28.45	20.60	+38
Lemonsole	56.00	53.15	44.00	36.78	+20	50.09	43.29	+16
Greysole	37.71	36.30	29.40	20.41	+44	34.09	26.56	+28
Blackback	35.10	32.15	30.05	19.29	+56	31.28	26.92	+16
Wholesale -								
5 lb. domestic	92.5	97.5	111.3	88.8	+25	98.1	85.8	+14
5 lb. Canadian	77.8	79.1	80.5	58.0	+39	78.9	55.5	+42
Retail <sup>2</sup>	204.0	225.7	236.6	167.8	+41	212.2	160.3	+32
<b>HADDOCK:</b>								
Ex-vessel <sup>1</sup>								
Large	44.4	47.10	49.7	41.5	+20	46.4	42.4	+ 9
Scrod	28.7	27.16	32.5	33.3	- 2	28.5	34.8	-19
Wholesale								
5 lb. Canadian	77.5	78.0	79.5	59.5	+34	78.1	59.2	+32
Retail <sup>4</sup>	119.6	120.8	124.2	103.4	+20	120.1	102.9	+17
<b>OCEAN PERCH:</b>								
Ex-vessel <sup>1</sup>	7.2	7.2	7.6	5.4	+41	7.6	5.3	+43
Wholesale -								
5 lb. domestic	56.5	60.8	61.5	38.8	+59	58.6	36.0	+63
5 lb. Canadian	51.5	53.6	54.3	38.6	+41	52.4	36.6	+43
Retail <sup>4</sup>	90.3	91.8	94.4	73.1	+29	91.0	73.2	+24

<sup>1</sup> Quotes taken at Boston, Mass.

<sup>2</sup> New York Consumer Market Reports.

<sup>3</sup> New Bedford, Mass.

<sup>4</sup> Bureau of Labor Statistics — average of 36 U.S. cities.

NOTE: All wholesale prices—f.o.b. Boston, Gloucester, and New Bedford.

January-April, total supplies were 159 million pounds, compared with 140 million pounds a year earlier.

Although above the previous year, ex-vessel prices for cod, and flounder were below the previous month in April in spite of lower landings (Table 2). Haddock and ocean perch ex-vessel prices were up an average of 10 and 6 percent, respectively. Wholesale and retail prices were well above the previous month and year for cod, haddock, flounder, and ocean perch.

Consumption of groundfish in April was 4 percent above the previous year, with gains in cod, flounder, and haddock. Ocean perch was off somewhat. Consumption for January-April was 1 percent higher than a year earlier.

### BLOCKS, STICKS AND PORTIONS

Supplies of fish blocks in April this year were well below a year ago, as both

imports and beginning inventories were off sharply (Table 3). April imports of blocks totaled 29 million pounds—down 36 percent from a year earlier. This decline represented the fourth consecutive month that imports have been below the previous year and this has put a severe crimp on available supplies. As a result of the recent reduction in imports, producers of sticks and portions have had to rely on inventories to support production. Inventories have accordingly declined approximately 43 million pounds since the beginning of the year.

With the production needs of stick and portion producers increasing and supplies becoming more tight, prices of blocks have steadily risen throughout the year (Table 4). Wholesale prices in May were above the previous year for each species as cod and ocean perch led the way with gains of 32 and 39 percent, respectively.

Sticks and portions mirrored the block situation with declining inventories (Table 5) and generally higher prices (Table 6). Inventories have fallen about 30 percent since the beginning of the year while prices have increased from 2 to 12 percent from April, 1972.

### SHRIMP

Because of high inventories at the start of the month, supplies of shrimp during April were 9 percent above the previous year. Unlike March, however, domestic landings, as well as imports, were below year ago levels (Tables 7 and 8). The Pacific shrimp catch, which had been supporting the overall increase in U.S. landings, declined about 75 percent from the previous month to a quantity estimated to be equal to the low catch in April 1972. Imports of shrimp again declined as the Japanese apparently have provided a good deal of competition for U.S. importers. Domestic exports continue to be well above the previous year as the Japanese have reportedly purchased substantial quantities of shrimp on the U.S. market.

During January-April, the U.S. Pacific shrimp were predominant in the

Table 3.—Blocks and slabs, supplies, April 1973.

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Million Pounds--				Percent	-- Million Pounds--		Percent
Beginning Inventory	62.4	48.6	41.2	49.8	- 17	75.8	62.7	+ 21
Production	0.6	0.4	0.2	0.1	+100	1.5	0.6	+150
Imports	17.0	30.2	18.7	29.0	- 36	82.7	114.2	- 28
Total Supply	80.0	79.3	60.1	78.9	- 24	160.0	177.5	- 10
Ending Inventory	48.6	41.2	32.6	51.8	- 37	32.6	51.8	- 37
Consumption	31.4	33.3	27.5	27.1	+ 1	127.4	125.7	+ 1

Table 4.—Blocks and slabs, prices, April 1973. Wholesale prices of blocks f.o.b. primary wholesaler — Boston, Gloucester, and New Bedford, Mass.

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
		-- Cents Per Pound--											
Cod	1972		46.5	47.0	47.0	47.0	45.6	46.5	47.0	47.0	47.0	47.0	48.0
	1973		48.6	52.4	56.6	58.5	60.0						
Flounder	1972		43.5	44.4	45.3	49.2	51.7	53.3	55.6	57.0	58.0	58.7	59.5
	1973		59.5	59.6	60.0	60.0	60.0						
Haddock	1972		47.1	47.5	47.5	47.9	50.3	52.8	54.4	57.0	58.1	59.5	59.5
	1973		60.1	60.5	61.4	63.3	64.5						
Ocean Perch	1972		38.5	38.5	38.7	39.5	39.5	39.8	41.6	45.0	48.0	48.3	49.4
	1973		51.2	53.1	53.9	54.0	55.0						
Pollock	1972		32.3	32.0	32.0	32.1	31.2	31.5	31.5	31.0	29.6	29.5	28.3
	1973		29.0	30.1	33.0	34.0	34.3						
Whiting	1972		33.0	33.5	33.0	33.0	33.2	31.5	31.5	31.5	31.5	32.0	34.1
	1973		34.6	35.8	37.5	37.5	37.5						
Wolfish	1972		49.3	50.0	50.0	50.0	50.3	50.5	51.0	51.5	51.3	51.0	51.0
	1973		51.0	50.0	54.5	52.0	52.0						

Table 5.—Sticks and portions, supplies, April 1973.

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Million Pounds--				Percent	-- Million Pounds--		Percent
Beginning Inventory	34.9	32.0	25.8	17.3	+49	34.4	23.2	+48
Production:								
Sticks	12.3	14.2	N.A.	10.2	N.A.	N.A.	43.1	N.A.
Portions	22.6	26.7	N.A.	23.6	N.A.	N.A.	88.6	N.A.
Total	34.9	40.9	N.A.	33.8	N.A.	N.A.	131.7	N.A.
Imports	0.1	0.2	0.2	0.1	+100	0.6	0.3	+100
Total Supply	69.9	73.1	N.A.	51.2	N.A.	N.A.	155.2	N.A.
Ending Inventory	32.0	25.8	24.4	16.1	+52	24.4	16.1	+52
Consumption	37.9	47.3	N.A.	35.1	N.A.	N.A.	139.1	N.A.

Table 6.—Sticks and portions, weekly average wholesale prices, April 1973.

Item	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change
	-- Cents Per Pound--				
Cod portions	62.0	64.5	67.0	59.6	+12
Haddock	70.0	69.5	69.5	64.3	+ 8
Cod sticks	78.0	78.0	78.0	76.0	+ 3
Haddock sticks	79.7	79.7	79.7	78.2	+ 2

domestic catch and landings from this area were double a year earlier. Overall, the January-April shrimp catch was up

11 percent from 1972. The landing season for Gulf shrimp begins in May and this will be the principal source of domestic shrimp for the remainder of the year. Imports during January-April were down 3 percent. Demand was strong enough during the period to cause an unusually heavy drain on inventories, which dropped from 93 million pounds on January 1 to 59 million pounds on April 30. Consumption for the period was up 14 percent compared with last year.

## SCALLOPS

Supplies of scallops in April continued to be well above the previous year (Tables 9 and 10). The increase amounted to 87 percent, the result of higher beginning inventories, landings, and imports. For January through April, total supplies of scallops were 58 percent above a year earlier. The declining trend in ex-vessel and wholesale prices, begun in October, 1972, continued through April with declines of 10 percent and 2 percent, respectively. Retail prices, however, were 30 percent above the previous year.

Apparently in response to lower prices and improved supplies, consumption has consistently been above year-earlier totals. The April increase in consumption moderated somewhat from the previous month, but it was still 30 percent above the quantity consumed a year earlier. Consumption for January-April was 9 million pounds, compared with 6.5 million pounds a year earlier.

## AMERICAN LOBSTER

April supplies of American lobsters were 23 percent above 1972 as a result of gains in both landings and imports (Table 11). Maine landings were 16 percent above April, 1972, and the January-April total was 66 percent above a year earlier. After being down during the first two months of the year, imports have recovered to post gains of 65 percent in March and 25 percent in April for an overall increase of 2 percent during the January-April period. Prices were again below the previous year, although not as much as in March (Table 12). Ex-vessel prices were down 5 percent while wholesale prices were 7 to 9 percent below 1972 except 1½ and 2 pound lobsters, which registered gains.

## SPINY LOBSTERS

Spiny lobster tail supplies in April were well above last year as a result of substantially heavier beginning inventories (Table 13). Imports in April dropped again with higher shipments from Australia, Brazil, and New Zealand. Only South Africa showed a gain

**Table 7.—Shrimp supplies, April 1973.**

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Million Pounds --				Percent	-- Million Pounds --		Percent
Beginning Inventory:	82.7	79.2	69.2	58.5	+ 18	92.7	69.9	+ 33
Landings:								
Total	12.0	12.7	6.3	7.7	- 18	44.7	40.1	+ 11
Gulf	4.1	4.2	4.0	4.5	- 11	17.6	22.4	- 21
Northeast	2.2	3.1	.9	1.6	- 44	8.4	7.7	+ 9
Pacific	5.6	5.4	1.4 <sup>1</sup>	1.4	-	18.3	9.3	+ 97
South Atlantic	.1	-	-	.2	-	.4	.7	- 43
Imports	16.8	16.3	17.0	18.3	- 7	68.5	70.5	- 3
Total Supply	111.5	108.2	92.5	84.5	+ 9	205.9	180.5	+ 14
Ending Inventory	79.2	69.2	58.7	56.9	+ 3	58.7	56.9	+ 3
Exports:								
Total	4.9	6.6	5.5 <sup>1</sup>	3.5	+ 57	21.5	13.4	+ 60
Domestic Fresh & Frozen	3.6	4.9	3.9 <sup>1</sup>	2.8	+ 39	16.1	11.4	+ 41
Transshipments	1.3	1.7	1.6 <sup>1</sup>	.7	+129	5.4	2.0	+170
Gulf Canned Pack Fresh & Frozen	.4	-	-	-	-	.9	.9	-
Consumption	27.0	32.4	28.3	24.1	+17	124.8	109.3	+14

<sup>1</sup>Estimated

**Table 9.—Scallop supplies, April 1973.**

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Thousand Pounds --				Percent	-- Thousand Pounds --		Percent
Beginning Inventory	3,870	3,418	2,869	1,066	+169	3,736	1,585	+136
Landings, Total	618 <sup>1</sup>	571 <sup>1</sup>	650 <sup>1</sup>	622	+ 4	2,210	2,027	+ 9
Imports	1,058	1,995	1,370	927	+ 48	5,785	3,835	+ 51
Total Supply	5,546	5,984	4,889	2,615	+ 87	11,731	7,447	+ 58
Ending Inventory	3,418	2,869	2,714	946	+187	2,714	946	+187
Consumption	2,128	3,115	2,175	1,669	+ 30	9,017	6,501	+ 39

<sup>1</sup>Estimated

**Table 11.—American lobster supplies, April 1973.**

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Thousand Pounds --				Percent	Thousand Pounds	Percent	
Maine Landings	174	149	317	273	+16	1,048	633	+66
Imports	1,055	1,606	1,493	1,195	+25	6,156	6,027	+ 2
Consumption	1,229	1,755	1,810	1,468	+23	7,204	6,660	+ 8

**Table 13.—Spiny lobster tails, supplies, April 1973.**

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change	JAN-APR 1973	JAN-APR 1972	Percent Change
	-- Million Pounds --				Percent	-- Million Pounds --		Percent
Beginning Inventory	8.3	7.8	8.0	5.2	+54	8.9	4.7	+89
Imports	3.3	3.7	2.4	3.3	-17	12.2	14.2	-14
Total Supply	11.6	11.5	10.4	8.7	+20	21.1	18.9	+12
Ending Inventory	7.8	8.0	7.5	6.4	+17	7.5	6.4	+17
Consumption	3.8	3.5	2.9	2.3	+26	13.6	12.5	+ 9

from the extremely low level in 1972. For January-April, total supplies were up 12 percent.

Wholesale prices were somewhat mixed during the month (Table 14). Cold-water tails registered a 6 percent gain but warm-water tails were off 14 percent. Apparent consumption of 2.9 million pounds was 26 percent above April, 1972, and 9 percent above the cumulative total for the first 4 months of the year.

**Table 8.—Shrimp prices, April 1973.**

Item	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change
	--- Dollars Per Pound ---				
Ex-vessel:					
15-20 count	\$1.88	\$1.98	\$2.06	\$2.07	-
31-35	1.70	1.76	1.81	1.38	+31
51-65	1.10	1.26	1.35	.90	+50
Wholesale:					
15.20 count	2.00	2.12	2.19	2.34	- 6
31-35	1.80	1.89	1.95	1.74	+12
51-65	1.20	1.32	1.51	1.09	+38
Retail:					
15-20 count	2.84	3.06	3.05	3.02	+ 1
31-42	2.09	2.29	2.26	2.14	+ 6

**Table 10.—Scallop prices, April 1973.**

Item	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change
	--- Dollars Per Pound ---				
Ex-vessel	\$2.03	\$1.96	\$1.76	\$1.86	- 5
Wholesale	2.44	2.25	2.22	2.23	-
Retail	3.24	3.19	3.23	2.48	+30

**Table 12.—American lobster prices, April 1973.**

	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change
	-- Dollars Per Pound --				
Ex-vessel	\$1.89	\$1.78	\$1.43	\$1.50	- 5
Wholesale:					
1-¼ lb.	\$2.63	\$2.49	\$2.06	\$2.21	- 7
1-½	2.79	2.88	2.55	2.30	+11
1-⅝	2.56	2.47	2.00	2.20	- 9
2	2.92	3.10	2.83	2.40	+18
chix	2.50	2.42	1.99	2.14	- 7

**Table 14.—Spiny lobster tails, wholesale prices, April 1973.**

Item	FEB 1973	MAR 1973	APR 1973	APR 1972	Percent Change
	-- Dollars Per Pound --				
6-8 oz. tail					
Cold-water	\$4.40	\$4.56	\$4.64	\$4.38	+6
Warm-water	3.17	3.30	3.33	3.89	+14