

FOREIGN FISHERY TRADE

Imports and Exports

GROUND FISH IMPORTS: From January 1 through September 30, 1946, there were 36,401,020 pounds of fresh and frozen groundfish imported into the United States under the tariff classification "Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish." This was 4,263,917 pounds greater than the groundfish imports for the corresponding period in 1945, according to a report from the Bureau of Customs of the Treasury Department. The reduced tariff quota for the year is 20,380,724 pounds.

Commodity	Sept. 1-30, 1946	Aug. 1-31, 1946	September 1945	Jan. 1- Sept. 30, 1946	Jan. 1- Sept. 30, 1945
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	3,344,057	3,247,613	3,655,290	36,401,020	32,137,103



Canada

COLD-STORAGE: Canadian holdings of fishery products totaled 44,903,000 pounds on October 1, according to a preliminary report received from the Department of Trade and Commerce, Dominion Bureau of Statistics. Compared with stocks held on September 1, this was a decline of 523,000 pounds, but was 6,824,000 pounds greater than October 1, 1945.

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QUEBEC COLD-STORAGE: The Government of the Province of Quebec operates 37 cold-storage plants within the Province, according to information recently received by the Fish and Wildlife Service from the Quebec United Fishermen. These plants are located as follows:

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|-------------------------------|----------------------------|------------------------------|
| 1 - in Riviere du Loup County | 15 - in Gaspé-South County | 5 - on the north shore |
| 1 - in Matane County | 8 - in Bonaventure County | of the St. Lawrence |
| 5 - in Gaspé-North County | | 2 - in the Magadalen Islands |

The first of these plants was built in 1932 and the latest in 1942. The daily freezing capacity of the plants ranges between $1\frac{1}{4}$ and 10 tons of fish. Storage capacity ranges between 80,000 pounds and 1,000,000 pounds. Until 1943, the Government of Quebec operated these plants as a public service, at no direct charge to the fishermen or packer. However, since 1943, there has been a small storing and freezing charge. Freezing charges vary between $\frac{1}{4}$ of a cent and 2 cents per pound, according to species of fish.



Honduras

FISHERY DEVELOPMENT: Excellent quality salt-water fish are being retailed for 12½ to 17½ cents per pound in Tegucigalpa, Honduras, the United States Embassy in Honduras reports.

Tegucigalpa, 80 miles inland from the Pacific waters of the Gulf of Fonseca, received only very occasional receipts of fresh salt-water fish prior to 1942. During that year, an enterprising company began shipping fresh fish by airplane from the Gulf to the capital city.

This company arranged to purchase fish from fishermen living at Amapala on Tigre Island, who already were catching small quantities of snappers, groupers, corbina, snook, and other Pacific species. It established its own retail outlet in a converted dwelling in the center of town. From the beginning, this company charged as low prices as possible for its products, selling them within a range that compared with the cheapest meats. The people of Tegucigalpa, who at first knew very little of salt-water fish, responded immediately to the new products. The demand has increased gradually. Early production brought about 5,000 pounds per month to the capital and the receipts have since been raised to 20,000 pounds. It is estimated that twice the present production could now be marketed. The company plans to expand operations further.



Since it was instituted, the production of this company has been enlarged chiefly by expansion of fishing efforts to the coast approaching the capital. Fish caught near San Lorenzo are shipped daily to Tegucigalpa in iced pick-up trucks, while other supplies continue to be flown, iced, twice a week from Amapala. The company anticipates the establishment, in the near future, of a plant for canning tuna and sardines.



Newfoundland

FISHERY OUTLOOK: Copy of an address entitled "The Fisheries--Retrospect and Prospect," delivered before the St. John's Rotary Club by the Chairman of the Newfoundland Fisheries Board on September 12, was received by the U. S. Department of State from the American Consulate General at St. John's, Newfoundland.

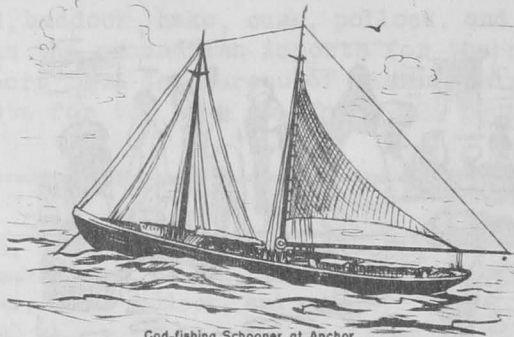
Excerpts of the address follow:

When considering Newfoundland and its available fishery resources, it is found that this country is one of the favored of the world, situated as it is at the edge of the world's greatest fishing grounds. The tremendous areas of the fishing banks adjacent to this country contain incredibly huge populations and many vari-

eties of fish. In addition, its unique shore fishery produces large quantities of cod, which, utilized by the filleting and freezing plants, yield a quality product equal to any and inferior to none. Unfortunately, other types of groundfish do not seem to be present in commercial quantities in inshore waters, but are available on the offshore banks.

In matters of production, however, Newfoundland's fisheries are, in relation to the country's possibilities, among the least developed in the world. Other

more progressive countries, operating thousands of miles distant, have reaped the harvest of Newfoundland's fishing banks to a far greater extent than it has. Other countries have developed higher standards of cleanliness and care.



God-fishing Schooner at Anchor

During the past 4 years, a Marketing Administration Committee, composed of appointees of the Salt Codfish Association and the Fisheries Board, has supervised the marketing of Newfoundland's salt codfish within the international distribution arrangements, under the Combined Food Board. The work of this committee has been a splendid example of the value of intelligent collaboration between government and industry. This committee and the Fisheries Board have spent over a year in the preparation of a Review of Markets and Post-War Planning report, which is probably one of the most comprehensive, analytical, and useful documents ever compiled about Newfoundland's fisheries. It is, for the moment, a confidential report and not for publication. For the past 8 months, a committee on costs of production has been collecting data over the Island in order that an analysis may be made of costs from the producer to the consuming market. Similarly, a most intensive study of the group marketing system, including detailed examination of the operation of such groups in other countries and in other commodities, has been going on for months. The object of this research is to make the country's marketing groups as strong and efficient as may be possible.

From the standpoint of marketing, Newfoundland is in a sounder position today than she has ever been. Because of good organization and future planning, the country has had a number of stable years and has avoided the mistakes which brought many firms to disaster after the first World War. This has brought about the present satisfactory financial condition of Newfoundland's fishery industry.

It is impossible to predict in any detail the events of the next decade; but there is no reason to be pessimistic--they should and can be years of progress and expansion. The world trade in salt codfish is not dying. There are many areas in the world where, for climatic and other reasons, salt codfish will always be in demand, since the combination of high animal protein and salt is well adapted to their needs. The frozen fish industry may suffer from a temporary recession, due to withdrawal of the abnormal wartime demand, but its future, in common with the future of frozen foods generally, should be bright.

Newfoundland's fishery has shown an increase in volume every year for almost a decade. That forward movement should continue. With the concentration of raw material for filleting and freezing, the utilization of fish waste is becoming a possibility. Its application generally to the shore fisheries is a problem which has been receiving attention for several years.

The Food and Agriculture Organization of the United Nations, which is intended to be a permanent body, has recently set up a Division of Fisheries. Newfoundland is not lacking in influence, either in the inclusion of fish as an integral part of the Organization's work, or in the documentation which will guide the Division of Fisheries in its activities. In the next decade there will be more international activity in fisheries than ever before, and it is important that Newfoundland be represented during this period.

To live and prosper, Newfoundland must export more per capita than she has done. This must come largely from the fisheries; not through greater returns from a smaller volume, but by increased production.



Taiwan

FISHING INDUSTRY: Because the inhabitants of Taiwan (Formosa) are a continental rather than an oceanic people, who prefer agricultural pursuits to fishing, there is little prospect for extensive future development of the sea fisheries of Taiwan, the American vice-consul in Tiahoku reported to the State Department on August 20. Fishing in Taiwan is restricted mainly to salt waters, as all lakes, rivers, and ponds in the Province are small and shallow.

The coast line of Taiwan is rather regular, with few indentations to afford breeding grounds for various species of fish and protection for small fishing boats. There are, in some districts, so-called salt-water fish farms for oysters and mackerel. The bulk of the salt-water fishery production, however, is obtained from open sea and bottom fishing in the North China Sea, the Taiwan Channel, and the "vast sea shed extending out through the South China Sea." Tuna fishing is a specialty in the Pacific, South China Sea, the Sulu Sea, the Celebes Sea, and the Banda Channel.



Of the 284,000,000 pounds taken in all marine fishing during 1940, 66 percent was obtained in trawling, tuna fishing, and other operations off the coast; 18 percent was taken in coastal fishing by haul seines and other gear; and 16 percent was produced by "fish culture" or salt-water fish farms (oysters and mackerel). The trawl fishery of Taiwan employed a number of motor fishing craft of 200 to 1,000 metric tons, while tuna fishing was carried on with wooden or steel craft of 50 to 200 metric tons. Also employed were "hand-winding" seines which are drawn along the sea bottom between 2 motor boats. A total of 1,359 motorized craft and 4,468 motorless boats were used in Taiwan fisheries between 1937 and 1943.

Of the total prewar catch, 63 percent was consumed normally within Taiwan, 14 percent was exported, principally to Japan; and 23 percent was used in manufacturing byproducts. About 200,000 cans of tuna were packed.

Fishing equipment, afloat and ashore, suffered heavy war damage during World War II. Only about 10 percent of the fishing industry remained able to produce. Most of the cold-storage and freezing equipment and ice-producing plants escaped damage. Reconstruction has been planned. Handicaps include repair to damaged properties, replacement of experienced men due to withdrawal of Japanese technicians and laborers, and the difficulty of hiring laborers from a population suffering from inflation, heavy increases in taxation, and failures to pay promised wages. Needed materials for rehabilitation include, particularly, heavy oil; manila, wire, and cotton rope for boats and gear lines; seine twine; vessel-building materials; and amonia, calcium chloride, and other items used in refrigeration and storage operations.



Union of Soviet Socialist Republics

FIVE-YEAR PLAN: In a report dated August 19 to the U. S. Department of State the Minister for the Fish Industry of the USSR has given an account of that Republic's 5-year plan for the development of its fishery industries.

The report has been extracted as follows:

The heavy losses sustained by the Soviet fish industry during the war may be estimated by the devastation wrought in fishing areas which used to deliver 40 percent of the country's total catch. These areas require almost complete restoration. This includes fisheries and plants on the Azov and Black Seas. In

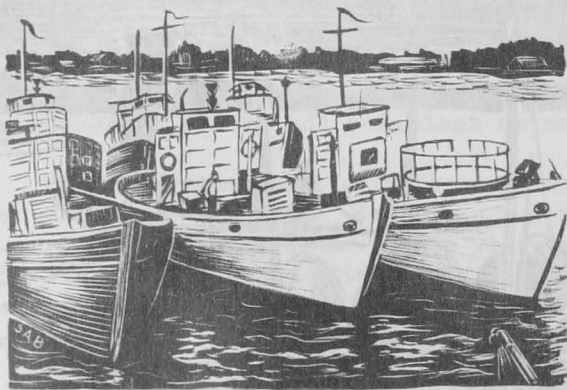
Murmansk, especially, the fishing fleet suffered so heavily that 38 percent of the netting motor boats and 87 percent of the net-lifting craft have been sunk.

The first task is, therefore, to repair the damages caused by the war. The restoration work will be done on the principle of improvement and modernization.

The 5-year plan provides for a considerable increase in fish production compared with the prewar level.

Figures showing the scale of operations planned in the Murmansk trawling base and processing enterprises in 1950 are: at least 25-27 trawling vessels to be unloaded in port daily, 30 vessels to be in the repairing yards, and the Murmansk combined fish-processing enterprise to dispatch two train-loads of produce per day. The trawler base in Murmansk will be enlarged to hold a number of trawlers $2\frac{1}{2}$ times greater than the maximum number in the fleet in 1939.

By 1950, the catch must be 57 percent greater than before the war. The increased output of fish will be mainly achieved by intensified fishing in the sea basins of the North and Far East. In 1950, the number of fishing trawlers in the North will be double the prewar number, and in the Far East, the delivery of fish will be increased $2\frac{1}{2}$ times and will form over one-third of the whole catch of the



USSR. Industrial enterprises will also be built which, in conjunction with the old Japanese area and enterprises, will make the Far East one of the leading fish areas of the Union.

The catch must increase in the old basins. The plan also provides for fish breeding, including sturgeon and salmon, and various meliorative and acclimatizing measures.

During the war, the fishery industry had to reduce its assortment of products and concentrate on the output of special produce. One of the tasks under the new plan is to restore the prewar assortment and quality. In 1950, the output of canned fish should be more than doubled; Murmansk alone should produce, by the end of the 5 years, $2\frac{1}{4}$ times more fishery products than before the war. Various kinds of food fish must be sold in abundance in the delicatessen stores. It is planned that Siberia shall produce a great quantity of tinned fish, which is a specialty of that region. The fishery industry must also find additional methods of processing fish and producing a large quantity of vitamins and endocrine products.

Another important phase of the development is ship building and the manufacture of nets and containers. Each of these is an important industry in itself, and the plan provides measures of development for each separately. The number of fishing craft which must be built is equal to 80 percent of the entire present fleet, and there will be more than double the present scale of ship repairs. In 1950, fishermen must have at least 1,100,000 nets.

Wooden containers will be replaced by cardboard containers, but even then, the amount of special timber required will be very great. Consequently, the fishery industry must increase its timber operations about threefold and prepare timber not only during the fishing season, but all year 'round.

The Murmansk fishing port will be considerably enlarged, and new ship-building yards will be built in the Far East and in other basins. Sea fishing bases will be organized in Koenigsberg, Klaipeda, and Lipaya, with large fishing vessels, including trawlers. New refrigerating plants, canning factories, net-making factories, and other auxiliary enterprises will be built in various parts of the country, but success will depend on their improvement rather than their increase in number.

In the basins of the North, Far East, and Siberia labor needs are serious. As these sections of the country are sparsely populated, the building of homes must be done on a very large scale.

The number of fishery specialists that will be required in the fishery industries in 1950 is estimated at 1,700, with approximately 7,000 technicians. This is expected to be achieved by enlarging the Moscow and Astrakhan Institutes and by organizing a new fishery institute in the Far East.

It is planned that in 1950, 880 million pounds of frozen and refrigerated fish shall be sold on the market (80 percent more than in 1940) and over 220 million pounds of fresh fish. It will, therefore, be necessary for the Ministry of Railways to increase the number of refrigerator cars and special cars for the transportation of live fish, and for the Ministry of Trade to provide the warehouses and stores with the necessary refrigerating facilities. The Ministry of the Paper Industry is expected to build factories for the manufacture of cardboard packing cases.