THE FRENCH TUNA INDUSTRY

David K. Sabock

Tuna canning is an old French industry. It started at La Rochelle and Les Sables d'Olonne in 1850. By 1869, the island of Croix had become the tuna center, but it wasn't until 1891 that the first major tuna-fishing campaign was organized in Concarneau.

Today, French tuna vessels fish the nearby Atlantic and Mediterranean waters--and range to the distant fisheries in the Gulf of Guinea off W. Africa, and in the Indian Ocean. Despite the fleet's wide range, the industry is oriented domestically. However, with its fleet expanding, France sees herself becoming a more important factor in the international tuna market.

A significant amount of production takes place in several African countries tied to France by cooperation agreements. The French fishing fleet is responsible for most of this production, which is processed in African canneries with large shares of French ownership.

Catch Doubled in 10 Years

Tuna landings almost doubled from 1958 to 1968: from 34,000 metric tons (live weight) to 65,600 tons. Estimated landings for 1969 are 67,000 to 70,000 tons. This increase corresponds to increased French activity off the W. African coast, a fishery France entered in 1955-56. Since then, yellowfin has become the dominant species, accounting for 49,100 tons in 1968--75% of the total catch.[1] Albacore, formerly the main species, accounts for most of the remainder. Albacore catches were steady from 1958 to 1964, but then declined 40% to 14,600 tons. Small amounts of bluefin, skipjack, and bigeye also are caught. Tuna account for 8% of total fish and shellfish landings--and 12% of total value.

In the last decade, world tuna landings rose from 990,000 tons to 1.4 million tons. The French catch has increased more rapidly. France now accounts for almost 5% of the world catch, compared to 3.5% in 1958. It is now the world's 4th largest tuna harvester, behind Japan, the U.S., and Taiwan.

Some confusion exists over the French names for tuna. The French equivalents of English names are given here in parentheses: Albacore (Thon blanc, Germon), bluefin (Thon rouge), and yellowfin (Thon albacore). In English translations, albacore may also be called white tuna; bluefin, red tuna.

Fishing in European & W. African Waters

Albacore and bluefin are caught almost exclusively in European waters including the Mediterranean. Yellowfin, bigeye and skipjack, but primarily yellowfin, are caught in W. African waters (Gulf of Guinea).

Albacore and bluefin are fished in nearby French waters from July to October by about 450 vessels berthed at nearly every important Atlantic port. Primary ports include Douarnenez, Concarneau, St. Geunole, Lorient, Les Sables d'Olone, l'Ile d'Yeu, and St. Jean de Luz. Concarneau and St. Jean de Luz are the leading ports.

Early in the African fishing season, effort is concentrated between Libreville, Gabon, and Point Noire, Congo. As a warm-water oceanographic front moves southward during that hemisphere's summer months, the yellowfin also move southward. The fishing area then spreads from Libreville to Luanda, Angola, in the fall--and from Point Noire to south of Luanda in the winter. French fishermen have fished as far north as Port Etienne in Mauritania. July to December is the peak season for the African fishery.

Search for Other Fishing Areas

The expanding industry has looked elsewhere for tuna. In 1968, 20 vessels explored in the Mediterranean's Gulf of Genoa. Results were satisfactory. Vessels sailed from Port-Vendres, Agde, Marseilles, and other southern ports. Observations indicated two migrations of tuna, one in spring and one in summer.

In July 1969, the French CIAP Corporation placed a US$556,000 order with a Japanese fish net and gear manufacturer for a

Mr. Sabock is Foreign Affairs Officer, BCF Office of Foreign Fisheries, Washington, D. C. 20240.

[1] Landings data for yellowfin include small amounts of skipjack and bigeye.

modern 400-GRT double-deck longliner. The vessel will work in the Indian Ocean from the tuna base at Reunion Island, a French possession about 400 miles east of Madagascar and near Japanese base at Port Louis, Mauritius.

CIAP is a semigovernment corporation established in St. Denis, Reunion. It was formed to develop a tuna base in the Indian Ocean in line with the EC (European Communities) common fishery policy of promoting tuna fisheries. Plans call for initially conducting exploratory fishing with a longliner and, eventually, increasing the fleet to 10 vessels. Catches will be delivered to tuna packers in France.

Reports circulated in 1969 that France's (and Europe's) largest tuna seiner, the 'Biscaya' (1,082 GRT), would be fishing tuna in the Eastern Pacific. More recent information indicates the ship is working W. African grounds.

Fleet Develops

Only 20 years ago, most of the fleet was sailing boats. Since then, vessels were developed for longlining and purse seining. Vessels also grew larger. Orders for 155- and 165-foot vessels have been placed within the last few years for St. Jean de Luz and Concarneau, mostly the latter. The success of large seiners off W. Africa has stirred considerable interest among French companies; more "super-seiners" similar to the Biscaya are being built or planned.

Two Fleets for African Fishery

There are two fleets operating in African waters: one supplies fresh tuna to local canneries, the other ships frozen round tuna via refrigerated carriers to France. Vessels include bait boats, seiners, and combination seiner-bait boats. Emphasis is swinging to the seiners because their catch rates have been higher.

Considering the rapid development in the Gulf of Guinea, total catches there should continue to increase over 1968's 50,000 tons (live weight). The 1969 fishery may not have fulfilled expectations.

Although the U.S., Japan, Taiwan, South Korea, Spain, Italy, and Portugal fish tuna off W. Africa, the French fleet is dominant. About 42 French vessels fished in 1969, including 31 freezers and 11 bait boats. Operations are controlled by the Societe de Vente de Thon Congele (SOVETCO), an association of vessel owners headquarted at Concarneau, with representatives at African transshipping ports.

Canned Pack Rises--45,000 Tons in 1970?

Canned tuna production increased 53% from 19,600 metric tons (product weight) in 1958 to 30,000 tons in 1968. An output (preliminary figure) of 37,500 tons was attained in 1969. A pack of 45,000 tons is forecast for 1970. Since 1958, total canned fish production rose from 57,000 tons to 92,700 tons in 1967. It fell to 83,400 tons in 1968 as output of canned sardines dropped drastically. Tuna now dominates the canned fish pack with close to 40% of total output in 1968. Sardines (28%) and mackerel (24%) represent most of the remainder.

France ranks as the world's 4th largest tuna packer, behind the U.S., Japan, and Italy. It produced 8% of the world's 1968 tuna pack.

Firms Concentrate

Output has increased with reduction in number of firms and plants in the canning industry, and an increase in productivity of existing canneries. The number of firms dropped from 159 in 1956 to about 107 now. These firms operated 207 plants in 1956, 130 now. Average production per plant is about 600 tons, but average capacity is 1,000 tons. Eighteen plants produced more than 2,000 tons, 16 between 1,000-2,000, 16 between 500-1,000, and 47 under 500.

Processing techniques vary, depending on how tuna are to be packed. An oil pack is most common, although much is canned in brine. Other ingredients are used, mainly tomato sauce.

Imports High, Exports Low

France is a net importer of canned fish. It purchased 39,000 tons in 1968, while exporting only 2,100 tons. In recent years, both imports and exports have been relatively steady. About 11,700 tons of canned tuna were imported in 1968, a 30% increase over 1967. Principal suppliers were Senegal (8,050 tons and the Ivory Coast (1,800 tons). Preliminary 1969 data indicate a 15,000-ton import level with a proposed 20,000-ton purchase in 1970

Fresh and frozen tuna also are imported, though fresh tuna purchases are only 90 tons, almost all from Italy. Frozen tuna imports were 2,400 tons, up 33% from the 1,800 tons shipped in 1967. Japan supplied 40% of the total.

Special Arrangements with African Countries

Most tuna imports originate from Senegal, Ivory Coast, Congo-Brazzaville, Malagasy, Cameroon, Dahomey, and Mauritania. Their association with EC gives them the right to sell duty free on the French market, but quota limitations are in force. Quotas are assigned annually, with added provision that the tuna canned must have been caught by French fishermen. About 70% of the quota is assigned to Senegal, most of the remainder to the Ivory Coast.

The domestic fleets of these African countries are improving, with resulting increases in catches. It is becoming increasingly difficult for France to absorb this expanding output. The French quota is considerably below the capacity of African canneries, output is rising, so attempts will be made to export to the U.S., Italy, and West Germany. To assist in this effort, a guaranteed minimum price system for tuna exported is being considered.

Besides quota arrangement, Senegal also controls the supply of fish to various canneries. Senegal has 4 canneries with a total annual capacity of 35,000 tons (1968/69 quota was only 12,500). The canneries--SAPAL, Conserverie du Senegal, SCAF, and SOSAP--are in the Dakar-Rufisque area. Local tuna consumption is very low.

The Ivory Coast's quota in recent years, has been assigned to one firm, the Societe des Conserveries de Cote d'Ivoire (SCODI). Its daily capacity is about 35 tons of tuna and sardines.

Consumption Rising

Although French consumption of all types of canned fish is rising, this form accounts for only 20% of total fish consumption. Canned tuna consumption has more than doubled in ten years. Much of the increase is attributable to large nationwide advertising campaigns. Consumption is widespread, except for poorest people. Most tuna is consumed as cold hors d'oeuvres. In 1970, consumption is expected to approach 47,500 tons, 32% more than in 1968. The supply will be fulfilled easily from domestic production, plus imports from Africa.

Government Control and Assistance

Financial support given to the industry is the same as that for all French fisheries. Aid is provided for shipbuilding, interest rebates are granted to induce owners to build new vessels or modernize existing units, and the Credit Maritime Mutuel makes loans to fishermen and cooperatives to promote ownership of vessels and foster cooperation in small-scale fisheries.

The Comite Interprofessionnel du Thon (Interprofessional Tuna Committee) controls the industry by establishing or assisting in establishing exvessel prices, quotas, special trade arrangements, allocating supplies, and planning and setting the length of each season. It also assists the industry by supporting exploratory fishing, technological development, marketing, and other programs.

Fixed Price Systems

Most fish sales are by auction, but tuna for canning, along with sardines and salted cod, are exceptions. Prices of tuna used in canning are fixed for a 3-year period by agreement within the trade and approved by government authorities. There is provision for amendment, if necessary. A minimum price system does not exist.

The system requires that a single price be set for each species. The Comite Interprofessionnel du Thon operates the system, which includes setting quantities and allocating supplies. Pressure to adopt this type of pricing arrangement came in the early 1960s when canners could not obtain adequate supplies of raw tuna, and fluctuating catches made the existing seasonal price system inadequate. A 3-year fixed price system was adopted in 1963.

In fixing quantities, priority is given to French production. Quotas for sales in the French market are assigned to African countries in October of each year based on their tonnage caught, and the capacity of the French market to absorb output. African production for 1970 may reach 20,000 tons, about double 1968's.

Supplies are allocated to canners based on firm orders accompanied by an irrevocable payment with a partial bank guarantee. Canners are held to prices as long as economic conditions remain unchanged during the life of the contract. There is a levy on value of catches to finance a partial price-equilibrium fund and a countrywide advertising campaign.

The Future

Two items are particularly interesting in considering the future of the French tuna industry: (1) the results of their preliminary attempts at establishing a tuna base in the Indian Ocean, and (2) plans for marketing tuna from francophile West African countries.

Increasing worldwide interest is being shown in the fisheries potential of the Indian Ocean. France is entering that tuna fishery in its early stages. Also, the capacity of the West African canneries is far above their quota for the French market, and the output is increasing yearly. Where will they attempt to market their production? To what extent? And how will ability to sell elsewhere affect their efforts in France?

Main sources for this article were reports in 'La Pêche Maritime,' 'France Pêche,' and U. S. Embassy dispatches. A 35-entry bibliography is available on request from BCF Office of Foreign Fisheries.

WEST GERMANY

HERRING SHORTAGE GROWS

A growing shortage of herring has left the German canning industry unable to fill the strong domestic demand. German fishermen supply only about two-fifths of the canners. Foreign suppliers face the same difficulty as German fishermen--a declining herring catch from traditional fishing grounds. For the past three years, German fishermen have been increasing their herring fishery off the U.S. Atlantic Coast, especially on Georges Bank. However, they are still unable to satisfy the canners' demands. The canners are considering importing frozen herring from Canada. They also are thinking about shifting to other types of fish.

Opportunity for U.S.

This situation has created a real opportunity for the U.S. fishing industry. If need be, the industry could exploit Georges Bank herring stocks. The German market would not be a stop-gap business. The annual sales potential for U.S. frozen herring there has been estimated at well over one million dollars.

Detailed Report Available

German importers and canners would welcome U.S. offers. (U.S. Consul, Bremen, Jan. 27, 1970.)

A detailed report, FFL-181, is available from Office of Foreign Fisheries, BCF, Department of the Interior, Washington, D. C. 20402.

NORWAY

FISH MEAL QUALITY IS UPGRADED

Installation of 4 solvent-extraction plants has greatly increased Norway's supply of upgraded fish meal. This was reported by the University of Rhode Island's Commercial Fisheries News Letter in Jan. 1970.

Solvent extraction is used to upgrade regular fish meal. Defatted Norwegian herring meal contains over 80% of highly digestible protein and has a pleasant malty flavor.

Pet Foods & Animal Feeds

Used in pet foods and animal feeds, defatted fish meal partially replaces dried skim milk as a source of high-quality protein. Commercial quantities are being exported to the U.S.