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THE FISHING INDUSTRY AND THE MARKET FOR FISH IN SWEDEN 1/

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This report is designed to provide a picture of the fishing industry in Sweden and on general marketing conditions for fish in recent years. Tons are metric tons.

SOURCES OF DATA

Information on the status and progress of the fishing industry is given in "Fiske" published annually by the Central Bureau of Statistics. The issuance of this publication is usually delayed about 1½ years after the end of each fishing season. Current statistics on catches and sales in the 3 sea fishing regions--the West Coast, the South Coast and the East Coast--are presented in "Jordbruksekonomiska Uppgifter", which is sent regularly to the Library of the Department of Agriculture.

It should be noted that the account of catches and sales, as given in Jordbruksekonomiska Uppgifter, is not inclusive. The coverage ranges between 75 and 80 percent of the total.

Official statistics do not include fresh water catches estimated at 15,000 tons annually.

The figures given in this report represent total catches.

SCOPE OF INDUSTRY

In the year of 1945 about 16,000 persons derived the larger share of their income from salt water fishing. The corresponding number in 1940 was 13,306. In addition, around 9,000 persons had fishing as an important supplemental source of income. The fishing fleet numbered 21,924 vessels or boats in 1945 as compared with 20,294 in 1940. Of these, 3,282 were larger vessels with decks and motor. Of the open boats, 6,594 were equipped with motors.

Total 1945 investments of the fishing industry amounted to 49 million kronor for vessels and 39 million kronor for equipment, or a total of 88 million kronor.

1/ American Consulate Report No. 475, Stockholm, Sweden, October 6, 1948.

Chief wholesale markets on the West Coast are Gothenburg, Gravarne, Smogen, Lysekil, and Stromstad.

There are in the country, altogether around 1600 cooperative fishery associations, most of which operate as sales and bargaining organizations at the local level. The producers associations on the East Coast enjoy monopoly in the sales of herring, while the West Coast catches are sold largely through private channels.

The fishermen on the West Coast are, however, members of special price regulation associations designed to assist in the implementation of the Government price support program (see below).

A national federation, based upon local fishery associations and individual fishermen, was recently (September 1948) formed, under the name of The National Federation of Swedish Fishermen (Sveriges Fiskares Riksforbund).

CATCHES

The salt water catches of fish rose substantially during the war and exceeded 150,000 tons in 1945 and 1946. Catches during the first half of 1948 were exceptionally large (Table 1).

Table 1 - Sweden: Catches of Salt Water Fish in 1938 to 1948

Year	East Coast	South Coast	West Coast	Country
	tons	tons	tons	tons
1938-40	31,000	12,630	58,500	102,130
1941	32,761	21,499	57,919	112,179
1942	39,293	19,762	66,345	125,400
1943	43,106	20,422	80,281	143,809
1944	35,581	17,707	72,143	129,431
1945	34,375	21,491	96,775	152,641
1946 ^{1/}	28,100	19,064	109,000	156,064
1947 ^{1/}	13,700	18,900	99,500	132,100
Jan.-June 1948 ^{1/}	8,500	15,700	63,000	87,200

^{1/} Preliminary

KINDS OF FISH CAUGHT

More than half of the volume of fish caught is herring. Cod, sprat, whiting, mackerel, haddock and flounder, in the order mentioned, are the next most important kinds. (Table 2).

Table 2 - Sweden: Importance of Various Kinds of Salt Water Fish Caught. Average for 1941-1945.

Kind	Volume in 1,000 tons	Percent
Herring	69.7	52
Cod	18.6	14
Sprat	9.2	7
Whiting	6.0	5
Mackerel	6.1	5
Haddock	4.1	3
Flounder	2.2	2
Shell fish	2.1	2
Eel	1.6	1
Plaice	1.5	1
Sole	0.9	*
Ling	0.8	*
Pike	0.7	*
Salmon	0.6	*
Not specified	8.8	7
Total	132.9	100

* Less than 1 percent.

The percentage distribution, as shown above, reflects fairly the relative importance of the various kinds of salt water fish caught in a normal year.

PRICES AND INCOME

Prices of fish reached a peak in 1943 when, for example, herring sold at 72 ore per kilogram at the Gothenburg fish auction. The declining trend from that year was reversed in 1947--a relatively poor fishing year. The price trend since prewar for the most important kinds is shown below (Table 3).

Table 3 - Prices of Fish at Gothenburg Fish Auction--by Year and Kinds of Fish, in Ore per Kilogram

Kind	1938	1945	1946	1947	July 1948
Herring	17	64	34	36	54
Cod	29	66	57	65	68
Sprat	32	51	54	55	-
Whiting	26	46	36	39	47
Mackerel	39	67	73	72	86
Haddock	32	76	53	62	71
Flounder	30	61	56	73	56
Eel ^{1/}	169	301	311	326	207
Plaice	85	128	110	121	131
Sole	69	137	98	125	169

^{1/} Estimated wholesale price for Baltic catches.

The value of fish sold averaged 30,687,000 Kronor in 1936-40. It reached about 120,000,000 Kronor in 1943. With food supplies more ample in recent years, the gross income of the fishing industry has shown a downward trend in recent years. (Table 4).

Table 4 - Sweden: Approximate Sales Value of Salt Water Fish Caught

Year	Herring	Other Fish	Total
	Million Kronor	Million Kronor	Million Kronor
1936-1940	11	20	31
1941-1945	43	58	101
1946 ^{1/}	32	52	84
1947 ^{1/}	27	51	78

^{1/} Preliminary

The Government has fixed guarantee prices to producers for all important kinds of fish. This regulation is financed by means of a levy amounting to 5 percent of the sales value, on the West Coast, 4 percent on the South Coast, and 2 ore per kilogram of herring* sold. Prices are kept at or above the support level by the withdrawing of any surplus from the market. Most of the surplus fish are salted and only a small quantity are put into cold storage.

FOREIGN TRADE

If landings of fish in foreign ports by Swedish fishermen are considered, the exports of fresh and processed fish about equalled the imports in the period 1938-40. Foreign trade was insignificant during the period 1942-44. During 1945-47, export deficits alternated with export surpluses. Due to good catches, an unusually large export surplus of 33,263 tons was registered during the first 6 months of 1948. (Table 5).

Table 5 - Sweden: Foreign Trade in Fish, by Years

Year	Fresh	Processed ^{1/}	Total
I. Imports	tons	tons	tons
1938-1940	14,120	28,830	42,950
1941	1,640	13,987	15,627
1942	4,661	3,051	7,712
1943	2,820	129	2,949
1944	1,109	21	1,130
1945	3,974	12,244	16,218
1946	4,166	22,434	26,600
1947	7,789	19,926	27,715
Jan.-June 1948	2,235	4,122	6,357

Year	Fresh	Processed ^{2/}	Total	Landings by
				Swedish fishermen in foreign ports
II. Exports	tons	tons	tons	tons
1938-1940	22,600	4,130	26,730	13,700
1941	2,121	1,455	3,576	1,164
1942	1	191	192	7
1943	-	-	-	2
1944	22	4,572	4,594	8
1945	443	6,337	6,780	6,731
1946	4,992	28,818	33,810	13,000
1947	6,152	11,108	17,260	6,900
Jan.-June 1948	13,526	21,121	34,647	6,686

^{1/} Principally salted herring.

^{2/} Salted, spiced or smoked.

The foreign trade in fish in 1947 is shown below by countries of origin and destination (Table 6).

Table 6 - Sweden: Foreign trade in fresh and processed fish in 1947; by countries of origin and destination.

Country of Origin or Destination	Imports	Exports
	tons	tons
Czechoslovakia	-	5,186
Italy	-	2,665
Poland	27	2,649
U. S. S. R.	-	1,613
France	-	1,107
The Netherlands	196	816
Denmark	3,652	640
Great Britain	3	587
Norway	19,867	527
Austria	-	383
U. S. A.	410	33
Iceland	2,444	-
International waters	968	-
Other countries	148	1,054
Total	27,715	17,260
Add: Swedish landings in foreign ports ^{1/}	-	6,900
All	27,715	24,160

1/ Denmark, the Netherlands, and Great Britain.

As indicated, Norway, Denmark, and Iceland were the chief suppliers. The exports went to a number of countries including Italy, the Soviet Union and Soviet dominated states.

Most of the exports during the first half of 1948, altogether 34,647 tons--went to Czechoslovakia and the French Zone of Germany. Denmark, the Netherlands and Great Britain were the recipients of the volume of fish which was landed direct by Swedish fishermen at foreign ports,

SUMMARY OF SUPPLY AND UTILIZATION

The following table shows the supply and utilization of fish, including fresh water fish, during the period 1938-48. (Table 7).

Table 7 - Sweden: Summary of Supply and Utilization of Fish, by Years

Year	Salt water catches ^{1/}	Fresh water catches	Im-ports	Total sup-ply	Ex-ports	Direct landings in foreign ports	Domestic consump-tion
	1000	1000	1000	1000	1000	1000	1000
	tons	tons	tons	tons	tons	tons	tons
1938-40	116	13	43	172	27	14	131
1941	113	13	16	142	4	1	137
1942	125	14	8	147	-	-	147
1943	144	15	3	162	-	-	162
1944	129	15	1	145	4	-	141
1945	153	15	16	184	7	7	170
1946	169	15	27	211	34	13	164
1947	139	15	28	182	17	7	158
Jan.-June 1948	94	7	6	107	35	7	65
Average	139	14	17	170	15	6	150

^{1/} Including landings by Swedish fishermen in foreign ports.

As shown in the above table, catches of both salt and fresh water fish averaged 153,000 tons per year during the period. If direct landings in foreign ports are included, Sweden had an average annual net export of 4,000 tons during the period. Domestic consumption increased from 131,000 tons in 1938-40 to a peak of 170,000 tons in 1945 and averaged 150,000 tons for the whole period.

It appears that the large exports in the first half of 1948 have resulted in some decline in consumption during the same period.