

FOREIGN FISHERY TRADE

Imports and Exports

GROUND FISH IMPORTS: From January 1 through June 29, 1946, there were 24,676,000 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 19,615,000 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	June 2-29, 1946	Apr. 27- June 1, 1946	June 1945	Jan. 1- June 29, 1946	Jan. 1- June 30, 1945
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	4,330,976	3,983,146	3,176,093	24,675,749	19,615,133



Canada

COLD-STORAGE: Canadian freezings of fresh fishery products in May totaled 14,422,000 pounds. Heaviest freezings were of whole cod, cod fillets, and halibut, according to a preliminary report of the Department of Trade and Commerce of the Dominion Bureau of Statistics. Holdings totaled 22,309,000 pounds on June 1, compared with 15,537,000 pounds on May 1 and 17,489,000 pounds on June 1, 1945.



Ecuador

FISHING REGULATION: A report from the American Embassy at Quito, Ecuador, received by the State Department on July 1, 1946, states that the President of Ecuador, on December 27, 1945, signed Executive Decree No. 2160, which imposes penalties for the violation of the basic fishing regulation or for the use of nets. This decree, the execution of which is under the jurisdiction of the Ministries of National Defense, Foreign Affairs, Treasury and Economy, became effective by its publication on March 27, 1946. The only change effected by this decree is the addition of a paragraph to Article 5 of the basic Tuna Fishing Regulation, which was promulgated on February 21, 1940, and subsequently amended.

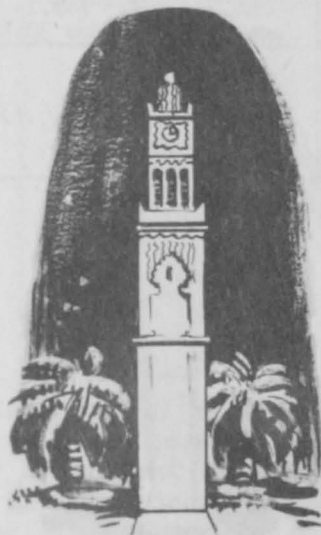
Decree No. 2160 imposes sanctions upon nationalities other than Ecuadoran who use purse seines in the continental waters. This means that fishing vessels

from Peru, the United States, or other countries, which may be licensed by Ecuadoran consuls, will be subject to the penalty set forth in Decree No. 2160. This decree does not modify the previous regulation concerning the use of nets, including the prohibition against the use of nets in the Galapagos Islands. It merely clarifies the authority of Ecuadoran Government officials to impose sanctions and states the sanctions which will be imposed if the regulation is violated.



French Morocco

SARDINE INDUSTRY: The fishing industry in Morocco is a comparatively recent development, according to a report received by the U. S. Department of State on June 13 from the American Consulate at Rabat, Morocco. The report is in part as follows:



In 1922, total production was about 2,200 metric tons. It reached 10,000 tons in 1930, 30,000 tons in 1937, and 36,000 tons in 1939. During the first years of the war, this production dropped considerably, but again passed 30,000 tons in 1943. At present it may be placed at slightly over 30,000 tons, two-thirds representing sardines.

The tonnage of the fishing fleet is roughly 5,000 tons. Of the 4,500 men employed, 75 percent are native Moroccans. The fleet consists of 20 trawlers, 140 sardine boats, 75 motor launches, and about 700 small sail boats. In addition, there are seven trawlers chartered by the French Government. These are the only vessels large enough for fishing on the high seas. Their catch is reserved principally for distribution

in France and Algeria. It can be seen, therefore, that under present conditions, whatever there is of a large-scale fishing industry in Morocco is confined to sardines.

There are 50 sardine canneries in Morocco which are divided among the various ports. In addition to these canneries, there are 29 factories that prepare brined and smoked fish. These, however, represent what might be called a wartime industry, which developed out of the shortage of canning material. Production at these factories has reached 4,000 tons, as compared with only a few hundred tons before the war. A return to normal conditions will perforce reduce this production considerably.

The sardine canneries have, to the present time, been operating at only about 50 percent of their potential capacity, which is placed at one million cases of sardines per year (100 cans of $\frac{1}{4}$ kg. net per case). It is for this reason, probably, that no further authorizations are being issued by the Protectorate Government to open new factories.

Total sardine production, even in the best years, has not exceeded much more than half of the estimated potential capacity of the canneries. During the war

years, production was only one-fourth of this potential capacity, primarily because of shortages in canning material and because of wartime military restrictions imposed on the activity of the fishing boats.

As for the 1945-46 season, production had to be stopped in October because of the shortages of metal and oil. Production had by that time reached 500,000 cases.

The greatest difficulty foreseen in attaining a high production goal in 1946-47 is the shortage of oil. At least 3,800 tons of oil will be needed. This represents about one-fifth of an entire year's supply for the very limited edible oil ration for the Moroccan populace.

Before the war local consumption was not very great. All but 20,000 to 30,000 cases were exported, 40 percent to France and the rest to other countries. During the first years of the war (1940-42), exports were to France alone. In 1943, however, 87,480 cases were purchased by the British Ministry of Food.

Because of the shortage of meat, Morocco's civilian consumption of fish has increased. Of the 1945 production, 253,000 cases were reserved for civilian consumption; the remainder was to be exported.

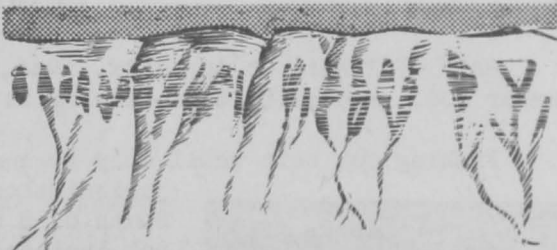


Iceland

ECONOMIC REVIEW OF ICELAND'S FISHING INDUSTRY--1945: The economic pulse of the nation quickened in the early months of 1945 in anticipation of the cessation of hostilities in Europe and continued to beat rapidly throughout the remainder of the year as Iceland girded itself to meet the conditions of the postwar world and the unleashing of competition from the fisheries of the liberated countries of Europe, according to a report dated April 3, 1946, received by the U. S. Department of State from the American Legation at Reykjavik, Iceland.

As the year opened, the Government's industries revitalization program with its far-reaching plan to re-equip the fisheries, mechanize agriculture, and expand transportation and power facilities in order to improve the country's competitive position was already under way and was gaining momentum. Orders were placed in Denmark, Great Britain, and Sweden for new fast merchant vessels, large trawlers, and smaller motor boats.

The termination of the war in Europe brought heightened anxiety over the possible future losses of a great part of the British market for Icelandic fishery products, where for the five preceding years these items enjoyed a maximum demand and provided nearly 90 percent of the export income of the country. Steps were



taken even before the war's end to commence two-way trade relations with Scandinavia and the Continent. As soon as conditions permitted, Government emissaries and businessmen were dispatched to Sweden, Denmark, France, Belgium, and other European countries to survey marketing and purchasing possibilities and to arrange for trade agreements.

The first and perhaps most significant of these agreements was made with Sweden. Iceland contracted to deliver to Sweden 125,000 barrels of salted and cured herring in return for which Sweden offered to supply to Iceland necessary wooden packing barrels, consumer goods, industrial machinery, agricultural implements, power equipment, lumber, fishing vessels, and communications equipment. The north coast summer herring run turned out to be an unusually poor one and only about 75,000 barrels of herring could be produced, an insufficient amount to meet the cost of goods ordered in Sweden.

Despite the changing international scene, Iceland's trade position remained firm throughout the year, and at the year's end Iceland's fresh fish sales agreement with Great Britain was extended for another three months. Quick-frozen fish fillet deliveries to Great Britain continued at peak levels through December 31. However, a sudden decision on the part of Britain to cease all purchases of Icelandic frozen fish at the year's close brought near-panic to freezing plant owners and other investors in this branch of the nation's fishing industry. As the year ended, hurried efforts were being initiated to market future frozen fish fillet production in the United States, France, Czechoslovakia, and other European countries.



Panama

BAIT FISHING: On April 27, 1946, the Government of Panama issued Decree Number 408, regulating bait-fishing in Panama waters. Excerpts follow:

Fishing for bait shall only be permitted to sea-going vessels within the jurisdictional waters of the Republic located to the South of 8 degrees 30 minutes of North Latitude, and not included in special agreements concluded with the Nation.



The owners or skippers of boats which are engaged in this type of fishing shall obtain an annual permit which will be issued by the Ministry of Agriculture, Commerce and Industry and the navigation permit issued by the Ministry of Hacienda and Treasury in these cases.

The tax to which this type of fishing shall be subject shall be progressive and shall be fixed according to the gross tonnage of the vessel, as is specified below:

Vessels less than 25 tons	B.150.00	Vessels from 25 to 50 tons	B.200.00
Vessels from 50 to 100 tons ..	300.00	Vessels from 100 to 150 tons ..	350.00
Vessels from 150 tons	500.00		

Fishing for bait by sea-going vessels shall be permitted only during the following periods: from January 15 to April 15 and from June 15 to September 30 of each year, fishing being prohibited during the months not included in the said periods.

In order to be allowed to fish for bait during the months fixed in this decree when fishing is prohibited, a special permit is necessary from the Ministry of Agriculture, Commerce and Industry, which may grant it when it is provided with proof that the vessel could not operate in the periods authorized, because of some fortuitous circumstance.

To kill, mutilate, or render useless in any way, the kinds of fish caught in the nets used in fishing for bait, and which are not suited for that purpose, shall be prohibited. Captains or skippers of vessels shall see to it that the fish which they do not wish to use as food for the crew are returned alive to the sea. It shall also be forbidden for members of the crew and representatives of these vessels to sell any fishing product within the jurisdictional waters of the Republic or in local markets.

Skippers of fishing boats shall be obliged to send, at the end of each fishing season, to the Ministry of Agriculture, Commerce and Industry a detailed report on the quantity, in pounds of the bait caught and on the kind of said bait. Fishing for bait includes only sardines and anchovies.

Violators of this decree shall be punished with fines of not less than five hundred balboas (B. 500.00) and not more than two thousand balboas (B. 2000.00) which shall be imposed by the Ministry of Agriculture, Commerce and Industry, which may designate, when it considers it advisable, persons or groups who shall cooperate in the control of fishing and the collection of the tax.



Peru

EXPORT DUTIES: The new system for the assessment of export duties on fish in Lima, Peru, has been described in a report dated June 18 to the U. S. Department of State from the American Embassy at Lima.

The system has been described as follows:

According to Law No. 10545 of April 16, 1946, published in the official gazette "El Peruano" of June 1, 1946, the collection of export duties on frozen tuna fish, bonito, skipjack and fish livers, as provided by Law No. 9506 of December 31, 1941, is extended to cover all kinds of fish exported from Peru; fresh, frozen, salted, or preserved. Pursuant to Article 2 of Law No. 10545, fish exports will be subject also to the payment of the additional 10 percent ad valorem export tax established by Law No. 9466 of December 18, 1941, which is payable when the export quotation exceeds by 25 percent the base price fixed for the assessment of export duties. A supplementary resolution dated April 20, 1946, instructed Peruvian customs house authorities to begin the collection of export duties on fish, effective April 20, 1946, as prescribed by Law No. 10545. The following base prices have been established for the assessment of export duties:

Salted fish - 160 dollars, U. S. Cy. per short ton.

Canned fish - 425 dollars, U. S. Cy. per short ton.

Law No. 9506 of December 31, 1941, established export duties on frozen tuna fish, bonito, skipjack and fish livers as follows:

Ten percent on frozen tuna fish on the difference between the basic production cost at Peruvian port, fixed at 50 dollars, U. S. Cy. per short ton, net weight, and the declared export price, less freight and insurance charges.

Ten percent on frozen bonito and skipjack on the difference between the basic production cost, fixed at 40 dollars, U. S. Cy. per short ton, net weight, and the declared export price, less freight and insurance charges.

Ten dollars U. S. Cy. per metric ton, net weight, on fish livers of all kinds.

FISH COLLECTING PLANTS: In Supreme Resolution No. 268 of June 12, 1946, published in the local newspapers of Lima, Peru, on June 21, 1946, authority is vested in the Ministry of Agriculture to establish plants for the collection, cleaning, salting, and smoking of fish, or to enter into contracts with local entities for the same purpose, according to an announcement made by the American Embassy at Lima, Peru, on June 28, 1946, received by the State Department at Washington, D. C.

It was stated that the purpose of the above resolution is to develop the fishery industry, thus contributing to the solution of the domestic meat problem.



Puerto Rico and the Virgin Islands have no very extensive fishery resources. Tropical bank and reef fishes, like snappers and basses, are taken all year 'round, and tunas, mackerels, and jacks during their seasonal migrations.

The 1940 catch was 3.7 million pounds.

--Senate Document No. 51