



Australia

THE WHALING INDUSTRY ACT 1949: The "Whaling Industry Bill 1949" was introduced in the Australian Parliament on May 20, 1949, and after passage by both Houses, received Royal Assent and became law on July 12. This permits the Government to establish a shore station for whaling in Australia, according to a July 20 report from the American Embassy at Canberra.

The Bill provides for the establishment of a whaling commission consisting of a chairman, a deputy-chairman, and one other member, to be appointed by the Governor General. The Commission will have very broad powers, its functions being:

1. To engage in whaling in Australian waters
2. As an aid to the economic and stable operation of its whaling activities in Australian waters, to employ in whaling in the vicinity of any Australian waters, vessels not required for the time being for whaling in Australian waters

The Commission is empowered to maintain and operate chaser ships, shore bases and factory ships, to process whales, manufacture any product derived from whales, and to sell either the whales or products derived from them. There are also a number of incidental powers, such as the right to lease, charter, purchase and sell ships, and to use such ships in foreign or coastal trade when they are not needed for whaling. (Also see Commercial Fisheries Review, August 1949, page 31.)



Bizone Germany

CUTTER FISHERIES: While steam trawlers now catch most of the sea fish consumed in Germany, the so-called high-seas and coastal cutters are also of importance, according to an August 2 American consular report from Bremerhaven. In 1938, for example, cutters landed about 15 percent of the total German catch of sea fish of over 700,000 metric tons; in 1948, the cutter's share amounted to 22 percent of a total German catch of 373,000 tons. The place of the cutter as a supplier of quality fish to a free, well-balanced market is shown by the fact that the average price for cutter-caught fish in 1938 was 137 percent of the average price for trawl fish in the same year.

The German fishing industry classifies fishing vessels into 3 major types: trawler (fischdampfer), logger, and cutter.

The cutter is distinguished from the other two types by its smaller size and by its use of a sail as an auxiliary means of propulsion and as a means of maintaining stability when heaving the net. Two classes of cutters are recognized.

The high-seas cutter (hochseekutter) is at least 52 feet in length. A common type of high-seas cutter is the 65.6 feet, 120 h.p. "KFK" cutter, built during the war by the German Navy to serve as a minesweeper, taken over after the surrender by the occupying powers, and subsequently turned back under various arrangements to the German economy for refitting as a fishing craft. A 5- to 7-man crew is carried. Such a vessel usually makes trips of not more than 12 days, but has at times gone to the fishing grounds off Iceland and has remained at sea as long as 20 days. In 1938, 173 high-seas cutters were in operation in all Germany; at the end of 1948, 417 were registered in Western Germany. The 92 United States-owned and 118 United Kingdom-owned KFK cutters largely account for the increase in the cutter fleet.

The coastal cutter (kustenkutter) is less than 52 feet in length. A typical one is 32.8 feet long, has a 40 h.p. diesel engine, and a crew of 2. Coastal cutters fish in rivers or occasionally in the waters around the Frisian Islands and remain out of port for 24 hours. Before the war, about 10,500 coastal cutters were registered in all of Germany; it is estimated that about 5,000 now are in use in the British and American zones.

The cutter fishers are now experiencing a financial crisis. From April through July this year, the ex-vessel prices for cutter fish have dropped along with the prices for trawl fish. Since the cutters for the most part are owned or chartered by individual operators who have little accumulated capital, the cutter fisher has felt the effect of continued low prices more quickly than the trawl fisher. The Land Bremen Fisheries Administration has estimated that cutter fishers are in debt \$900-\$4,500.

Among those fishers who have chartered United States-owned KFK cutters from the Fischdampfer Treuhand, a certain amount of ill-will towards the United States has arisen. In their minds, the United States seems to be playing the role of Shylock, demanding high charter fees and insurance premiums at a time when fish prices have dropped so much that they can hardly cover their operating expenses. The truth of the matter is that the United States did turn over the cutters to the Fischdampfer Treuhand without compensation and receives nothing from the charter fees or insurance premiums. The cutter charter fees, 10 percent of the ship's catch or a minimum of \$1,500 per year, were set by the Fischdampfer Treuhand as the minimum needed to amortize in 15 years or less the cost of converting the minesweepers to fishing craft. The United States has required that the cutters be insured at full replacement value, but this insurance is written by German companies. And to further refute the idea that the United States is driving the KFK cutter fisher into debt, it should be noted that the KFK cutters can be turned back to the Treuhand if the charterer so desires.

Most charterers have held the replacement value of the cutters for insurance purposes to be too high. The conversion costs also are thought to have been too high, especially in view of the fact that the KFK cutter has a hull made of soft and not too durable wood. Although the United States retains title to all improvements and repairs made to the cutters, no one in Bremerhaven fisheries circles expects the United States to take the boats back and consequently no one accuses the United States of having had costly repairs for its benefit made at the expense of the charterers.

In contrast to the proceedings in the American zone, the British had the cost of converting the 118 KFK cutters which fell to them as war booty charged to the occupation. Consequently, the charterers of fishing craft from the British do not bear the same amortization burden as do their American zone counterparts.

That the cutter fishery now is facing a financial crisis is evident. Because of the greatly increased number of high-seas cutters presently in operation as compared with 1938, the advisability of attempting to mitigate the effects of the economic forces at work is questionable. It would seem that sooner or later, the ratio of trawler landings to cutter landings will have to rise at least to the pre-war value, caused partly by an increase in the size and number of trawlers and largely by a decrease in the number of cutters. The disposition of the 92 KFK cutters owned by the United States after the vessels have ceased to have any value as fishing craft is a matter still to be faced.

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FIRST U. S. FISHING TRAWLERS ARRIVE: The first 5 of the 12 trawlers purchased in the United States by OMGUS for use by the German fishing industry have arrived in Bremerhaven, according to a July 26 report from the American Consulate at Bremerhaven. The purchase of these ships by the United States has not met with universal approval in Bremerhaven fisheries circles. The rapid improvement in the German food supply starting in the spring of 1949 has decreased the demand for fish so much that it is not possible to market at a profitable price all fish brought in by the present fleet. Some of the less economic trawlers have had to be withdrawn from service. Under these conditions, ship owners are inclined to move cautiously in accepting new vessels and especially so when these new vessels have features never before used in a German trawler.

It was first planned to distribute the ships strictly in proportion to war losses suffered. This plan has not been held to for several reasons, one being the reluctance on the part of the largest companies to take over any of the vessels. Also, the GHG (Gemeinwirtschaftliche Hochseefischerei Genossenschaft), the union-sponsored trawler-owning corporation, is to be given 2 of the 12 ships on charter, although having been founded after the war, it suffered no war losses whatsoever. Of the remaining 10 ships, 5 are to be chartered to small Bremerhaven firms, 2 to Cuxhaven firms, 2 to Hamburg firms, and 1 to a Kiel firm.

Because the new trawlers are constructed along lines differing from German trawlers, certain conservative elements have opposed accepting them. Old-time fish-

ing vessel personnel, familiar only with steam propulsion, do not relish the introduction of diesel propulsion, and have belittled the new trawlers. Since the German fishing vessels remain at sea longer than is customary in the United States, the quarters for the crew on the new trawlers are considered by the Germans to be sub-standard. It is customary in the German fishing fleet to clean the catch and to extract the livers at sea. For this purpose a special room is needed where the livers may be chopped up, cooked, and where the oil can be separated. No provision for such an installation was made in the Amer-



NEW ENGLAND-TYPE LARGE TRAWLER PURCHASED IN THE UNITED STATES BY THE U. S. ARMY FOR USE BY THE GERMAN FISHING INDUSTRY.

ican-built trawlers. The small size of the new trawlers (average capacity 3,500 baskets of fish) furnishes another ground for complaint, as the local fishing companies prefer much larger vessels.

Certain features of the trawlers have met with approbation by unbiased experts, such as the low oil-consumption, the refrigerated storage space, the recording

marine sounder, and the good condition in which they arrived. However, even if the vessels were well suited to German conditions, and no spare parts problem existed, the wisdom of bringing them to Germany is questionable, since the average cost (\$270,000) is little, if at all, under the cost of building a new trawler of the recent German 400-ton series.



Canada

NEW SEINER-PACKERS LAUNCHED ON WEST COAST: Typical of the continued development in the type of vessels participating in Canada's fisheries are the several new boats now in operation on the British Columbia coast, according to the August 1949 Trade News of the Canadian Fisheries Department.

Recently, five vessels of the seiner-packer type were launched in the Vancouver area.

Three of these were built at a cost of about \$55,000 each, and are designed for both salmon and herring fishing.

One of these vessels has a length of 64 feet and a beam of 17 feet; a 150 h.p. main Diesel engine with a speed of 11 knots; a registered tonnage of 47 tons, a gross of 59 tons; and accommodation for eight berths. The vessel's seine table, winch, and anchor are driven by hydraulic power, while auxiliaries are used for the 32-volt lighting plant, air, and water pumps.

The two others are 65 feet in length, with beams of 17 feet; seiner-packer type; 150 h.p. Diesel capable of 10.25 knots; gross tonnage of 54 tons and registered tonnage of 37 tons; accommodations for eight berths; auxiliary power operates each vessel's 32-volt lighting plants, air and water pumps; and both are equipped with 50-watt radio transmitters.



Denmark

DANISH FISHING IN BARENTS SEA: During the summer of 1948, a Danish fishing vessel conducted experimental fishing (the first into these waters) for plaice and flounder in the Barents Sea, according to a May 23 report from the American Embassy at Copenhagen. Results were highly satisfactory, and the vessel brought home a catch valued at approximately \$8,335.

This year five Danish ships visited the same area. All are modern fishing vessels of postwar construction and of 50 to 60 gross registered metric tons. On May 8, 1949, four of the ships reported by radio that they expected to land their catches in Aberdeen, Scotland within a few days. The radio reports further stated that each ship would bring in from 25 to 30 metric tons of frozen flounder tentatively valued at \$10,419. The grounds are located, about 220 nautical miles southeast of Vardo, Norway, and about 50 miles beyond the Russian maritime jurisdiction. The most effective equipment was the Danish seines (trawls were tried but found to be unsuited to that particular type of sea bed).

The Faroe Islanders are known to fish the Barents Sea for cod, and although little information is available concerning their methods and catches, it is believed they employ the trawl.

The captain of one of the vessels considered the expedition highly successful for all vessels engaged in it, and he predicted that "several hundred" Danish fishing vessels would sail for the Barents Sea next year.

Such a development will offer new incentive to the Danish fishing industry. However, the Danish market will hardly be able to absorb any considerable increase in fisheries products, either in direct consumption or in the canneries. But possible markets such as England and Western Germany, are near at hand, depending, of course, upon import policies adopted by these countries.



Ecuador

INTERPRETATION OF TERRITORIAL WATERS: With regards to territorial waters, Article 582 of the Ecuadoran Civil Code states:

"The water adjoining the Ecuadoran coast seaward for a distance of one marine league^{1/} measured from the water line at lowest tide is territorial sea and under national domination; but the right of policing these waters for matters concerning the safety of the nation and for observance of fiscal laws extends seaward for four marine leagues measured in the same manner."

Ecuador interprets its law to mean that its territorial waters extend 12 miles from the western-most extension of the mainland, which is the peninsula of Santa Elena, according to a July 28 report from the American Embassy at Quito. The same interpretation is applied to the waters surrounding the Galapagos Islands.

^{1/}A marine league is equivalent to 3 nautical miles, or 20 to the degree (one degree equals 111.111 meters).



Egypt

REVIEW OF THE FISHERIES: The sources of Egypt's fish supply are a coastline of more than 1,500 miles, lakes having an area of some 1,000,000 acres, and the Nile River and its tributaries, according to an American consular report from Cairo. The fisheries of Egypt have not yet been extensively developed; however, the Egyptian Government is studying modern techniques in fishing, preservation, and processing, and plans are being developed to improve and expand the industry.

It is roughly estimated by Egyptian Fisheries Department officials that 40,000 metric tons of domestic fishery products are consumed annually in Egypt. Of this total, 25 percent represents the marine catch along the Mediterranean and the Red Sea; 60 percent, lake production; and 15 percent, that taken from the waters of the Nile and its tributaries. The Red Sea fishing grounds furnish about 4,000 metric tons of the marine total, with a value at landing points of \$826,600.

Egypt imports over 10,000 tons of fishery products from all sources, and exports (principally in the form of supply to ships' stores) between 500 and 600 tons. Note: Values converted on the basis of 1 Egyptian pound equals \$4.133 U. S.

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SPONGE FISHERY, 1949: The sponge fishing season starts in May and ends in November of each year in Egyptian waters. Because of litigations between the Egyptian and Greek sponge fishing interests, the production during the 1947 season was only fair, and was even less in 1948. By January 1949, all stocks on hand in December 1948 were sold, according to a July 18 report from the American Consulate General at Alexandria.

Early in May 1949 an agreement was signed between the Egyptian sponge company (sole holder of all Egyptian Government permits to fish sponges in Egyptian waters) and the Greek Minister of Foreign Affairs. The Egyptian Government granted the Egyptian sponge company 5 more fishing permits, which brings the fishing permits to a total of 20 instead of 15 (18 of these were given to Greek fishers, i.e., 17 sailing vessels carrying crews equipped with diving suits and 1 vessel carrying a crew of 80 without diving equipment; 2 permits were reserved for Egyptian fishers).

Sponge fishing started on June 23, 1949, with a total of 45 fishing boats and a complement of 560 greek fishers and 90 Egyptians. It is stated that the Egyptian sponge company has already sold 70 percent of its share of the 1949 total sponge production to the Greek captains of the sponge fishing fleet.

It is estimated that the production will be about 44,000 pounds, divided as follows:

Honeycomb.....	33,000 pounds
Turkey cup.....	8,800 pounds
Zimocca.....	2,200 pounds



Gambia (British West Africa)

STATUS OF THE FISHERIES: In an effort to increase the catch of sharks and to experiment with deep-sea fishing for the purpose of augmenting the Gambian diet, a fishing vessel ordered from the United Kingdom was expected to arrive during July 1949. It will be suitable for fishing some 40 to 50 miles at sea. Byproducts of the catch will be used as feed for poultry in the form of ground bones and fish meal, according to a June 20 report from the American Consulate General at Lagos, Nigeria.

Sharks are plentiful off the coast of Gambia, and exports of some 2,500 pounds of livers to the United Kingdom are expected this year. The meat of the shark is sun-dried for eating, most of it being shipped to neighboring French Senegal because the Gambians do not like it. Each year about half a ton of shark fins are exported to China to be used in soup.

Most of the fishing is done from native canoes with nets, the annual catch being about 1,000 metric tons. It is believed that the catch could easily be doubled as there is no evidence of overfishing.

Greece

SPONGE FISHERY AND MARKET, 1948: Fishing Fleet: According to the Greek Inspector of Fisheries, Ministry of National Economy, the 1948 sponge fishing fleet consisted of approximately 250 fishing boats of all types and sizes and 80 auxiliary boats, or 330 vessels of all kinds. The number of divers and crew members was 3,526—divers, 1,274; sailors, 1,652; auxiliary boat crews, 600. This is a slight reduction in the number of boats, and a considerable reduction in the number of men, compared to 1947, according to a May 4 report from the American Embassy at Athens. This reduction is probably due to

1. The long delay in getting the Greek sponging fleet equipped and launched in 1948;
2. the large stocks of sponges on hand from the 1947 harvest;
3. the conditions under which fishing licenses were issued Greek spongers by the British authorities in the former Italian colonies in North Africa, which may have discouraged some sponge fishermen; and
4. the fact that the 1947 figure of 4,200 men engaged in the sponge fishery may have included not only divers and the crews but also persons engaged in sponge processing on shore.

1947 Harvest: The 1947 sponge harvest, which the Greek trade estimated would reach 450,000 pounds, was originally reported as 331,000 pounds, but according to the Inspector of Fisheries actually amounted to 352,700 pounds. The latter is a revised figure.

1948 Harvest: Due mainly to the two months' delay in the sailing of the sponge fishing fleet, the 1948 harvest produced only between 309,000 and 320,000 pounds (Table 1).

The 1948 harvest consisted of 286,594 pounds of honeycomb; 11,027 pounds of Turkey cup and Turkey toilet; 11,023 pounds of zimocca and elephant's ear; and 11,023 pounds of Grade D and scrap, distributed throughout all species collected. Around 209,000 pounds of the honeycomb were collected off Cyrenaica; 77,000 pounds were collected from Greek waters. The Turkey-cup and Turkey-toilet catch was unusually

small because unfavorable restrictions placed on Greek sponge fishers by the Egyptians discouraged Greek fishing in Egyptian waters. Greek sponge fishermen were prohibited from working in the Tripolitania waters during 1947, and permission was granted in 1948 only after considerable delay. The small zimocca and elephant's ear catch is said to have been due to the fact that only three Greek boats fished sponges in the Tunisian waters during 1948.

Table 1 - Approximate Greek Sponge Production, By Grades, 1948	
Grade of Sponges	Lbs.
A	176,368
B	88,184
C	44,092
D and other	11,023
Total	319,667

Table 2 - Average Prices for Bengazi Honeycomb Sponges, 1947-48 ¹		
Grade	Price	
	1948	1947
A	Per Lb. \$15.88	Per Lb. \$16.00-\$17.00
B	9.07	9.00- 10.00
C	5.45	4.50- 5.00

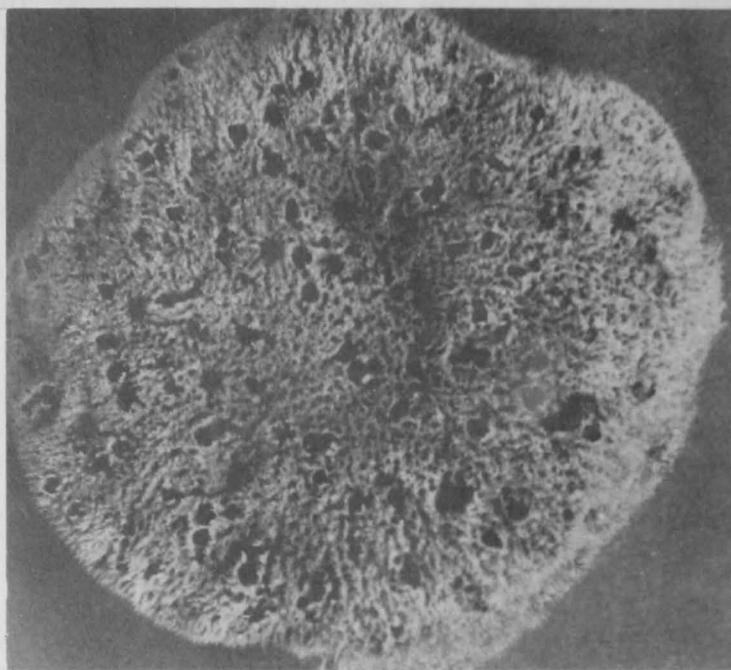
¹All prices are quoted f.o.b. Greek port.

Prices: The average price differed only slightly from prices in 1947 (Table 2).

Turkey cup and Turkey toilet averaged between 10 and 12 percent higher than Bengazi honeycomb; zimocca and elephant's ear, about the same; and Greek honeycomb, from 8 to 10 percent less than Bengazi honeycomb.

The prices of grade D and scrap sponges were approximately one-half the price of the preceding grade, and prices varied according to the degree of damage done

the sponges during or subsequent to their harvest—usually being about one-half the difference between their original grade price and the price of the next lowest grade in the same species, but closer to the price of the original grade.



ZIMOCCA SPONGE SPECIMEN FROM MEDITERRANEAN SEA (TOP VIEW)

pounds of sponges on hand as of December 31, 1947. However, all 1948 exports of sponges were from the 1947 harvest. It would appear, therefore, that there were around 142,800 pounds of the 1947 catch still unexported as of December 31, 1948. This balance of the 1947 crop, plus the entire 1948 catch, would show a balance on hand as of the close of 1948 of between 452,000 and 462,000 pounds. This exceptionally high figure for stocks on hand as of December 31, 1948 is unrealistic. Export figures quoted were obtained from the Greek Customs Administration, and do not reflect the quantities of sponges that have already been sold, but not yet delivered, or quantities on which trade bargaining had been opened but not yet consummated at the time these data were compiled by Customs. The export statistics quoted above probably do not reflect certain stocks now being held in anticipation of their exchange for commodities under barter agreements made, or under negotiations, with various European countries. Actual stocks on hand, unconsigned and not otherwise earmarked, according to the Inspector of Fisheries, are so small as to have negligible economic importance.

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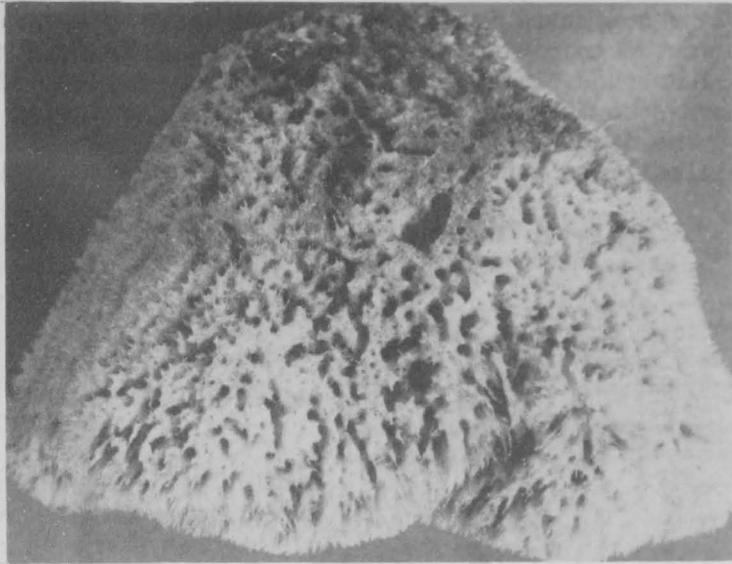
Table 3 - Greek Exports of Sponges, Quantity & Value, 1948

Country of Destination	Quantity	Value
	Lbs.	\$
United States	18,457	203,588
Germany	4,636	87,526
United Kingdom	6,219	55,954
Italy	6,539	36,240
Czechoslovakia	3,274	34,770
Belgium	4,134	33,252
Canada	2,449	30,304
Sweden	2,771	22,522
Other countries	6,713	76,408
Total	55,192	580,564

Outlook for 1949: It was the opinion of the Inspector of Fisheries and other sources consulted that the 1949 sponge harvest would be the same as that for 1947 (close to 352,000 pounds). Greek sponges, in spite of their high prices, will

to be in demand throughout the world because of the various measures taken by Greek sponge merchants to safeguard the favorable position of Greek sponges on the world market.

The sponge fishing season extends from April through September in the Mediterranean area, and a large number of Greek fishing boats are reported to have set out for the sponge beds along the northern coast of Africa in pursuit of the 1949 sponge harvest. There is no reliable estimate yet available of the number of boats and men engaged in Greek sponge fishing activities this season, but the industry got under way approximately two months earlier than it did last year.



ZIMOCCA SPONGE SPECIMEN FROM THE MEDITERRANEAN SEA
(SIDE VIEW).



Iceland

1947 BUDGET CONTINUES TO PROVIDE FOR PAYMENT OF FISHERIES SUBSIDIES: The Icelandic Minister of Finance (in a speech delivered in the Althing prior to the passing on May 17 of the national budget bill for 1949) stated, with reference to fisheries, that during the last few years, the motorboat fishing industry was going heavily into debt primarily because of poor herring runs.

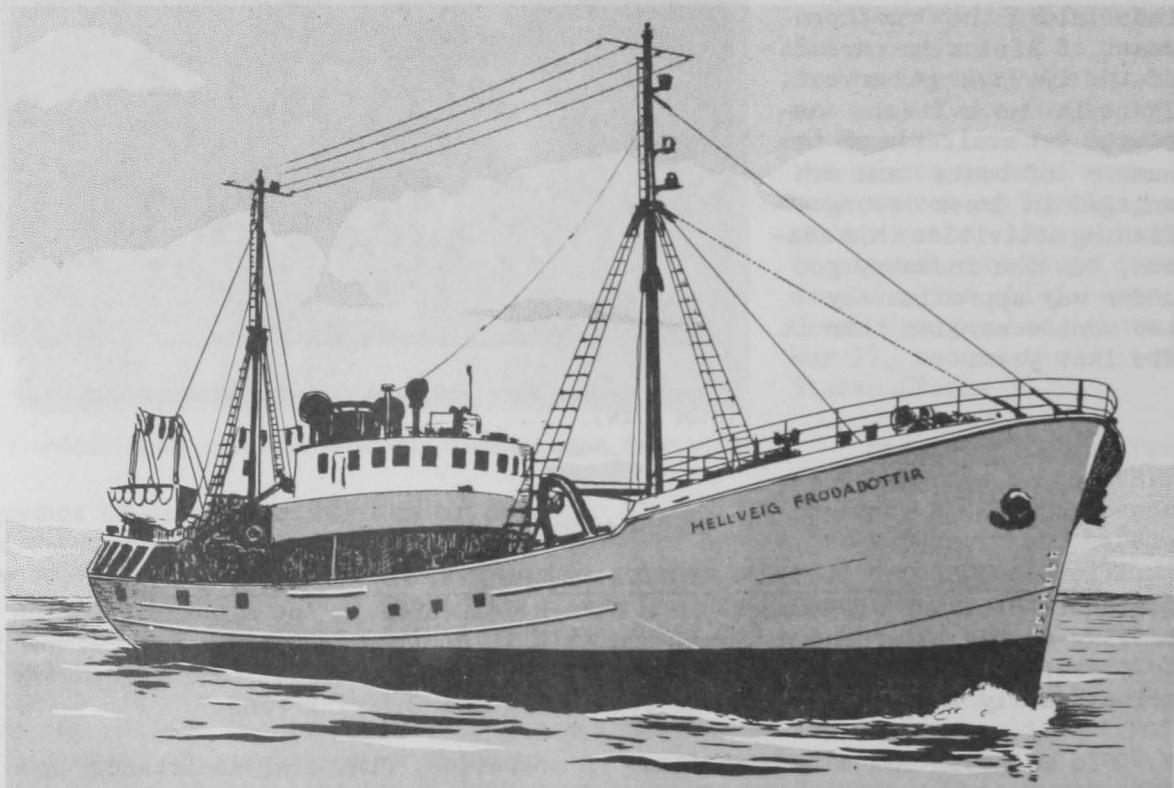
To maintain the motorboat fleet in operation, financial assistance was required and provided for in the Anti-Inflationary Act passed in December 1948. The law provided for a guaranteed price on deliveries of fresh fish to the factories and on exports of frozen fillets and salt fish. It also provided for the creation of a State Inflation Fund, the proceeds of which are to be utilized in rendering financial assistance to the fishing industry. (See Commercial Fisheries Review, February 1949, p. 45, and March 1949, p. 53.)

The present budget bill is an attempt to bring the budget as close to balance as possible. However, a general lowering of world prices of frozen fillets and salt fish may compel the Government to increase payment of subsidies on these exports. The Government's financial situation will depend to a great extent on the outcome of this year's summer herring catches, which to date have been very poor.

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TO BUILD TEN NEW TRAWLERS: On July 8, 1949, the British Minister of Finance signed an agreement whereby a London bank will extend to the Icelandic Government a loan (stock certificate) amounting to 1,250,000 pounds sterling (approximately \$5,037,500), according to a July 25 report from the American Legation at Reykjavik.

This is the first foreign government loan permitted by the British Government since World War II. The proceeds of the loan will be used to cover almost the entire cost of constructing 10 new Icelandic trawlers contracted for in the United Kingdom. The actual cost of the trawlers is estimated to be approximately \$6,045,000 and they will be completed during December 1950-September 1951. The effective rate of interest on the loan will amount to approximately 5 percent; the nominal rate, 4½ percent. The loan runs for a period of 20 years. Payment of annuities will commence in 1953. In order to meet the yearly payments, a portion of the earnings of the new trawlers is to be set aside. Priority to purchase trawlers will be extended to Icelandic municipalities and corporations rather than to individuals.



ONE OF A NUMBER OF TRAWLERS BUILT IN BRITAIN FOR ICELAND IN 1948-49. HAS SEVERAL OUTSTANDING FEATURES INCLUDING ALUMINUM FISH HOLD.

The agreement concerning the loan was worked out in June 1949. The British Government approved the extension of the loan to Iceland. The Icelandic Parliament (Althing) likewise sanctioned the loan by the passage of appropriate legislation. Final details and formalities were worked out in Reykjavik where the agreement was signed.

Several Icelandic newspapers voiced concern over the construction of a large trawler fleet in view of the recent lowering of the prices of iced fish (exported solely to the United Kingdom and Germany), and the depletion of fishing off the coasts of Iceland. In addition, British trawler owners have taken strong exception to the construction of the Icelandic trawlers.



Ireland (Eire)

FISHERIES REVIEW, 1947: Production and Prices: The Irish Minister for Agriculture states that sea fish landings during 1947 were less both as to quantity and value than those for 1946, due to the abnormal weather conditions in the early months of the year. Figures compiled to date for 1948 show a great improvement, according to a May 5 report from the American Legation at Dublin.

The total value of fish and shellfish landed in 1947 was \$2,628,067, compared with \$2,772,152 for 1946.

The value of shellfish taken during 1947 was \$428,383, as against \$509,820 for 1946. The main decline was in scallops, which dropped almost 50 percent. The value of crabs, lobsters and oysters was also down. On the other hand, the returns for crayfish and periwinkles showed substantial improvement. The principal landings in order of value were lobsters, periwinkles, oysters, and crayfish.

Fishing Fleet and Employment: The difficulties experienced in recent years in obtaining supplies of boats, engines and fishing gear were not reduced during 1947. However, the number of persons engaged in commercial sea fishing, either full time or part time, tended to rise. Full-time fishermen increased from 1,936 in 1946 to 1,955 in 1947, while the part-time men rose in number from 8,226 in 1946 to 8,277 in 1947. The number of vessels of all types used totaled 3,502 in 1947, as against 3,460 in 1946.

Through its marketing service for members, the Irish Sea Fisheries Association disposed of 8,170,288 pounds of fish and shellfish in 1947 as compared with 7,916,048 pounds in 1946.

Inland Fisheries: The unfavorable weather conditions which adversely affected the sea fisheries, also seriously restricted the potential output of those engaged on the inland fisheries.

Table 1 - Irish Landings of Fish
(Do Not Include Salmon & Shellfish), Quantity & Average Prices,
1942-47

Year	Quantity	Avg. Prices
	Lbs.	\$ per cwt.
1947	35,396,368	6.21
1946	36,516,368	6.20
1945	41,656,944	5.33
1944	34,369,328	6.00
1943	31,126,032	6.60
1942	28,302,736	6.16

Table 2 - Irish Fish Landings by Principal Types,
Quantity & Average Prices, 1946-47

Type or Species	1 9 4 7		1 9 4 6	
	Quantity	Avg. Price	Quantity	Avg. Price
	Lbs.	\$ per cwt.	Lbs.	\$ per cwt.
Demersal fish ...	16,091,824	9.92	17,521,728	9.41
Herring	13,990,816	3.20	11,255,328	3.46
Mackerel	4,285,120	3.38	7,496,608	2.97

The catch of salmon and trout was somewhat better than in 1946, despite the severe weather early in the year. The price received for salmon and trout exported to Great Britain in

1947 showed some improvement compared to the previous years.

The British Ministry of Food purchased the entire exportable surplus of the country's salmon catch in 1947, as had been done in each of the preceding five seasons. The terms were rather more favorable for the producers than previously.

Investigations into the life history of the Irish salmon were continued during the year, and investigations were also carried out on salmon, sea trout, and brown trout in various localities. Towards the end of the year arrangements were being made for an investigation into the life history of the Atlantic salmon.

NOTE: Values converted on basis of 1 pound sterling equals U. S. \$4.02.

Japan

BONIN ISLAND WHALING OPERATIONS, 1949: Whaling operations in the Bonin Islands by the Japanese have been completed for this season, February 20-May 22, 1949.

Bonin Island Whaling Catch, Feb. 20--May 22, 1949			
Species	Number	Products	Quantity Metric Tons
Sperm	85	Meat for food	1,409
Humpback	4	Whale oil	147
Sei	116	Blubber for food	401
Total	205	Blubber for leather	218
		Bone meal	158
		Sperm blubber	451
		Others	417
		Total	3,201

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FINANCING DIFFICULTIES OF FISHING INDUSTRY: Since November 1948, the Japanese fishing industry in general has had increasing difficulty in obtaining funds to finance seasonal operations, preparation for which, in some fisheries have to be started many months before actual fishing operations, according to the June 4 Weekly Summary of SCAP. The financial situation of fishermen has been affected by the recent reduction in activities of the Reconstruction Finance Bank as a loaning agency of the Japanese Government. No adequate substitute plan of financing has been installed for the fisheries. The principal source of funds is from local banks, which reportedly already are heavily loaded and are opposed to assuming additional credit obligations.

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U. S. AID TO FISHERIES: The Japanese fishing industry, which suffered severely during World War II, rapidly is being restored through the assistance provided from United States relief and rehabilitation funds, according to the July 30 Weekly Summary of SCAP's Natural Resources Section. Fish production in 1949 will reach an estimated 7 billion pounds and will again place Japan far ahead of all other fish-producing nations.

Japan's requirements for skillful fishermen, fishing boats, and adequate supplies of fishing materials (such as, nets, rope, and fuel oil) far exceed those of any other nation. Increased 1949 production will require about 1,250,000 fishermen operating more than 450,000 boats, and a tremendous amount of raw materials for fishing equipment. Present annual requirements for maintaining fishing gear and operating boats amount to about 39 million pounds of manila fibers, 26 million pounds of cotton, and 3½ million barrels of petroleum.

An extensive boat-building program and repatriation of fishermen rapidly made up the losses of fishermen and boats resulting from World War II. However, the most severe shortages occurred in fishing materials, such as nets and ropes, which were made almost entirely from imported raw materials. As a result, large quantities of supplies were needed in 1948 to replace old, worn-out gear. That year 86 million pounds of manila (or substitutes) and cotton fibers were obtained, in addition to 2½ million barrels of petroleum for operating the boats. As a result of these extensive imports in 1948, many of the cumulative needs of the fishermen were met, so that 1949 imports will be reduced to 65 million pounds, and to 62 million pounds in 1950.

The recovery of the Japanese fisheries has meant a substantial increase of indigenous food for the Japanese people. Aquatic products supply 85 percent of the animal protein of the Japanese diet, and the purchase of such products makes up 8 to 12 percent of the Japanese family budget.



Lebanon

SPONGE FISHERY, 1948: Production: Sponge production in Lebanon in 1948 was double that of 1947 because of the introduction of new sponge equipment imported from the United States and Great Britain, according to a March 30 American Consular report from Beirut. The capacity of the industry is stated to have been increased to four times that of 1947, but increased production, decreasing foreign demand and falling exports have caused a price drop of about 24 percent since early 1948, which will probably hold 1949 production to the 1948 figure or below. The increase in capital investment during 1948 was encouraged by the heavy foreign demand for sponges in 1947.

Consumption and Stocks: It is estimated that about 880 pounds per year are consumed locally. The total quantity of sponges of all varieties and grades now in the Lebanese market is approximately 2,200 pounds.

Foreign Trade: Foreign trade statistics are prepared by the Council Supérieur des Intérêts Communs for the Syro-Lebanese Customs Union as an entity, and therefore no separate official figures for Lebanon alone are available.

Table 1 - Sponge Production in Lebanon, 1948	
Variety	Quantity
Fine (A)	Lbs. 1,550
{ B }	1,100
{ C }	330
Honeycomb (A)	1,540
{ B }	880
{ C }	290
Total	5,720

Foreign trade totals for the first nine months of 1948 show that the Syro-Lebanese Customs Union imported 2,430 pounds of sponges valued at \$4,860, as compared with 175 pounds valued at \$307 during the whole year of 1947. Beirut trade circles state that this vast increase in imports was the result of large purchases by Syrian merchants of sponges from Italy, Transjordan and France. Local importers and exporters state that these exceptionally large imports are no longer in the Lebanese half of the Customs Union.

A check of consular invoices shows that in 1948 Lebanese merchants shipped 2,180 pounds of sponges valued at \$17,000 to the United States alone. A total of 2,500 pounds of sponges were exported in 1948 as compared with 3,637 pounds in 1947.

Table 2 - Wholesale Prices of Sponges in Lebanon, March 18, 1949

Variety	Price
	\$ per Lb.
Fine (A)	6.90
{ B }	5.20
{ C }	3.40
Honeycomb (A)	5.20
{ B }	3.90
{ C }	2.60

Market Situation and Prices: The drop in foreign demand and the increase in local production in 1948 have combined to depress the market price of sponges and to reduce the activity of the local market. Present wholesale prices average 24 percent below those of May 1948.

Outlook for 1949: If demand existed, the Lebanese sponge fishers could gather about

11,000 pounds of sponges in 1949, according to trade circles. The sponge beds are reported by these same circles to be able to supply this quantity without undue exhaustion, since modern equipment was first introduced in 1948. On the other hand, with prices falling, wages for divers will be lower and it appears unlikely that the total 1949 production will exceed that of 1948.

NOTE: Values converted on the basis of 3.50 Lebanese pounds equal U. S. \$1.00.



Malaya (British)

RESTRICTS FISH IMPORTS: The Controller of Imports and Exports at Singapore has stated that until further notice, applications for licences for imports from dollar countries will be considered only for a few specified goods which do not include any fish or fish products, according to the August 1949 Trade News of the Canadian Fisheries Department.



Norway

NORWEGIAN-BRITISH DISPUTE OVER NORWAY'S SEA BOUNDRIES: A Norwegian-British disagreement over Norway's sea boundaries may soon be placed before the International Court of Justice at The Hague, according to a report released the first week in August by the Norwegian Foreign Ministry. The official statement notes that negotiations, which began in London in January of last year, brought forth a proposed solution which the Norwegian Parliament has not been able to accept.

On July 19, the British Government replied that it was of decisive importance that the matter be placed before the International Court and asked whether it should be submitted jointly or by the British Government alone. Norway, on July 29, recommended that the latter course be followed and agreed to a British proposal to continue negotiations during the period that the case was before the Court. Should an agreement be reached before the Court decides the matter, both parties would request the Court's permission to withdraw the case.

In the interval, Norway will continue to enforce fully the fishing boundaries established by the Norwegian Royal Resolution of July 12, 1935.

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PACKS SARDINES IN HERRING AND OLIVE OILS: According to a statement made by a leading Norwegian sardine canner, the use of hydrogenated herring oil in the packing of sardines has proven successful, as reported by the August 1949 Trade News of the Canadian Fisheries Department. Under the current trade agreement with Great Britain, 500,000 cases of Norwegian canned fish packed in herring oil are to be shipped. French canneries are also importing Norwegian herring oil in bulk to use for their own products.

While herring oil has, apparently, been acceptable also in the U. S. market, there is a preference in the U. S. for fish packed in olive oil and a consequent demand for that product from Spain and Portugal. The Norwegian canners have now

suggested a plan by which they would obtain larger quantities of olive oil from Spain in exchange for increased exports of Norwegian dried fish, because they have decided that next year they will pack their sardines in olive oil.

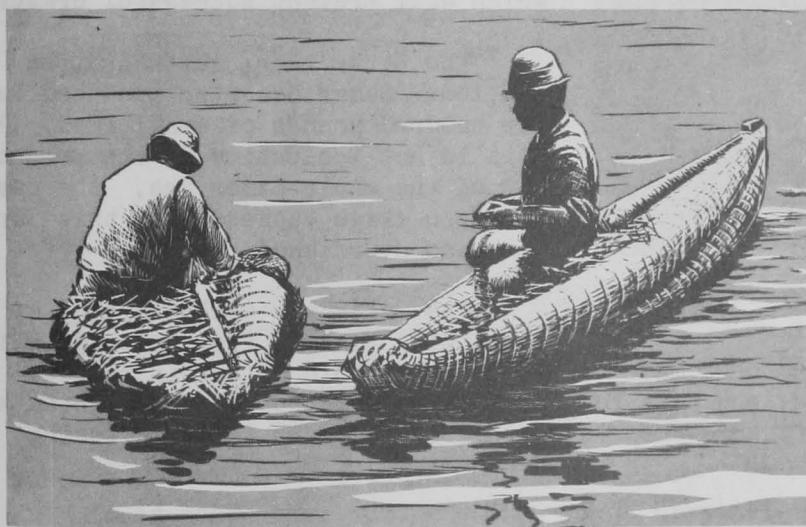
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POLLOCK FISHERY: Pollock purse seiners completed their season off Griptaren, Norway, with catches doubled over last year, due to the use of echo sounders in locating the schools of pollock. Experiments with pollock purse seines and the Danish floating trawl off of West Greenland have begun, according to the July 21 issue of Fiskaren.

TUNA FISHERY: Two large tuna purse seines have been used in Lovoyfjord with varying results. One took 28 large bluefin in one haul while the other took only 4 and had 18 tears in the seine. It is yet too early to say whether the large expensive seines are a success, but their operation is being observed with interest.



Peru



TYPICAL COMMERCIAL FISHING CRAFT (BALSAS) USED BY FISHERMEN (MOSTLY INDIANS) OF LAKE TITICACA IN PERU (THE HIGHEST NAVIGABLE LAKE IN THE WORLD) OPEN TO COMMERCIAL FISHING THE YEAR ROUND. THE BALSAS ARE MADE OF TOTORA.

FISHING INDUSTRY, 1948: The fishing industry of Peru continued to show a substantial production in 1948, although export shipments declined slightly, according to a recent American Consular report.

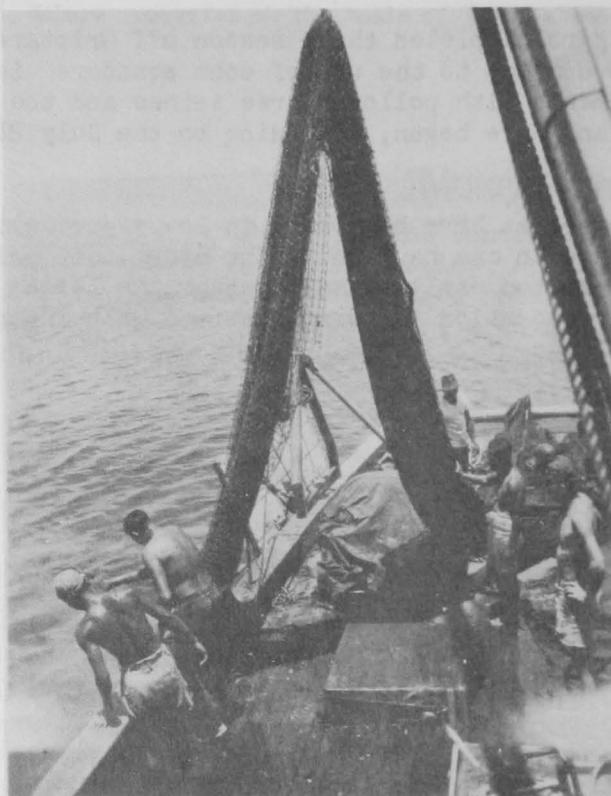
For the period January-November 1948, exports of canned fish--mainly solid packed bonito and tuna--totaled 3,423 metric tons, valued at approximately \$1,750,000, compared with 4,618 tons, valued at \$2,294,000 in 1947. There were 28 fish-canning plants in operation during 1948.

Exported for the first time in late 1948 were 250 tons of frozen tuna and 414 tons of frozen swordfish, with a total value of \$132,000.



Republic of the Philippines

LEYTE GULF YIELDS POOR FISHING: The Philippine Fishery Program vessels, the Theodore N. Gill and the David Starr Jordan returned to Manila on August 19 from an exploratory voyage to Leyte Gulf and the Samar Sea. The vessels examined the possibilities of new dragging grounds for the otter trawl fishery and demonstrated fishing techniques to the fishing industry of Tacloban and Catbalogan.



BRINGING THE OTTER TRAWL ABOARD THE M/V
THEODORE N. GILL.

in his opinion, the small catches made by the vessels could be due in part to the extensive use of explosives, and that the Philippines will soon be faced with serious depletion of its fishery resources unless efforts to curb illegal fishing are intensified.



Poland

CARP AND CRAB FISHERIES: The artificial water reservoir in Gaje (a suburb of Sluzewiec) is the property of the Central Fish Organization, according to a May 18 news release in Rzeczpospolita and reported on June 21 by the American Consulate at Warsaw. It is connected by canals with a network of concrete basins which constitute a transitory dwelling place for carp. More than 200 metric tons of fish passed through these basins last year, and were purchased by Warsaw. Motor-truck tanks bring the fish from various localities in Poland. The full fish season is September through December.

In the spring season, the Central Fish Organization deals with crabs. Empty fish basins have been utilized for the storage of crabs, and Gaje is gradually

Exploration with the otter trawl produced but limited quantities of fish, indicating that grounds within the 30 fathom curve of Leyte Gulf are not overly fertile and contain but few of the types of bottom fishes taken with trawling gear. Results of the work also indicate that the explored portions of this Gulf are foul with war debris and other obstructions which will prevent successful dragging.

The otter trawl demonstration in the lower Samar Sea also produced but a few hundred pounds of small fish. While this is not indicative of the productivity of the whole Samar Sea, the demonstration drags suggest that this area has been overfished.

The Service's Administrator of the Philippine Fishery Program said that,

becoming a crab export center. Two types of crabs are handled: "American" and "Polish". American crabs, having a very hard shell, lend themselves exclusively to processing, and a canning plant for processing American crabs will be established this year.

Polish crabs are not only distributed among local retail trade centers, but also exported alive. They are exported from Warsaw to Paris by airplane. The cost of the Polish crabs delivered to Paris is 61 cents a pound. Belgium and Switzerland will also receive Polish crabs.

These export plans call for organized crab breeding, and the use of small water areas for this purpose.

NOTE: Values converted on basis of official rate of exchange of 400 Polish zlotys equal \$1.00 U. S.



St. Vincent (British West Indies)

FISH IMPORTS CUT: In view of the serious dollar situation, the Government of St. Vincent (British West Indies) has found it necessary to make a 20 percent cut in fish imports the next five months. This was announced in the St. Vincent Government Gazette of July 15, 1949, according to the August Trade News of the Canadian Fisheries Department. The issue of all new licences for import from the dollar area will be withheld until further notice.



Sweden

BUILDING FISHING VESSELS FOR RUSSIA: A Russian Commercial Delegation was in Stockholm in June and ordered a series of 25 motor-driven fishing vessels from Swedish shipbuilding yards, according to the June 18 issue of the British publication, The Fishing News. These vessels will be of the "Swedish West Coast" type, 75 feet long, 35 metric tons, and are to cost approximately \$84,000 each. They will probably be ready for delivery in October this year.

It is known that other Swedish yards have recently delivered about 50 motor-driven vessels to Russia at a total cost of about \$1,700,000.

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SWEDISH-ICELANDIC TRADE PROTOCOL: On July 15, 1949, a new Swedish-Icelandic Trade Protocol covering the period April 1, 1949, through March 31, 1950, was signed in Stockholm, according to a July 22 report from the American Embassy at Stockholm. The Swedish Government, within the framework of its general Import Plan, will license the importation from Iceland of salted, sugared-and-salted, and spiced herring. The other traditional Icelandic export commodities, such as cod roe and mutton, will be imported "to the usual extent". Iceland will adjust its imports from Sweden according to the level of Swedish imports from Iceland.

Turkey

SPONGE PRODUCTION AND TRADE: Production: Turkey's present and potential production of sponges is handicapped by two factors:

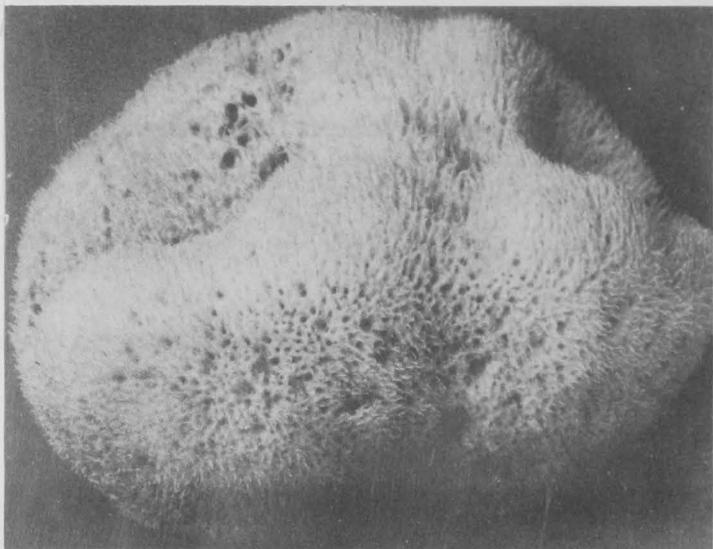
1. Sponge-fishing boat owners have insufficient financial means from off-seasonal activities to prepare properly for the fishing season.
2. There are insufficient firms having the required personnel for the processing and exportation of Turkish sponges to permit healthy competition to flourish.

Under these circumstances, sponge fishers find themselves obliged to dispose of their produce through a limited number of concerns holding the market under a virtual monopoly, which prevents the development of the industry and market, according to a March 19 report from the American Consulate General at Istanbul.

Over-all sponge production for the year 1948, excluding low grade "sharta" sponges, amounted to 31 metric tons as against some 29 tons for the previous year (see table).

Methods of Fishing: Fishing methods vary in the various areas. In the Marmara-Dardanelles area, divers operate from small boats without diving equipment. In the Bodrum area two methods are used—dredging and diving with a mask. In the Marmaris and Cesme area three methods are used—divers with suits, divers without equipment, and dredging.

Estimated Turkish Sponge Production, 1948	
Type	Quantity Metric Tons
Turkish cups	0.7
" solids ..	2.5
Elephant's ear ..	0.25
Honeycomb	17.1
Fine	3.0
Velvet	7.0
Grass	0.5
Total	31.05



TURKEY—CUP SONGE SPECIMEN FROM THE MEDITERRANEAN SEA.

of the previous year totaled 72,000 pounds. The bulk went to Great Britain (35,274 pounds), followed by United States (19,841 pounds), and Netherlands (11,464 pounds).

Outlook: Fishing for sponges starts about the first of April, and market circles anticipate a substantial demand on the part of regular foreign purchasers.

Consumption: Trade estimates place domestic consumption of sponges during 1948 at 5,280 pounds. These sponges were of low grade. About 3,080 pounds of this amount was purchased for the Turkish Army, Navy or other State-owned industrial organizations. The balance was consumed through regular market channels.

Stocks: Market circles estimate present stocks of sponges at some 6 metric tons, of which 11,550 pounds are in the hands of merchants and exporters.

Foreign Trade: According to well informed trade circles, exports of the 1948 crop and stocks

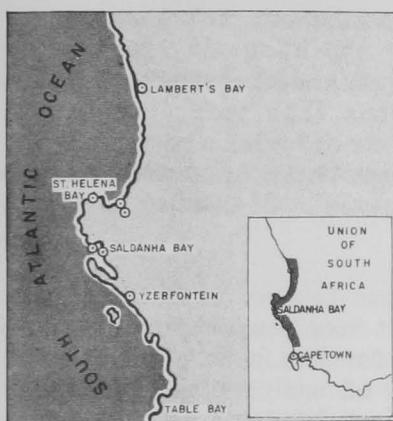
Germany is also expected this year to enter the market with substantial purchases. This has resulted in preparations for the season by a much larger number of sponge-fishing boats. Furthermore, at least one export firm has decided this year to advance funds to a number of sponge-fishing boat captains to help them better to equip themselves for the coming season. Consequently, it is expected that this year's crop will reach and may even exceed 40 metric tons.



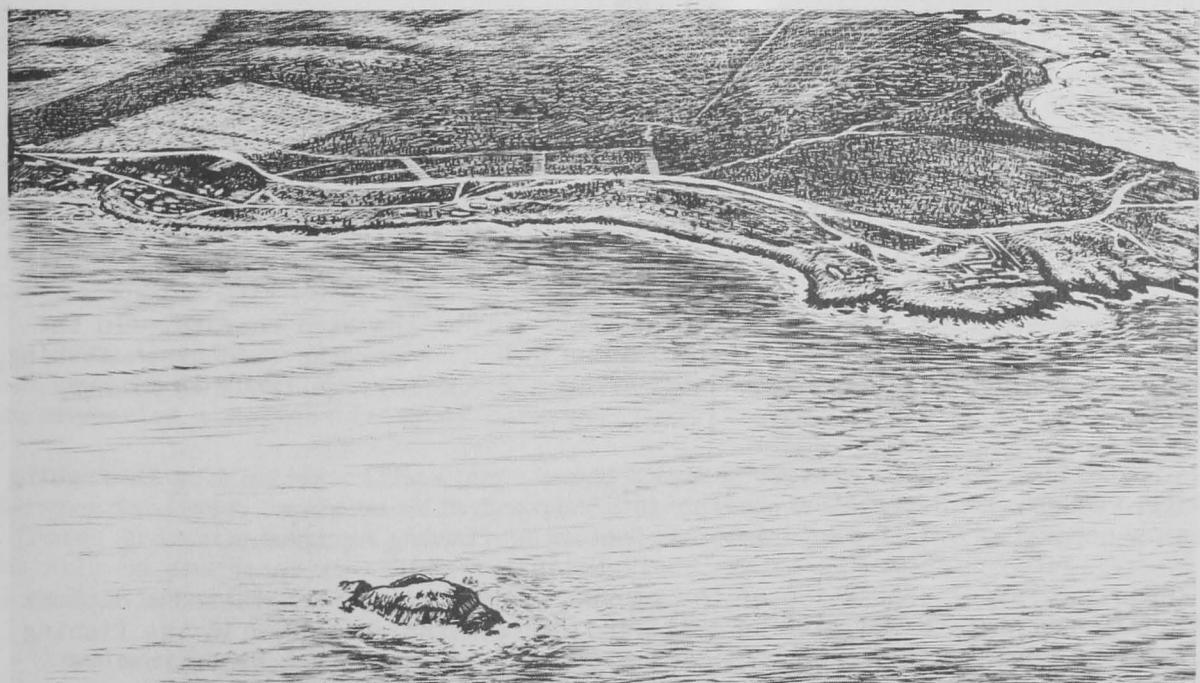
Union of South Africa

BUILDS PRIVATE FISHING HARBOR AND PLANTS: South Africa's first private fishing harbor has been under construction since November last year at Yzerfontein, between Cape Town and Saldanha Bay, 15 miles from Darling, and will be finished by December 1949. It will be used as a base for pilchard and tuna fisheries, to supply a cannery plant and fish reduction plant (daily capacity of 96,000 pounds), according to the British periodical, The Fishing News, of August 13, 1949.

The project (to cost approximately \$1,200,000) is based on American experience, and the company will use California-type boats and purse-seine methods. The reduction and cannery plant will be in full production in 1950, while a 15-ton-an-hour shark liver factory is already in operation.



SOUTH AFRICAN COAST WHERE A
CONSIDERABLE EXPANSION OF THE
FISHERIES HAS TAKEN PLACE DURING
THE PAST THREE YEARS.



YZERFONTEIN, SOUTH AFRICA, WHERE A PRIVATE FISHING HARBOR AND NEW FISH MEAL, OIL, AND CANNING PLANT IS NOW BEING ERECTED. A SHARK LIVER OIL PLANT IS NOW IN OPERATION AT THIS SITE.

United Kingdom

EXPANDS FISHING FLEET: The president of the British Trawler Owner's Federation stated that British trawler owners have under construction or on order 80 new trawlers of the most up-to-date type, according to the July 16 British publication, Fish Trades Gazette. The cost (approximately \$32,240,000) is being found by private enterprise without any Government loan or backing. These new British trawlers will bring the catching capacity considerably over that of prewar, and the Federation is already preparing a scheme to keep the vessels in port in rotation to prevent glutting the market with unsaleable supplies of fish.

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IMPORTS CANNED SALMON FROM U. S. S. R.: Practically the whole of the total British imports of canned salmon during the first six months this year (3,808,000 pounds, valued at approximately \$2,100,000) originated in the Soviet Union, according to the August 27 Foreign Trade of the Canadian Department of Trade and Commerce.

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PURCHASES CANNED SARDINES FROM YUGOSLAVIA: Agreement has been reached in London with representatives of the Government of Yugoslavia for the purchase by the British Ministry of Food of 80,000 cases (8 million cans) of sardines (1949 pack), according to an August 2 report from the American Embassy at London.

The first shipment will leave Yugoslavia in September 1949 and supplies will be on sale in the United Kingdom next year. The sardines will be packed in the popular quarter-club can containing 4½ ounces net weight.



Yugoslavia

TECHNICAL FISHERIES SCHOOL: Upon the initiative of the Croatian Ministry of Fisheries, the first Yugoslav technical school for fisheries will be opened shortly at Zara (Zadar), according to a June 29 American consular report from Belgrade. The course of study will last three years.

During their first year, all students will pursue the same courses. In the two succeeding years students will specialize in one of several branches: fishing, scientific testing, the fishing industry, domestic and foreign trade in fishery products, etc.

In addition to their classroom work, the students will participate in fishing expeditions and oceanographical investigations, and will be given practical experience in canneries and in factories manufacturing fishing equipment.

Upon successful completion of the course, students will be granted a diploma as fishery technicians and will be qualified for leading positions in the fishing industry. Graduates will also be entitled to apply for commissions as reserve officers of the Yugoslav Navy.



International

SALTED COD—WORLD STUDY OF PRODUCTION AND MARKETING: The first in a series of fisheries studies, Salted Cod and Related Species, was issued in August by the Food and Agriculture Organization (see review of this publication on page 70 of this issue). This commodity study of salted cod and related species covers world landings, production, imports, exports, craft, fishing grounds, etc.

The report shows that in the interwar period 1920-39, the world's production of salted cod and related species averaged 259,000 metric tons (dried weight) annually. Four of the producing countries (France, Iceland, Newfoundland, and Norway) accounted for the bulk of salted fish production; the Latin countries in Europe and the Americas are the main consumers. Approximately 90 percent of total production entered international trade.

Fisheries in general play an important role in the economies of these countries, and salted fish forms a significant part of their fisheries industry. Thus their whole economy has always been very sensitive to changes in the salted fish trade.

Production of salted cod and related species is confined mainly to fish caught off the eastern and western shores of the North Atlantic Ocean. Smaller quantities of salted fish are also produced from similar species caught in the Pacific Ocean, mainly by the United States and Japan, but this production is not considered in this study. The term "salted fish" comprises fish preserved by means of salt (sodium chloride) and includes the following species: cod (Gadus morrhua); haddock (Melanogrammus aeglefinus); hake (Merluccius merluccius); cusk or tusk (Brosme brosme); pollock, saithe, or coalfish (Pollachius virens); and ling (Molva molva). The producing countries are of two main types: those that base their industry almost entirely on exports (Canada, Faroe Islands, Iceland, Newfoundland, and Norway), and those that produce solely or mainly for domestic markets (France, Portugal, and Spain).

The outbreak of World War II in 1949 disrupted the salted fish industry. World production of salted cod and related species declined rapidly, and in 1943 and 1944, it totaled only about 1/3 of the average for the immediate prewar years. The main reason for the decline was the diversion to fresh and frozen products. However, by 1947, salted fish production was back to the 1938 volume. Total production for that year was 253,000 tons, somewhat more than the high 1938 production. The 1948 world figure is some 40,000 tons less than in 1947.

During the 1920's and 1930's, fish prices fluctuated greatly. In spite of quadrupled prices, postwar demand for salted fish has been high. Temporary gluts, however, emphasize the instability of markets.

Many salted fish exporting countries are expanding their fishing capacity, and landings are likely to increase further. If the present expanded markets for fresh and frozen products contract, some of the raw material now being utilized in these forms will be processed as salted and dried fish, and so add further to the substantial quantities which are already being produced.

There are many questions about production and distribution policies in relation to the salted fish industry to be solved for the future. Action coordinated through an international approach has yet to be tried. Even national approaches to these problems have been difficult because of diversified ownership of the tools of production and geographical and administrative decentralization in processing operations and the export trade.