United States Department of the Interior, J. A. Krug, Secretary
Fish and Wildlife Service, Albert M. Day, Director

Fishery Leaflet 271

Washington 25, D. C. September 1947

SPANISH FISHING INDUSTRY, 1946 1/

By Mario A. Pey, Foreign Service Clerk

EXTRACTIVE INDUSTRY:

With the exception of about 15 large companies, the fishing fleet is owned and operated by individual shipowners. According to the last available figures it is composed of the following units: 2/

	Units	Tonnage
Steam	1,150	81,975
Motor	6,076	58,690
Sail	12,605	36,667
Oars	14,569	18,836
Totals	34,400	196,168

In spite of the many difficulties encountered in obtaining supplies of materials, new construction is still going on in increasing volume. Most of it, of course, is to replace old units and modernize others, but the large profits made during the past years by ship-owners of the medium-radius type (up to 200 tons registry) and the large Government loans for boat building are also important factors.

One of the main problems still confronting the industry is the proper fueling of the fleet, especially coal. In 1946, there were allotted to the fishing fleet, which enjoys preferential treatment in the allocation of supplies, 480,000 metric tons of coal but this was only theoretical since it only received 322,403 metric tons which represents a 67.29 per cent of the actual requirements.3/ Consequently, more and more ships are being converted to oil burning, though the government has imposed restrictions on these activities.

CATCH

The total catch of all species of fish including mollusks and crustaceans in 1946 surpassed the total catch for the previous year, which was an all-time record, by over 50,000 tons. There are no available figures at present regarding catches in other fishing countries. The last available were those for 1941

1/ American Consulate Report No. 3, Vigo, Spain, July 31, 1947
2/ Industrias Pesqueras, May 15, 1947, page 9.
3/ Ibid

United States Department of the Interior, J. A. Krug, Secretary
Fish and Wildlife Service, Albert M. Day, Director

Fishery Leaflet 271

Washington 25, D. C. September 1947

SPANISH FISHING INDUSTRY, 1946 1/

By Mario A. Pey, Foreign Service Clerk

EXTRACTIVE INDUSTRY:

With the exception of about 15 large companies, the fishing fleet is owned and operated by individual shipowners. According to the last available figures it is composed of the following units: 2/

	Units	Tonnage
Steam	1,150	81,975
Motor	6,076	58,690
Sail	12,605	36,667
Oars	14,569	18,836
Totals	34,400	196,168

In spite of the many difficulties encountered in obtaining supplies of materials, new construction is still going on in increasing volume. Most of it, of course, is to replace old units and modernize others, but the large profits made during the past years by ship-owners of the medium-radius type (up to 200 tons registry) and the large Government loans for boat building are also important factors.

One of the main problems still confronting the industry is the proper fueling of the fleet, especially coal. In 1946, there were allotted to the fishing fleet, which enjoys preferential treatment in the allocation of supplies, 480,000 metric tons of coal but this was only theoretical since it only received 322,403 metric tons which represents a 67.29 per cent of the actual requirements.3/ Consequently, more and more ships are being converted to oil burning, though the government has imposed restrictions on these activities.

CATCH

The total catch of all species of fish including mollusks and crustaceans in 1946 surpassed the total catch for the previous year, which was an all-time record, by over 50,000 tons. There are no available figures at present regarding catches in other fishing countries. The last available were those for 1941

1/ American Consulate Report No. 3, Vigo, Spain, July 31, 1947
2/ Industrias Pesqueras, May 15, 1947, page 9.
3/ Ibid

and at that time Spain ranked eighth among the producing countries, but with the elimination of Japan and Germany and the organization occurring in other countries such as Norway and France, it is believed that Spain now ranks fourth. For comparison, the following table has been prepared showing the amount and value of the catch for the past seven years:

Year	Kilos 1/	Value-Pesetas 2/
1940	432,641,701	725,788,018
1941	442,823,721	988,823,729
1942	454,283,000	1,002,544,607
1943	430,099,667	1,006,128,194
1944	463,065,266	1,045,234,118
1945	543,445,200	1,254,874,401
1946	594,278,487	1,715,951,100 3/

The total catch for 1946 is divided as follows:

	Kilos	Value-Pesetas
Fish	550,067,500	1,561,511,700
Crustaceans	18,328,487	81,359,400
Shell-fish	25,972,500	73,080,000
Totals	594,278,487	1,715,951,100 4/

The following table shows a breakdown of the amount and value of the principal species which were caught during 1946:

Species	Kilos	Value-Pesetas
Sardines	104,451,400	253,172,600
Anchovies	15,940,300	30,177,800
Bonito	25,032,500	133,712,100
Hake	69,409,300	339,599,800
Small hake	57,621,100	220,206,600 5/

As may be seen from the foregoing table, sardines and hake, as usual, constituted the largest part of the catch of the principal species. The latter was caught in larger quantities than in the previous year and maintained prices but the former, against all expectations, suffered another tremendous decline in volume, which resulted in an equal increase in price.

The increase in the amount of hake brought into the ports is accounted for by the larger number of vessels which due to the steady disappearance of former restrictions and delays in obtaining sufficient amount of fuel are now able to go to the fishing grounds of the Grand and Petite Soles, off the coast of Ireland.

1/ Kilogram equals 2.2 pounds
2/ One dollar, U.S., equals 10.91 pesetas
3/ Figures collated from data published in Industrias Pesqueras, April 1947, pages 81 to 97
4/ Industrias Pesqueras, April 1947, pages 81 to 96
5/ Figures collated from data published in Industrias Pesqueras, April 1947, pages 81 to 96.

The steady decline observed in the volume of sardine catches for the past two years is causing considerable worry to the local fish canning industry which largely depends on this kind of fish. The absolute lack of the proper bait (cod-roe) is given as one of the reasons for the decrease in volume of the catches along this littoral, but according to local ichthyologists, the deviation of the Gulf stream, which is the natural bank for this kind of fish, may be the real cause for its practical disappearance from the northwestern Spanish coast, since sardines continue to be plentiful along the southern coast of Portugal not far from Cape Saint Vincent.

Bonito, which is another of the preservable varieties, was plentiful during 1946, but it went up in price by about 55 per cent over that quoted in the previous year, mainly due to the heavy demand for this fish on the part of the fish packing industry which, unable to get sufficient quantities of sardines, had to make use of bonito in order that the factories might be kept working. It is believed that the steadily decreasing purchasing value of the peseta also had an important part in the increased price.

Anchovies were brought in in smaller quantities than in the preceding twelve months. Prices were slightly higher than in the previous year, but the demand for this kind of fish on the part of the packing industry was not large due to the almost complete lack of packing supplies, such as tin-plate, and the unsettled conditions in the principal consuming markets for this product, i.e., Italy and Greece.

As has been previously reported, the Spanish coast and islands are divided into eight separate regions. The following table contains a breakdown of the catch by regions during 1946:

Region	Kilos	Value-Pesetas
Northwestern	163,304,900	519,176,600
Cantabrican	154,930,387	441,544,500
South Atlantic	97,688,900	307,089,800
South Mediterranean	52,596,700	102,660,900
Levant	23,401,400	61,305,700
Tramontana	50,402,200	191,120,600
Balearic	5,079,600	17,005,200
Canaries	46,874,400	76,047,800
Totals	594,278,487	1,715,951,100 1/

The composition of the catch, by regions, is as follows:

Fish	Kilos	Value
Northwestern	144,061,500	479,320,500
Cantabrican	153,877,600	436,004,900
South Atlantic	85,447,900	255,441,700
South Mediterranean	49,504,900	94,034,000
Levant	22,663,200	56,954,400
Tramontana	43,040,200	150,372,100
Balearic	4,748,500	13,978,200
Canaries	46,723,700	75,405,900
Totals	550,067,500	1,561,511,700

1/ Figures collated from data published in Industrias Pesqueras, April 1947, pages 81 to 96

Crustaceans	Kilos	Value
Northwestern	4,385,800	7,088,700
Cantabrican	579,887	3,259,000
South Atlantic	9,087,800	42,444,900
South Mediterranean	1,357,000	5,917,000
Levant	332,800	2,921,500
Tramontana	2,441,500	18,501,900
Balearic	42,500	1,127,100
Canaries	11,200	99,300
Totals	18,328,487	81,359,400

Shell-fish		
Northwestern	14,857,600	32,767,400
Cantabrican	472,900	2,280,600
South Atlantic	3,153,200	9,203,200
South Mediterranean	1,734,800	2,709,900
Levant	405,400	1,429,800
Tramontana	4,920,500	22,246,600
Balearic	288,600	1,899,900
Canaries	139,500	542,600
Totals	25,972,500	73,080,000 1/

There is appended another table which shows the principal species brought into the different regions, together with their value at first sale in the fish exchanges.

Sardines		
Northwestern	25,980,800	64,082,100
Cantabrican	5,642,700	13,814,200
South Atlantic	25,958,600	75,599,800
South Mediterranean	19,967,500	37,650,100
Levant	8,698,800	16,636,500
Tramontana	17,077,300	43,426,300
Balearic	13,000	60,000
Canaries	1,112,700	1,903,600
Totals	104,451,400	253,172,600 2/

Anchovies		
Northwestern	928,200	1,739,600
Cantabrican	10,033,800	18,986,700
South Atlantic	703,000	514,900
South Mediterranean	2,326,600	3,997,100
Levant	1,317,600	2,915,800
Tramontana	607,300	1,980,200
Balearic	--------	---------
Canaries	23,800	43,500
Totals	15,940,300	30,177,800

1/ Figures collated from data published in Industrias Pesqueras, April 1947, pages 81 to 96.
2/ Ibid.

Bonito	Kilos	Value
Northwestern	3,916,300	27,549,700
Cantabrican	12,459,400	75,573,200
South Atlantic	7,718,800	26,989,900
South Mediterranean	358,400	898,500
Levant	187,500	1,148,900
Tramontana	210,500	1,206,100
Balearic	-------	---------
Canaries	181,600	345,800
Totals	25,032,500	133,712,100

Hake	Kilos	Value
Northwestern	33,238,300	143,708,300
Cantabrican	30,600,900	163,254,100
South Atlantic	3,274,400	20,650,600
South Mediterranean	296,600	1,755,500
Levant	-------	----------
Tramontana	768,300	6,218,600
Balearic	-------	----------
Canaries	1,230,800	4,012,700
Totals	69,409,300	339,599,800

Small Hake	Kilos	Value
Northwestern	26,516,700	105,282,400
Cantabrican	10,996,500	37,896,000
South Atlantic	16,596,700	60,621,400
South Mediterranean	1,196,100	4,585,700
Levant	647,000	3,176,100
Tramontana	1,148,600	7,232,800
Balearic	---------	---------
Canaries	519,500	1,412,200
Totals	57,621,100	220,206,600

A study of the foregoing tables will show that the Northwestern and Cantabrican regions, where the two principal fishing ports of the Peninsula: Vigo and Pasajes, are located, accounted for more than sixty per cent of the total catch. Pasajes, during 1946, maintained its leading position as the port of larger entires with an increase over those for 1945, while Vigo, on the contrary, showed a decline in the volume of the catches. For purposes of comparison the following table showing the entries at the two ports during 1945 and 1946 has been prepared:

Year	Vigo	Pasajes
1945	70,390,900 kls.	74,580,901 kls.
1946	60,535,800 kls.	85,504,600 kls.

The same reasons given in last year's report regarding the extraordinary increase in the volume of the catches at Pasajes were still applicable during 1946, namely - fishing boats registered at Vigo worked out of Pasajes which belongs to the preferred coal zone, while coal was most difficult to obtain at Vigo. Ice was also much more abundant there than in Vigo. The decline in the Vigo entries is the direct result of the poor sardine catch and the disbanding of its fishing fleet to northern ports where supplies such as coal and ice were obtained more easily.

Conditions under which fresh fish is being distributed have improved somewhat during 1946, but they are still far from being satisfactory, both from the sanitary and commercial or industrial viewpoints. Fish continues to be transported to the interior of the country, principally to Madrid, which is the largest consuming center, packed in ice either by rail or motor truck. The establishment of several small factories for the processing of fish waste for the obtention of fish oil - which is being used as a substitute for linseed oil in the manufacture of paints - has finally induced fish dealers to remove head and entrails before shipment, thus saving space. It has also given rise to the establishment of a small but productive industry. An important handicap in the development of the new industry is the practical impossibility of obtaining the necessary foreign exchange for the importation of the machinery necessary for the industry, which is now using the crudest of machines.

The fish catch at Vigo during 1946 was distributed as follows:

Exported by rail	33,911,650 kilos
Exported by truck	7,494,420 kilos
Consumed locally	4,276,310 kilos
Canned	7,281,194 kilos
Smoked or dried	1,159,555 kilos 1/

PACKING INDUSTRY

The Spanish fish packing industry was created and developed with the definite purpose of capturing foreign markets. One of the first factories to be established in this littoral in 1880 was organized precisely for the purpose of exporting the largest part of its production to France. Since then, the Spanish fish packing economy expanded and developed closely together with the opportunities offered by foreign markets. Due to the tenacious efforts of the packers, the Spanish products found ready acceptance in almost every country. Before World War I Argentine and France were by far the largest consuming markets. During the war many other countries opened their doors to the Spanish preserved fish, thus giving the local industry an opportunity to enlarge their installations and to improve their methods of production.

The peak of the export volume was reached in 1937 with a total of 1,006,607 cases weighing 24,553 kilos. From that year the volume of exports decreased steadily until 1945 and 1946 which were almost negligible.

It is unquestionable that the Spanish fish packing industry is at present facing a crucial crisis, which is the natural result of the difficulties caused first by the Spanish Civil War and then by World War II.

Among the many factors working against the recovery of the industry and

1/ Industrias Pesqueras, January 15, 1947, page 14.

the resumption of its exportation activities is the lack of raw materials, especially tin and tin-plate which were formerly imported from England. The need of the latter is so critical that unless the Government changes its present policy and authorizes its free importation, the industry will never recover and will gradually disappear, since the national markets will never absorb more than a 20 per cent of the total normal production.

These circumstances, steadily aggravated since 1941 when reduction in the allocation of raw materials began, have compelled the industry to be idle for long periods, to the extent that during 1946 it was only able to work at about 5 per cent of capacity. The following table has been prepared for purposes of comparison to show the amount of some of the essential raw materials used by the industry in 1935 and the corresponding amounts allotted during 1946:

	1935	1946
Tin-plate	556,000 cases	40,000 half cases
Oil	16,000,000 kilos	600,000 kilos
Coal	40,000,000 kilos	500,000 kilos
Rubber	92,000 kilos	-------
Wire	480,000 kilos	10,000 kilos
Nails	325,000 kilos	10,500 kilos

Another factor of paramount importance in hampering the natural export activities of the industry is the present abnormal absorption capacity of the domestic markets which has permitted packers to buy raw fish at prices far beyond those that would be necessary if the finished product were to be sent to foreign markets.

The Spanish Government in its effort to obtain foreign currency is forcing the fish packing industry to divert its attention from the domestic markets and to resume its former exporting activities. To this end it has reestablished ceiling prices for both domestic and foreign markets, but the measure, unless accompanied by a more effective and actual supply of raw materials or easement of official controls to permit packers to secure necessary requirements in the open markets, will only be theoretical.

In order to foster exports, the Government has offered the Galician fish packing industry, which as stated elsewhere represents an 80 per cent of that in the whole country, to supply the necessary tin-plate and oil. The fact is that since January 1 of the current year, when the first new allotments were to be supplied, the industry has received these materials even in lesser quantities than in the previous year, and therefore has had its activities practically paralyzed during the first six months of the present year.

The continuous paralization of business, mainly due to the shortage of raw materials, including fresh sardines which is the species most in demand by the packing industry, and the impossibility of regaining foreign markets with the minimum export prices fixed by the Spanish Government at the fictitious rate of exchange of the Spanish peseta in relation to foreign currencies, has induced many of the larger and old-established fish packing firms to open factories in Portugal where conditions seem to be much better.

In an effort to revive the importance of the industry, the Association of Fish Packers has requested the Government to permit the use of at least 50 per cent of the total value of its export business in the purchase abroad of necessary materials, removal of minimum prices fixed by the Government for export activities, and modification of the fictitious rate of exchange; three essential requisites to permit the industry to meet competition in foreign markets.

The outlook of the industry is far from satisfactory and unless a radical remedy is soon found, it is believed that this important branch in the Spanish economy will soon lose its predominant position.

26743