

FRESH AND FROZEN FISH

New England

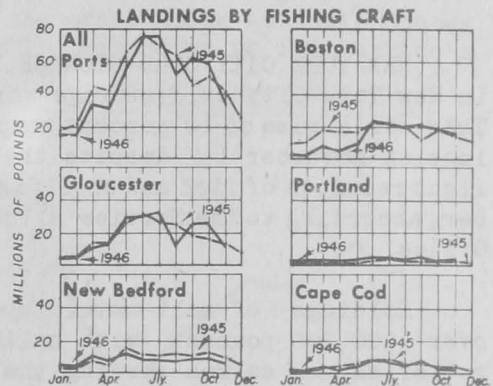
PRODUCTION: Production in all the major New England ports decreased during November, according to the Service's Market News Office at Boston. The total landings amounted to 33,206,000 pounds, a decrease of 21,130,000 pounds compared with October.

Those larger Boston trawlers fishing Georges and Channel Banks found fish scarce there. Consequently, only a few individual trips amounted to more than 100,000 pounds.

Pollock came into prominence at Boston and Gloucester during the last 2 weeks of the month with several heavy landings, but only 7,223,000 pounds of rosefish were landed at Gloucester compared with 20,852,000 pounds in October. Despite the decline in rosefish production, cold-storage plants at Gloucester reported nearly capacity holdings. Some consideration was given by interested parties to converting to other types of fishing.

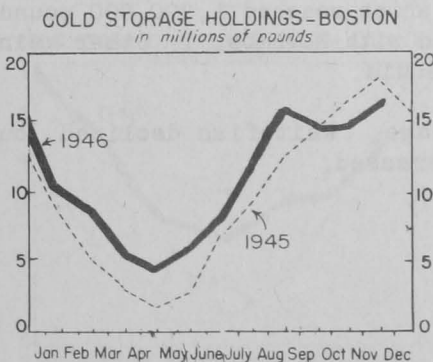
* * * * *

LANDINGS DURING NOVEMBER: Landings by fishing craft at the ports of Boston, Gloucester, New Bedford, Portland, and on Cape Cod during November amounted to 36,510,000 pounds, valued at \$2,822,165. This was a decrease of 12 percent in the volume of the landings compared with November 1945. Total landings at these ports during the first 11 months of 1946 amounted to 513,598,000 pounds, 6 percent below those for the corresponding period in 1945. Landings at Boston during the first 11 months were 33 million pounds less than those for the 11-month period in 1945. Gloucester showed an increase in landings of 3 million pounds; New Bedford and Cape Cod, 11.5 and 2.8 million pounds, respectively; while Portland increased 13.6 million pounds, according to Current Fishery Statistics No. 316.



* * * * *

BOSTON COLD-STORAGE HOLDINGS: Holdings of fishery products in cold-storage plants in Maine and Massachusetts on November 30 amounted to 32,232,000 pounds, an increase of 2,417,000 pounds compared with October 31, according to the Service's Market News Office at Boston.

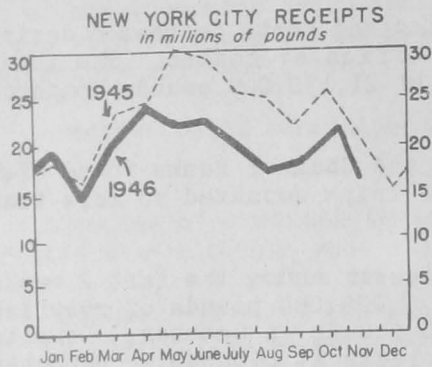


Despite the decline in production at the major New England ports during November, the movement of fish and fishery products into cold-storage during the month exceeded deliveries by 3,806,000 pounds. This is contrary to the normal movement at this time of year. Holdings of pollock fillets increased during November, reaching

a total of 1,627,000 pounds on November 30.

Middle Atlantic

NEW YORK CITY RECEIPTS: Landings and receipts of fish and shellfish in New York City during November totaled 16,822,000 pounds. This was a decline of 26 percent compared with October and was 19 percent below November 1945, according to the Service's local Market News Office.



Compared with the previous month, fish receipts dropped $4\frac{1}{2}$ million pounds, while those of shellfish declined $1\frac{1}{2}$ million pounds.

The predominating species during the month were cod, haddock, hake, whiting, pollock, yellowtail, and flounder. Boston mackerel and salmon were received in good supply and also fresh and frozen halibut. Hard clams, oysters, scallops, and shrimp were the foremost shellfish items.

The normal November marketing pattern was followed, once again, this year. Throughout the first week of the month, the demand was good; from then on, the market weakened and was extremely sluggish the final week.

* * * * *

NEW YORK CITY COLD-STORAGE HOLDINGS: Holdings of fish and fishery products in New York City cold-storage warehouses totaled 17,235,000 pounds on December 1. This was a rise of 10 percent compared with holdings on November 1, despite the comparatively light receipts of fish and shellfish during November, according to the Service's local Market News Office.

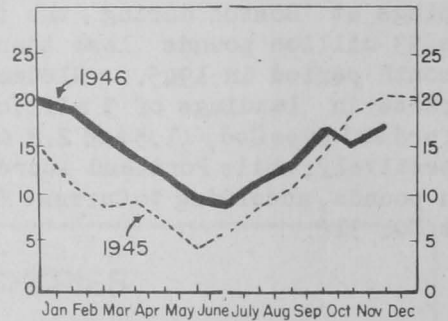
Holdings of salt-water species increased over 900,000 pounds, with halibut, mackerel, sablefish, and salmon showing the largest gains. Cod fillets showed a decrease.

Shellfish stocks displayed an increase of 700,000 pounds compared with November 1.

The greatest rise occurred in shrimp holdings, which reached 1,300,000 pounds on December 1, an increase of 450,000 pounds compared with November 1. Other gains were recorded in lobster tails, sea scallops, and squid.

Fresh-water stocks showed only a slight increase. Whitefish declined, but holdings of cisco, sturgeon, and spoonbill cats increased.

COLD STORAGE HOLDINGS - NEW YORK
in millions of pounds



Chesapeake

PRODUCTION: Landings of only 674,000 pounds of fish in the Hampton Roads area of Virginia in November 1946 were the lowest recorded for any month during the year by the Service's Market News Office at Hampton.

Similarly, light production was reported for the Beaufort-Morehead City area of North Carolina, also covered by the same office. Landings in this area amounted to 722,000 pounds during November compared with 1,687,000 pounds in October.

Production of fresh picked crab meat also showed a marked decline. The total production for November in the Virginia-Maryland areas amounted to 166,000 pounds compared with 268,000 pounds during October. This reduction has been attributed to the colder weather during the month, which retarded the movement of the crabs. Dredging for crabs is prohibited in Virginian waters, by State law, between April 1 and December 1.

Shucked oyster production increased from 246,738 gallons in October to 259,294 gallons in November.

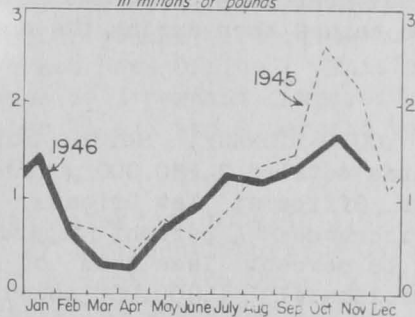


South Atlantic

RECEIPTS: Shrimp production for Florida and the other South Atlantic States during November totaled 1,265,000 pounds (heads off), according to the Service's Market News Office at Jacksonville. This was a decline of 26 percent compared with October and 41 percent less than landings in November 1945. The only State in this section to show an increase over landings in November 1945 was South Carolina with a gain of 29 percent.

The decline in shrimp production during November has been due, in large measure, to bad weather at sea and a labor dispute at St. Augustine, Fla. During this period, no landings were made by the larger vessels.

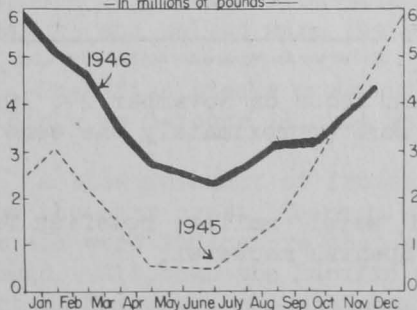
SOUTH ATLANTIC SHRIMP RECEIPTS
in millions of pounds



* * * * *

COLD-STORAGE HOLDINGS: Stocks of fish and shellfish in five major cold-storage warehouses in the South Atlantic States totaled 4,184,000 pounds on December 1, according to the Service's Market News Office at Jacksonville. Compared with holdings on November 1, this was an increase of 484,000 pounds, but was 407,000 pounds less than December 1, 1945.

COLD STORAGE HOLDINGS—SOUTH ATLANTIC
—in millions of pounds—



Items with stocks of 100,000 pounds or more were, in order of quantity: mullet, fillets of cod, haddock, pollock, and rosefish; shrimp, whiting, king whiting, and scup.

Holdings of fish increased 363,000 pounds, while shellfish stocks rose 121,000 pounds during November. The gain in fish holdings was due main-

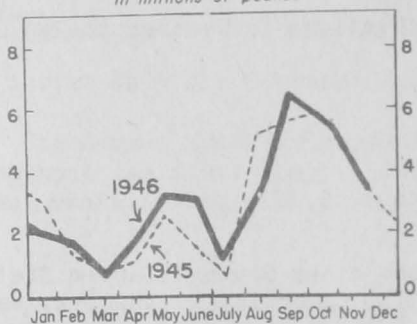
ly to rises in stocks of mullet. Small increases were also noted in the inventories of croaker, grouper, halibut, scup, sea trout, and red snapper. Shellfish stocks were enlarged by heavier receipts of crabs, crab meat, shrimp, and lobsters. Shrimp holdings, however, are only about half those for the same period last year.



Gulf

PRODUCTION: Shrimp production in the Gulf area during November amounted to 28,958 barrels, 32 percent less than October and 17 percent below November 1945, according to reports received by the Service's Market News Office at New Orleans. Total landings for the 11 months ending November 30 were 2 percent below production during the corresponding period in 1945.

GULF SHRIMP RECEIPTS—
in millions of pounds



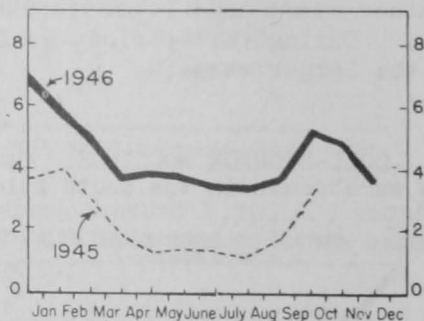
The peak month in shrimp production is October, consequently, the reduction in landings in November followed the regular seasonal downward trend.

The quantity of shrimp used for canning during November was three times greater than that in November 1945. For the first 11 months of 1946, more than double the shrimp were canned than during the corresponding period in 1945.

* * * * *

COLD-STORAGE: Shrimp holdings in 11 cold-storage warehouses in the Gulf States totaled 3,680,000 pounds on November 28, according to the Service's Market News Office at New Orleans. This represented an increase of 4 percent compared with October 31, but 18 percent less than on November 29, 1945. Approximately 1,800,000 pounds of shrimp were sent to cold storage during the month, and 1,650,000 pounds were withdrawn.

GULF COLD STORAGE HOLDINGS
in millions of pounds



Holdings of frozen cooked and peeled shrimp amounted to 150,000 pounds on November 28. Stocks of these items on November 29, 1945, totaled 72,000 pounds.

Frozen salt-water fish holdings on November 28 totaled 1,925,000 pounds, 16 percent greater than those on November 29, 1945. The "in" movement and withdrawals during the month were approximately the same as for the previous month.

The leading species, in order of quantity held, were: mullet, rosefish fillets, whiting, and king whiting, cod fillets, and Spanish mackerel.



Great Lakes

CHICAGO RECEIPTS: Receipts of fresh and frozen fishery products in Chicago during November totaled 6,598,000 pounds, according to the Service's local Market News Office. This was a decline of 44 percent compared with October and 4 percent below November 1945.

Fresh-water receipts decreased 46 percent, and salt-water arrivals fell 47 percent compared with October. One of the chief reasons for this decline was poor consumer demand.

Closed season regulations in areas producing the bulk of lake trout and whitefish were responsible for the decline in arrivals of these varieties during November.

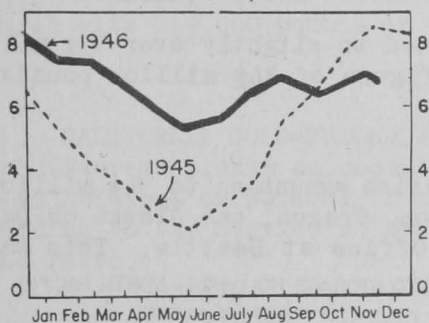
Shellfish receipts, amounting to 1,436,000 pounds, were 32 percent below those for October.

Transportation difficulties on the Pacific coast greatly curtailed arrivals from that area. However, despite the diminished receipts of halibut and salmon, the supply was quite sufficient to meet the demand.

* * * * *

CHICAGO COLD-STORAGE HOLDINGS: Stocks of fishery products in Chicago cold-storage warehouses on November 27 amounted to 7,702,000 pounds, according to the Service's local Market News Office. This represented an increase of 7 percent compared with holdings on October 31 and was 8 percent below November 29, 1945.

COLD STORAGE HOLDINGS — CHICAGO
in millions of pounds

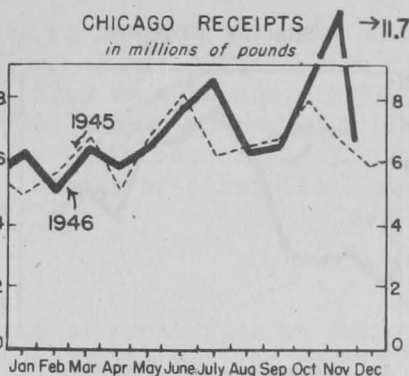


Stocks of fresh-water fish totaled 1,900,000 pounds on November 27, 4 percent above the October 31 holdings, but 17 percent below those on November 29, 1945. Whitefish accounted for 491,000 pounds; lake trout, 314,000 pounds; and chubs, 289,000 pounds.

Holdings of salt-water varieties totaled 4,365,000 pounds, an increase of 4 percent compared with stocks on October 31, but were 2 percent below those on November 29, 1945. Rosefish and cod fillets, halibut, and salmon were the predominating species.

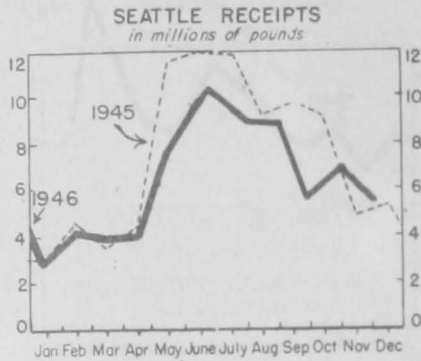
Shellfish stocks amounted to 1,437,000 pounds on November 27, 24 percent above holdings on October 31, but were 14 percent below November 29, 1945.

A slow movement of frozen fillets from cold storage followed heavy arrivals from the east coast. These holdings showed little change during October and November and were indicative that small deliveries were sufficient to accommodate the demand. Although the Pacific coast transportation situation was eased the latter part of November, wholesalers, realizing that local holdings were sufficient for the demand, did not rush to augment their stocks with west coast products.



Pacific

SEATTLE RECEIPTS: Landings of fresh and frozen fishery products at Seattle during November totaled 5,810,000 pounds, according to the Service's local Market News Office. This represented a decline of 15 percent compared with October, but was an increase of 18 percent over November 1945.



Receipts of salmon, amounting to $4\frac{1}{2}$ million pounds, represented 73 percent of all receipts. Purse seining and gill netting for chum salmon in Puget Sound were particularly productive, and these operations were responsible for the delivery of more than 4 million pounds of this species during the month. In addition, moderate quantities of silver and king salmon were landed, with Indian gear accounting for a good portion of the catch.

Operations of the long-line fleet drew to a close after a fairly successful season. Twenty-seven vessels landed 375,000 pounds of sablefish and 55,000 pounds of incidentally-caught halibut, together with moderate catches of mixed cod.

The otter-trawl operators, after settling a number of irritating labor and price disputes, were further retarded by storms and rough weather on the offshore banks.

As the result of the maritime dispute, which kept the Puget Sound region closed for all sea-going shipping during November, no direct shipments of Alaskan products were made to Seattle. This was partially responsible for the decline in the month's receipts.

Receipts for the first 11 months of 1946 amounted to slightly over $73\frac{1}{2}$ million pounds, 13 percent below the comparable 1945 figure of $84\frac{1}{2}$ million pounds.

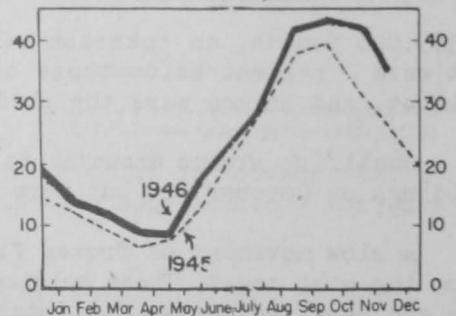
* * * * *

NORTHWEST COLD-STORAGE HOLDINGS: Fish and shellfish amounting to $34\frac{1}{2}$ million pounds were held in cold-storage plants in Washington, Oregon, and Alaska on December 1, according to the Service's Market News Office at Seattle. This was 7 million pounds less than stocks on November 1, but was 8 million pounds greater than those on December 1, 1945.

The region's holdings were credited to various sections as follows: Alaska, 60 percent, which included a half million pounds of United States-owned fish in Prince Rupert, British Columbia; Washington, 27 percent; and Oregon, 13 percent.

The maritime dispute continued to tie up coastwise shipping in the Puget Sound area, with the result that none of the 7-million pound reduction in Alaska's holdings landed directly at Seattle. The greater portion of the north-frozen fish was shipped to various Canadian ports and sent by rail to eastern or southern markets.

COLD STORAGE HOLDINGS—NORTH PACIFIC
in millions of pounds



Freezings during November were heaviest in Washington, where over $2\frac{1}{4}$ million pounds were placed in the warehouses. Of this amount, $1\frac{1}{2}$ million pounds of chum salmon and nearly 300,000 pounds of sablefish were frozen in Puget Sound area plants. Trawling was poor off both the Oregon and Washington coasts, resulting in very small groundfish freezings.

All items showed materially reduced inventories on December 1, with halibut and sablefish displaying a decline of half a million pounds each. Five items accounted for 96 percent of the region's holdings. They were salmon, 16,374,000 pounds; halibut, 9,576,000 pounds; sablefish, 4,610,000 pounds; groundfish fillets, 961,000 pounds; and rockfishes, 724,000 pounds. In addition, nearly 3,812,000 pounds of mild-cured salmon were in cold storage. Stocks of other fish, shellfish, and cured products were relatively small.

* * * * *

RECEIPTS AT SOUTHERN CALIFORNIA PORTS: Landings of fresh fish at the ports of San Pedro and Santa Monica showed a decline of more than a million pounds during November as compared with October, according to the Service's Market News Office at San Pedro. Only 797,000 pounds of mackerel were landed during November compared with 2,260,000 pounds in October. This decrease, however, was partially offset by landings of 511,000 pounds of sardines in November.

Landings at San Diego during November were only half the October total. A decrease was noted in nearly all species landed, but the sharpest declines were noted in barracuda, with 15,000 pounds; California halibut, with 24,000 pounds; black sea bass, with 6,000 pounds; swordfish, with 335 pounds; and yellowtail, with 29,000 pounds. The only sizable increase occurred in mackerel landings, 43,000 pounds, compared with 12,000 pounds in October.

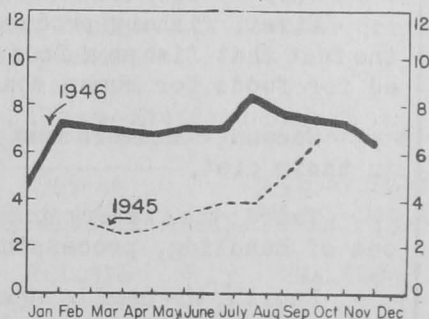
Likewise, Newport Beach showed decreases in nearly every species landed, except mackerel. Total landings during November amounted to 161,000 pounds, compared with 219,000 pounds in October.

* * * * *

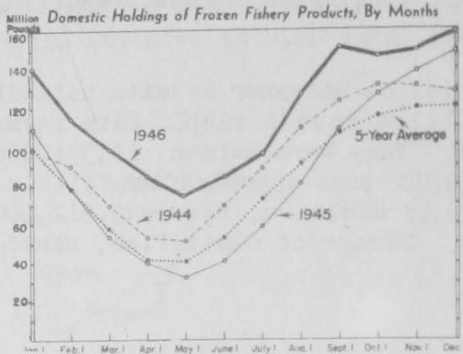
CALIFORNIA COLD-STORAGE HOLDINGS: Stocks of fish and shellfish in California cold-storage plants on December 1 totaled 6,602,000 pounds, 741,000 pounds less than holdings on November 1 and 1,633,000 pounds less than December 1, 1945, according to the Service's Market News Office at San Pedro.

During November, 334,000 pounds were frozen compared with 322,000 pounds in October. Freezings of bait and animal food increased during November. This was the result of large quantities of sardines and mackerel in the San Pedro area being bought by various fresh fish dealers and sold in sizable quantities for freezing purposes; and two sardine vessels landing large quantities of sardines at Santa Barbara, from which point the fish were sent to Monterey to be frozen for bait.

COLD STORAGE HOLDINGS—CALIFORNIA
in millions of pounds



United States



COLD-STORAGE FREEZINGS AND HOLDINGS: Domestic stocks of frozen fish and shellfish reached a record total of 158,486,000 pounds on December 1. Five items accounted for nearly 50 percent of the total holdings. These were salmon, 21.9 million pounds; halibut, 16.3 million pounds; rosefish fillets, 15.5 million pounds; shrimp, 13.8 million pounds; and cod fillets, 10.5 million pounds, according to Current Fishery Statistics No. 306.



POSTWAR OUTLOOK IN THE FISHERY INDUSTRIES

All industries are projecting plans for maintaining the high productivity achieved during the war. They are seeking every means to convert their productive capacity into products and services that consumers will buy and use. The marketing skill of all industries is concentrated on developing methods for obtaining the fullest utilization of their commodities. With each industry seeking for its products a share of the consumer's dollar, competition for consumer markets will be greater than ever before.

From what we know at present, it appears that the fisheries will have greater domestic and foreign competition than they have ever before experienced. The future success of the fisheries depends upon at least four factors.

First, fishery producers and distributors must learn to appreciate the fact that fish as a food must meet the highest requirements established for foods for human consumption.

Second, consumers must be convinced of the value of fishery products in their diet.

Third, the fishery industries must seek out and adopt improved methods of handling, processing, and utilizing the catch.

Fourth, the need is apparent for the continued development of genuine cooperation within the industry.

--Fishery Leaflet No. 215