

# FOREIGN FISHERY TRADE

## Imports and Exports

**GROUND FISH IMPORTS:** From January 1 through August 31, 1946, there were 33,057,000 pounds of fresh and frozen groundfish imported into the United States under the special tariff classification "Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish." Approximately 28,482,000 pounds were received during the corresponding period in 1945, according to a report received from the Bureau of Customs of the Treasury Department. The reduced tariff quota for the year is 20,380,724 pounds.

Commodity	Aug. 1-31, 1946	July 1-31, 1946	August 1945	Jan. 1-Aug. 31, 1946	Jan. 1-Aug. 31, 1945
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	3,247,613	5,366,323	5,309,245	33,056,963	28,481,813



### Canada

**FROZEN FISH INDUSTRY:** The Fisheries Division of the Nova Scotia Department of Industry has recently announced a new development in the frozen fish industry in Nova Scotia. The project, which has been in the planning stage in the Fisheries Division for the past two years, calls for the construction of a million-dollar fish processing unit at Louisburg, Nova Scotia (a small seaport in the northeastern section of Cape Breton Island). It is reported that the project will be jointly financed by the Provincial and Federal Governments, and private capital, and that the latter interests will be both Canadian and American.



The announcement, dated August 27, was received by the U. S. Department of State from the American Consulate General at Halifax, Nova Scotia. It stated further, that the Provincial Government intends to construct a freezing and a cold-storage plant at an estimated cost of \$350,000, while the Federal Government is expected to build a pier at an estimated cost of \$300,000. The Provincial Government's contribution will include a boiler plant, refrigerator equipment, cold-storage holding rooms, package freezing equipment, sharp-freezing units, and bait freezing facilities. The plans call for a pier 300 feet long and 60 feet wide. The land surrounding the freezing and cold-storage plants is to be made available to private fish companies to erect fish-handling plants.

Construction work on the development is scheduled to start next spring, and the plants are expected to be in operation early in 1948. At first it is planned to handle frozen fish exclusively, but firms interested in installing canneries will be assisted in every way.

It is reported that the bulk of the fish supply will be caught by trawlers and that the Nova Scotia fishing fleet will be nearly doubled. In this connection, it is understood that three new trawlers are now under construction.

It is hoped eventually to build fish production of this one development up to about 200 million pounds a year (total catch of fish in 1945 for the Province was over 400 million pounds).

The significance of the development lies in the huge potential increase in the production of frozen fish, and the emphasis to be placed on exports to the United States.

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**FRESH LOBSTERS:** By Order in Council dated August 29 the Canadian Government has exempted imports of fresh lobsters into Canada from Customs duty from September 1, 1946 to February 15, 1947, inclusive.

During the autumn, fish dealers on the Canadian Atlantic Coast purchase from U. S. fishermen lobsters caught in the United States. After being packed in Canada, these lobsters are exported to the United States in carload lots, making this return journey duty free.

Similar tariff exemption was provided for the 1945-46 season.

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**COLD-STORAGE:** Canadian holdings of fishery products totaled 45,272,000 pounds on September 1, according to a preliminary report received from the Department of Trade and Commerce, Dominion Bureau of Statistics. Compared with stocks held on August 1, this was an increase of 7,003,000 pounds, and was 9,938,000 pounds greater than September 1, 1945.

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**SALMON PACK:** According to a bulletin issued by the Chief Supervisor of Fisheries of British Columbia on August 17, 1946, the salmon pack as of that date is the smallest in six years, amounting to but 434,657 cases as compared with a pack of 910,804 cases at this time last year. This information was made public in a report dated August 28 to the U. S. Department of State from the American Consulate General at Vancouver, B. C.



Canned Salmon Inspection Laboratory

The pack by species as of August 17, 1946, is shown below with comparative figures for the corresponding periods of 1945 and 1942:

Species	1946 (48 lb. cases)	1945 (48 lb. cases)	1942 (48 lb. cases)
Sockeye .....	201,781	312,022	219,420½
Springs .....	5,841½	6,412½	10,933½
Steelheads .....	2,708½	1,685	2,085
Bluebacks .....	2,733½	6,660½	21,189
Coho .....	41,803	69,988½	65,405½
Pinks .....	71,400½	451,209	163,062
Chums .....	108,389½	62,826½	33,461
Totals .....	434,657½	910,804	515,556½

It is reported that commitments have been made to Great Britain, whereby that country will receive 70 percent of the coho pack, 50 percent of the pink pack, and between 30 and 40 percent of the chum pack. An allotment of 500,000 cases will be made for the Canadian market--200,000 more than last year--providing there is that much available after fulfilling British commitments.

Should there be any additional salmon available after Canada's domestic quota has been filled, the remainder will be sold through the London Food Council Areas organization.



## Great Britain

IMPORT DUTY: In addition to the British maximum price reductions on fresh headless fish, the British Government intends to reimpose a 10 percent import duty on all fish, in any form, imported from non-Empire countries, effective September 1, according to information received by the U.S. Department of State dated August 23, from the American Legation at Reykjavik, Iceland. It was reported that the duty was initially established in 1932, but was suspended in 1940 in order to encourage foreign fish landings in Britain during the war.

The British Ministry of Food is reported to have offered to issue permits to Icelandic trawlers on a temporary basis to land fresh fish on ice at Hamburg and Cuxhaven, Germany, at 75 percent of August 10 schedule of British maximum prices, but duty free. This fish would be used to feed persons in the British occupation zone.



Icelandic trawler owners claim that the trip to Germany is almost the same distance as two trips to the United Kingdom and more than twice as costly, because of the loss of fishing and delivering time. In addition, trawlers would have to refuel in Britain both coming from and going to Germany. Consequently, the trawler

owners feel that they cannot afford to ship their fish to Germany under the terms of the present British offer, despite the fact that they are eager to reopen their prewar markets in Germany.



## Germany

**FISHERIES:** During the first six months of 1946 seagoing fishing vessels sailing from Hamburg, Cuxhaven, and Wesermunde made 2,004 trips and landed catches amounting to 56,751 tons, according to a report dated August 19 from the American Consulate General at Hamburg, Germany, to the U. S. Department of State. This catch, added to the fish imported from abroad, makes a total turnover of 146,826 tons.

Prospects of the German fishing industry in 1947 look brighter as a result of a recent British Military Government order authorizing the construction of 100 new fishing vessels by German shipyards. This construction program is to begin during the spring of 1947, so that some of the new vessels can make their maiden voyage in the fall of the same year. With the completion of the 100 new ships, the German fishing fleet will consist of 227 vessels, compared with the present 127, and the prewar total of 360.



## Iceland

**FISH PRODUCTION, 1946:** Catches during Iceland's winter fishing season were slightly below the production record set the previous winter season, according to a report from the U.S. Legation at Reykjavik. The catch between January 1 and the end of March reached 310 million pounds of groundfish despite bad weather which prevented smaller fishing vessels from leaving port during January and most of February.

It was estimated that by the end of June, the 1946 production of frozen fillets had reached 138,600,000 pounds.

Following several years of low production of salted fish, Iceland has begun again to prepare large quantities of that product. By the end of May, almost 28 million pounds of fish were salted, more than 12 times the production for the corresponding period of 1945. Output of fresh fish on ice was 143 million pounds for the 5-month period, a drop of over 30 percent from 1945.



Unloading difficulties in Great Britain plus a dropping British market price are said to be the causes of the decrease in iced fish production. Britain has

been Iceland's major market for fresh fish. Interest in salted fish has been active, with inquiries received from Italy, Spain, Ireland, and Sweden and purchases consummated in Greece and France. Salted fish have been priced at 12 cents per pound compared with 6 cents for fresh fish (50 to 60 percent in weight is lost in the salting process). Further markets for salted fish are expected to develop in the Mediterranean area and in Latin American countries.

Marketing of frozen fillets presented the greatest difficulties, it was reported. Britain, a maximum producer during the war, ceased purchasing with the close of 1945. By mid-May, the cold-storage plants became filled with accumulating stocks. The United States, France, and other countries made purchases, but much of the stocks remained unsold until the Soviet Union agreed to purchase 33 million pounds at the end of May. Stocks remaining at the end of June were estimated at between 2 and 4 million pounds.

Despite difficulties of marketing frozen fillets, Iceland intends to continue production of this product. At least 4 new filleting and freezing plants began operating this season, and construction continued on a Government-owned plant on Reykjavik's widened western breakwater.

Demand for Iceland's 1946 herring pack is reported as unprecedented, with the entire production sold in advance at record prices. Production begins after July 1.

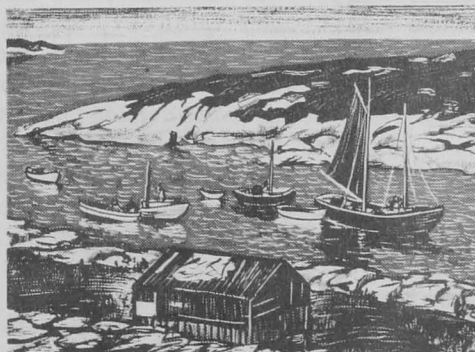


## Newfoundland

**ECONOMIC REVIEW:** The economic conditions of Newfoundland's fisheries have been reviewed for the first four months of 1946 in a report issued on April 25 by the American Consulate General at St. John's, Newfoundland, and transmitted to the U. S. Department of State.

The report states, in part, as follows:

The period under review has been the off season for the fishing industry. Nevertheless, there have been important developments which offer some indication of trends that are likely to develop this season. Most important has been a series of meetings of the Fisheries Products Committee of the Combined Food Board in Washington, D. C. According to the Chairman of this Committee, who is also head of the Newfoundland Fisheries Board, the requirements for bulk and canned fish up to June 1947, are far in excess of estimated supplies. In view of this situation, representatives of the various governments agreed that the allocating of supplies of salt fish should continue through the 1946 season, and those of canned fish until June 1947. Since the demand will far exceed the supply for this year, the price of salt codfish is expected to show little change, if any.

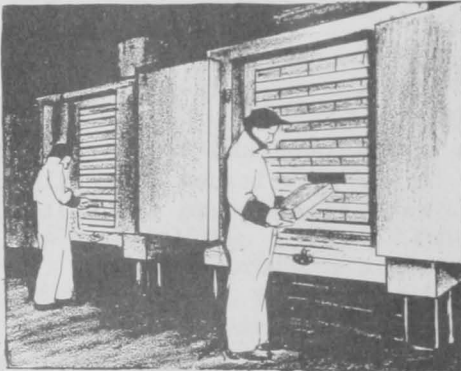


At the end of the quarter, the deep sea, or "bank," fishery got under way. The banking fleet operates from March to September, and sometimes vessels engage in the winter fishery out of Canada. (The shore and Labrador fisheries are prosecuted only in the summer and early fall months.) The size of the banking fleet this year is expected to be about the same as last year, when 111 vessels engaged in deep sea fishing. By the end of April, approximately a score of vessels had set sail, mostly from south coast ports. The south coast fleet will include at least three vessels of the "dragger" type. Draggers are a new venture in the local deep sea fishery and represent a step in efforts to keep pace with Nova Scotian methods.

The success which attended the bank fishery last year, when fishing vessels set new records for fish caught and crew earnings, has inspired considerable optimism for the present season. Newfoundland fishermen, however, expect to find keener competition this year from European ships, particularly the trawler types. These ships appeared on the banks last year after an absence during the war years, and it is believed that there will be a larger number of them this season.

During the latter part of March, a contract was closed with the United Kingdom for cod fillets. The new contract provided for a total of 3,300 tons of fillets, or 7,392,999 pounds, as compared with some 19 million pounds sent to Britain last year. The price was disclosed to be slightly lower than last year.

During the first four months of 1946, a leading St. John's firm built a new cod filleting and freezing plant, which was scheduled to go into production early



in April. This brings to 17 the total number of plants in Newfoundland for freezing and storing fresh fish fillets. Productive facilities for a greater output than last year will thus be available, provided markets are opened. Attention is being concentrated upon the United States market, particularly since the United Kingdom market has already sharply contracted.

In March the Newfoundland Fisheries Board announced a new UNRRA contract to provide up to 25 million pounds of herring, approximately 110,000 barrels over and above the 200,000 barrels contracted for in August 1945. As was the case last year, the Fisheries Board announced that, since the additional quantity of herring contracted for was a specific one, it would again be necessary to issue quotas to pack. The new order brought the value of gross orders placed by UNRRA with Newfoundland to approximately \$4,650,000, making a very substantial addition to Newfoundland's fisheries export trade.

The Board also announced that the large herring reduction plant destroyed by fire in 1945 had been rebuilt and was ready for operation. As the rebuilt plant has a capacity to handle about 2,000 barrels of herring per day, and besides a large quantity of herring oil, its daily production of herring meal will amount to approximately 50 tons.

Only one steamer prosecuted the seal fishery this year, together with six auxiliary vessels and a number of very small ships. Returns will not be known until the next quarter; however, early reports have not been too encouraging.



## Spain

FISHING INDUSTRY, 1945: Developments in Spain's fishing industry during 1945 have been described in a report dated July 31, 1946, from the American Consulate at Vigo, Spain, to the U. S. Department of State.

Extracts of the report follow:

Spain's fishing fleet consists of some 40,000 vessels of all types, ranging from tiny coastal boats to cod-fishing vessels of 1,200 tons. There are 20 companies engaged in fishing, but in addition, there are innumerable private owners and a considerable portion of the fleet is owned by other industries.

It is reported that there are 192 fishing boats under construction at the present time, including 9 cod-fishing vessels at Vigo. However, new construction is severely handicapped by want of certain materials such as cables, steel plates, fittings, tubing, rope, and paint. Diesel and steam engines are another problem, since the domestic production is small and boat builders prefer foreign engines. But the government policy of favoring home industry makes it difficult to import items which can be made in Spain.

The fishing fleet has had its ups and downs during the period of its evolution and may now be considered as having recovered from the effects of the Spanish Civil War (1936-1939), when many vessels were lost and the fleet in general fell into disrepair. There is still the necessity of retiring aged units and modernizing and re-equipping others, but since the production of fish is now adequate for the country, this problem can await the recovery of the canning industry or the opening of foreign markets for fresh fish.

In 1945, the total catch of all species of fish, including mollusks and crustaceans, reached an all-time record figure (over 543,000 metric tons).<sup>1/</sup> In 1941, Spain ranked eighth among the world's fish-producing countries. At the present time, she has probably attained the fourth or fifth rank due to the elimination of Japan and Germany from among the leaders and the increase of over 100,000 tons in her own production.

The principal species taken were hake and sardines. In 1944, sardines predominated, but in 1945 the catch of hake showed a tremendous increase, while the sardine catch declined. This was due to several causes, among them the lifting of wartime restrictions on fishing areas, particularly in the Bay of Biscay, and an increased interest on the part of the boat owners to cater to the fresh fish market rather than try to supply the paralyzed canning industry with sardines.

The predominating species making up the catch in 1945 were sardines, hake, anchovies, and bonito. These were the species of most importance brought into Spanish ports. There were many others, of course, but sardines, anchovies, and bonito were the principal kinds used for canning, while hake were consumed fresh throughout the country in large quantities.

<sup>1/</sup>All production figures given, unless otherwise stated, are "official" and do not include fish which was not entered through the exchanges and, therefore, not controlled. An additional 10 percent of raw fish probably entered the country unrecorded.



In general, the preservable varieties suffered declines in both volume and price during 1945, while the species which were consumed fresh increased tremendously in volume. There may be natural causes for the declines, such as the failure of the sardines to appear in such large runs as in previous years, but the increases in catch of fresh fish could be attributed to the efforts of the fleet to capture the species which were holding up in price. Another contributing factor was the lifting of wartime regulations on the fishing areas which had hampered the long-range fleet for several years, while coastal fishing for sardines had not been particularly affected by the war.

At the present time, the largest part of Spain's catch is consumed fresh; nevertheless, the fishermen are dependent to a very great extent on the packers because the sardine, the most abundant species, lends itself to preservation in tins, but does not compete favorably with other species as fresh fish. Fresh fish is a staple item in the diet of nearly all Spaniards who live near the coast or in the dozen or more cities in the interior where fish is distributed by rail or motor truck. It is reported that this market, though large, cannot absorb any more of the production under present conditions of transportation and facilities.



The Bonito Vendor

Modern processes which the Spanish fishing industry is watching develop in other countries are the use of dry ice, quickfreezing, and the dehydration of fish. At the present time, none of the equipment for filleting, quick freezing, dehydration or packaging is available in Spain, and the industry must wait until availability elsewhere and the Spanish foreign trade situation permit the importation of the necessary equipment.

Spain used to occupy third place in the world in the production of canned fish, manufacturing nearly 3 million cases per year. Prices for export were generally somewhat higher than those of other countries but the product usually was superior, due mainly to the use of pure Spanish olive oil, which is the ingredient next in importance to the fish itself and often more expensive. The history of this industry during the past 10 years has been one of a losing fight against conditions imposed, first by the Spanish internal strife and civil war, and then by the world war.

Production of canned fish in 1945 did not exceed 600,000 cases.<sup>2/</sup> With a capacity of 3 to 4 million cases, it is plain that the industry is all but paralyzed. Production in 1944 was 795,716 cases. The species canned are principally sardines, anchovies, and bonito in oil. Some jacks are put up in oil, and occasionally sardines and jacks are canned in other preparations such as tomato sauce.

It is plain that the salvation of the industry lies in the solution of a number of problems, principally having to do with raw materials. Olive oil, for example, has ceased to be plentiful, as it once was. Owing to the world-wide situation in regard to fats and oils, it has acquired a value both abroad and in Spain which makes it so sought after that fish packers, even if they could obtain

<sup>2/</sup>Sardines are packed in cases of 100 tins, 180/190 grams content. Anchovies are usually packed in smaller tins for export, but for the domestic market and hotel trade, sizes as large as 1 kg. are often used.



it, could not use it industrially without pricing themselves out of the market entirely. The same is true of wire, nails, rubber for sealing rings, and solder, to say nothing of canning and can-making machinery.

The preserving of fish in brine or dry salt is a phase of the industry which is rather widespread, but centered mostly on the Can-tabrican coast. This coast normally harbors a thousand or more small boats, which bring in 3,000 to 5,000 tons of anchovies per year. This relatively large catch is preserved in brine or salted down. In the past it was shipped to Italy and Greece in very large quantities.

There are three companies organized in Spain for the purpose of fishing cod in North Atlantic waters for domestic consumption. The catch in 1945 amounted to 10,300 metric tons. After drying, this will all be consumed domestically, where it is a favorite fish, and in some localities forms one of the staple items in the diet.

The fishing grounds open to the cod fishing fleet are Newfoundland, Iceland, Greenland, North Cape (Norway), and Bear Island. Greenland and Newfoundland are actually utilized because of the facilities for obtaining fuel at Nova Scotia.

Tunny fish are captured at two seasons of the year. Beginning in May, the fish come from the Atlantic and enter the Mediterranean for the breeding season. After July, they return once again to the ocean. During these migratory movements, when the fish pass through the shallow waters near the straits, they are trapped in specially prepared nets.



THE TERRITORY OF HAWAII has an extraordinary variety of fishery resources, the most valuable of which has been exploited almost entirely by Japanese nationals before the war. In spite of the rich diversity of species, not one of them is vastly abundant as are such northern fishes as herring and cod. Nevertheless, Hawaii is peculiarly well situated for development of great ocean fisheries, for around the islands of the western Pacific are large quantities of tuna, which before the war had supplied Japanese canning industries. Hawaii is no farther from these profitable grounds than Los Angeles is from the southernmost latitude visited by the California tuna fleets. Up to 1945, however, Hawaiian fisheries have not extended more than 100 miles from home waters.