

## Somali Fishing Industry Has Potential for Growth

Somalia is one of the least developed countries in Africa. It has also suffered from food shortages caused by a severe drought during the early 1970's. The Somali Ministry of Fisheries and the Coastal Development Agency (CDA) want to increase the fisheries catch to help alleviate the country's food shortage.

Somali fisheries are still largely undeveloped and play a minor role in the nation's economy. However, they could become important. Somali fishermen caught only about 11,000 metric tons (t) of fish in 1980 (Table 1), a small catch for a country with over 3,000 km of coastline. Most of the Somali catch is harvested near the northeastern coast, between Alula and Bella (see map).

The Somali fishing fleet is largely artisanal. Cooperative fishermen have about 700 small boats (6 to 8 m long), and private fishermen operate an additional 100 boats of similar size. The Somali Government helped the fishermen buy and motorize these vessels under the country's 1974-78 development program. The only commercial vessels are operated by the state-owned company Somalfish, which has 11 trawlers. These vessels are based in Kismayu and are about 23-27 m long.

Note: Unless otherwise credited, material in this section is from either the Foreign Fishery Information Releases (FFIR) compiled by Sune C. Sonu, Foreign Reporting Branch, Fishery Development Division, Southwest Region, National Marine Fisheries Service, NOAA, Terminal Island, CA 90731, or the International Fishery Releases (IFR), Language Services Biweekly (LSB) reports, or Language Services News Briefs (LSNB) produced by the Office of International Fisheries Affairs, National Marine Fisheries Service, NOAA, Washington, DC 20235.

According to Ministry sources, none of these trawlers are currently operational, due to technical problems.

The Government's recent development program has emphasized the formation of agricultural and fishery cooperatives for artisanal fishermen, as well as resettlement centers for displaced nomads. The Ministry and the CDA have organized 19 fishing cooperatives. Fishermen from these cooperatives harvest most of the country's catch, almost all of which is marine since Somalia lacks freshwater lakes and rivers.

Somalia fishermen are required to sell their catch through the cooperatives at prices set by cooperative committees. The prices vary from US\$0.24-

Table 1.—Somali fish catch, 1971-80.

Year	Catch (× 1,000 t)	Year	Catch (× 1,000 t)
1971	17.6	1976	8.3
1972	17.6	1977	14.8
1973	17.6	1978	8.4
1974	7.7	1979	11.0
1975	8.0	1980	11.0

<sup>1</sup>FAO estimate.

Source: FAO "Yearbook of Fishery Statistics," 1980.

US\$0.80/kg. Cold stores have been built in Kismayu, Lula, Berbera, and Las Koreh. The Government is constructing additional cold stores in Mogadishu with Japanese assistance, and in El Hamid with German (FRG) assistance. A cold store may also be built in Zeila. The fish catch is primarily marketed domestically as the Ministry has made little effort to export. The only exports are small shipments of lobster to Europe (primarily to Italy) and shark fin to the Far East.

The Somali Government allows some foreign fishing either through joint venture agreements or by licensing foreign fishermen. There are currently two joint venture companies. The first is an Italian-Somali venture



called Somital, which operates three freezer trawlers. The second is an Iraqi-Somali venture called Siadco, which operates four trawlers. The foreign partners in both joint ventures provide the vessels and the Somali Government permits them to fish in Somali-claimed waters. The catch is marketed almost entirely in the respective foreign countries.

A third joint venture, formed with the U.S.S.R. in 1974, allowed the Soviets to operate 10 trawlers. This joint venture was terminated in 1977, however, when Somalia and the U.S.S.R. broke diplomatic relations over Soviet support for Ethiopia in the Ogaden border dispute. In addition to the two current joint ventures, five foreign vessels are licensed to fish in the 200-mile territorial waters claimed by Somalia. There are no details available on the licensing arrangements.

Six foreign countries and international organizations are currently providing fisheries aid to Somalia. Foreign aid to Somali fisheries exceeds US\$22 million. Foreign fishery projects include:

- 1) The Danish International Development Agency has agreed to provide US\$1.4 million for the development of Somalia's north coast fisheries.

- 2) Germany (FRG) is providing US\$12.2 million in assistance, not including its cold store project in El Hamid.

- 3) The Japanese Government is funding a US\$2.2 million program for the development of cold stores and fish markets.

- 4) The Swedish International Development Agency (SIDA) has provided US\$2.0 million for a shipyard in the Mogadishu area.

- 5) The United Nations Development Project (UNDP) and the Food and Agriculture Organization have an ongoing fisheries development project in the Kismayu area. The UNDP also has a US\$4.0 million fisheries project along Somalia's northeast coast.

- 6) The United Kingdom, in cooperation with SIDA and the UNDP, is providing technical assistance for the maintenance of marine engines.

Many observers believe that the

Somali fishing industry has considerable potential, for Somali-claimed waters reportedly contain important stocks of sardines that are currently unutilized. The Government, however, has not assigned a high priority to the fisheries sector and has not yet implemented a coordinated fisheries development program.

The Somali catch has grown somewhat in recent years, but its growth

was seriously interrupted when the Soviets terminated their assistance in 1977 (Table 1). The traditionally low status of fishing in Somalia impedes fisheries development. Few Somalis have ever fished and most consumers prefer other types of meat. The fishery cooperatives' practice of setting prices, which most consumers consider to be excessive, also hampers development. (Source: IFR-82/66.)

### **Canadian Fish Exports Jump Sharply in 1981; Imports Rise Slightly**

Canada exported a record \$1.24 billion worth of fishery products in 1981, a 24 percent increase over the \$1.0 billion exported in 1980. That made it the largest exporter of fisheries products in 1981 and the United States was its largest customer, purchasing \$668 million worth of fishery products, 16 percent more than in 1980 when U.S. imports from Canada totaled \$576 million.

The European Community was Canada's second largest customer, buying \$253 million worth of fishery products in 1981. This was a decline of 4 percent from the 1980 total of \$264 million.

Canada exported \$103 million worth of frozen blocks in 1981, an 18 percent decrease from the \$122 million in exports in 1980. Cod block exports amounted to \$83 million in 1981, with the United States buying \$72 million worth, a 23 percent decrease from the \$89 million that U.S. importers spent on Canadian frozen cod blocks in 1980.

Canada also exported \$115 million worth of salted and dried groundfish in 1981, or 35 percent more than in 1980 when such exports amounted to \$85 million. Cod products accounted for \$93 million of the total salted and dried fishery exports. Portugal was Canada's largest customer for salted and dried cod, purchasing \$31 million worth in 1981, more than double the \$13 million worth shipped to Portugal

in 1980. The United States bought \$22 million worth of these products from Canada in 1981, a 15 percent increase over the \$19 million spent in 1980.

Canada exported \$248 million worth of fresh and frozen shellfish products in 1981, a 5 percent increase over the \$236 million exported in 1980. Scallops accounted for \$86 million worth of shellfish exports in 1981, with almost the entire amount going to the United States.

Canada exported \$114 million worth of canned fish in 1981, up 34 percent from the \$85 million exported in 1980. Canned salmon exports were valued at \$86 million in 1981, with \$47 million worth being exported to the United Kingdom.

Canada imported 129,700 metric tons (t) of fishery products worth \$307 million in 1981, a slight increase over the \$302 million worth of fishery products imported in 1980. Canada bought \$193 million worth of fishery products from the United States, a \$7 million decrease from the \$200 million spent on U.S. fishery products in 1980.

Canadians bought 9,070 t of shrimp worth \$69 million from foreign suppliers in 1981, a 9 percent increase over the \$63 million worth of shrimp imports in 1980. U.S. suppliers sold \$46 million worth of shrimp products to Canada in 1981, a 16 percent increase over the \$39 million sold them in 1980. Mexican shrimp exports to Canada decreased by 9 percent from 579 t (worth \$6.3 million) in 1980 to 511 t (worth \$5.7 million) in 1981. (Source: IFR-82.)

## Mazatlan: A New Mexican Tuna Port

The port of Ensenada has dominated the Mexican tuna industry from its inception. However, Mexico is now creating a modern new tuna port to the south in Mazatlan. The transition of Mazatlan to an important tuna port is being carried out primarily by the large state-owned corporation, Productos Pesqueros Mexicanos (PPM)<sup>1</sup> which has based its Operation Tuna in Mazatlan. Private investors, both Mexican and foreign, however, are also involved.

Tuna was first landed in Mazatlan in 1974. The Mexican-Italian joint venture, Productos Alimenticios del Mar (Palmar), landed 500 metric tons (t) in 1974. Palmar had trouble selling it to local processing plants, however, and kept it in cold stores for over a year. During this time, 300 t of the original 500 t spoiled and had to be discarded. Finally, Palmar gave up on selling the tuna in Mazatlan and shipped the remaining 200 t to Ensenada in 1975. After that experience, Mexican tuna fishermen avoided Mazatlan.

Tuna landings were not resumed at Mazatlan until 1979 when Productos Pesqueros de Mazatlan (Propemaz), the local PPM affiliate, initiated its program to turn Mazatlan into a major tuna port. Landings totaled only 200 t in 1979, but by 1981 they had increased to 13,600 t, or about 20 percent of Mexico's total yellowfin and skipjack catch of 69,000 t.

Propemaz has faced great difficulties in rapidly increasing landings at Mazatlan. Dock workers had no experience in handling tuna. This resulted in damage to the tuna and created delays in unloading the seiners. Propemaz claims that an average of about 150 t of tuna per day could be unloaded (some observers claim that unloading is much slower), about half of the average unloaded at Ensenada. In practice, however, much less is often unloaded. Cold stores are full of

tuna and local authorities often only unload what canners can process on any given day. Other difficulties are faced by Propemaz. The existing fishery piers, designed for shallow-draft shrimp trawlers, are not able to handle large tuna seiners which have to use Mazatlan's general cargo docks. Port authorities, however, give tuna seiners low priority, and long delays in unloading the vessels are common. It has taken over 3 weeks to unload some seiners.

Mazatlan's current canning capacity only totals about 65 t per 8-hour shift. Propemaz is able to can about 25 t per shift and the two PPM canners nearby at La Reforma and Escuinapa, about 20 t each. The existing cannery at Topolobampo, located about 200 km north of Mazatlan, adds about 40 t per shift to the canning capacity in the Mazatlan area (Table 1). PPM is building a large new cannery at Topolobampo which, until a new cannery is built by Propemaz, will process tuna unloaded in Mazatlan.

Cold stores in Mazatlan were not able to handle all the tuna landed in 1981. The total cold storage capacity in the Mazatlan area is about 7,100 t (Table 1). Not all of this, however, is available for tuna. Only about 1,500 t

Table 1.—Capacity of canneries processing tuna landed in Mazatlan and cold stores at Mazatlan, January 1982.

Company	Cannery cap. <sup>1</sup>	Cold stores cap. <sup>2</sup>
Propemaz	25	3,000
PPM-Escuinapa <sup>3</sup>	20	600
PPM-La Reforma	20	
PPM-Topolobampo	40	
Andsa		3,500
Total	105	7,100

<sup>1</sup>Short tons per 8-hour shift.

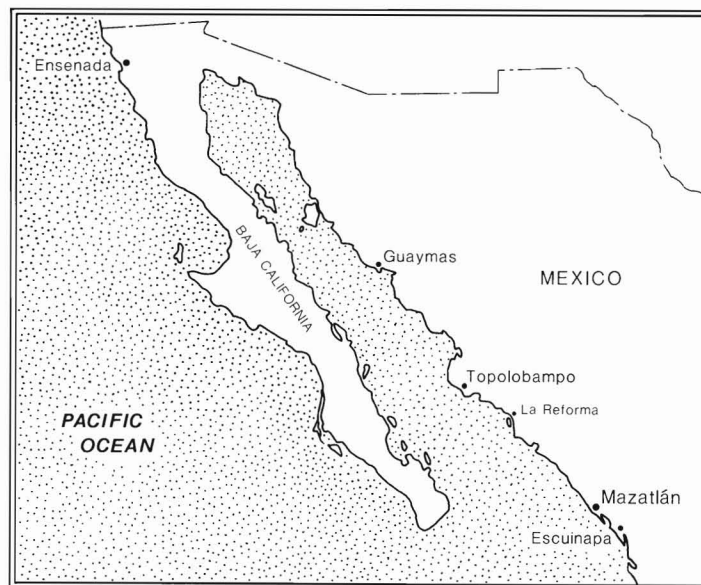
<sup>2</sup>Quantity in metric tons.

<sup>3</sup>Located about 75 km from Mazatlan.

of Propemaz's cold storage capacity, for example, can be used for tuna.

As a temporary measure, PPM leased three refrigerated Spanish cargo vessels to store the tuna: *Sierra Fria*, *Sierra Aramo*, and *Sierra Aranzazu*<sup>2</sup>. These three Spanish refrigerated cargo vessels have added 6,000 t of storage capacity, all of which is being used for tuna. These vessels, however, were not designed to store fish and large amounts of tuna have reportedly spoiled because of improper handling. In addition, repair facilities and spare parts for the vessels are limited in Mazatlan. One of the three cargo vessels has reportedly had to return to Spain for repairs. As needed,

<sup>2</sup>The vessels have mostly been docked in Mazatlan; one of the three may have been deployed to Guaymas for a brief period according to an unconfirmed report.



<sup>1</sup>Mention of trade names or commercial firms does not imply endorsement by the National Marine Fisheries Service, NOAA.

Mexican fishermen have been able to use the new 3,000 t cold store which was completed at Topolobampo in late 1981.

PPM officials insist that the tuna landed in Mazatlan will be canned, primarily for the domestic market. They point out that until the United States embargoed tuna in 1980<sup>3</sup>, most of the tuna landed in Ensenada was simply unloaded and trucked across the border to canneries in southern California. PPM maintains that canning the tuna in Mexico creates jobs and increases the food available to Mexican consumers.

Propemaz officials see three advantages in making Mazatlan a major tuna port. First, much of Mexico's tuna is taken at the mouth of the Gulf of California, placing Mazatlan much closer to the fishing grounds than Ensenada. Second, Mazatlan is much closer to Mexican population centers where the tuna is to be marketed. Third, Mazatlan has better facilities to service tuna vessels than Ensenada<sup>4</sup>. Many seiners based in Ensenada have had to use U.S. shipyards.

Propemaz officials are working to solve the existing difficulties. In the future, tuna seiners will land their catch at docks to be located along Mazatlan's new industrial development area, Parque Industrial Bonafil. Propemaz, with Mexican and French investors, has decided to build a large cannery at Bonafil. Private investors are building a cold store. (Source: IFR-82/81.)

## Norway Sees Basis for Strong Fishery Growth

It is possible to achieve a considerable and profitable growth in Norwegian fisheries industry, asserts a gov-

<sup>3</sup>The United States embargoed Mexican tuna and tuna products because Mexico seized U.S. tuna purse seiners for fishing tuna within their claimed 200-mile Exclusive Economic Zone (EEZ). The United States does not recognize the jurisdiction of coastal states over highly migratory species such as tuna.

<sup>4</sup>Ship maintenance facilities in Ensenada are currently being expanded. Astilleros Rodriguez is building a major new facility with a syncrolift that will be able to service up to eight large seiners at one time. The new facility should be open by July 1982.

ernment-appointed committee which has presented its report to Norway's Minister of Fisheries Thor Listau.

The committee proposes, among other things, a better exploitation of nontraditional types of fish by-products and "waste," and also that more emphasis must be placed on quality. Marketing, product adjustment, and process development should be stimulated, and education and training should be given priority, the report states.

A recommendation was also put forward for a grant of US\$16.6 million towards a special readjustment and renewal fund for the industry. The resources will mainly be used within firms and for personnel measures. After a 10-year development program has been implemented, the industry should have a substantially better economic basis for self-sufficiency, on a par with other industries, says the committee.

It was pointed out in the report that three-fourths of the present Norwegian catch is used for fish meal and oil, and that more of the catch should be used for food. So-called inedible fish and other, up-to-now, largely disregarded resources, should be better utilized. On the long term, there appears to be a possibility of a considerable increase in the sales value by also going in for a more planned fishing, the report concludes.

The committee is confident of growth in the fishing industry if its advice is followed and does not rule out the possibility that this industry can, in the future, provide profitable and meaningful employment for more than the 50,000 persons at present employed in it. (Source: Norinform.)

## INDIA SEEKS TO DEVELOP FISHERIES

India is reportedly eager to develop its fishing industry. One of its immediate goals is to step up fishery production from 1.69 million metric tons (t) to 1.86 million t for the 1982-83 season. It hopes to attain this goal by encouraging joint ventures and foreign investments in India, two areas which were hitherto eschewed in India's policy.

Also, Indian companies are increasingly going to be authorized to charter foreign vessels. In the effort to improve Indian fisheries, significant financial aid will be granted to assist in building boats, along with other installations, to facilitate importing the necessary construction materials. The government also has plans to lighten the financial load of the fishermen, especially in light of the rising cost of fuel. Thus it appears that the Indian government is making a concerted effort to improve its fishery industry and to promote its exports to Australia, Canada, Japan, the United States, and western Europe. (Source: LSB-11-82.)

## France to Modernize Its Fishing Fleet

French Government has announced its new Five Year Fishery Promotion Plan 1982-86, which includes a budget of 2.6 billion francs<sup>1</sup> to modernize its fishery fleet. Of the 2.6 billion francs, 1.4 billion francs will be used for large-scale fishery corporations and 1.2 billion francs will be used for middle- and small-scale fishery corporations.

The plan aims to increase the French catch by 10 percent by 1986. The planners expect French vessels to operate freely within English waters by late 1982. According to the plan, the development of the fishery fleet will be facilitated by spending 5 billion francs to deliver 12 tuna vessels. Also, 1.85 billion francs will be spent to purchase four new distant-water fishery vessels to be used in waters off Canada, Norway, Greenland, and Antarctica.

The Government will be granting subsidies to investments made by fishery firms and will be providing low-interest loans to middle- and small-scale firms. Furthermore, the Government will grant special subsidies to firms which scrap their old vessels to build new vessels. The Government has promised to guarantee the price increase of diesel oil to be lower than the consumer price index. (Source: LSB-9-82.)

<sup>1</sup>US\$1.00 = 6.081 French Francs.