

FOREIGN FISHERY TRADE

Imports and Exports

GROUND FISH IMPORTS: From January 1 through March 30, 1946, there were 12,416,533 pounds of fresh and frozen groundfish imported into the United States, an increase of 4,566,980 pounds compared with the same period in 1945, according to a report received from the Bureau of Customs of the Treasury Department. The reduced tariff quota for the year is 15,000,000 pounds or 15 percent of the average apparent consumption of the past three years, whichever is greater.

Commodity	Mar. 4-30, 1946	Feb. 4-Mar. 2, 1946	March 1945	Jan. 1-Mar. 30, 1946	Jan. 1-Mar. 30, 1945
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	5,294,741	3,497,692	3,940,872	12,416,533	7,849,553



Australia

WHALE FISHERY: After a lapse of decades, Australian whalers will once again enter the Antarctic whale fishery and take a share of the wealth offered by those waters, according to the February 1946 issue of the Fisheries Newsletter.

On January 18, a full Cabinet of the Commonwealth Government agreed to ratify the International Whaling Agreement and Protocol as a preliminary step towards the establishment of a whaling industry based in this country. The Cabinet also decided to place an order in Great Britain for the construction of a modern factory ship of 20,000 tons.



Humpback Whale

It is anticipated that the keel of the new vessel will be laid in May and will be completed, together with chaser vessels, in sufficient time to engage in operations for the season 1947-48.

In a statement issued following the Cabinet meeting, the Prime Minister said that the establishment of shore-whaling operations in Western Australia and Tasmania would be discussed with the Governments of those States.

Before the war, the main countries concerned with whaling were Britain, Norway, Germany, Japan, and the U.S.A. Most of the whaling was concentrated in the Antarctic, and of the total catch in this area, the Japanese took 11 percent. The British and Norwegian companies were generally financed by British capital, and the British companies were operated by Norwegian experts.

Up to the present time, Australia has taken very little part in the whaling industry. In the early days, considerable activity took place in Australian waters, but during the 20th century very little has been done. A small primitive station has operated intermittently at Twofold Bay, and a shore station was established at Point Cloates, in Western Australia, by the Norwegians. This station, however, has not been sustained. Factory ships have operated in Australian territorial waters with considerable success, but these have been American or British owned.

Whales occur in Australian territorial waters, and Australia controls practically one-third of the Antarctic waters, which are the richest whaling grounds in the world. It, therefore, seems obvious that this country should take part in this valuable industry.

The development of an Australian Whaling Industry would yield the following benefits to the country:

1. Certain industrial products would become available directly, such as whale oil, meat meal, fertilizer, pharmaceutical preparations, and baleen, or whalebone.
2. Avenues of employment for Australian capital and labor (particularly discharged service personnel) would be provided.
3. Facilities would be provided for training seamen for naval establishments and the Australian maritime fleet.
4. Australia's hold upon waters under control would be strengthened.



Canada

COLD-STORAGE: A small increase during March in Canadian holdings of fresh frozen fishery products, due mainly to enlarged stocks of cod fillets and tullibee, was indicated in a preliminary report of the Department of Trade and Commerce of the Dominion Bureau of Statistics. Holdings totaled 17,123,000 pounds on April 1 compared with 16,762,000 pounds on March 1 and 15,428,000 pounds on April 1, 1945.

HALIBUT VESSELS: Canadian fishing vessels engaged in the North Pacific halibut fishery are entitled to land their catch of halibut in ports of entry in Alaska

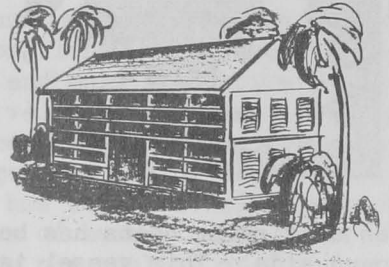
until and including June 30, 1946. An order to this effect, which waived compliance with Section 4311 of the Revised Statutes in these cases, was issued on April 24 by the U. S. Treasury Department. Landings are subject to compliance with applicable customs laws.



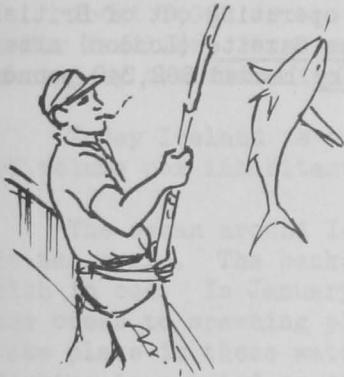
Costa Rica

A report received by the State Department from the U. S. Embassy at San Jose, Costa Rica, discussing the economic developments in that country's fisheries during 1944 and 1945, is extracted as follows:

Fishing for tuna takes place off the Pacific Coast in the waters off Puntarenas. Most of the boats are from California and, with few exceptions, use live bait and hooks instead of purse seines. A company of the United States maintains a canning factory and refrigeration plant at Puntarenas, serviced steadily by several boats working out of that port intermittently and by some of the California fleet.



Exports of frozen tuna in 1945 weighed 651 metric tons, valued at (U.S.) \$112,759. Canned tuna shipped in the same period amounted to (U.S.) \$185,167 in value. Shipments during 1944 followed a different pattern. Frozen tuna weighing 864 metric tons was exported during the year but at a total value of (U.S.) \$413,182. The canned product, on the other hand, had a value of (U.S.) \$9,587 for a weight of 10.4 tons.

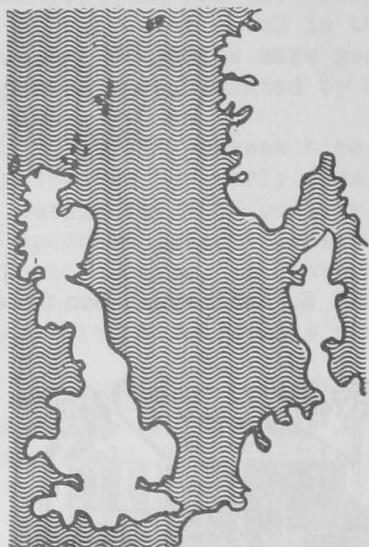


The shark liver business declined in 1945. Fishing boats had to go farther and farther from shore to make paying catches, either because the fish were being killed off too rapidly or because they shunned waters where others had been cut open and thrown overboard. Interest also ceased in Caribbean Coast sharks, because their livers were found to contain too low a vitamin content. Exports for the year were valued at (U.S.) \$43,387 (60 metric tons) in comparison with (U.S.) \$50,023 (92.8 tons) in 1944. At the present time, the skin, fins, and meat are being wasted; the carcass is not even converted into fish meal.

Turtles lay their eggs along the sandy beaches between Limon and the Colorado Bar on the Caribbean side. Here they are caught by the hundreds and shipped alive to the United States. This business was worth (U.S.) \$7,979 in 1945 (148 metric tons) as compared with (U.S.) \$1,561 (23.8 tons) in 1944. It was reported that there is danger of extermination of the turtles along the shore for lack of conservation measures.

England

Although three members of the staff of the Fisheries Laboratory, Lowestoft, who were acting as coastal fishery officers, succeeded in making scientific observations which have given valuable information on the wartime recovery of fish stocks, all co-ordinated scientific work at the Laboratory was suspended during the war, according to Nature (London), April 13, 1946. The Laboratory reopened in September 1945, when ichthyometric work on the chief food fishes and age-composition observations on the North Sea plaice and herring were resumed at the appropriate ports of landing. Plans for work in the waters around the British Isles and in the Arctic fishing grounds are in active preparation. These include the construction of a new laboratory, the building of a large research ship of the type used by the Hull trawler owners for the prolific Arctic fishery, and the conversion for research work in the North Sea of the Admiralty trawler Sir Lancelot, built during the war on the model of a successful commercial type--the Star of Orkney. In the meantime, a 90-foot motor fishing vessel of a class built by the Admiralty with a view to subsequent



use as fishing boats has been borrowed and converted to carry a trawl on the starboard side. This vessel is to be known as the Platessa. While her main task will be to mark large numbers of plaice in the southern North Sea so as to obtain vital information on the yield of the stock at the present rate of fishing, it also is hoped to gain information on the suitability and efficiency of this type of craft as a commercial trawler.

RECORD TRAWLER CATCH: A new record catch for trawlers operating out of British ports was reported in the March 23rd issue of the Fish Trades Gazette (London) after a 23-day trip to fishing grounds off Norway, the Norman Sky landed 662,340 pounds of fish at Grimsby.



Iceland

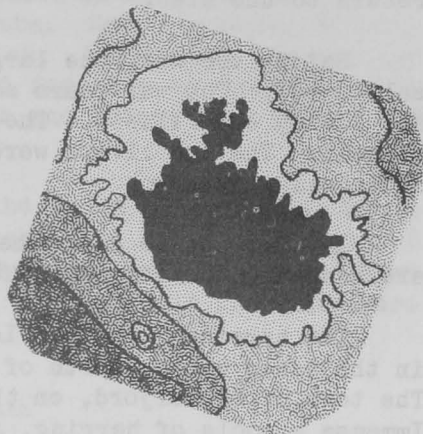
Perhaps in no other country on earth do the fisheries play as decisive a role as in Iceland, which is almost devoid of mineral resources and vegetable raw materials for industry, according to a report released by the State Department from the U. S. Legation at Reykjavik, Iceland.

Excerpts from the report follow:

With an abundance of easily caught fish in adjacent waters, Iceland has developed into practically a one-product country and today is dependent almost entirely upon active foreign markets for its fish and fishery products for earning its livelihood and maintaining its standard of living.

The Icelandic fisheries are reputed to be as old as the nation itself. It is said that the early Viking settlers brought the technique with them from old Scandinavia. However, until 1300, fishing was no more than spare time activity.

Early fishing was done with a hand line. Around 1400, the long line was introduced. Between 1400 and 1800, the activity continued on a limited scale, and only open row boats with hand lines and long lines were used. Fishermen rarely ventured out into the open sea. They fished in the fjords and the nearest of the offshore banks. Early in the nineteenth century, decked sailing vessels began to replace the open boats. Hand and long lines continued to serve as tackle, but more distant and more productive grounds could be reached by these vessels. Around 1900, the steam trawler was introduced, followed by the motor boat. Likewise, there began the use of nets. During the past 45 years, there has been a steady trend towards increasing the number of mechanically propelled boats and towards improving the quality of the equipment used.



The Icelandic fishing fleet consists of nearly 1,000 units, ranging in size from 3 tons upward. Of these, 624 are motor driven.

About 7,000 of the 126,000 population are employed in the fishing fleet. With their families, 16 percent of the population, or 20,000 persons, are directly supported by the fisheries.

Today Iceland is one of Europe's greatest fishing nations and, on the basis of volume per inhabitant, far in the lead.

The ocean around Iceland is reputed to be one of the richest fishing areas in the world. The banks to the south and southwest of the country are especially rich in cod. In January and February each year, the schools of cod migrate from the ocean to spawning places near the coast. The major cod fishing activities take place in these waters in the late winter and early spring months. However, fishing is carried on off the coast practically the whole year around.

Before World War II, Iceland had at least 11 different foreign nations competing with its fishing fleet on the extensive banks which surround the country. Despite a great drain on the fish resources, it does not appear to have decreased them in any great degree, and in spite of the competition in the prewar days, the Icelanders caught almost one-half of all the fish that were taken near Iceland and far more than any of their foreign competitors. The war halted the fishing operations in the neighboring waters of Iceland of nearly all other European coun-

tries, leaving the banks to be worked almost exclusively by the Icelanders. Since the end of the war, British, Norwegian, and Swedish fishing vessels have begun to return to the area.

Before the war, the large cod catches were used chiefly in manufacturing dry salted cod. The war years saw a shift towards production of fresh cod on ice, and frozen cod fillets. The dry salted cod output dwindled and almost ceased completely. The cod livers were, and continued to be, the basis of a thriving cod-liver oil industry.

In addition to cod, other important varieties of fish caught in Icelandic waters are haddock, pollock, halibut, flounders, and herring.

The herring fishery in Iceland is distinctly seasonal. It is maintained mainly in the ocean waters north of the country from about July 1 until September 15. The town of Siglufjord, on the north coast, is the central point of the industry. Immense schools of herring, searching for food, migrate towards the land and feed

on the ocean's supply of plankton. The catch is taken mainly with purse-seine nets and partly in gill nets. Some boats take as much as 135 to 200 metric tons (298,000 to 441,000 pounds) of herring in one haul. A portion of the catch is salted in barrels and cured in various ways. Much of the herring, however, is not salted or cured and is utilized in the numerous herring oil factories which, in recent years, have been built in northern Iceland. In these plants, the oil is pressed out of the herring, while the residue is made into herring meal for sale as stock food on domestic and foreign markets. A small, but expanding, canning industry

absorbs some of the herring for making certain canned specialty items such as gaffelbitter and fat herring fillets in oil.

Iceland's catch per capita in 1935 was more than six times as great as that of Norway, which ranked first in total quantity. During the war years, the production of Iceland's fisheries increased steadily. In 1944, the catch amounted to 461,314 metric tons, or 8,069 pounds per capita.

It is estimated that, in the years just prior to the war, Icelandic waters produced from 17 to 21 percent of the total output of Europe, Icelanders catching about half of this amount, the rest having been taken by fishermen from other countries.

The extreme perishability of fish and the fact that Iceland's fishing grounds are located far from consuming centers have always necessitated the utilization of preservation methods such as drying, salting, icing, or freezing.

Experiments in fish fillet freezing were started in 1929 and proved successful. Soon, plans for a gradual expansion of the original plant and the construction of new ones were undertaken. Between 1935 and 1939, a total of 19 quick-freezing fish fillet plants were completed and put into operation. In the six years that followed, 1940-45, an average of more than eight fish freezing plants a year were erected. At the end of 1944, Iceland had 62 such plants in operation, with a total processing capacity of 630 metric tons of fish per 24-hour day.



Salted Herring

The nature of the markets available to Iceland has, to a great extent, determined the mode of preparation followed by the industry. Prior to 1939, most of the Icelandic cod catch was salted and dried and prepared as klipfish for sale in the markets of Portugal, Italy, Spain, Brazil, and Cuba. Great Britain, France, and Argentina also were purchasers of this salted fish. Similarly, the greater portion of the herring catch was barrelled and cured for sale to Sweden. Only small quantities of white fish were marketed in fresh and frozen form before the war.

The war shut off the markets for salt fish in the Latin European and Latin American countries due either to blockade or lack of shipping and widely expanded the fresh and frozen fish market in Great Britain. The resulting changes rendered in the mode of preparation of white fish for market by the Icelandic fisheries were significant and are reflected in the following table.

Preparation of Iceland White Fish
(In metric tons of gutted fish)

Mode of preparation	1941	1942	1943	1944	1945 (11 mos.)
Fish on ice	118,320	151,897	162,273	179,035	150,793
Fish frozen	11,636	24,358	31,833	55,207	58,679
Stockfish	2,920	879	1,183	1,328	1,834
Salted fish	64,407	12,681	4,084	3,701	3,223

In 1935, dried salt fish exports amounted to 38,861 metric tons (85,674,000 pounds). In 1944, the yearly exports of this product had fallen to 39 tons (86,000 pounds). Wet salted fish exports fell from 14,844 metric tons (32,725,000 pounds) in 1935 to 1,253 tons (2,762,000 pounds) in 1944. Meanwhile, fresh and frozen fish exports multiplied more than 10 times in the 10-year period.

The current period is a crucial one for Iceland's fishing industry. The war is over and the British, Scandinavian, and other European fishermen are returning in increasing numbers to the sea. Iceland's all important market in Britain appears to be dwindling rapidly. Already, Britain has halted all purchases of Icelandic frozen fish fillets. New markets of any size to replace the loss of the British market have not yet been found.

The Icelandic Government has recently made attempts to sell fresh and frozen fish in quantity to France, Belgium, the Netherlands, Denmark, Switzerland, Poland, Czechoslovakia, Finland, and the Soviet Union. An effort is even being made to sell fish to occupied Germany. Little has as yet resulted from these tries. Several boat loads of fresh fish were landed in Belgium but payment was not received and landings ceased. France took 2,513 tons of frozen fish but gave no guarantee about the extent of future purchases.

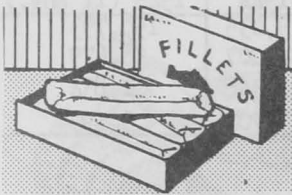
A maximum commercial market exists for Icelandic cod-liver oil in the United States and other countries. The small amount of canned goods put out by Iceland's fish canning industry is also being consumed to the full capacity of the industry by the United States market and will very likely continue. However, it is questionable whether Icelandic fresh and frozen fish are saleable in any quantities at the present time outside of some of the devastated countries in Southern and Central Europe who may neither be able to pay in stable currency nor in manufactured goods.

Proposals have been made by certain factions in Iceland to sell fresh fish on ice and frozen fish fillets to Central European countries on credit. These are

being carefully examined by the Iceland Government. Moreover, it is feared that the instability of the currencies of some of these countries would make any such deals very risky. Monies received in the future against the present loans may be greatly decreased in value.

Another course open to the Icelandic fisheries is to revert to the production of wet and dry salted fish. The Latin European and Latin American demand for the product is said to exist in the same proportions as in prewar days. But, the Icelandic producers would accept such a course only as a last resort because the income from sales of salted fish can in no way match the returns on fresh and frozen fish. Perhaps the fresh fish producers will accept a return to the salt fish markets sooner than will the frozen fish producers. The country's 62 freezing plants represent a \$10,000,000 capital outlay that few would let slip into bankruptcy without a protracted struggle.

There are elements who look to developing a market for Icelandic frozen fish fillets in the United States. They have been encouraged in this idea by the fact that several American frozen fillet distributors have recently showed an interest in buying Icelandic frozen fillets to meet their volume of orders currently unfillable by American producers. One New England firm alone expressed an interest in buying several hundred thousand pounds of Icelandic frozen fish fillets. These may only be interim purchases by United States firms where an expanding frozen fillet industry may eventually be able to take care of the entire demand. On the other hand, it may be the start of the development of a new marketing outlet for Iceland frozen fillet production.



A number of speculations are current but unless Iceland can very soon find ample markets for her frozen fish, the industry will have to close down and unless future fresh fish markets are assured, the fisheries will of necessity have to revert to salting and drying and in turn accepting the lower prices that the salted product commands in the Mediterranean and Latin American markets.



Ireland

While Ireland's 1944 sea fish catch (exclusive of shellfish) was the best in six years, the country's inland fishing proved less satisfactory, according to a report on Ireland's sea and inland fisheries for the year 1944, recently transmitted to the State Department by the American Consulate General at Dublin, Ireland.

The 1944 sea fish catch (exclusive of shellfish) totaled 34,370,000 pounds, valued at \$2,068,000 compared with 31,130,000 pounds in 1943, valued at \$2,059,000. The quantity and value of the catch for the years 1939-44, (converted from hundred-weights and pounds sterling) were as follows:

Year	Quantity	Value	Year	Quantity	Value
	Pounds	Dollars		Pounds	Dollars
1939	21,050,288	790,682	1942	28,302,736	1,747,610
1940	25,172,560	1,077,952	1943	31,126,032	2,059,209
1941	30,888,816	2,014,613	1944	34,369,328	2,067,644

The value of the shellfish catch in 1944 amounted to \$454,000 compared with \$402,000 in 1943. This, added to the value of other types of sea fish, brought the total for all classes of sea fish landed in 1944 to \$2,522,000, stated to be the highest figure for the past 25 years. With the use of deep-sea trawlers, fishermen from Dublin and Howth Counties were responsible for the highest returns in point of value.

Shellfish continued to provide a source of income for coastal communities. The 1944 return exceeded that for 1943 by 13 percent which, in turn, exceeded that of 1942 by approximately 40 percent. Lobsters, scallops, periwinkles, oysters, and mussels were the chief varieties. Mussels in considerable quantity were exported in 1944 from Dundalk Bay and the Boyne district, presumably for use as bait. The Irish Sea Fisheries Association, in 1944, undertook the marketing of frozen scallops as an experiment, dispatching the product to market in waterproof cartons. This undertaking resulted in the trebling of the scallop catch in Connemara in 1944, as compared with 1943. Although the value of periwinkles and mussels declined in 1944, the oyster catch was double that for 1943, with the main increase in the Galway Bay area. Because of the prevailing high prices, there was a tendency to neglect the conservation of natural stock, with resulting damage to the oyster beds.



The 1944 catch of demersal fish, amounting to 15,650,000 pounds, showed a 21 percent increase over 1943 and was the highest recorded for 23 years. The herring catch for 1944 was, except for 1941, the highest yield since 1929. Mackerel landed, although less by approximately 1,120,000 pounds than the 1941 catch, represented the second largest catch for the past 15 years.

Personnel engaged in the sea fishing trade totaled 9,879 men in 1944 (1,925 whole time and 7,954 part time) against 9,646 in 1943. Vessels engaged numbered 3,439 in 1944 against 3,387 in 1943.

Fish marketed by the Irish Sea Fisheries Association in 1944 amounted to 6,160,000 pounds against 6,190,000 pounds in 1943, with payments to members totaling \$510,000 in 1944 compared with \$552,000 in 1943. In 1939, 1,550,000 pounds were marketed, with \$85,000 disbursed to members of the Association.

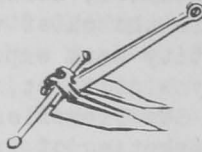
The return from fresh-water operations in 1944 was stated to be disappointing. With the exception of eels, capture of other types of fish was small, salmon and trout yields being the lowest for the past six years. The bulk of the salmon and sea trout catch is usually exported, although home consumption has increased since 1942. Exports of salmon and sea trout since 1939 have been as follows:

Year	Quantity Pounds	Year	Quantity Pounds	Year	Quantity Pounds
1939 ...	1,438,976	1941 ...	2,881,984	1943 ...	1,895,712
1940 ...	1,662,192	1942 ...	2,399,824	1944 ...	1,240,512

Quantity and value of the 1944 fresh-water catch is not included in the annual report, but the December 1944 trade statistics of the Department of Industry and Commerce show that fresh-water fish valued at \$759,000 were exported in 1944. Exports of sea fish were valued at \$1,899,000.

Approximately 6,300 men were employed in 1944 in various phases of the salmon fishing industry.

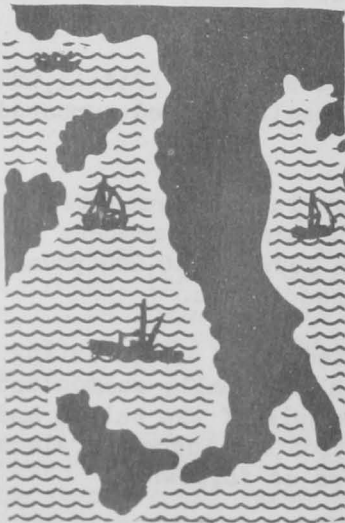
Average prices per hundredweight for fish realized by fishermen have shown steady increase during the war years. In 1938, a hundredweight (112 pounds) of herring averaged \$1.36; in 1944, \$4.23. Mackerel realized \$2.52 in 1944 compared with \$1.44 in 1938 and \$1.24 in 1935.



Italy

Information regarding an Italian project for development of their postwar ocean fishing industry was received by the State Department on February 20, 1946, from the U. S. Embassy at Rome, Italy. Excerpts follow:

It is Italy's desire to rehabilitate her ocean fishing industry to the level attained before the war and to extend the industry to such an extent that the fish and fishery products will supply an important part of the Italian diet.



According to the Embassy's report, 25 Italian vessels, with a total gross weight of 11,809 tons, a total fish-carrying capacity of 4,640 tons, and an average annual import capacity of 21,000 tons, were operating before the war, fishing in the waters off Mauritania and Newfoundland. In September 1945, only four of these vessels were capable of operating and only four other vessels of the fleet could be salvaged and put into operation in 1946. This fleet of eight vessels could obtain for Italy about 10,700 tons of fish annually, or about half the prewar average.

To rebuild the fleet to its prewar capacity, plus a margin for expansion of about one-third, it is estimated that nine additional vessels of 800 gross tons, and one vessel of 3,000 gross tons would be required.

A plan for establishing a fleet that could bring a million tons of fish to Italy annually, instead of the 21,000 tons brought in from Atlantic waters before

the war, is presented as a possible solution to Italy's ever-present and acute shortage of protein foods. However, consumption of a million tons of fish annually in Italy would require a per capita consumption of about one pound per week. This is still less than is consumed in certain other European and oriental countries, but far more than now consumed in Italy. The Italian Committee for the Study of Ocean Fishing hopes to interest private American capital in these plans. Presumably, American participation would provide the vessels, or funds to purchase the necessary vessels and perhaps a certain quantity of refrigeration and other equipment not available in Italy.



Mandated Islands

The Chairman of the Board of the Reconstruction Finance Corporation announced, on April 16, that the long-projected economic survey of the former Japanese mandated islands of the Central Pacific will become a reality late in April when the survey vessel furnished by the Navy sails from Pearl Harbor for Truk. Before returning to Honolulu in the middle of August, the scientists and economists on board the survey ship and others assigned to groups of islands will have visited every major island in the Caroline, Marshall, and Mariana groups. The results of their investigation and study will be incorporated later into a comprehensive report for the guidance of future administrators.

The broad purpose of the survey is to determine the extent of the economic resources of the islands and to make specific recommendations as to how such resources may best be utilized in the interest of native populations. The Fish and Wildlife Service is represented on the survey party by Mr. Robert O. Smith.

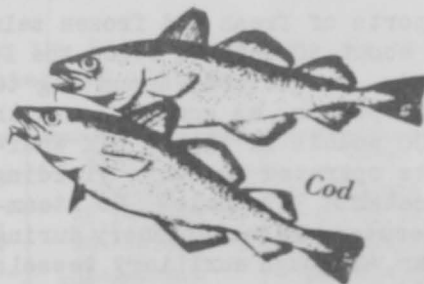


Newfoundland

In a report to the State Department dated March 13, 1945, the American Consulate General at St. Johns, Newfoundland, discussed the cod fishery, Newfoundland's dominant industry.

The report states, in part, as follows:

For a time during the war, newsprint superseded the cod fishery from the export angle, as large numbers of men turned from the fisheries to join the armed services and to engage in work on American and Can-



adian military bases in Newfoundland. During the last two years, however, this trend has gradually been reversed, and in 1945, fisheries again constituted the leading export industry. Approximately 24,700 men engaged in the cod fishery in 1945, an increase of about 10 percent over 1944.

The value of fishery exports in 1944-45, for the first time in Newfoundland's history, exceeded the \$20,000,000 mark.

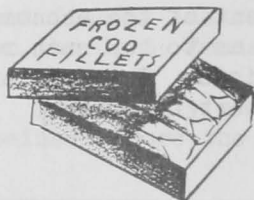
The estimated quantity of codfish salted during 1945 was 106,984,000 pounds, an increase of 1,618,000 pounds over 1944. This may be broken down as followst

Inshore fishery - 71,848,000 pounds Deep-sea fishery - 14,295,000 pounds
 Labrador fishery - 20,841,000 pounds

Exports of salt codfish during 1945 amounted to 120,321,000 pounds compared with 94,340,000 pounds in 1944, an increase of nearly 30 percent. Shipments to Spain, Puerto Rico, Portugal, Jamaica, and for relief, accounted for nearly 78 percent of total exports. Shipments to Spain increased over 16 million pounds, and for relief, over 8 million pounds, thus accounting for practically all of the 1945 increase. Exports to the United States showed little change.

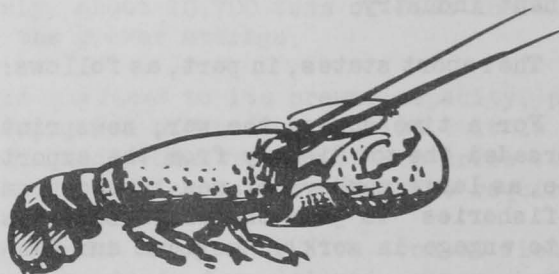
During 1945, fishermen received prices equal to and, in some cases, in excess of 1944. The inshore fishery was marked by a record fall fishery, the Labrador fishery was relatively unsuccessful, and the deep-sea fishery was the best of the century.

One of the most encouraging aspects of the Newfoundland fisheries is the continued growth of the frozen codfish industry. During 1945, 44 filleting plants and 15 freezing plants were operated. The production of frozen cod fillets in 1945 was 30,851,000 pounds as compared with about 24,000,000 pounds in 1944. Exports of fresh and frozen cod fillets in 1945 amounted to 33,881,000 pounds. These exports went largely to the United Kingdom (57 percent), Canada, and the United States. But it is the United States to which Newfoundland is hopefully looking as a potentially permanent market for this product--as it is generally conceded that the British market will greatly diminish.



The production of herring in 1945 amounted to 219,405 barrels (225 pounds each) compared with 106,497 barrels in 1944. More than half of this production was shipped to the United Nations Relief and Rehabilitation Administration and the Foreign Economics Administration, such relief shipments representing a value of over 2 million dollars.

Exports of fresh and frozen salmon during 1945, amounting to 1,596,000 pounds, dropped about 50 percent below the 1944 exports. The lobster catch was exceptionally good, production amounting to 2,622,000 pounds as compared with 2,293,000 pounds in 1944. Six whaling boats operated in 1945, yielding a total catch of 393 whales. No steamers prosecuted the seal-fishery during that year, although auxiliary vessels and landsmen were responsible for a substantial catch. Exports of seal skins in 1945 amounted to 49,005 skins.



Exports of fishery oils for 1944 and 1945 were closely similar, except for herring oil, which showed a sharp decrease. This was due to the destruction by fire of the Newfoundland dehydrating plant on the West Coast.

During the war period, there was an assured demand for Newfoundland's codfish and herring, and the immediate outlook is for another highly successful season in 1946.



Norway

Norway's fish catch already has been reported unusually favorable this season, even approaching record proportions in some operations, according to a report dated March 20, received by the State Department from the American Embassy at Oslo, Norway.

Norwegian whaling expeditions in the Antarctic likewise report good results, with assurance that the season's production of whale oil will approximate close to 83,000 metric tons (about 23,700,000 gallons).



Spain

A report on Spain's fisheries, dated March 13, 1946, has been received by the State Department from the Consulate General at Barcelona, Spain. Excerpts from the report follow:

No shore plants for preparation of cod exist either at Bilbao, Santander, or Gijón. It is reported that the three large shore plants for cod are located at Pasajes, El Ferrol, and Vigo.

A captain of one of the cod fishing boats, who resides in a suburb of Bilbao, reports that the past season was unfortunate due to the inefficiency of the vessels, which resulted in an early return and, consequently, a smaller catch.

The total catch during 1945 from ports in the Bilbao district was, according to Provinces, as follows (converted from pesetas and kilograms):

Province	Quantity		Value
	Founds		Dollars
Oviedo	56,153,058		6,008,301
Santander	24,116,435		1,903,510
Vizcaya	41,296,578		4,240,627
Total	121,566,071		12,152,438

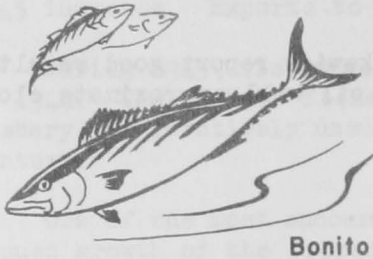
The total catch from Asturian ports in 1945 was 56,036,000 pounds, valued at \$6,008,000. The fishing fleet consisted of 134 vessels, plus 387 gasoline motor boats and 81 boats powered with gas-oil engines. This made a grand total of 602 craft of all kinds.

Gijón is the most important fishing port in the Province of Oviedo. The Chamber of Commerce in that city provides the following data:

The catch out of Gijón in recent years has been as follows:

Year	Quantity	Value	Year	Quantity	Value
	Pounds	Dollars		Pounds	Dollars
1942	-	2,318,893	1944	18,681,902	2,292,467
1943	14,457,923	1,779,748	1945	21,967,256	2,966,256

It is stated that bonito is always the most important catch out of Gijón; in 1944, it amounted to 5,424,000 pounds.



Bonito

As of July 1945, there were 42 fish-packing plants operating in the Gijón district. Olive oil is consumed in those plants at a rate of 2,640,000 pounds annually.

During the latter part of 1945, there were heavy catches of hake off Ireland and off France. The season for bonito is also said to have been important. Inshore fishing, on the other hand, is reported to have been very poor and resulted in many vessels returning almost empty. This affected particularly the catches of pescadilla, sardina, and anchoa.

The total catch from ports in Santander Province during 1945 was 24,066,000 pounds, valued at \$1,904,000. This represents a decrease in quantity of 5,864,000 pounds, or 19.6 percent, from the 29,930,000 pounds caught in 1944.

The catch from ports in Vizcaya Province during 1945 totaled 41,210,000 pounds, valued at \$4,241,000. This represents a very small decline of 141,000 pounds, or 0.3 percent from the 1944 catch of 41,352,000 pounds, but a greater decline in value of \$193,000, or 4.3 percent from the 1944 figure of \$4,433,000.

Olive oil consumption in the industry tends to fluctuate with changes in quantity exported to the United States, where olive oil is particularly in demand. On the other hand, very little of the olive oil pack is shipped to Italy, which is normally also an important export market.

It is reported that the following shipments of fish were made to the United States during 1945, from the Provinces of Vizcaya, Santander, and Oviedo:



