

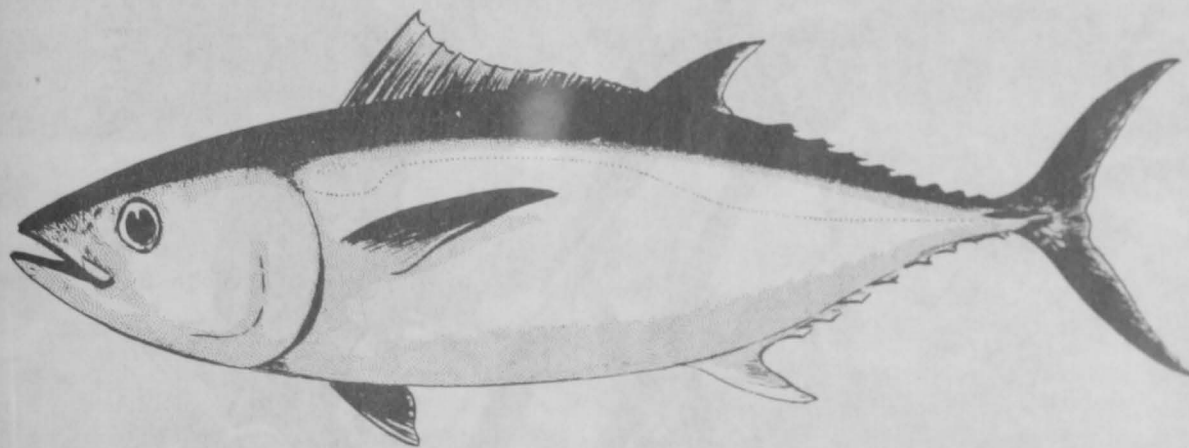


## Australia

### AMERICAN INTERESTS REQUEST PERMISSION TO FISH FOR TUNA IN AUSTRALIAN WATERS:

An opportunity has arisen to test pole fishing with live bait and purse seining for tuna in Australian waters, the July 1950 Fisheries Newsletter of the Australian Director of Fisheries reports. Negotiations are now taking place between American interests and the various Australian Departments concerned to facilitate the entry of the tuna vessels in that country's waters.

The offer to test live-bait pole fishing has been made by the general manager of the Fiji-Samoa tuna enterprises (see Commercial Fisheries Review, September 1950, p. 52). These companies plan to bring a tuna clipper, live-bait boat, and a refrigerated carrier, manned by experienced crews, to see if they can catch in Australian waters the tuna that they have failed to take in sufficient quantity in Fijian waters.



SOUTHERN BLUEFIN TUNA (THUNNUS MACCOYII) IS CAUGHT NEAR AUSTRALIA.

A somewhat similar offer has been made by one of California's largest tuna packers through a company in Sydney. This company plans to send a purse-seine skipper and vessel, and a skilled crew.

In addition to proving if tuna can be taken in Australian waters in commercial quantities by either or both of these two fishing methods, the exploratory fishing planned would provide a valuable opportunity for training Australian crews in both pole fishing and purse seining, provide employment for Australian fishermen, and greatly increase Australia's dollar-earning capacity.

It is pointed out that neither of the above methods is within the financial resources of the average Australian fisherman, but for him there will always remain trolling, which is capable of considerable expansion in New South Wales and can be introduced to other States.

SPINY LOBSTER AND TUNA EXPLORATIONS PLANNED: To investigate the prospects of finding new spiny lobster (crayfish) grounds in Western Australia, the Commonwealth Scientific and Industrial Research Organization has chartered the Villaret, a 139-metric-ton vessel. The vessel will operate in an area of 1,200 square miles which extends from North-West Cape to Onslow, and northwards to Barrow and Monte Bello Islands, the Western Australian Fisheries Department reports.

The vessel is being equipped with the latest quick-freezing and processing equipment and will be as modern and up-to-date as any on the Australian coast similarly engaged. In addition to the standard type of lobster pot, experiments will be made with a recently designed pot not previously used in Western Australia. Special lighted buoys for night hauling will be used.

Trolling for tuna and the operation of fish traps will also be undertaken with a view to gauging the commercial possibilities of these two methods of fishing.

Should the investigations prove favorable, it is believed that the spiny lobster fishing areas of Western Australia (already a valuable dollar-earning source) could be almost doubled, the July 1950 Australian Fisheries Newsletter states.

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UNITED STATES LEADING IMPORTER OF AUSTRALIAN SPINY LOBSTER TAILS: Frozen spiny lobster tails are fast becoming one of Australia's most important items in



AUSTRALIAN FISHERMEN HAUL UP A LOBSTER POT INTO THEIR CUTTER. CATCHES ARE VARIABLE, DEPENDING ON THE CONDITIONS AT SEA. THEY'RE LIGHT WHEN A TURBULENT SEA KEEPS THE LOBSTERS IN THEIR CREVICES OR CLINGING TO THE ROCKY BED, AND GOOD WHEN THEY'RE CRAWLING ON THE SEA BED FORAGING FOR FOOD.

its postwar trade with the United States, according to a report from R. R. Ellen, Australian Government Trade Commissioner at New York City. A relatively small item in 1947, when less than 100,000 pounds were shipped from Australia to the United States, the spiny lobster industry has had a spectacular development over the last three years. In 1948, more than 500,000 pounds were sent to the United States; and in

the calendar year of 1949, exports tripled to the record figure of more than 1,500,000 pounds (valued at \$1,033,167). Since then, exports have been steadily climbing, with 2,609,996 pounds shipped to the United States from July 1949 to the end of June 1950.



A PACKER DISPLAYS TWO AUSTRALIAN SPINY LOBSTERS READY FOR PROCESSING.

gauged, and exporters have hopes of developing the trade to a point where this Australian food specialty will be selling in many retail stores.

The Australian spiny lobster (or marine crayfish), caught in the cool southern waters, is an entirely different species from the rock lobster caught in and around the Caribbean. It has a flesh color varying from white to pink and pale orange. For export to the United States, only the pure white is classified as "fancy grade." Processing of the spiny lobsters takes place within a few hours of catching, and every care is taken in their handling to avoid bruising and marking. As the habitat of the Australian spiny lobster is the dark cool waters of the sea floor, speed in transporting it to processing and freezing points is essential.

Specific Department of Commerce and Agriculture regulations determine the temperatures at which spiny lobster tails are frozen, stored, and shipped. The tails, which must be severed from the spiny lobsters while alive, are cleaned in clear water, wrapped in cellophane, and quick-frozen at  $-20^{\circ}$  F. They are shipped to the United States in 20-pound packages.

Western Australia is by far the largest shipper of "tails" to the United States, but substantial quantities are also shipped from Tasmania and South Australia. The annual catch of spiny lobsters in Western Australia is more than 6,000,000 pounds, or almost one third of that State's total fish production. Most of these shellfish are

The United States is Australia's biggest spiny lobster customer, taking about 96 percent of the season's exports (valued at \$1,360,000). In the 1948-49 season, Great Britain, the British West Indies, India, and Singapore also took shipments. Early shipments of the tails were absorbed by the restaurant and hotel trades, but the capacity of the Australian fisheries has not been fully



taken in the Abrolhos Group--coral islands and reefs extending for about 50 miles and lying 40 miles off the coast near Geraldton. The other fishing areas in Western Australia are coastal waters west and north of Fremantle.

Lobster tails promise to be a valuable dollar earner for Australia.

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FISH CANNERS URGE PROTECTION FROM IMPORTS: Commenting on the closing of three Australian fish canneries this year, the Secretary of the Fish Cannery Association of Australia said the Commonwealth Government would have to take urgent action to protect the industry or its future would be seriously prejudiced, reports the Australian Fisheries Newsletter in its July 1950 issue. Referring to the successful development of tuna canning in New South Wales last year, which marked the beginning of exploitation of Australia's tuna resources, he pointed out that this new development would be seriously retarded if the Government did not find some means of protecting the industry from imports.

The Fish Cannery Association, as a general measure of protection from imports, has asked the Government to fix maximum imports from easy-currency countries at 100 percent of their 1938-39 shipments, and from dollar countries at 50 percent.

Of the three canneries that ceased operations, two are now processing frozen fish, and the other was sold to a crayfish-processing company. Australia now has 15 canneries operating, at least to some extent.



## Canada

FISHERIES DEPARTMENT ESTIMATES FOR 1950-51 EXPENDITURES: Main and supplementary estimates of expenditures by the Canadian Department of Fisheries for the fiscal year 1950-51 were approved by the House of Commons during its recent session and include activities in the fields of fish inspection, patrol and protection, fish-culture development, research, education, bait services, and international fisheries commissions, according to that Department's Trade News of July 1950. The Department's estimates provide for expenditures totaling C\$10,651,174, including C\$1,547,588 for supplementaries.

A joint federal-provincial working committee to unify government operations across Canada in fisheries protection, inspection, and development generally has been established.

The largest amount (C\$4,088,650, an increase of C\$864,250 over the previous fiscal year) of the 1950-51 funds will be spent for the maintenance of fisheries inspection, which includes salaries for fishery officers and guardians and the cost of fisheries patrol and protection services.

The East Coast administrative machinery has been revamped, and plans call for the reorientation of areas of administration, and in some cases, the reallocation of duties and the engagement of new staff.

In the inland areas, the Department's staff has been increased and services for whitefish inspection have been stepped up. The fisheries of the Northwest Territories, particularly those of Great Slave Lake, are expanding in economic impor-



tance and Federal officials feel keenly their responsibilities to encourage the utilization of, but at the same time the perpetuation of, the valuable fish stocks there. In Newfoundland, the Department has made a substantial increase in its inspection staff.

Similarly in fish-culture development, continued expansion of the work requires an appropriation of C\$779,045 for 1950-51, compared to C\$693,400 last year.

The main estimates also provide for an expenditure of C\$250,000 by the Department's Information and Educational Services. This provides for increased activities in technical education of fishermen.

The Fisheries Research Board of Canada was provided with an appropriation of C\$1,550,600 for operation and maintenance, an increase of C\$151,925 over last year's funds, and includes C\$103,000 for the acquisition of research equipment. For construction and improvements by the Board, the estimates provide an expenditure of C\$503,000. Expansion of both biological and technological services of the Board is provided for in these funds. At Halifax, N. S., provision is made for the extension of the work of the Atlantic Experimental Station, and new construction is being undertaken which, among other things, will provide space for pilot-plant experiments. At St. Andrews, N. B., similar building expansion is planned for the Atlantic Biological Station in order to enlarge their conservation and development studies activities. Both of these undertakings are the result of demands by the industry for increased fisheries research.

In British Columbia, the Department has substantially increased its biological and engineering activities.

The estimates contained C\$548,400 for the maintenance and extension of bait services. Three additional bait depots are provided for Newfoundland.

Other funds provided were C\$180,650 for Canada's share of the expenses of the International Pacific Salmon Fisheries Commission; C\$50,000 for Canada's share of expenses of the International Fisheries Commission for the regulation of the North Pacific halibut fisheries; and C\$500,000 for Canada's share of expenses of the Provisional Fur-Seal Agreement.

The Department again has been given special funds: C\$100,000 to be used to provide assistance in the construction of vessels of the dragger and long-line type; C\$100,000 to provide assistance in the construction of bait-freezing and storage facilities; and C\$80,000 to provide for the extension of educational work in cooperative producing and selling among fishermen.

NOTE: VALUES SHOWN ARE IN CANADIAN DOLLARS (C\$). VALUE OF 1 CANADIAN DOLLAR IS APPROXIMATELY 90 CENTS U.S.

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FISHERIES SUPPORT PROGRAM, FISCAL YEAR 1950: With the exception of the purchase of 4,476,802 pounds of Manitoba lakes frozen fish, valued at C\$281,740, no other species of fish were supported by the Canadian Government during the fiscal year ended March 31, 1950, according to the annual report of the Fisheries Prices Support Board.

During the previous fiscal year (1948-49), the Board supported the prices of East Coast fish by purchasing 151,026 cases of canned cod (and related species), herring, and mackerel. While arrangements had been made to dispose of the entire

purchase of canned fish before March 31, 1949, certain stocks still remained in warehouses at that date pending shipment. The loss incurred in the 1949-50 fiscal year in disposing of this balance amounted to C\$604,985. The loss incurred in the previous fiscal year was C\$538,988, bringing the total cost for this program up to C\$1,143,973, according to a July 10 American Embassy dispatch from Ottawa.

A limited program to assist Newfoundland fishermen (but not processors) by the purchase of 1949 carry-over stocks of salt cod was announced by the Minister of Fisheries in the House of Commons on June 28. The Fisheries Prices Support Board will undertake this buying at prices averaging two-thirds of the prices prevailing at the beginning of last year.

NOTE: VALUES SHOWN IN CANADIAN DOLLARS (C\$). THE CANADIAN DOLLAR AT THE OFFICIAL RATE IS WORTH \$0.9091 U. S.



## Chile

DEVELOPMENT OF FISHERIES PLANNED: The Chilean Government has maintained its policy of fostering the fishing industry, according to an August 8 American Embassy dispatch from Santiago.

Chile's fisheries were surveyed during April and May by a representative of the Food and Agriculture Organization. The Corporacion de Fomento de la Produccion, on the basis of recommendations made in this survey, has announced a program which includes the building of fish processing plants; the development of a whaling industry, hydrogenation of fish oil, and ship construction; aid to fishery schools and organizations; improvement of marketing facilities; and preparation of a map of Chilean fisheries.



## Costa Rica

GROUP OF DANISH FISHERMEN INVITED TO DEVELOP COSTA RICAN FISHERIES: The Government of Costa Rica invited a group of Danish fishermen to visit Costa Rica. This group is interested in transferring a fishing fleet and processing factories to Costa Rica in order to catch and preserve tuna and other fish, and to manufacture fish meal and oils, a September 11 American Embassy dispatch from San Jose reports. However, no definite plans have been formulated as yet.



TYPICAL COSTA RICAN SAILBOAT USED FOR HOOK AND LINE FISHING.

## Ecuador

FISH MARKETING SITUATION:<sup>1/</sup> Ecuadoran public markets in June 1950 had adequate supplies of fresh fish and shellfish. Most small fish weighing less than two pounds are sold by the piece without weighing. Since ice is used sparingly, most of the fish and shellfish are sold within 12 hours of being caught.

Most fishing is done with hook and line from canoes, or reed floats. The principal fishing ports in the Guayaquil area, other than the estuary and bay of Guayaquil, are Salinas, Libertad, and during the dry season from June to November, Ayangué and Entroda. At other seasons, roads to the latter are impassable.



SELLING LIVE CRABS OUTSIDE THE PUBLIC MARKET IN GUAYAQUIL, ECUADOR.

There is a tremendous fluctuation in prices for fish and shellfish in the markets, not only seasonally, but from day to day. This is due to the lack of refrigerated storage facilities so that all fish must be sold as soon as possible. Prices drop sharply when supplies are abundant and rise steeply on days of scarcity. The lack of processing plants, either canning or reduction, contributes to the general instability of prices.

Ecuador has been a net importer of processed fishery products, and seems likely to continue to be in spite of proven tuna resources in the Galapagos. There appears to be no likelihood of establishing any canning facilities during the remainder of 1950. No dried or salted fish was being imported during the first half of 1950, but adequate supplies were being produced both in Ecuador proper, especially in the Galapagos Islands. Species commonly used are sharks, bonito, and albacore.

Although a fairly wide selection of fishery products was imported in the pre-war period, 1935-39, the actual quantities were relatively small and only sardines reached a respectable amount--varying between 750,000 pounds and 1,500,000 pounds annually. Imports from the United States averaged a little better than 880,000 pounds per year.

<sup>1/</sup>THIS IS THE ELEVENTH REPORT IN A SERIES TO GIVE INFORMATION ON CURRENT AND POTENTIAL MARKETS FOR UNITED STATES FISHERY PRODUCTS IN SOUTH AMERICA. MILTON J. LINDNER AND ROBERT O. SMITH, UNITED STATES FISH AND WILDLIFE SERVICE REPRESENTATIVES, WERE IN SOUTH AMERICA IN JUNE INVESTIGATING MARKETS IN CONNECTION WITH A SURVEY SPONSORED COOPERATIVELY WITH THE U. S. DEPARTMENT OF AGRICULTURE'S OFFICE OF FOREIGN AGRICULTURAL RELATIONS. MORE DETAILED REPORTS WILL BE ISSUED AT A LATER DATE AS "FOREIGN MARKET CIRCULARS" AND WILL BE AVAILABLE FROM THE BRANCH OF COMMERCIAL FISHERIES, U. S. FISH AND WILDLIFE SERVICE, WASHINGTON 25, D. C. THE ANNOUNCEMENT OF THIS STUDY APPEARED IN COMMERCIAL FISHERIES REVIEW, JUNE 1950, P. 18, AND THE FIRST REPORT IN THIS SERIES ON THE ARGENTINE REPUBLIC ON PP. 33-4 OF THE SAME ISSUE; THE SECOND ON THE NETHERLANDS WEST INDIES APPEARED IN JULY 1950, PP. 46-7; AND OTHERS APPEARED IN THE AUGUST 1950 ISSUE AS FOLLOWS: THE THIRD ON URUGUAY, PP. 61-2; THE FOURTH ON PARAGUAY, PP. 52-3; THE FIFTH ON BRAZIL, P. 41; THE SIXTH ON BOLIVIA, PP. 39-40; THE SEVENTH ON SURINAM, PP. 57-8; THE EIGHTH ON VENEZUELA, PP. 62-3; THE NINTH ON CHILE, PP. 43-4; AND THE TENTH IN THE SEPTEMBER 1950 ISSUE, PP. 53-5.



Postwar import statistics are available only for 1946-47, and do not show the volume of present business. Considering the data at hand, it is evident that the demand for anchovies, smoked herring, shrimp, crabs, lobsters, and caviar is very light, and the total dollar value for each, except caviar, is less than \$1,000. Only two other categories, in addition to canned sardines, are represented in sufficient volume to warrant interest on the part of United States processors: miscellaneous salted and canned fish. The former, now supplied by Peru to the extent of over 148,000 pounds in 1947, is known to consist mostly of shark and bonito. Canned fish consists of such items as mackerel in various forms, fish roe, and other specialty products.

Data for 1946-47 show a rapid recovery in sardine imports, so that the 1947 figure of 767,000 pounds is approaching the 1935-39 average of about 1,162,000 pounds annually. However, the quantity from the United States has declined from 83 percent (5-year average 1935-39) to 61 percent (average 1946-47). The chief United States competitors have changed from Japan and Spain (prewar) to Canada, Venezuela, Peru, and Norway.

Ecuador's problem with respect to imports from the United States is the now familiar one of limited dollar exchange. With the possible exception of sardines, Ecuadoreans prefer to turn dollars into automotive products, machinery, tools, household equipment and supplies, and synthetic materials. The probability is remote that any unusual demand for fishery products will develop.

The Ecuadoran economy is based on agriculture and is dependent on imports for most types of manufactured goods. All imports into Ecuador are subject to exchange controls. Import permits must be obtained from the Central Bank, which is the only agency authorized to issue permits. When the import permit is issued, the dollars are granted.



CUTTING AND SKINNING A SHARK AT A STALL IN THE GUAYAQUIL PUBLIC MARKET.

There are three classes of commodities under the import permit system: List A is designated "essential," List B "useful," and List C "non-essential." An import permit for items listed under either A or B carries with it permission to buy the necessary dollars from the Central Bank at the rate of 13.50 sucres per U. S. dollar. Import permits for "C" items do not include authority to purchase dollars from the Central Bank. Such dollars must be purchased in the free market at rates which have fluctuated from 16.50 to 18.50 sucres to the U. S. dollar during the past 18 months. Fishery products are on List "C," except canned fish which is on List "B." Since List C items cannot be imported with Central Bank dollars, the full c.i.f. value of the shipment in dollars must be deposited with the Central Bank at the time the import permit is issued.

Ecuador extends 100 miles north and 400 miles south of the equator. The population was estimated in 1948 at 3,362,000. Of this number, from 250,000 to 300,000 live in and around the port of Guayaquil.

## El Salvador

**LEGISLATION PASSED TO ENCOURAGE FISHERIES ENTERPRISES:** Legislation designed to encourage the development of commercial fishing and canning industries in El Salvador was passed by the Salvadoran Government, an August 17 American consular dispatch from San Salvador states. Reports indicate that fish are plentiful in Salvadoran coastal waters, but El Salvador has never had a commercial fishing enterprise or a canning industry.

The law (Decree Law No. 726, published in Diario Oficial of August 8, 1950) provides that during the period of 15 years following its publication, any fishing or canning industry established in El Salvador will have the benefit, during that period, of special concessions among which are: (1) tax free operations; (2) duty-free imports of all necessary equipment, machinery and supplies, including fuel oil; (3) the right to utilize fishing boats and equipment freely and without hampering restrictions in the bays, estuaries, rivers and at sea.

In order to qualify for the special benefits awarded, the law specifies that future canning or fishing industries comply with the following conditions: (1) be organized as a corporation under the laws of El Salvador; (2) at least 50 percent of the stock consist of Salvadoran capital, and no stock can be owned or acquired by foreign governments; (3) 80 percent of the employees must be Salvadoran citizens; (4) priority be given to the sale of the production in the domestic market; (5) sell the production to government, social benefit institutions at a discount of no less than 50 percent of the profit obtained from sale to private firms.

Article 6 of the Decree declares null and void a law passed in 1921 which gave an exclusive concession to a Salvadoran citizen for the establishment of a canning industry. No cannery was established in El Salvador by this citizen, despite the legislation which had enabled a virtual monopoly, and the fact that such a law remained on the books has militated against the establishment of a canning industry by other interested persons. The present law provides for free competition in both the fisheries and canning fields.

It is interesting to note that almost simultaneously with the publication of Decree No. 726 there arrived in El Salvador the first commercial fishing boat destined to fish exclusively in Salvadoran waters and sell its production in the local market under the terms of the new law. This boat, a 9-ton, Diesel-driven fishing craft, purchased in California, is to be operated by two American citizens who reportedly have the financial backing of a Salvadoran firm. Although this business is being started on a very small scale, it is important in that it is the first commercial fishing enterprise ever begun in this country, and should eventually make available fishery products at a cost low enough to bring them within the range of the low-income groups of El Salvador.



## German Federal Republic

**GOVERNMENT MEASURES AFFECTING THE FISHERIES:** Equalization Fund: The amount paid from the Equalization Fund on unsalable and condemned fish was reduced from 6 to 5 pfennigs per  $\frac{1}{2}$  kilo (from 1.3 to 1.1 cents per pound); the minimum price of fish sold for industrial uses was thereby lowered from 10 to 9 pfennigs (from 2.2 to 2 cents per pound), as the price of the fish to the processor remained at 4

pfennigs (1 cent per pound). The shipowners are said to object to the decrease, claiming that their break-even point is 15 pfennigs (3.2 cents per pound), reports an August 22 American consular dispatch from Bremerhaven.

The Equalization Fund is derived from a charge on each kilo of fish landed in Bremerhaven, Cuxhaven, Hamburg, and Kiel. Collections for the Fund, which ceased on April 1, 1950, following the expiration of the law under which they were made, were resumed on July 1, 1950, upon passage of a new law. It has been possible to continue payments during the interval between laws with the surplus which had been accumulated.

From this fund, DM2,000,000 was released (\$476,000) for credit to fish wholesalers, fish importers, and the industry. Of this amount, DM730,000 (\$173,740) was for use in Bremerhaven, DM530,000 (\$126,140) in Hamburg, DM490,000 (\$116,620) in Cuxhaven, and DM250,000 (\$59,500) in Schleswig-Holstein.

Loans for the Fisheries: Land Bremen has offered a guarantee of DM2,000,000 (\$476,000) for short-term bank loans made through the Fischereihafen-Betriebsgesellschaft (the port administrative authority), Bremerhaven, on the current herring catch. The Fischereihafen-Betriebsgesellschaft has been authorized to apply for loans totaling DM5,800,000 (\$1,380,400) of which DM4,000,000 (\$952,000) is to be loaned on salted herring and DM1,800,000 (\$428,400) on marinated herring. Loans cannot exceed 60 percent of the processed value of the fish.

The press reports that Land Niedersachsen has also established a credit of DM2,000,000 (\$476,000) for the Cuxhaven herring industry.

A credit of DM3,100,000 (\$737,800) has been approved for the renovation of motors and equipment of the high sea and coastal fisheries of Schleswig-Holstein. Of this sum DM2,000,000 (\$476,000) will be advanced by the Federal Government from funds for use in areas of heavy unemployment, and DM1,100,000 (\$261,800) by the Land.

Subsidy for Coal Used By Fishing Vessels Extended: The law providing a subsidy of DM15,00 (\$3.57) per ton on coal used by the high sea fisheries has been extended through June 1951. The law was originally due to expire on June 30, 1950, but was prolonged because of the difficult financial position of the fisheries.



## Iceland

HERRING PRICES RAISED: Prices of fresh herring for processing into oil and meal were fixed at 65 kronur per mal (approximately \$1.34 per hundredweight) by the Icelandic Minister of Fisheries on July 6, according to a July 6 American consular dispatch from Reykjavik. The price last year was 40 kronur per mal (83 cents per cwt.).

Two devaluations of the Icelandic krona were primarily responsible for the rise in the price of fresh herring in terms of Icelandic currency.

On July 7, the State Herring Board fixed the price of fresh herring for salting at 110 kronur (approximately \$6.75) per barrel (209 pounds) without heads (or \$3.23 per cwt.). Provided there will be ample fresh herring this summer, the Icelanders expect to salt approximately 200,000 barrels for export to countries with which Iceland has concluded Trade Agreements.



## Japan

EXPORT OF SKILLED FISHERMEN TO INDIA: Three expert Japanese fishermen and an interpreter departed for Bombay, India, on August 14 to assist in the commercial development of fisheries in that area, according to the August 12 Weekly Summary of SCAP's Natural Resources Section. This is the first "export" of Japanese fishermen to overseas fisheries since the termination of hostilities.

Request for the fishermen was originated by commercial interests in Bombay with the approval of the Indian Government. The contract provides for the services of the skilled fishermen for a period of one year during which the Japanese technicians will supervise and participate in the exploration of the sea areas about Bombay. The Japanese fishermen will modify fishing boats and gear presently available at Bombay to meet fishing conditions which are peculiar to the Bombay area. The project provides for the Japanese to train Indian fishermen in the new type of operations.

JAPANESE GOVERNMENT



## Mexico

EXPORT DUTIES ON SHRIMP: Owners and operators of freezing plants in the Mazatlan area (Sinaloa) on the west coast of Mexico are requesting the Government to put a duty of 3,000 pesos (about \$347) per metric tons on fresh shrimp, thus making it impossible to send fresh shrimp to the United States. However, the boat operators fear that a monopoly would result, a September 6 American consular dispatch from Mazatlan reports. The refrigerating plants are willing to pay an export duty of 650 pesos (about \$75) per ton on frozen shrimp. To date it is believed that export duties have not been definitely established by the Government.

SHRIMP WEIRS TO BE REMOVED: It is reported that some of the weirs placed in the estuaries or lagoons of southern Sinaloa, which prevent the shrimp from migrating to the open sea, will be removed this year and the balance will be eliminated gradually over a period of time. Those operating boats offshore oppose the use of weirs as they claim small shrimp cannot reach the ocean to mature to the size demanded by the export market. On the other hand, lagoon operators, which fish from small dugout canoes, favor the continued use of the weirs which protect their supply of small shrimp for the local market. Mexican fisheries authorities point out that the removal of the weirs must be gradual and with the cooperation of the canoe fishermen because the many lagoons would make it impossible to enforce any wide-scale removal order.

AMOUNT OF SHRIMP BEING FLOWN TO THE UNITED STATES INCREASING: A new 10-ton daily shrimp flight from Ciudad del Carmen (on the east coast of Mexico) to Brownsville, Texas, was announced during August. Fishing cooperatives in Carmen have contracted with an air line for 10-ton daily air shipments to Brownsville. This flight will bring to four the number of air carriers hauling shrimp from Carmen to Brownsville, according to a September 9 American consular report from Matamoros.

SHRIMP INDUSTRY EXPANDING: Fishermen at Ciudad del Carmen are reportedly getting very large catches. In addition, August reports indicate that schools of "giant" shrimp have recently appeared in large numbers off the coast of Campeche State, a September 7 American consular dispatch from Merida states. Facilities for processing and refrigerating shrimp are being increased at the city of Campeche in order to handle the contemplated increased production.

## Norway

WEST COAST BOAT BUILDERS REPORT A SLUMP IN FISHING-VESSEL CONSTRUCTION: Norwegian west coast boat builders report that practically no fishing boats are being constructed at the present time, allegedly because of the difficulty fishermen have in raising the required capital. A fishing vessel 75 feet long costs approximately \$35,000. Loans up to three-fifths of the needed amount may be secured from the Government-operated Fiskeribanken; the remainder must be secured from private sources by prospective purchasers.

Another reason given for this slump is that war losses have been replaced and the effectiveness of the fishing fleet is reported to be double what it was before World War II, states an American Embassy dispatch from Oslo dated September 1.

It is also very difficult to secure the necessary crews to man the new vessels.

### WHALING COMPANIES CHALLENGE RIGHT OF GOVERNMENT TO FIX PRICES FOR WHALE OIL:

In a suit seeking the highest claims for damages ever presented to a Norwegian court, whaling companies have challenged the right of the Norwegian Price Directorate to levy an export tax and fix lower domestic market prices for whale oil than prevail in the world market. The damage claim is for 115 million kroner (\$16,100,000) covering losses allegedly sustained in the first three postwar years.

The Norwegian Export Council has called upon the Government to waive all export taxes.



## Peru

REVIEW OF THE FISHERIES, 1949:1/ Fishing Seasons: Peruvian fishing operations are carried on throughout the year, according to an American consular report dated June 28. The most favorable periods for the catch of the important species are as follows: Bonito - October to March; Swordfish - August to March; Tuna - Sporadically throughout the year.

The other species of fresh fish consumed locally are caught throughout the year. However, the period of greatest abundance appears to be from September to March.

Number of Vessels: Official data on the number, size, and types of boats currently engaged in fishing are not available. However, an estimate, gathered from well-informed trade sources, reveals the following:

Type	Length	Total Units
	Feet	Number
Motorized Units:		
"Boliche" type .....	36 - 45	109
"Boniteros" (covered launches) .....	32	450
Sailboats .....	24	1,500
Sea-going rowboats .....	-	750

1/ALSO SEE COMMERCIAL FISHERIES REVIEW, SEPTEMBER 1950, PP. 53-5; APRIL 1950, P. 77.

Production by Species, 1949: Bonito and yellowfin tuna are the leading species of fish produced in Peru (see table). The catch of bonito has steadily increased from 32,463,614 pounds in 1946 to 59,940,760 pounds in 1949.

Peruvian Fish Production by Leading Species, 1946-49 (Landed Weight)

Species	1949	1948	1947	1946
..... (in pounds) .....				
Atun (yellowfin tuna) .....	7,072,285	1,303,975	1,873,377	3,012,909
Barrilete (skipjack tuna) .....	3,015,247	926,757	149,373	56,280
Bonito (bonito) .....	59,940,760	43,934,557	35,275,253	32,463,614
Caballa (mackerel) .....	4,031,515	1,792,017	5,506,547	6,217,312
Cabrilla (sea bass) .....	2,410,437	2,773,536	2,161,069	1,950,516
Cojinoba (pompano) .....	2,872,888	2,605,506	5,203,029	4,379,419
Lorna (drum) .....	3,555,152	4,806,886	2,380,763	1,502,875
Machete (herring) .....	3,332,481	1,957,657	923,985	634,962
Pez espada (swordfish) .....	825,075	5,810,823	2,349,070	1,196,606
Other .....	12,516,235	13,164,824	11,889,600	9,431,479
Total .....	99,572,075	79,076,538	67,712,066	60,845,972

\* \* \* \* \*

EXPORT DUTIES: Export duties and charges are the most important source of revenue for the Peruvian Government, a September 1 report from the American Embassy at Lima states.

The basic export duty on fish of all kinds (Law No. 10545 of April 16, 1946) is 10 percent on the difference between the basic production costs at Peruvian port and the market price in the United States. For this purpose, basic production costs have been established as follows: salted fish, \$160 per short ton (907.184 kilograms, net weight); preserved fish, \$425 per short ton.

An additional export tax of 10 percent, payable on the market price exceeding by 25 percent the base price, is also levied.

The export duty on fish livers is \$10 per metric ton (net weight), but no additional export tax is collected on this item.



Republic of the Philippines

REVIEW OF THE FISHERIES, FISCAL YEAR 1949-50: Production: There was an estimated 22 percent increase in the Philippines' production of fishery products during

Table 1 - Philippine Production of Fishery Products, Fiscal Year 1949-50 & 1948-49<sup>1/</sup>

Item	1949-50	1948-49
..... (in pounds) .....		
Production from:		
Commercial licensed fishing vessels (of at least 3 metric tons) .....	128,633,157	96,684,498
Fish ponds .....	53,917,116	52,292,328
Municipal and sustenance fisheries .....	365,100,547	297,953,654
Total .....	547,650,820	446,930,480

<sup>1/</sup>Does not include gathered fishery products, such as shells, trepang, coral, etc.



the fiscal year ended June 30, 1950, when compared with production recorded for Fiscal 1949 (table 1). In view of the drastic import cuts<sup>1/</sup> on fish products, the necessity for continued increases is apparent, states an August 31 dispatch from the United States Embassy in Manila.

**Number of Vessels:** In 1949-50 there were 825 commercial licensed vessels with total gross tonnage of 20,245 metric tons engaged in the fisheries, compared with 700 vessels with a gross tonnage of 18,006 metric tons in 1948-49.

**Fish Ponds:** A total of 1,901 applications for fish-pond permits were filed during 1949-50, compared with 1,065 applications the previous fiscal year. In 1949-50, 302 permits were issued and 639 permits renewed, while the previous fiscal year only 194 permits were issued and 331 permits renewed.

There was also an increase in the acreage used for fish ponds from 171,156 acres in 1948-49 to 173,024 acres in 1949-50.

The productivity of fisheries has been seriously impaired over the past three years by the rampant use of dynamite and fish poison. Republic Act No. 428 passed during the last session of Congress declares illegal such practices and provides strict penalties. Although a downward trend has been noted in dynamite fishing, the virtual inability of the authorities to police the law will make the practice a problem for some years to come.

Table 2 - Philippine Production of Fishery Products (Including Gathered Products) Calendar Year 1948 and 1949

Item	Calendar Year 1949			Calendar Year 1948		
	Quantity	Value		Quantity	Value	
	lbs.	Pesos	U.S.\$	lbs.	Pesos	U.S.\$
Fish production .....	523,606,871	296,865,658	148,432,829	429,172,663	163,456,630	81,728,315
Shell production .....	1,593,526	186,944	93,472	30,636,412	366,601	183,301
Production of other fishery products	34,019	35,218	17,609	446,281	65,956	32,978
Total .....	525,234,416	297,087,820	148,543,910	460,255,356	163,889,187	81,944,594

**Development of Fisheries:** In line with the nation-wide drive on food production the amount of P100,000 (\$50,000) has been appropriated by special legislation for the promotion of the fisheries industry. Out of this amount, P75,000 (\$37,500) have been



allotted for the construction of three demonstration fish-farm projects and P25,000 (\$12,500) for the financing of a fishery technological building to house a pilot canning plant and fish preservation laboratory. The Philippine Bureau of Fisheries actively engaged in expanding the fishing industry by lending technical guidance, providing stocks of fish for cultivation purposes, and by offering demonstration classes on prevention of waste by proper methods of preservation.

**Imports:** Imports of fishery products decreased from 79,565,299 pounds, valued at P28,284,656 (\$14,142,328) in 1948 to 66,287,489 pounds, valued at P32,588,985 (\$16,294,493) in 1949. More of a decrease can be anticipated during 1950 due to import cuts of from 60 to 80 percent based on average c.i.f. values of imports for the years 1946, 1947, and 1948.

**Gathered Fishery Products:** Unfinished shell production (table 2) and exports shown a steady decline since 1948 due largely to increased competition from Australia

<sup>1/</sup> SEE COMMERCIAL FISHERIES REVIEW, AUGUST 1950, PP. 53-7.

and other sources and the lowered market value of commercial shell in New York. At the end of the fiscal year 1950, commercial shell exports, such as mother-of-pearl, trocha, snail and kapis, amounted to 656,066 pounds valued at P443,951 (\$221,971), compared with exports of 1,464,617 pounds valued at P976,180 (\$488,090) for Fiscal 1949. Exports of shell buttons, blanks and novelties increased during the same period from 47,399 pounds, valued at P368,912 (\$184,456) for Fiscal 1949 to 150,088 pounds, valued at P875,663 (\$437,832) for Fiscal 1950.



## Portugal

FISHERIES REVIEW, 1949: Introduction: Portuguese fisheries production (according to official statistics) in 1949 was 203,243 metric tons (excluding whales), compared with 219,964 tons in 1948 (table 1), mid-year American consular dispatches from Lisbon report. During the years 1943-49, the annual average catch amounted to about 237,000 tons.

The main types of fisheries are:

1. Coastal fishery - concerned mainly with the production of sardines, but substantial quantities of anchovies, tuna, chinchards, and mackerel are also caught.
2. Otter-trawl fishery - conducted mainly on the high seas off the coast of West Africa in the vicinity of Cape Blanco. The chief varieties caught are whiting, pargo, sea bream, scabbard fish, dogfish, corvina, and some sole and turbot (flatfish).
3. Cod fishery - fishing on the Newfoundland Grand Banks and the west coast of Greenland. Conducted by a large fleet (mostly modern) of Portuguese schooners and trawlers.
4. Whale fishery - conducted on a small scale off the coast of Setubal and in the adjacent islands of the Azores.
5. Miscellaneous fisheries - small amounts of shellfish and fresh-water fish.

Coastal Fishery: The failure of sardines to appear off the Portuguese coast in sufficient quantities during the past two years has created economic distress in the sardine fishing industry. Before 1948, the annual sardine catch was around 100,000 tons. The catch for 1949 was only 55,842 tons, compared with 78,569 tons (table 1) for 1948. A scarcity of sardines has curtailed the fishery for the past several years. The sardine fishing season extends from May to December, but during the off-season, operations are conducted on a small scale.

The disposition of the total coastal fisheries production of 94,208 metric tons was as follows: sold in fresh-fish auction markets for public consumption, 69,709 tons; delivered to the fish canneries, 24,499 tons (consisting of 14,849 tons of sardines, 1,342 tons of chinchards, 2,077 tons of mackerel, 4,779 tons of anchovies, and 1,452 tons of tuna). About 85 percent of the fish sold to the canneries was canned in oil or sauce, and the remainder (mostly anchovies) processed in brine.

Table 1 - Landed Catch of Portuguese Fisheries by Type of Fishery and Leading Species, 1948-49  
(Official Statistics)

Type of Fishery and Species	1 9 4 9			1 9 4 8		
	Quantity	Value <sup>1/</sup>		Quantity	Value <sup>1/</sup>	
	Metric Tons	Escudos	U.S.\$	Metric Tons	Escudos	U.S.\$
<b>Coastal Fishery:</b>						
Sardines <sup>2/</sup> .....	55,842	192,202,000	7,457,438	78,569	254,665,000	10,237,533
Chinchards .....	26,655	70,750,000	2,745,100	32,375	76,932,000	3,092,666
Anchovies .....	4,564	10,173,000	394,712	3,392	15,191,000	610,678
Mackerel .....	4,524	12,507,000	485,272	1,592	6,700,000	269,340
Tuna and similar species	2,623	24,107,000	935,352	2,997	23,111,000	929,062
<b>Total<sup>2/</sup> .....</b>	<b>94,208</b>	<b>309,739,000</b>	<b>12,017,874</b>	<b>118,925</b>	<b>376,599,000</b>	<b>15,139,279</b>
<b>Cod Fishery .....</b>	<b>43,953</b>	<b>263,736,000</b>	<b>10,232,957</b>	<b>35,932</b>	<b>215,626,000</b>	<b>8,668,165</b>
<b>Otter-Trawl Fishery:</b>						
Whiting .....	13,035	108,553,000	4,211,856	12,245	104,151,000	4,186,870
Other species .....	41,510	183,822,000	7,132,294	41,082	175,127,000	7,040,105
<b>Total<sup>3/</sup> .....</b>	<b>54,545</b>	<b>292,375,000</b>	<b>11,344,150</b>	<b>53,327</b>	<b>279,278,000</b>	<b>11,226,975</b>
<b>Miscellaneous Fisheries:</b>						
Shellfish .....	9,939	11,204,000	434,715	11,157	15,680,000	630,336
Fresh-water fish .....	598	5,015,000	194,582	623	4,518,000	181,624
<b>Total .....</b>	<b>10,537</b>	<b>16,219,000</b>	<b>629,297</b>	<b>11,780</b>	<b>20,198,000</b>	<b>811,960</b>
<b>Grand Total .....</b>	<b>203,243</b>	<b>882,069,000</b>	<b>34,224,278</b>	<b>219,964</b>	<b>891,701,000</b>	<b>35,846,379</b>

<sup>1/</sup>Based on wholesale auction sales.

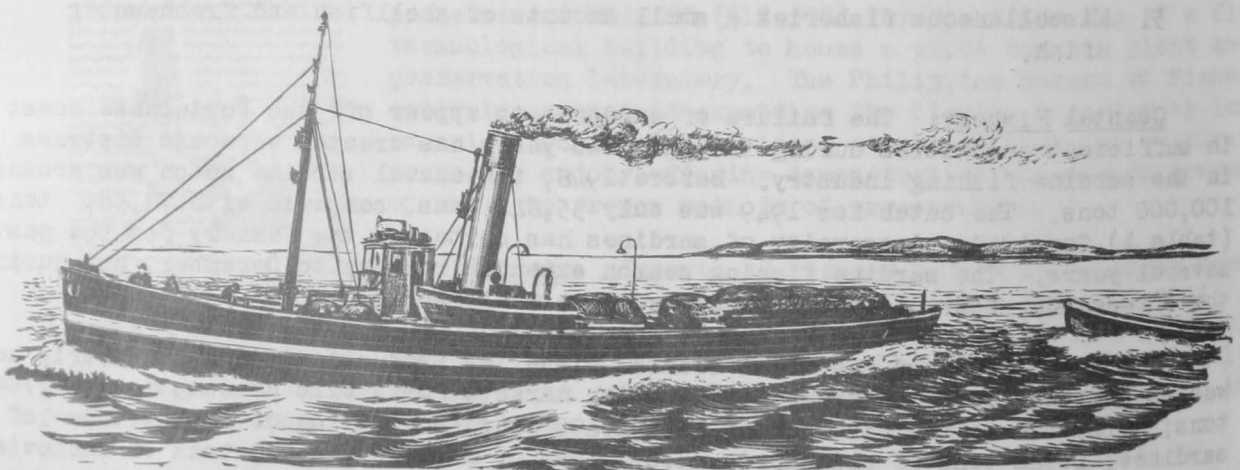
<sup>2/</sup>According to statistics compiled by the fish-canning institute, the 1949 sardine catch was 34,796 tons, valued at US\$7,002,391 (47,683 tons, valued at US\$9,212,312, in 1948); and the total coastal fisheries catch was 79,879 tons, valued at US\$10,050,830 (84,861 tons, valued at US\$12,303,813, in 1948). These are the figures usually used by the trade.

<sup>3/</sup>The gremio of owners of trawling vessels, a semi-official trade organization, reports the 1949 catch as 41,700 tons and the 1948 catch as 42,669 tons.

In addition to canned and brined products produced by the canneries, it is estimated by trade authorities that the scrap sold to factories yielded 700 tons of oil and 400 tons of fish meal.

**Wholesale Prices:** The rise in the wholesale price of sardines for canning and public consumption that took place during 1949 was attributable to the prevailing scarcity of fish (table 3).

**Developments and Problems in the Sardine Fishery:** The sardine fishing industry and the important canning industry, which depends on it, went through a disastrous year in 1949.



TYPICAL PORTUGUESE SARDINE MOTHERSHIP (GALEAO) USES LARGE SEINE NET WHICH OCCUPIES MOST OF THE DECK SPACE. VESSEL IS ABOUT 40 GROSS METRIC TONS AND 66 FEET IN LENGTH.



Because of the failure to organize a systematic, scientific study of the sardine fishery, very little is known concerning the causes of the sardine scarcity from which Portugal has suffered during the last two years. The only concrete development toward this end is an ECA technical assistance project recently approved under which Dr. Magalhaes

Ramalho, Director of the Marine Biology Station of Lisbon and Portugal's leading expert in the field of marine biology, planned to leave for the United States in July 1950 on a two-month study mission. Dr. Ramalho, accompanied by Dr. Jose Mouzinho de Figueiredo of the Fisheries Research Office, a body recently established by the fishing gremios, was to study scientific research projects carried out in the United States to determine the causes of the disappearance of sardines from the California coast, with a view to determining whether similar measures can be applied in Portugal. Whether the necessary funds will be forthcoming from the Government and other sources to mount a similar project in Portugal is problematical. The ECA technical assistance offered at least represents a hopeful beginning.

Table 2 - Portuguese Canned Fish Pack by Species, 1949 (Trade Statistics)

Species	Quantity
	Std. Cases
Sardines .....	726,870
Anchovies .....	231,500
Mackerel .....	79,508
Tuna and similar species .	69,023
Chinchards .....	54,182
Other species .....	20,355
Total .....	1,181,438

1/A wooden case holding 100  $\frac{1}{4}$ -club cans (30 mm. size), each can containing  $4\frac{1}{2}$  oz. Gross weight of case is approximately 51 pounds, while the contents of the case (excluding the weight of the wooden case) is about 42 pounds.

Table 3 - Portuguese Wholesale Average Prices for Sardine Fishery Catch, 1948-49 (Trade Statistics)

Species	U.S. cents per lb.		Escudos per kilo	
	1949	1948	1949	1948
Fresh sardines for:				
Canning .....	10.4	9.9	5.90	5.40
Brine .....	4.1	4.8	2.31	2.61
Local consumption .....	8.2	7.6	4.66	4.16
General use .....	9.1	8.8	5.18	4.80
All other species .....	3.1	3.8	1.74	2.07
Total average for coastal fishery catch .....	5.7	6.6	3.24	3.61

Meanwhile, the economic crisis in the sardine ports, brought about by reduced sardine catches and the operation of the canneries at a small fraction of capacity, has resulted in the widespread unemployment of large numbers of packing-house workers and fishermen.

The ills from which the sardine fishing and packing industries are suffering are much more basic than the temporary misfortune of the sardine shortage. The sardine fishing fleet was considerably expanded during the war, and in 1949 it consisted of 385 vessels, as compared to about 250 in 1939. The result has been an intensified and uneconomic competition among the proprietors with each boat producing a smaller yield than formerly, since the total catch did not increase between 1939 and 1946 and since the latter year it has declined drastically. The yield of sardines per boat has dropped from about 350 metric tons before the war to only 90 tons in 1949 as the result of the greatly reduced catch and the increase in the fleet.

The Gremio estimates that an economic loss of about one million dollars has been suffered because of the excessive investment of capital in the sardine fleet. It also attributes the sardine scarcity to excessive fishing by the increased fleet and points out that even if the fish were abundant and the yield per boat returned to the 1939 level of 350 tons, the 385 boats now fishing would catch 135,000 tons. The canning industry might handle a maximum of 60,000 tons, but according to the Gremio the balance of 75,000 tons would be excessive for purposes of public consumption and the price would fall to ruinous levels.

In the face of the industry's difficult situation, the chief actions by the Government have been the imposition of a ban on further construction of sardine boats, small loans to proprietors to tide them over the crisis, reductions in the price of coal and liquid fuels supplied to the sardine fishing fleet, and the consideration of certain measures of tax relief. The Gremio has also extended financial assistance to its members to enable them to equip their boats for the 1950 season.

In addition to the measures cited, the Government restricted sardine fishing operations for the first time in 1949 by issuing regulations requiring the mandatory suspension of fishing activities for minimum periods of 15 days each. The time of such suspensions of activity are freely chosen by the proprietors and the periods may be continuous or alternating on condition that the annual total of suspension is 60 days for boats up to 39 feet in length and 90 days for boats of a length greater than 39 feet. These new regulations became effective on January 1, 1949.

At the insistence of the various fishing organizations, the Government has called a conference in June for the purpose of making an over-all study of the industry and of submitting recommendations for relief. The Ministries of Marine, Economy, and Colonies were to participate in this conference.

In the meantime, efforts have been made to alleviate the hardships being experienced in the sardine fishery by investigating the possibility of fishing sardines off the coast of Morocco. As a result of this investigation, the Government is led to believe that there is an abundance of sardines and that the volume is steady. A number of vessels have already explored the possibilities and have returned with satisfactory catches; however, due to the long haul, the fish have all been marketed for direct local consumption. It will be difficult to gauge accurately the results of fishing off Morocco until the end of 1950 because the boats were not permitted to fish during April and May due to a Moroccan regulation which forbids fishing in these two months.

Problems of the Fish Canning Industry: The situation of the canning industry is even more serious than that of the coastal fishing industry because of the larger capital investment involved in plants and equipment. The most serious problem is reported to be the ruinous competition among the various producers which during the past season drove export prices down to unremunerative levels. The hopes that were placed last year on the British collective contract for one million cases of sardines were unfulfilled (as was the contract). It was anticipated that this contract would constitute a guarantee of continuity for the operation of the industry and also have a stabilizing effect on prices, since it fixed the price for 50 percent of the production which was mandatorily set aside to fulfill the contract. However, these hopes were not realized and most producers

vied with each other to sell their production at whatever price it would bring. A slight ray of hope that the canning industry might establish a more cooperative relationship with the fishing proprietors in the sale of the catch was provided by an agreement made at the important fishing center of Matosinhos last year to fix prices and the percentage of sardines to be delivered to the canneries. This agreement is said to have worked out well and to have shown possibility of an effective accord between the two industries for the mutual defense of their interests.

Aside from internecine conflict over prices, the canning industry's chief current problem is the lack of export markets. Portugal's traditional customers for canned fish have made imports more difficult by increasing their restrictions, reducing quantities authorized in commercial accords, and in some cases prohibiting imports entirely. The network of bilateral trade agreements established by Portugal with other European countries since the war has proved unsatisfactory to the industry because in the majority of cases actual exports of canned fish have not approached the contingents set in the respective agreements. The industry has been extremely critical of the measures taken to protect its interests in the negotiation of trade accords and has insisted that such accords must carry some guarantee of compliance on the part of the countries concerned. The development of canning industries in other countries and the consequent movement to discourage or prohibit imports of canned fish has also had its repercussions on the Portuguese industry. This factor has been responsible for the loss of Portuguese markets in Central and South America.

Also, there is the severe competition represented by the Moroccan industry which disposes of a plentiful supply of fish and cheap labor. The Moroccan production represents a serious threat to the Portuguese industry since, because of the local shortage of fish, it has tended to displace Portuguese products in their



UNLOADING SARDINES FROM THE HOLD OF A PORTUGUESE SARDINE AUXILIARY CRAFT. SINCE THERE IS INSUFFICIENT SPACE IN THE MOTHERSHIP TO HOLD THE FISH, THE MOTHERSHIP IS ACCOMPANIED BY 3 OR 4 SMALL AUXILIARY CRAFT TO TRANSPORT THE SARDINES.

traditional markets of Western Europe. Exports of Moroccan canned fish in 1949 were twice those of Portugal and are increasing rapidly. The United Kingdom has this year signed a collective contract with Moroccan producers for the purchase of one million cases of sardines and is offering Portugal a similar contract for only half that amount. Finally, the devaluation of the escudo in September 1949, while it benefited Portuguese exports to the United States, it also prejudiced them to all other countries, es-

pecially to the sterling area which has practically ceased purchases.



Perhaps the basic need is a radical reorganization of the entire canning industry in the country with a view to reducing the present excessive number of factories. Such a reorganization was advocated in an article in the January 1950 issue of Conservas de Peixe by Engineer Henrique Perreira. He points out that in 1947 there were 247 canning factories in continental Portugal employing 20,424 workers of both sexes. These factories produced in that year approximately 1,900,000 cases of canned fish, whereas their theoretical capacity, as fixed by the Canned Fish Institute, was more than three times that quantity, or about six million cases. The writer makes out a convincing case that the industry is over-equipped and that the economic return on the capital invested in it cannot be remunerative under present conditions. The solution he advances is a program of expropriating the smallest and most antiquated plants and centralizing the production in the largest and most modern establishments. Wherever possible, he proposes that surplus plant and equipment be transferred to Angola for use in the fish canning industry there which the Government is now seeking to expand.

Early in 1950 the Portuguese Canned Fish Institute presented an exposition to the Government on the crisis of the industry in which it advocated the immediate adoption of certain measures.

In response to the requests made in the Institute's exposition, the Government abolished the taxes on olive oil and peanut oil used by the industry. It also abolished the export tax on canned fish which amounted to approximately four-tenths of a cent a pound. The abolition of these two taxes will result in a saving to the producers and exporters of about 42 cents per case. Finally, it exempted factory owners during 1950 from the obligatory payment of three days' wages per week to workers as called for in the collective labor contract.

Cod Fishery: Participating in the 1949 cod-fishing campaign on the Grand Banks off Newfoundland and Greenland were 17 trawlers and 47 schooners. The trawlers made two trips between late February and November, while the schooners made one trip extending from April to November. The landed catch of the combined fleet amounted to 43,953 tons of salted green cod, compared with a catch of 35,932 tons for 1948 (table 1). When dried, the 1949 salted green cod production will yield about 30,750 tons of dried cod. In addition, the cod-fishing campaign also yielded some 600 tons of medicinal oil and 120 tons of industrial oil, according to trade estimates.

The retail price of dried cod is controlled by regulation. The present average (1950) is approximately 14 escudos per kilogram (about 22 cents per pound).

The cod-fishing fleet is still in the process of expansion. Four new trawlers entered this fishery early in 1950. With the hope of gaining an advantage by fishing close off the shores of Newfoundland, where in recent seasons there has been a greater abundance of large cod, the schooner fleet in 1950 proceeded from Portugal about a month earlier than usual.

The expanded and modernized cod fishing fleet has made notable progress in recent years in supplying an ever greater proportion of the Portuguese consumption of dried cod, which is currently estimated at 60,000 tons annually. In 1949, the national catch resulted in the production of approximately 50 percent of the domestic requirement. By comparison, in 1936, only about 8,500 tons of dried cod were produced from the national catch, which covered only around 15 percent of the country's consumption.

Otter-Trawl Fishery: The Portuguese otter-trawl industry (which does not include the cod-fishing boats) during 1949 operated 98 trawlers in the eastern Atlantic mainly off the coast of West Africa in the vicinity of Cape Blanco. These trawlers landed 54,545 tons of fish in 1949, compared with 53,327 tons in 1948 (table 1).

With the exception of Cape Blanco, all of the official fishing grounds for this fleet were visited less in 1949. The preference for the Cape Blanco fishing grounds is considered healthy since the ships fishing there have greater capacity and their catches represent a greater return for the effort and capital involved.

The fishing policy of the Gremio is founded on two basic principles:

1. The need of increasing the production.
2. The protection of the fisheries resources of the Portuguese coast.

To achieve these ends, the Gremio has been promoting an increase in its high-seas trawling fleet, and in collaboration with the Government, attempting to prevent overfishing off the Portuguese coast. Thus, the policy is one of promoting high production in fishing grounds off Portugal and defending the coastal fisheries from too intense an exploitation.

There are no byproducts derived from the otter-trawl fishery. The whole fish is sold at auction; occasionally, the head, tail, and other parts are retailed separately for consumption by low-income groups.

According to trade sources, the average wholesale price for the entire trawl catch (not including the cod fishery) in each of the years 1945 through 1949 was as follows (in escudos per kilo with the approximate U. S. value in cents per pound in parenthesis): 1949--5.30 escudos per kilo (9.3 cents per pound); 1948--5.13 (9.3); 1947--4.77 (8.7); 1946--4.75 (8.7); and 1945--4.57 (8.4). These are only average prices--there is a considerable range between the highest and the lowest price.

The retail mark-up for the species of fish caught by the trawl fishery is anywhere from 30 to 60 percent. The retail prices of the more desirable varieties, such as sole and whiting, are currently (1950) between 18 and 30 escudos per kilo (28 to 47 cents per pound). The official ceiling prices for fresh fish, which had been imposed during the war were removed in 1948.

At the close of 1949, the trawler fleet consisted of 100 vessels divided as follows:

45	- high-seas trawlers
44	- coastal trawlers
11	- restricted coastal trawlers
100	- with a gross tonnage of 18,741 metric tons

The greatest part of the trawler fleet is antiquated, but more than one-third of the vessels being under ten years of age. In 1949, 4 new units were added with a total of 713 gross tons. Five high-seas trawlers are now under construction in Portuguese shipyards, and it is anticipated that by the close of 1950 these five and possibly a sixth will be in operations. The Gremio is seeking to have the proprietors fit these ships with the latest equipment, such as, metal holds, refriger-

ator facilities, etc. It is anticipated that the regular replacement of obsolete units, with emphasis on high-seas trawlers as opposed to coastal vessels, will bring about in a few years a general renovation of the fleet, which thus will not only be expanded but modernized.

According to the Gremio, the number of men in the crews of the trawlers operating out of Lisbon is approximately 1,500. An additional 500 constitute the crews of trawlers based on Figueira da Foz and Oporto. In addition, the Gremio employs about 1,000 men on shore in connection with the operation of its fish auction markets.

The Gremio maintains fish auction markets (lotas) at all the ports named above with the Santos market at Lisbon being by far the largest and receiving approximately 85 percent of the total trawler catch. Upon discharge of the catch, the fish are sorted out by species and weighed in boxes of 132 pounds each. The auction method is to begin with a fixed price and to gradually reduce the quotation until sales are made. About half the wholesale sales are made to the fish women (varinas), who sell the fish at retail in baskets throughout the city of Lisbon. Most of the remainder goes into the public markets for sale. There are no price ceilings (tabelas) on fish and the prices are fixed by supply and demand. Certain discounts, however, are made for fish sold to public hospitals and military units and for fish distributed to interior points in the country. Some 20 percent of the fish sold at Santos is distributed outside the Lisbon area.

Together with its efforts to maintain an increased production, the Gremio has sought to increase its sales services and distribution of fish in the country. To this end in 1949, the regulations of the different auction markets were revised to permit a speeding up of the operations of loading and selling the fish and a better control of services and statistics. The results of these efforts are shown by the fact that in the Santos auction market, average daily sales are now between 140 and 160 metric tons, whereas until recently only 80 or 90 tons were handled in the same length of time. During the entire year of 1949, the average quantity of fish offered each day for sale was 115 tons.

Whale Fishery: The Azores and Madeira islands' catch normally consists of sperm whales only, while the Portuguese continental catch ordinarily is made up of about two-thirds finback whales and one-third sperm whales (table 4). Fishing operations from the continent in 1949 resulted in a very poor catch of only 37 whales, of which the more valuable finbacks constituted but a third. According to trade reports, the finback whales avoided Portuguese waters last year, however, they are this year reported to have returned in large numbers and a better than average catch is expected in 1950.

Table 4 - Portuguese Whale Catch by Area, 1947-49

Year	Species of whale	Continent	Azores	Madeira	Total
1949	Sperm	50	565	109	724
	Finback	111	-	-	111
	Total	161	565	109	835
1948	Sperm	47	698	162	907
	Finback	94	-	-	94
	Total	141	698	162	1,001
1947	Sperm	23	1/575	1/	598
	Finback	14	-	-	14
	Total	37	575	-	612

1/Azores and Madeira combined.

According to official statistics, the 1949 production of sperm oil in the Azores and Madeira was valued at 18,758,000 escudos (\$727,810), while in 1948 the total pro-



duction of whale oil in the islands and the continent was valued at 20,109,000 escudos (\$808,382). The whale products other than oil are of relatively small value-- in 1948, they were worth 1,380,000 escudos (\$55,476).

The Portuguese production of sperm whale oil represents slightly less than one-tenth of the world's total production (table 5).

Table 5 - Portuguese Production of Whale Products, 1947-49

Type of Product	1949	1948	1947
	(in metric tons)		
Azores and Madeira Islands:			
Sperm oil .....	2,037	3,249	2,658
Ambergris .....	<u>1</u>	<u>2</u>	<u>3</u>
Continent:			
Sperm and finback oil .....	676	598	149
Meat for human consumption .....	485	134	33
Preserved meat .....	137	63	-
Meat meal .....	268	281	154
Bone meal .....	146	162	57
Residues for fertilizer .....	787	902	141
Total for Continent .....	5,221	5,530	2,571
1/Data not available. 2/310 pounds. 3/141 pounds.			

Portugal is an exporting country with respect to whale oil and byproducts.

The current (1950) wholesale price f.o.b. Portuguese ports for sperm whale oil is approximately 53 cents per gallon.

Continental fishing began in 1944 in response to the war-time demand for edible finback whale oil and

other byproducts. Only one firm is engaged in the business with head offices at Setubal and a branch office in Lisbon. This firm has 3 vessels all equipped with modern whale hunting devices, including cannon for the shooting of harpoons. One of these vessels is a motor-driven ketch purchased in Norway and the other two are converted sardine boats known locally as "traineiras." In addition to this small fleet and fishing gear, the firm has a factory at the mouth of the Sado River near Setubal for the processing of the whales caught and also a small installation at Sacavem near Lisbon for the treatment of edible finback whale oil. It employs 40 men on its vessels and about 200 men at the two factories. Total investment is calculated at approximately 10,500,000 escudos (\$363,300).

Fishing operations are carried out from March to November but, in conformity with the International Whaling Agreement to which Portugal is a party, they do not extend over more than six months during the year on a daily basis. Fishing is carried out on the continental shelf south of Setubal as far down as Cape St. Vincent but does not extend more than 10-15 miles offshore. Once the whales are harpooned and killed they are towed into Setubal for processing. The whaling grounds are regularly traversed by whales swimming north along the Portuguese coast and they are normally present in fairly abundant numbers.

According to the official statistics, 597 men were engaged in whaling in the Azores and Madeira islands in 1947, operating 26 whale-hunting units, consisting of 121 boats with a total tonnage of 471 metric tons. At present, there are about 33 units (armacoes) operating, consisting of approximately 150 small boats manned by 800 men. Whale fishing is carried on from all the islands of the Azores but centers on the islands of Pico and Faial where about 70 whaling boats have their home ports. At present there are four factories for the processing of the catch with the islands of Flores, Pico, Faial, and Sao Miguel each possessing one. Two more are under construction, one in Pico and one in Madeira. Total capital invested in the industry in the Azores and Madeira is estimated at 20,000,000 (\$692,000). Fishing is carried on in the old-time manner of harpooning the whales from small boats and no modern equipment or cannons are utilized.

Besides the extraction of oil, the whale industry also produces whale meat for human consumption, either fresh, in brine, or canned. Fresh whale meat is consumed entirely in the Azores, and in the Setubal-Lisbon area as far as the continental area is concerned. The small amount of canned whale meat produced is exported principally to France. Whale meat meal and whale bone meal is used for cattle feed and most of the local production is exported, principally to Germany and Belgium. Residues remaining from the treatment of the whales are used in Portugal for fertilizer.

A Government delegate to the corporative fishing organization addressed the National Assembly at the end of 1949 on the economic crisis of the whale fishing industry, brought about by the decline in foreign demand for sperm whale oil. After describing the difficult situation of the industry and the danger that the capital invested in it might be lost if present conditions continue, he called for the Government to step in and extend financial assistance and relief both to the operators and the fishermen.

At the present time Portugal has a stock of about 4,000 tons of sperm whale oil for which no foreign markets can be found. To provide an outlet for some of this surplus, the Government has recently approved the mixing of 1,000 tons of it with gas oil sold for fuel on the continent. The Government is paying the owners of the oil for the difference in price for the thousand tons thus utilized. Because of the large surplus of sperm oil existing and the limited amount which can be absorbed by such expedients, it is anticipated that fishing for sperm whales will be greatly reduced in 1950 if it is not stopped altogether.

A decree published in the Diario Do Governo of September 11 exempts whale and sperm oil from export duty, as a means of relieving the crisis in the industry. World markets for whale oil are reported, however, to have improved recently to such an extent that the need for the relief is less urgent than it was a few months ago, a September 15 American Embassy dispatch from Lisbon reports. The exemption is also intended to facilitate shipment of whale oil to foreign countries for hydrogenation, there being no hydrogenating equipment in Portugal; a separate clause provides for a reduction of 50 percent from the minimum duty on hydrogenated oil re-imported by the leading manufacturer of margarine and vegetable lard, if made from raw oil exported by that company.

**EXPERIMENTAL USE OF HELICOPTER FOR WHALE FISHING:** Early in April 1950 experiments in whale hunting were carried out off the Portuguese coast with a helicopter. The British helicopter, which carries three persons, has facilities for the launching of harpoons from the air and is expected to be extremely effective in locating and killing whales at sea. Its maximum speed is 100 miles an hour. If the experiments come up to anticipations, the Portuguese whaling firm on the Continent is expected to purchase one of these helicopters for its own use.

**Exports:** Italy, the United Kingdom, the United States, Belgium-Luxembourg, and France (in that order) were the principal importers of Portuguese canned fish. Belgium was the principal purchaser of sardines, followed closely by the United Kingdom, and substantial quantities were imported by Italy and France, with the United States in fifth place. The United Kingdom was the principal purchaser of chinchards; Belgium of mackerel; Italy of tuna; and the United States of anchovies.

The possibility of expanding exports of sardines to the United States is conditioned by other factors than the exchange rate. Most important is the American tariff

Table 6 - Portuguese Exports of Canned Fish in Oil (Trade Statistics), 1949

Species	Total Exports				Exports to the United States
	Quantity		Value		
	Std. Cases <sup>1</sup>	Pounds	Escudos	U.S.\$	Pounds
Sardines .....	897,810	37,007,788	295,302,000	11,457,718	3,026,439
Chinchards .....	53,471	2,271,247	14,195,000	550,766	-
Mackerel .....	25,243	1,191,304	11,332,000	439,682	3,804
Tuna and similar species	68,963	4,358,512	53,573,000	2,078,632	189,556
Anchovies .....	298,007	6,066,210	78,880,000	3,060,544	5,017,965
Cuttlefish and squid ....	11,129	381,280	4,184,000	162,339	61,651
Other species .....	3,188	145,777	1,193,000	46,288	24,567
Total .....	1,357,811	51,422,118	458,659,000	17,795,969	8,323,982

<sup>1</sup>1/100  $\frac{1}{4}$ -club cans (30 mm. size), each can containing  $4\frac{1}{2}$  oz.

on sardines. About 95 percent of Portugal's exports of sardines to the United States consist of the boneless and boneless-skinless types which are packed chiefly as a specialty for the American market. These enter the United States at an ad-valorem duty of 30 percent. Norwegian canned brislings, on the other hand, pay 15 percent ad-valorem duty as the result of a reduction in the applicable rate under the GATT program. The competitive disadvantage at which the Portuguese products has been placed in the United States is of serious concern to local exporters.

The Canned Fish Institute, as a result of a visit of one of its directors to the United States in 1948 to study the market for sardines, has drawn up a plan promoting American sales and has collected approximately \$100,000 from its members for this purpose. However, nothing has yet been done to implement this scheme pending a decision by the Government as to what form Portugal's projected over-all dollar export promotion program should take.

Exports of anchovies in 1949 reached one of the highest levels in recent years and might have done much to compensate for the deficit in sardines if the competition among Portuguese exporters had not depressed prices to unremunerative levels. Thus, the price of \$11.00 per case for fillets of anchovies, prevailing in April of 1949, was forced down to as low as \$7.00 per case at the close of the year. The same situation occurred with respect to the export price of canned mackerel.

Exports of canned tuna fell 28 percent in volume and 19,500,000 escudos (U.S.\$756,600) in value in relation to 1948, due to a marked decline in exports to the United States and Italy which were not compensated by increased purchases by the United Kingdom. Italian purchases declined because of the difficulty in obtaining exchange, large offerings of Spanish tuna in that market, and competition from a new source--refrigerated tuna imported from Norway and Denmark. In the United States, the importation of Japanese tuna practically eliminated the possibility of effective competition as far as the Portuguese product was concerned.

Exports of fish in brine in 1949 (output of the coastal fisheries) totaled 466 metric tons--411 tons of sardines and 55 tons of other species. Greece was the principal market for sardines in brine, taking 273 tons. The value of exports of fish in brine, 3,559,000 escudos (\$138,089), was far below the value for the 1948 exports, which were valued at 27,500,000 escudos (\$1,105,500).

Frozen fish exports in 1949 amounted to 259 tons, valued at 4,144,000 escudos (\$160,787). These consisted mainly of octopus (120 tons) and sardines (93 tons). The United States was the principal market, taking 161 tons of the total. However,



the recently established frozen fish industry suffered a marked reduction in its exports in 1949, chiefly because Argentina, hitherto the principal market, has prohibited the entry of the Portuguese frozen fish.

Fresh fish exports were negligible in 1949--72 tons, valued at 606,000 escudos (U.S.\$23,513), were supplied to foreign ships in Portuguese ports.

In addition, Portugal exported the following fishery byproducts during 1949 (according to official statistics): 2,752 tons of fish meal to the United States; 1,489 tons of sardine oil (1,327 tons to Germany, 139 tons to Norway, and 27 tons to Czechoslovakia); 1,031 tons of sperm whale oil (695 tons to France, 205 tons to Holland, 105 tons to Denmark, and 26 tons to other countries); 156 tons of finback whale oil to Germany; and 58 tons of cod-liver oil to the United States. (Also trade sources report that the exports of cod-liver oil probably totaled 500 tons).

Imports: Portugal imported 27,609 metric tons of fresh and dried cod during 1949, valued at 257,172,000 escudos (U.S.\$9,978,274). Imports by country of origin in metric tons were as follows: Norway 9,785; Newfoundland 5,497; Denmark 5,124; Iceland 3,252; France 3,222; Greenland 549; England 180. Imports from Norway, Newfoundland, and the United Kingdom were fresh cod (preserved with salt or ice).

Imports of fish of the same varieties caught in the domestic sardine fishery during 1949 amounted to 390 tons, valued at 2,619,000 escudos (U.S.\$101,617) and consisted mainly of tuna in brine from the Portuguese African colonies, Spain, and French Morocco.

Fresh fish imports in 1949 amounted to 1,606 tons, valued at 10,246,000 escudos (U.S.\$397,545). The bulk (1,138 tons) was imported from Spain and the balance from French Morocco and Tangier.

Consumption: In one form or another, fish is a very basic element in the Portuguese diet. Dried cod is by far the most important staple of the diet. Annual consumption of dried cod amounts to around 60,000 tons. In recent years, there has been an increasing use of salted fish (salted sardines and chinchards). The amount of canned fish consumed in Portugal is small because fish packers operate predominantly for export. The annual consumption of fish is reported to be about  $2\frac{1}{2}$  times the combined consumption of beef, pork, sheep, goats, and poultry.

NOTE: VALUES IN U.S. DOLLARS SHOWN THROUGHOUT THIS ARTICLE ARE BASED ON THE FOLLOWING RATES OF EXCHANGE: 1950--1 PORTUGUESE ESCUDO EQUALS 3.46 U.S. CENTS; 1949--1 ESCUDO EQUALS 3.88 U.S. CENTS; 1948--1 ESCUDO EQUALS 4.02 U.S. CENTS.



## Spain

FISHERY BYPRODUCTS INDUSTRY: Introduction: The fishing industry of Spain is not only one of the country's important economic resources, but one of the leading sources of its food supply. The Spanish fishing fleet is composed of some 37,500 units of many types (from row boats to steam-propelled vessels), with a gross tonnage of about 210,000 metric tons, a February 28 American consular dispatch from Vigo reports.

The annual catch of the fishing fleet is estimated at about 500,000 metric tons, of which about 25 percent is said to be processed in the 200 odd canning and pickling plants operating in Spain.

Importance of Fishery Byproducts: In spite of the abundance of raw material, the processing of fish waste was not attempted in Spain until about 1935 when the manufacture of fish meal from the residue of the canneries was undertaken by one of the largest local fish canners, one of whose members spent some time in the United States studying the industrial processing of fish byproducts. Until then, fish scrap and waste, after the fish oil had been extracted, was either dumped into the sea or sold as fertilizer. The peak of the fishing season coincides with the period during which fertilizer is in demand. Because of the scarcity and high cost of nitrogen fertilizers, the agricultural industry continues to be the fish meal industry's biggest competitor for fish residue.

The value of fish byproducts was soon realized and the processing thereof was steadily stepped up. However, the outbreak of the Spanish Civil War in July 1936 and the dislocation of normal sources of supply caused by the outbreak of World War II, which followed the end of the Civil War in 1939, prevented any further development. The plants that were established continue, therefore, to operate with the same machinery and equipment that was originally installed in 1935.

Raw Material Used in Fish Reduction Plants: Mostly fish scrap and waste are processed by reduction plants. While the following calculations on the quantities of fish scrap and waste that are available for processing may not be considered too reliable, they may be of some value in appraising the situation. Of the roughly 125,000 tons of fresh fish that are normally available to the canneries, and picklers and smokers annually, 60 percent are purchased by the former and 40 percent by the picklers and smokers.

Fish waste and scrap from picklers and smokers is disposed of as fertilizer, after the fish oil has been extracted. Therefore, the amount of material that would normally be available for processing in fish-meal plants should average 22,500 tons, since fish residue represents, roughly, 30 percent of the weight of the fish purchased by the canneries. The greater part of this amount, however, is at present sold as fertilizer.

The bulk of the fish scrap and waste processed in fish meal plants comes from sardines (pilchard) and jurel (Trachurus trachurus), and to a lesser extent from bonito (albacore)--the principal varieties used by the canneries.

The scarcity of these varieties during the past two or three years also greatly reduced the possibility of any expansion of the fish-meal processing industry due to its complete dependence on the canneries.

Because fish meal must reach the market at prices within the limited purchasing power of the farmers, fish-meal processors have found the processing of even the cheapest fish specimens uneconomical. Only on the very rare occasions when the price of jurel has fallen below pesetas 0.40 per kilo (about \$1.66 per cwt.) at first sale, have fish meal processors purchased substantial quantities of this variety for processing.

Fish Reduction Season: Spanish fish meal plants are prepared to work all year round. The busiest months of the year, however, are from the latter part of August to the end of the year, which are the months of the heaviest catches of sardines and jurel.

Fish Meal Production: According to the largest fish-meal processing company in Spain, from 16 to 18 tons of fish meal are obtained from 100 metric tons of fish

scrap and waste. However, due to the competition of the farmers for fish scrap and waste for fertilizing purposes, it is estimated that the output of the fish-meal plants during 1949 was not more than 650 or 700 tons. The demand for fish meal is estimated at about 2,000 tons.

Fish Reduction Process: The first step in the processing of the fish scrap and waste is the extraction by a pressure process of all liquid elements which are deposited in large tanks. The residue is then dried by means of hot-air conveyors before it is passed on to the grinding mill. The second and only other step is the extraction of the oils and greases from the liquid elements deposited in the tanks, which is accomplished by a centrifugal process. The waste, or stickwater, that remains is estimated to amount to 400 tons to each 500 tons of liquid.

Stickwater: In spite of the fact that the Lassen system for the processing of waste stickwater created an interest among the fish-meal processors, no one has, until recently, given the matter any thought.

The possibility of processing fish stickwater, in accordance with Lassen's system, is now being studied by the Spanish processors, but the opinion is expressed that it would not pay to install the necessary equipment at this time due to the limited volume of material available from the fish canneries.



## Sweden

ECONOMIC CONTROL OF FISHERIES EXTENDED: The Swedish Riksdag decided to extend the system of price and market regulation (including fishery products) until July 1951 and took certain steps to centralize the exports of fishery products.

Exports of fishery products have met with increasing difficulties this year due to the bilateral trade agreements, and licensing and centralization of imports in certain foreign countries. Stocks of fish were high during the first four months this year and surpluses were used for the production of fish meal, an August 15 American Embassy dispatch from Stockholm reports.

GOVERNMENT PROPOSES EXTENSION OF "GENERAL WATERS FOR FISHING:" A bill proposing, among other things, a certain extension of "general waters" in which anybody should have the right to fish, has been submitted by the Government.

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SWEDISH-NORWEGIAN DISPUTE OVER FISHING RIGHTS IN THE SKAGERAK: A complaint that Norwegian patrol boats on repeated occasions had intercepted Swedish shrimp trawlers in international waters south of Farder (Norway) in the Skagerak and ordered them not to operate within eight nautical miles of the Norwegian coast was made by the Central Organization of the Swedish West Coast Fishermen in a letter to the Swedish Government published on August 15.

The most recent incidents of this nature were said to have occurred on July 25, when 20 Swedish trawlers were intercepted while fishing in what they regarded as their old fishing grounds in the waters between four and eight nautical miles south of Farder; and on July 27, when ten trawlers were similarly chased away from a point



5½ miles south of Farder. One of the Swedish fishing vessels was reported to have been threatened with gunfire by a Norwegian patrol boat, reports an August 18 American Embassy dispatch from Stockholm. Fishing, therefore, had to be abandoned and the trawlers returned to their home ports. They reported that a large number of Norwegian shrimp trawlers had been fishing in the same waters at the time and that even a Danish trawler had been allowed to remain although fishing much closer to the Norwegian shore.

The Swedish fishermen protested against what they considered discriminatory treatment in their "lawful pursuits" and requested that the Swedish Government approach the Norwegian Government in an effort to rectify the situation.

The matter is now being considered both by the Swedish Ministry of Agriculture, to which the Fishery Administration is subordinated, and by the Foreign Office.

With regard to the most recent incidents reported, the Foreign Minister was quoted by the press as saying:

"Swedish fishermen must naturally for the time being respect the Norwegian regulations pending a settlement of the dispute by agreement between the two Governments. It should be recalled in this connection that a dispute regarding the same question of principle concerning territorial waters in Norwegian fjords is under consideration by the Hague Court as a case between the United Kingdom and Norway."



## U.S.S.R.

REAFFIRMS CLAIM TO TWELVE-MILE LIMIT IN BALTIC: The Soviet Government, replying to Swedish-Danish notes of July 24 regarding territorial waters in the Baltic, has reaffirmed its claim to the twelve-mile limit, according to Stockholm press reports quoted by a September 7 American Embassy dispatch from that city.

The Soviet reply, as summarized by the Swedish Foreign Office, asserts that no general rules of international law exist regarding extent of territorial waters and that determination thereof falls within "exclusive competence" of each respective state. Reply also states that the extent of Russian territorial waters was established under decree of 1927, regarding Soviet frontiers, and that no extension has been made of Russian territorial waters.



## Venezuela

FISH CANNERS ASSOCIATION URGES BAN ON CANNED FISH IMPORTS:<sup>1/</sup> The problem confronting the Venezuelan fish canners has two solutions for immediate application: stop importations and establish rules and regulations for fish, according to an article which appeared in El Nacional of August 27 and which quoted the President of the Association of Fish Canners. He believes that unless measures are promptly taken to solve the problem definitively, the situation of the local fish canners will reach alarming proportions, a September 1 American consular dispatch from Caracas states.

<sup>1/</sup> SEE COMMERCIAL FISHERIES REVIEW, AUGUST 1950, PP. 63-4.

In addition, the President of the Association announced that four of the principal fish canners have stopped canning, and that of the three now in operation, two will have to close shortly.

All the Venezuelan canners through their association are advertising the following wholesale prices:

Type of Product	Cans Per Case	Weight Per Can	Price Per Case	
	No.	Ounces	In bolivars	U.S. <sup>2</sup> / <sub>100</sub>
Sardines:				
In peanut oil .....	100	4 $\frac{1}{2}$	45	13.43
In hot peppers .....	100	4 $\frac{1}{2}$	42	12.54
In tomatoes .....	100	4 $\frac{1}{2}$	40	11.94
Pickled .....	100	4 $\frac{1}{2}$	36	10.75
Pickled .....	100	5.3	36	10.75
Natural, in peanut oil ...	100	5.3	27	8.06

<sup>2</sup>/Converted on the basis of 1 Venezuelan bolivar equals 29.8507 U. S. cents.



## EGYPTIAN FISHERIES

Manufacturing operations in the Egyptian fishing industry are limited to the canning of sardines at the Suez landing point and in a small factory at Aboukir near Alexandria during the short sardine season lasting for about four months.

The Aboukir factory was established in 1941 with a paid-up capital of 50,000 Egyptian pounds. With some 100 workers, it has an annual output of 200 metric tons. Small takings of sardines during the current season have restricted operations this year.

The only other operation is the salting of mullet and sardines in a very primitive way, using barrels and empty gasoline cans.

There appears to be a need of canning factories during the sardine season. Egyptian waters are also rich in mollusks and crustaceans which might be preserved. An effort has been made to can shrimp but results so far have not been satisfactory.

Other secondary industries are the manufacture of fish oils, fish meal and fertilizers. All of these are projects which should receive the attention of local authorities as well as the National Government for the expansion of Egyptian canning, smoking, salting and preserving industries would absorb thousands of workers and reduce unemployment.

--Fishery Leaflet 363