

# FOREIGN FISHERY TRADE

## Imports and Exports

GROUND FISH IMPORTS: From January 1 through June 1, 1946, there were 20,344,773 pounds of fresh and frozen groundfish imported into the United States, the Bureau of Customs, Treasury Department reported on June 13. The tariff quota for the year is 20,380,724 pounds, and all imports in excess of this figure will be subject to the full tariff rate of  $2\frac{1}{2}$  cents per pound.

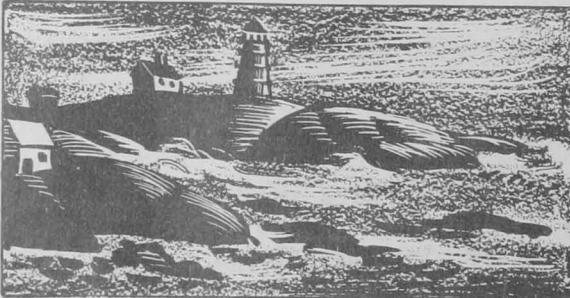
Commodity	Apr. 27- June 1, 1946	Apr. 1-27 1946	May 1945	Jan. 1- June 1, 1946	Jan. 1- June 2, 1945
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	3,983,146	3,945,194	4,437,164	20,344,773	16,439,040



## Canada

FISHERIES OF NOVA SCOTIA: In a report on the fisheries of Nova Scotia received by the State Department from the American Consulate General at Halifax, Nova Scotia, it is stated that Nova Scotia's fishing industry is second only to its primary iron and steel industry in gross value of production. The text of the report is in part as follows:

The problems of the eastern Canadian fisheries are numerous. The industry is made up of many small incohesive units that find it costly to obtain and maintain proper equipment. When fishing for the fresh fish trade or when curing his own, the individual fisherman finds it difficult to break away and adopt new techniques.



In 1939, the value of packed and processed fish in the Maritime Provinces was slightly more than a tenth of the value of the catch, showing that little processing was done locally.

Eastern Canadian fishermen place a high value on their freedom of action and are considered extremely individualistic in their outlook. The industry has been looked upon as a gamble, and to some, cooperation takes away the spirit of the business. The fresh fish interests are opposed to the salt fish interests, and neither group exhibits a unified effort.

With modern developments the dried fish trade lost much of the North American markets, and it was necessary to look farther afield and develop new markets in Central America and the islands of the Carribean and the countries surrounding the Mediterranean. The end of the first world war saw the reduction of purchasing power in southern Europe and the entrance of Norway and Iceland into these markets, together with a general fall in prices. This left the local fishing industry in precarious circumstances.

During the period between World Wars I and II, fishing was primarily carried on inshore, and only a few vessels operated on the banks. It is understood that during this period Canadian sea craft took less than seven percent of the cod annually caught on the banks. These offshore fisheries were exploited more vigorously by fishermen from the United States, Newfoundland, France, and Italy. It is reported that, in terms of efficiency, the fishing industry stood still during World War II in spite of good prices and demanding markets. The war, however, emphasized the need of a change in methods of marketing and necessitated a change in fishing methods. In this connection some changes have recently taken place; the industry is endeavoring to concentrate more heavily on the fresh trade and on local processing. While only three trawlers were licensed by the Federal Minister of Fisheries to operate in offshore waters before the war, there are now 10 trawlers and one dragger, with possibilities for more.

Prior to World War II it was recognized that the decline in the dried fish trade required new methods of marketing if the industry was to exist. As a consequence, the fresh, frozen, and smoked fish producers endeavored to expand. The fresh fish industry then attempted to enter fresh fish markets, but with old fishing techniques, including the lack of refrigeration services throughout distributive channels.

The Nova Scotia fisheries may be divided into two groups: the offshore fisheries and the inshore fisheries. The inshore fishermen usually operate within three miles of the coast, but sometimes venture as far out as twenty miles. The most suitable and prolific inshore fishing areas are, however, relatively close to shore. The offshore fisheries refer to the fishing banks farther out to sea, and are exploited by the trawler and schooner operators. For statistical purposes, "offshore" fish refer to the fish caught by vessels of over 40 tons; all other fish are grouped together as being from the "inshore" fisheries, having been caught by boats of under 40 tons.

Lunenburg, center of the salt fish trade, and Halifax, Yarmouth, Digby, Lockeport, North Sydney, and Canse, centers of the fresh fish trade, are the principal fishing ports, although many of the inshore fishermen are situated in the small fishing villages along the east coast.

In prewar years there was an average of 18,000 men engaged in fishing in Nova Scotia, with about 3,200 more employed ashore in the fish processing establishments, making a total of almost 22,000 employed in the industry. This figure declined, however, during the war. With the release of Service men from the armed forces, it is reported that there are now considerably more men engaged in the fishing industry. However, no estimate of the figure is available.

The hours of employment in the fisheries depend on the weather and the fishermen's equipment. In the inshore fisheries, a good boat with a marine engine cannot fish much beyond 140 days per year. For boats of less efficiency, the number of days may be cut down considerably. The hours of work are long--from dawn to sun-

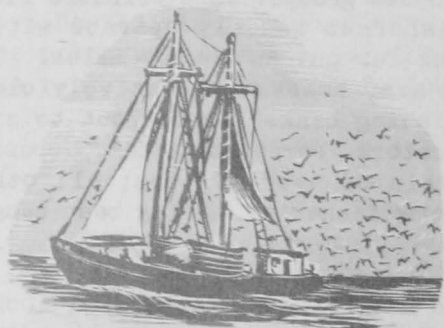
set in good weather. Working conditions are hard and difficult and, in many cases, miserable. For this reason, together with the fact that little monetary return is to be gained for the individual fisherman, it was difficult to obtain new men for the industry during the war.

The fishermen in the offshore fisheries do not work on a wage scale, but instead, each member of the crew takes an appropriate share of the landed value of the catch. The offshore crews may be out of port from a few days to six weeks at a time. These fisheries have not been prosecuted with as much vigor by Nova Scotia fishermen as might be expected of a seafaring province. In 1944, only 37 vessels on the fishing banks were of Canadian registry. This situation appears to be changing with the licensing of additional trawlers and with the objections of the schooner men and the inshore fishermen overruled.

In the inshore fisheries, one or two men operate each boat and divide the catch, the owner of the boat taking the largest share.

The inshore fisheries are worked by men in dories, sail boats, and gasoline driven motor boats, all less than 50 feet in length. The fishermen leave the shore early in the morning and return the same day. The best inshore fishing grounds are situated in the bays and numerous sheltered inlets, which form breeding and feeding grounds for a large variety of fish. A hand line, or trawl line, is used in the taking of cod and haddock, and for herring and mackerel, gill-net seines and trap nets are necessary, since the schools of these smaller fish move constantly along the coast.

The schooners fishing on the Grand Banks are usually about 140 feet in length, with a draft of 12 feet and a weight of about 100 tons. Vessels of this size carry about 26 dories for trawl fishing and for hand-lining. The fishing operations are carried out in waters 20 to 80 fathoms deep. A trip to the Grand Banks is usually of about six weeks to three months in duration. When the nearer banks are fished, the trip may last only a few days. Since the nearer banks provide fish for the fresh trade, the trips must necessarily be brief.



The diversity of the American market as to the type of fish desired, has, in recent years, created a change in the distribution of fish from Canada. In 1929, 32 percent of the total value of the groundfish exports went to American markets, and by 1932 this figure rose to 62 percent. This increase was not confined to groundfish, but repeated itself with regard to lobsters and pelagic fish. The Hawley-Smoot Tariff of 1930 did not decrease Canada's exports to the United States, but merely reflected itself in a lower standard of living for Canadian fishermen in the Atlantic fisheries.

At the present time, the fresh, frozen, and smoked fish find their markets in Upper Canada and the United States (during the war, Great Britain purchased large amounts of frozen and smoked fish). The dried, pickled, and salted fish are marketed chiefly in the islands of the Caribbean and in Central America. It is reported that local exporters are reluctant to attempt to reenter the dried fish markets in southern Europe.

The transition from the salt or dried fish trade to the fresh or frozen trade has been retarded in Nova Scotia because of the distance to the market in upper Canada and in the United States, by the reluctance of the industry to give up the dried fish tradition, and the lack of spirit and enterprise in adopting new techniques.

It is reported that the future of the Nova Scotia fisheries lies in the expansion and continued development of the fresh fish trade, and it is the concensus among local producers that the market in upper Canada and in the United States, now very active, will maintain itself. With the increase in the fresh fish trade, the technology of the industry is taking a turn to modernization; refrigeration plants are increasing in number, and distributive channels are being strengthened.

FISHERIES IN 1944: An advance report on the fisheries of Canada for 1944 has been issued by the Dominion Bureau of Statistics in cooperation with the Dominion Department of Fisheries and the Provincial departments which have jurisdiction over the fisheries of their respective provinces.

The report states in part as follows:

The value of Canada's fisheries attained a new peak in 1944, the \$89,418,600 (Canadian currency) recorded being an increase of \$3,824,000, or 4.5 percent, over that of 1943. Higher prices were again the predominant factor in the increase, as the quantity caught fell off by 4.8 percent. The total represents the value of the fish as marketed, whether fresh, canned, cured, or otherwise prepared, and includes the value of such by-products as oil and meal. The sea fisheries contributed \$78,093,100, or 87.3 percent, and the inland fisheries \$11,325,500, or 12.7 percent, to the total.

The salmon fishery retained the leading place, despite a reduction of 11.5 percent in the quantity landed. The marketed value was \$16,373,200 as compared with \$15,613,200 in 1943.

According to marketed value, British Columbia led the other provinces with 39.0 percent of the total, followed by Nova Scotia with 26.4 percent.



The total quantity of all kinds of fish, including shellfish, taken by Canadian fishermen in 1944 was 11,771,000 hundredweight, a decrease of 4.7 percent as compared with 1943. The sea fisheries accounted for 10,908,000 hundredweight, or 92.7 percent, and those of inland waters for 863,000 hundredweight, or 7.3 percent. Landed quantities and values are shown by provinces in the table which follows:

	Quantity caught cwt.	Value as landed \$		Quantity caught cwt.	Value as landed \$
Prince Edward Island ..	272,227	1,797,308	Manitoba .....	293,231	2,830,060
Nova Scotia .....	3,345,588	14,851,100	Saskatchewan .....	129,588	1,032,061
New Brunswick .....	1,751,725	5,403,571	Alberta .....	76,338	464,798
Quebec .....	1,008,860	3,974,495	British Columbia ....	4,583,226	17,333,347
Ontario .....	310,392	4,389,273	Yukon .....	281	3,131
Totals .....	6,688,792	30,415,747	Totals .....	5,082,664	21,663,397



**COLD-STORAGE:** A gain of 44 percent in May in the holdings of fishery products in Canadian cold-storage plants was indicated in preliminary reports of the Department of Trade and Commerce of the Dominion Bureau of Statistics. Holdings on June 1 were recorded at 22,335,000 pounds, compared with 15,537,000 pounds on May 1 and 17,489,000 pounds on June 1, 1945. The gain over May 1 was due mainly to increases in the holdings of halibut, sea herring, and cod fillets.



## Greenland

**FISHERY EXPANSION:** The Greenland Administration is encouraging the building of fishing vessels, according to a report sent to the State Department by the United States Legation at Copenhagen, Denmark.

Any person recommended by the local authorities may obtain a new boat if he is able to pay one-tenth of the purchase money and will obligate himself to deliver one-fifth of the catch until the cost of the boat has been paid. This is usually possible within eight years.

The new vessels are used in the traffic between Denmark and Greenland as coast vessels and as fishing boats for the Greenland population. It is intended to increase the Greenland fishing fleet to about 200 boats, compared with 73 prior to the war.



## Iceland

**PROCESSING OF FISH:** Significant changes in the processing of fish in Iceland are reflected in the following table published in the April 1946 Statistical Bulletin of the National Bank of Iceland and the country's statistical bureau:

Sea Fisheries

Mode of Preparation	January-March	
	1945	1946
	Pounds	Pounds
Fish on ice .....	112,540,000	80,457,000
Fish frozen .....	54,288,000	65,353,000
Stockfish .....	675,000	198,000
Canned fish .....	448,000	794,000
Salted fish .....	1,276,000	12,707,000
Home consumption .....	1,409,000	657,000
Total .....	170,636,000	160,166,000

The table shows the portion of the catch (in weight of drawn fish) diverted to each type of processing. In 1946, there was a significant gain in fish frozen and salted, while fish packed in ice declined.

## Italy

UNRRA PROGRAM: Notes on the work of UNRRA's fishery work in Italy were included in Issue No. 19 of Economic Notes, publication of the agency's Italian Mission. Excerpts follow:

**FISHING INDUSTRY REHABILITATION:** Initial assistance provided by the Allied authorities to the Italian fishing industry, which the war had brought to a standstill, has now developed into a comprehensive long-term plan drawn up by UNRRA in cooperation with the Italian authorities. Italy's 5,300 miles of seaboard has always afforded widespread seafaring activity and a means of livelihood to many thousands of fishermen and merchant sailors.

Though the Mediterranean is one of the poorest fishing grounds in Europe, the Italian fishing industry, with its large and up-to-date fleet, provided as much as 200,000 tons of food annually. Power fishing was carried out by some 1,400 units, of which approximately 1,300 were engaged in deep-sea trawl-fishing and fitted with 50 to 300 H.P. engines. Coastal or mid-water fishing with fixed nets, bow nets, and fish lines gave employment to about 30,000 sail and row boats.

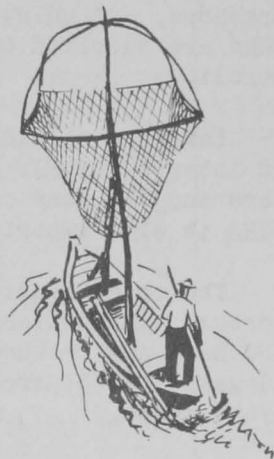
There was also a small but efficient ocean fishing fleet, consisting of about 25 units with a gross tonnage of 12,000 tons, which operated off the coast of northern West Africa (Mauretania), Newfoundland, and Iceland. The official annual yields were stated as follows:

	Tons
Coast fishing .....	130,000
Tuna .....	3,000
Pond .....	7,000
Shellfish bridings .....	8,000
Fresh waters fishing .....	10,000
North Western Africa (frozen fish by trawlers) .....	5,000
Newfoundland and Iceland (salted fish by trawlers) .....	6,000
Total .....	<u>169,000</u>

Many Italian authorities give the total catch as nearer 200,000 tons, on the grounds that fishermen would report lower figures in order to evade harbor dues and other liabilities. About 130,000 men were employed in the industry, and the value of the total catch was estimated at approximately \$8,490,000.

After September 8, 1943, the Italian fishing activities were greatly reduced. The smaller craft had been largely damaged or destroyed; the larger fishing vessels had been requisitioned for mine-sweeping. Equipment such as nets, hemp, and cotton twines, steel cables, and other essential gear were either looted or destroyed and could not be replaced. Many fishermen had sunk their craft so as to avoid seizure by the Germans. Shipyards, workshops, net factories, and refrigerating plants had been rendered useless by bombing or sabotage.

Access to fishing grounds was made very difficult, either because of restrictions imposed by the Allied Naval Authorities for military reasons, or because



mines and wreckage made sailing unsafe. Havoc had been caused to inland waters, where during the war period, fishing by explosives and poisons had been extensively practised, with the consequent destruction of stock, particularly of minnows.

Rehabilitation of the fishing industry is now proceeding. Mined beaches are being cleared and obstructions of ports and channels removed. Sunken motor fishing vessels, and row and sail boats are being salvaged and repairs carried out on damaged and partially destroyed craft. Steps have been taken to secure release of units of the fishing fleet as military necessities have ceased.

Over 1,000 tons of supplies provided by the Allies substantially contributed to the re-equipment and repair of fishing craft. Rehabilitation of net factories, workshops, and shipyards has been planned, and petroleum products imported by UNRRA are supplied to fishermen through local agencies of the Comitato Italiano Petroli.

Large quantities of raw cotton have been supplied by the Allied Commission and later by UNRRA. UNRRA has requested an allocation of 500 tons of Manilla fibre and 500 tons of coir yarn, which are still in considerably short supply. UNRRA is also importing 300 tons of linseed oil for the manufacture of paints.

The chief handicap to rehabilitation of power-driven fishing craft was fuel shortage. Allocations of UNRRA procured fuel through the Italian Government Agency, CIP, have now reached approximately: Diesel oil 62 percent, kerosene 68 percent, and gasoline 35 percent of demand, enabling craft to operate on an average of 16 days a month.

After a lapse of six years, an Italian ocean-going trawler has been able to operate outside Mediterranean water. The rebuilding, refitting, and fuelling of larger units is now under consideration, and plans in this connection have been submitted to UNRRA. Re-stocking of lakes and rivers has been materially assisted by one consignment of 70,000 rainbow trout eggs flown to Italy from the United States. UNRRA has already arranged for a second load of 70,000 trout eggs to be flown from Wisconsin during the month of May. The fry have been distributed to experimental breeding ponds throughout Italy.

Staff members of the UNRRA Fisheries Branch, working in close conjunction with local authorities, are at present making inspections of all Italian fishing ports.

Apart from the fact that the high nutritive value of fish proteins and fats help to make up the deficiencies of the average diet, it is essential that Italy should be given every opportunity to produce her own food, so as to relieve the acute shortage and ease her dependency on imports. Such fish, or portions of it, as are not consumed directly as food, may be converted into essential by-products such as industrial oils, vitamin A and D bearing oils, livestock and poultry feeds, and fertilizers.



## Japan

JAPAN'S FOREIGN TRADE: Japan's prewar foreign trade has been summarized in a May 1946 leaflet of the International Reference Service of the Department of Commerce. The following tables list the fishery products mentioned in the leaflet:

Japan's Principal Exports--1937-39 and 9 Months 1940

Commodity	Q U A N T I T Y				V A L U E			
	(In Thousands of lbs.)				(In Thousands of Yen)			
	1937	1938	1939	1940	1937	1938	1939	1940
Tangles and sliced tangles	68,688	52,903	78,256	50,931	2,698	2,638	7,342	8,285
Fish and shellfish, fresh	25,080	29,327	42,979	34,477	3,942	5,352	7,803	7,193
"    "    "    , dried:								
Cuttle	5,491	1,639	6,688	5,101	2,202	977	4,723	3,718
Trepang	2,099	4,029	3,925	2,568	1,578	2,350	6,668	5,183
Ligaments of scallops	1,255	995	2,204	988	1,351	1,257	5,557	3,167
Fish, salted, trout	38,059	28,366	77,438	5,904	1,992	2,155	9,968	999
Fish liver	-	-	5,514	5,538	-	-	6,047	10,141
Fish and animal oil:								
Sardine	82,823	35,557	4,397	-	9,304	2,746	560	-
Cod liver	-	-	1,689	-	-	-	3,174	-
Other fish	13,125	7,354	3,813	-	1,953	2,520	244	-
Hardened oil, fish	67,999	43,735	42,960	-	9,524	4,333	3,831	-
Fishing nets, cotton	4,834	3,037	4,039	2,015	4,336	3,053	3,635	2,312
Sardine fish meal	159,157	79,513	57,174	2,032	9,235	4,506	4,188	157
Comestibles in tin:								
Crabs	24,544	19,119	38,524	10,343	19,874	15,244	30,323	8,344
Salmon	36,345	58,938	49,550	2,115	18,626	28,383	27,092	1,075
Trout	46,506	54,194	40,951	13,978	8,865	10,079	8,907	4,317
Tuna fish	17,671	9,915	18,738	5,495	7,786	4,067	8,860	3,201
Sardines	92,627	56,232	53,402	21,605	11,176	7,543	7,922	4,769
Other fish	3,973	6,119	5,421	1,696	1,047	1,823	2,032	774
Snellfish	3,715	4,950	5,190	1,963	971	1,510	2,154	952

Japan's Principal Imports--1937-39 and 9 Months 1940

Commodity	Q U A N T I T Y				V A L U E			
	(In Thousands of lbs.)				(In Thousands of Yen)			
	1937	1938	1939	1940	1937	1938	1939	1940
Shells of mollusca	19,202	8,388	15,497	9,126	3,795	1,587	2,466	1,586

In 1939, 17.9 percent of Japan's export trade and 34.4 percent of her import trade by value was with the United States. Fishery products roughly approximated five percent of the value of all exports of that year.



## Newfoundland

Fish products produced in Newfoundland during 1945 were valued at over \$25,000,000 (Canadian currency), according to a dispatch to the State Department from the U. S. Consulate General at St. John's. The chief item produced was salted codfish, with 106 million pounds salted, valued at \$14,000,000.



Among Newfoundland's principal exports to the United States were the following fishery products:

	Pounds	Value (Canadian Currency)
Salted codfish .....	23,924,000 .....	\$3,048,000
Frozen cod fillets ..	6,372,000 .....	1,303,000
Herring .....	4,024,000 .....	928,000
Cod oils .....	1,323,000 U.S. gals.	771,000

**FROZEN FILLETS:** A contract for the sale of Newfoundland codfish fillets to Great Britain was signed during the latter part of March, according to a report to the State Department from the American Vice Consul at St. John's.

Following negotiations in Montreal, the contract was signed for a total of 7,393,000 pounds to be sold to the United Kingdom at a price "slightly lower" than was paid for the 19,000,000 pounds furnished to Britain in 1945.



## South Africa

**FUR SEALS:** Expansion of sealing operations in the Union of South Africa is imminent, The South African Shipping News and Fishing Industry Review for March 1946 reports. The South African seal fishery is based on the capture of the Cape fur seal (Arctocephalus pusillius). This species visits Cape Cross and numerous islands and rocks of the waters of South Africa.

With the exception of the Cape Cross rookery, which is controlled by a concession granted by the Administration of South-West Africa, all the seal islands are controlled by the Union Department of Agriculture, and sealing operations are carried out under the direction of the Superintendent of the Government's Guano Islands.

The Cape fur seal is taken principally for the skins, which are obtained from 6 to 9 months' old pups of both sexes, and not, as in the case of the Alaska fur seals, from 3-year old males or "bachelors."

The skins are not dressed in South Africa, but are sent to Britain and the United States for this purpose. The finished article is said to compare favorably with the Alaska seal fur.



Expectations for postwar expansion are based on research work at the University of Cape Town, which has shown that a first-class oil can be processed from seal blubber; that seal intestines constitute another useful source of oil; that seal livers are rich enough in vitamin A to make them rank almost as high as shark and codfish

livers as a source of this vitamin; and that there are other possibilities of using seal carcasses.

Providing proper facilities can be made available for this difficult and dangerous industry, and providing economic outlets can be found for the byproducts, the killing of seals may be increased substantially. While some 25,000 seals have been killed annually in South Africa during the war years, the resource is considered capable of supporting a greater take. The fitting out of a factory ship is being considered as a major part of an expansion program. Two vessels already constructed or being built for use in the guano traffic may be adapted for use in sealing.

DEVELOPMENT: A 5-year plan for the establishment of a 10-million dollar fishing industry in the Dido Valley in the Union of South Africa at Simon's Town was reported in the April 1946 issue of The South African Shipping News and Fishing Industry Review. The development will include the building of a fishing harbor and the opening up of building sites for the Union's leading fishing concerns. The total amount of the 10 million dollars is expected to be spent on the harbor, factories, plants, housing, and other construction associated with the enlargement of commercial activities in the area.

The plans were developed because of the overcrowded conditions of the fishing harbor at Kalk Bay. Also considered was the fact that the projected harbor will reduce considerable mileage from the distance trawlers have to run from the Agulhas Bank to port. This factor will be of particular importance during the winter months.

SPINY LOBSTERS: The South African crawfish industry is expected to double its prewar output of frozen tails within the next year, according to the March issue of The South African Shipping News and Fishing Industry Review. After six years of inactivity during the war, the industry is taking on a new lease of life. Large exports have been made to the United States during the past few months, and preparations are being made for expansion. Reports indicate that there is no shortage of crawfish, but that lack of suitable transportation facilities has handicapped the distribution of crawfish to home markets as well as for export.



Negotiations for the purchase and construction of a large number of 40- to 65-foot fishing boats have been begun, and a South African steamship line is making provision for the construction of large refrigeration chambers in its latest vessels. These sections are specifically designed for the conveyance of frozen crawfish tails.

Crawfish grounds extend roughly from Port Nolloth to Cape Point. There are no good grounds on the East Coast except one recently discovered off Natal in waters so deep that commercial fishing is not feasible. In 1940, the whole crawfish industry employed over 3,700 persons and operated 6,400 tons of small vessels.

TUNA: Technological research on the tuna of South Africa is discussed in The South African Shipping News and Fishing Industry Review for April 1946. Dr. W. S. Rapson and Dr. H. M. Schwartz of the Chemistry Department of the University of Cape Town, in conjunction with the Union's Division of Fisheries, are making a study of tuna liver oil as a source of high vitamin D potency oils. Assistance is being requested of anglers and commercial fishermen.

The most common species of tuna in South African waters is the bonito or Cape katonkel (Sarda sarda). Skipjack (Katsuwonis pelamis), yellowfin (Neothunnus macropterus?), bluefin (Thunnus thynnus), and frigate mackerel (Auxis thazard) also are found in this area.



## SOUTH PACIFIC FISHERY

The South Pacific Coast receives the greatest volume of fish landed anywhere in America. The foremost fishery is for the sardine, the largest fishery resource in the Western Hemisphere, which supplies raw material for cheap canned foods, fish meal, and oil. The tuna fisheries, operating mostly south of the United States, as far as Ecuador, supply an important canning industry in southern California. Unlike conditions on the North Atlantic Coast, food-rich water in the Pacific is not confined to the continental shelf. It extends many miles to sea over deep water and supports large populations of many kinds of pelagic fishes. The California catch in 1942 amounted to 1,173 million pounds.



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--Senate Document No. 51