

FOREIGN FISHERY TRADE

Imports and Exports

GROUND FISH IMPORTS: From January 1 to February 28, 1947, there were 2,977,548 pounds of fresh and frozen groundfish imported into the United States under the tariff classification, "Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish." This was 4,003,661 pounds less than the groundfish imports for the corresponding period in 1946, according to a report from the Bureau of Customs of the Treasury Department.

Commodity	February 1947	January 1947	February 1946	Jan. 1- Feb. 28, 1947	Jan. 1- Feb. 28, 1946
Fish, fresh or frozen fillets, steaks, etc., of cod, haddock, hake, cusk, pollock, and rosefish	1,417,052	1,560,496	3,466,388	2,977,548	6,981,209

Asia

EAST ASIA: The findings of the South East Asia Fisheries Conference have been summarized in the following report to D. W. Le Mare, Acting Director of Fisheries, Malayan Union and Singapore, according to the American Consulate General at Singapore.

A conference of scientists met in Singapore, January 6-8, 1947, to consider the problems of the fishing industries both marine and fresh water, of South East Asia and Australia in order to improve the value of the diets of the peoples of these territories by increasing their consumption of fish. The territories represented at this Conference were India, Ceylon, Burma, Siam, Hong Kong, Malaya, Singapore, North Borneo, Sarawak, Netherlands East Indies, and Australia, and the delegates were specialists known in many parts of the world. In fact, this was a historical occasion, for it is the first time that such a meeting has been convened in this part of the world and the delegates have all expressed their gratitude and pleasure at having met. To give some idea of the magnitude of the problems involved, a discussion was held, at a highly technical level, toward increasing the fish supply for nearly 650,000,000 people. The minimum target set by the nutrition authorities is to provide these people with 4 ounces of fish per head, per day, which means a total catch of nearly 100,000,000,000 pounds of fish per annum. The delegates to the Conference were unanimous in agreeing that this goal can be achieved. You may ask why this insistence on fish. The reason is that the majority of Asiatic peoples have a grave deficiency in the diet, a lack of protein.



Fish in one form or another is acceptable to most of them, and is a readily available form of protein. Now this target at which we are aiming means increasing the fish landings of these territories from 4 to 15 times their present level. This cannot be achieved in a short space of time and without planning and it may be 20 years before it is reached.

In the first place the provision of the essential gear and materials for re-establishing the fishing industries at a prewar level and to prevent them falling into a decline was discussed, for many of the territories concerned have not yet recovered from the ravages of the war. Burma for instance, has twice been a battleground in the course of 3 years. Consequently, the first problems to receive attention were those of rehabilitation of the industry.

The world-wide shortage of food makes reference to the immediate future a particular necessity. There is a serious shortage of cotton yarn needed for nets and tackle, and this is not only holding up the rehabilitation of the fishing industry (after the ravages of the war), but actually in some parts is leading to a decreasing production. A resolution was passed calling immediate and urgent attention to the matter by these organizations--international and national--which have control of the allocation and distribution of supplies of cotton yarn. There is a world shortage of cotton, but every attempt will be made for a special allocation for the fisheries of these waters.

Other urgent needs are for fishing hooks, manila rope, and wire netting. The speeding-up of the industry calls for powered vessels, especially for the purpose of servicing craft propelled by wind so that the fishing grounds may be extended, and the catches brought rapidly to market. There are many needs in respect of processing or preservation by cold storage. Diesel and other engines must be obtained.

Some of the methods of fishing in one area are not in use by the fishermen of other areas. The possibilities of an exchange of personnel and tackle for the extension of various methods was discussed at the Conference. Attention was given to the example of the introduction of methods by the Japanese before the war, when they supplied 35 percent of the fresh fish appearing in the markets of Singapore. The methods the Japanese used widely in South East Asia have largely fallen into abeyance and must be again established.

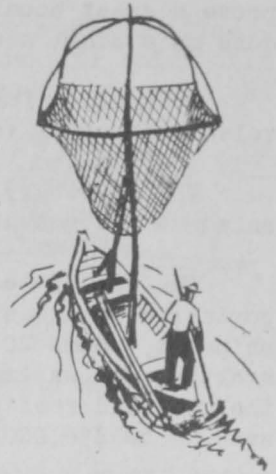
The question of trawling was considered, it was tried before the war; but scarcity of bottom-living fish in some areas, and above all, coral reefs, which ruin the nets, have precluded its extension; but it is being tried again with some success in Ceylon, and it will be watched by the experts of the other countries for the confirmation of this success.

The production of fresh-water fish in some countries almost equals the harvest from the seas. Some of this fish comes from lakes and rivers, but a great deal of it is from fish farming in ponds, paddy fields, and various collections of fresh water. Although fish culture goes back to early historical times, when in China and Europe several kinds of carp were cultured in ponds, yet fish farming of today needs the hand of the scientist for its further improvement.

The welfare of the fishermen received the attention of the Conference and among the items discussed were fisheries schools, extra rations where the work is particularly hard, loans, cooperative societies, the encouragement of subsidiary occupations in the off season, when the monsoon brings heavy seas.

Marketing facilities in all the territories need many developments. There is a shortage of machinery for making ice.

The importance of this is at once appreciated when it is recalled that the transport of fish from the sea to the consumer needs 4 times as much ice as the weight of the fish, if it is to be preserved in as fresh a condition as is desirable. Ice must be readily available at a very cheap rate for the fishermen, or it will never be possible to increase greatly the supply of fresh fish in the hot climates of these areas. That ice can be cheaply produced has been shown in Ceylon where it is sold by a trading company to fishermen at one rupee a hundredweight.



No nation possesses an ocean. Except for a fringe along the coasts the seas are free to all. The proper study and exploitation of the products of the sea can be dealt with only on an international scale. It is important, therefore, that there should be an organization to follow up the work of this Conference. The collection of scientific knowledge must be the basis for an extension of fishing methods and of fishing grounds, for improvements in processing and marketing, and the conservation of resources.

There is a good deal of information available in various territories, but there must be a central body to get this information together, interpret it and indicate its use. This is very important at the present time since many local records have been lost during the war, and perhaps copies of some of them may exist in other countries and can be collected.

Without a central body, collaboration and allocation of research programs cannot be adequately arranged.

One of the more important resolutions of the Conference was that there should be immediately started a permanent organization to follow up the work of the Conference, and to be the basis for the foundations of an Eastern council to be under the aegis of the Food and Agriculture Organization to which most of the United Nations subscribe.



Bahamas

The sponge beds in Bahamian waters which have been closed for the past several years were opened by Governmental decree on October 20, 1946, according to the Quarterly Economic Report of the American Consulate, Nassau, N. P., Bahamas. The disease which attacked the sponge beds and caused them to be closed has practically disappeared, but in some localities some small disease is still evidenced. Generally, the beds now being fished show an improved growth as compared with the pre-disease period.

The so-called mud beds, said to produce the best sponges, have not as yet been fished owing to the lack of boats and other equipment needed for this particular area. These mud beds, called the backbone of sponge beds, are located in the vicinity of Andros Island and cover an area approximately 100 miles in length by 80 miles in width and are in deep water.

Present fishing is being done in shallow water. If and when the mud beds are opened, thoroughly explored and found to be free of the disease, it should prove a great boon to this colony. Such fishing as has been commenced is being done on a small scale by native farmers who fish only part of the time.

Sponges so far put on the market are wool, reef, grass, and hardhead. No velvet or yellow varieties (the growth of the mud bed) have as yet been fished.

The Secretary of Agricultural and Marine Products Board stated that to date sales in the amount of \$12,000 have been made.

The writer took occasion to visit the sponge shed of one of the largest exporters of sponges in the colony where sponges were being sorted preparatory for shipment. Some 20 sorters and clippers were employed. The stock appeared to be healthy, and was made up of wool, reef, grass, and hardhead varieties, of which the wool and reef sponges were more abundant. In this shipper's shed, there were said to be \$56,000 worth of sponges ready for export from this market.



Canada

COLD STORAGE: Canadian holdings of fishery products totaled 27,417,000 pounds on March 1, according to a preliminary report received from the Department of Trade and Commerce, Dominion Bureau of Statistics. Compared with stocks held on February 1, this was a decline of 5,069,000 pounds, but was 9,218,000 pounds greater than stocks on March 1, 1946.



China

DAIREN: Emphasis is still being placed on fish production in the Dairen area, according to the American Consulate General at Dairen, China, which reports the following excerpts from local publications.

On January 15, 1947, there was published an article entitled "Helping Fishing Production," which reported that the Port Arthur-Dairen United Political Administration will extend loans of fishing equipment to the fishermen at market prices. The equipment may be obtained at once although the terms of the loan are not yet determined. The article further stated that the fishing industry must be developed to a degree far greater than under the Japanese occupation. On January 16, 1947, the local newspaper contained an article concerning an order of the Dairen Hsein Government. A fishing net factory is to be established, with the assistance of the Soviet military authorities, under the name of Yu Li Fish Net Manufacturer. When the factory is in full operation, it will employ 3,000 workmen. In the January 17, 1947, issue there was an item on the Sino-Soviet Fishing Company (subsidiary of the Soviet Fishing Trade Mission to Dairen). It stated that the company now has 30 fishing boats and that they are catching twice the quantity of fish caught by the same boats under the Japanese. An article in the February 10, 1947, issue stated that the fishermen in the Sino-Soviet Fishing Company receive an equal share in the profits and the employees of the concern receive a distribution of fish at very low prices.

Great Britain

BRITISH WHALING ACTIVITIES: Reports from the British Antarctic whaling fleet, recently released by British authorities, forecast a very successful catch this season. The factory ship Balaena has already taken 139,450 barrels of sperm and whale oil and it is estimated that the total catch of all ships may reach 900,000 barrels by April 7; whereas, the total catch last year--admittedly poor--was only 270,000 barrels. The value of this catch might reach \$42,000,000 with edible oil valued at \$270 per ton and sperm oil (used for highest grade lubricants) at \$320-\$450 per ton. Three factors were stated responsible for the good season:



1. Unusually good weather
2. Prevalence of blue whales which are richer in oil than the fin whales
3. Valuable "spotting" done by Walrus airplanes

Whale oil will be used largely in the United Kingdom for margarine and cooking fats rather than soap.



Iceland

ECONOMIC DEVELOPMENTS: Iceland fishing matters occupied an important part of a summary of recent economic developments in Iceland, received from the American Legation at Reykjavik.

Iced fresh fish sales to Great Britain were maintained at high levels throughout January and February. About 15,000 metric tons of fresh fish were unloaded at British ports in these two months at an average price of 0.50 crown (7.7¢) per pound.

Three thousand five hundred metric tons of herring were caught in Reykjavik's harbor waters during the first 2 months of this year. All of it was sent to Siglufjord on the north coast for reduction into valuable herring oil and meal.

The one year trade agreement between Iceland and Czechoslovakia due to expire on February 28 was prolonged for another 2 months pending the negotiation of another agreement. Under the original one, the Czechoslovaks have been buying, on a clearing basis, small quantities of Icelandic fish products, wool and sheepskins. The Icelanders have in turn been purchasing Czechoslovakian manufactured foods. The balance of trade between the countries has been highly favorable to Iceland because of lesser Icelandic purchases attributed to high prices in Czechoslovakia. The Icelandic Government hopes to find a way to reduce its clearing balance with that country before talks commence on the new agreement.

Icelandic trade delegations are currently negotiating fish sales agreements with the British and Soviet Governments in London and Moscow.



India

EFFORTS TO IMPROVE FISHING INDUSTRY: The Government of Bombay has devised a number of plans for the improvement of the fishing industry, according to information supplied by the American Consulate General at Bombay, India. It has established a technological laboratory in Bombay at a cost of Rs. 50,000 (\$15,000)^{1/} and it has appropriated \$140,400 for the opening of an aquarium with research facilities in Bombay and two research stations on the coast, one at Ratnagiri and the other at Karwar. Further expenditures will be required next year as the collective cost is estimated to be \$210,000.



The Government has been experimenting also in improved construction of fishing vessels, calculated to increase their range and improve their storage capacity. Two deckless vessels, 45 feet long with arrangements for fish storage are under construction. Thirty such vessels, costing \$240,000 in all, are to be built in the next five years and are to be made available at as many fishing centers as possible on a subsidy-with-loan basis. The Central Government and the Government of Bombay, sharing expenses equally, have also financed experimentation with a 52-foot vessel manned entirely by members of the fishing community and equipped with a 160 horsepower engine. A second trawler has been ordered from England for the use of the deep-sea fishing plan which was inaugurated some time ago in Bombay.

Additional cold-storage facilities are to be built in Bombay and two large fishing centers along the coast are to be erected. Toward this end the current year's budget has provided \$60,000 as a subsidy. One hundred and fifty-nine thousand dollars has been appropriated for the improvement of fish curing along the coast.

Training in the fishing industry is to be promoted by the establishment, by the Government, of a fish farm at Khopoli, where apprentices from the fishing community are to receive Government training. Nine thousand dollars has been set aside for the training of two science graduates who are to be sent abroad for training in technological problems connected with fishing. The Bombay Government will also submit the names of four candidates to the Central Government which plans to send youths to Grimsby, England, for training.

Finally, it is planned to grant larger loans at cheaper rates of interest to fishermen with boats and nets as security instead of property.



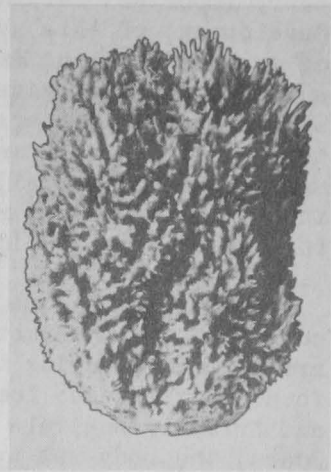
Lebanon

The outlook for the immediate future in the Syro-Lebanese sponge industry is not very promising, according to the American Legation in Lebanon. No large organizations engage in this business and individual divers have no means for acquiring modern equipment for sponge fishing.

^{1/}Indian Rupee equivalent to approximately 30 cents in U. S. currency.

Sponge beds are found along the Lebanese and Syrian coasts, between Nakoura (Lebanon) in the South and Tartous (Syria) in the North, as well as along the coasts of the Islands of Irwad and Cyprus. Summer and fall are the best seasons for sponge fishing. Local divers go out to sea in small fishingboats and dive in search of sponges without any equipment except iron nippers.

It is estimated that annual production in normal years amounts to between 2,200 pounds and 3,300 pounds. During the last few years, however, production has been very low due to wartime restrictions and to the absence of skilled divers and equipment. It has been estimated that annual production may be increased to 6,600 pounds and even to 11,000 pounds if present sponge methods are improved and modernized. Three kinds of sponges are produced: soft, medium, and coarse. About half the production is reported to be of the soft and medium varieties.



Newfoundland

MARKETING SYSTEM CONTINUED: The Newfoundland Fisheries Board has recently announced that the Newfoundland salt codfish industry will continue to market salted fish under the system which was developed during the war years and which is known as the Marketing Administration System, according to the American Consulate General, St. John's, Newfoundland.

From the early 1920's, the Newfoundland salt codfish trade in common with that of many other countries in the world, experienced a lengthy period of depression. Not only were conditions in the consuming markets bad, but it was common for exporters, in their efforts to dispose of the catch, to compete unnecessarily in making sales, to the detriment of prices. Arising from this, it became evident that some form of control was essential to the attainment of any degree of stability.

The first step in this direction was the passing of an Act in 1933 under which the Salt Codfish Exportation Board came into being. This was followed in May 1935 by the creation of the Salt Codfish Board. This Board covered only the salt codfish industry and it was apparent that its functions should be enlarged. Consequently, an Act was passed on May 24, 1936, setting up the Newfoundland Fisheries Board, with wide powers over all branches of the fishing industry.

Under the powers conferred upon the Board, under the Act, wide control was exercised over the marketing of salt codfish. This control took the form of prevention of sales on other than an outright basis and provided that such sales could be effected only on terms and at prices set by the Board from time to time. To assist the Board in establishing these conditions of sale and prices, various Advisory Committees were appointed.

One of the first steps taken by the Board was the licensing of all exporters of salt codfish and these licensed exporters formed a trade group known as the Salt Codfish Association.

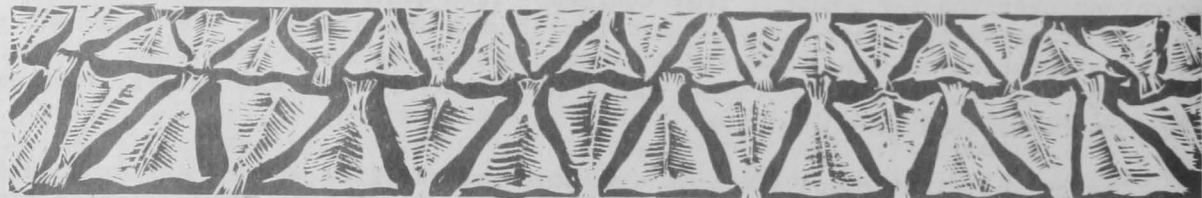
Portugal was the first market to be fully controlled and the results were so beneficial to the trade that this form of control was gradually extended to cover every important market to which Newfoundland exported salt codfish. A natural development of this system of control was the formation, under the encouragement of the Newfoundland Fisheries Board, of exporters into cooperative marketing groups, such groups being given the sole right to make sales to the respective markets. The Portugal Exporters Group, Ltd., was formed in 1936 and during the period up to 1943, the group marketing system was operating for Puerto Rico, Jamaica, Spain, Brazil, and in a small measure, for several other markets. The appointment by the Board of resident representatives in Portugal, Greece, Puerto Rico, and Jamaica further assisted in improving marketing conditions.

Early in 1943, a most important and far-reaching development took place in connection with marketing. This was, briefly, Newfoundland's participation in an arrangement covering the distribution of the 1943 production of salt fish of Newfoundland, Canada, Iceland, Greenland, St. Pierre and Miquelon among allied nations and friendly neutrals under an allocation scheme controlled by the Combined Food Board, the body set up by the United Nations to facilitate procurement and distribution of those food commodities the supply of which was short. A scale of prices was laid down for all markets of the various qualities produced and allocations set, on a percentage basis, for all purchasing countries. As a result of the Combined Food Board arrangements, it was possible to establish prices to be paid to fishermen before the opening of the fishing season.

On March 25, 1947, the Newfoundland Fisheries Board, in view of the abandonment of the international marketing arrangement instituted by the Combined Food Board,¹ made the following statement, announcing the continuance of the Marketing Administration System:

Notice of Newfoundland Fisheries Board

"Notice has been received that the arrangements which have existed since 1943, by which World production of salted codfish, haddock, hake, cusk, pollock, and ling was distributed to consuming countries by the Combined Food Board and latterly by the International Emergency Food Council, will not be continued to cover fish of 1947 production. However, improvement and unification of the Group Marketing System have been under intensive study for some time, and meetings of the whole Trade are planned in the near future to discuss proposals to this effect. In the meantime important forward sales of 1947 fish can be negotiated. In view of these things and with the approval of a substantial majority of active exporters it has been decided that it would be beneficial to the Newfoundland salt codfish industry to continue, until further notice, to market Newfoundland salted fish under the system which was developed during the war years and which is known as the Marketing Administration System. To facilitate the operation of these arrangements, a Committee, as was the case last year, has been set up by the Board and denominated "The 1947 Marketing Administration Committee." The following Notice, therefore, is given to licensed exporters:



¹The Combined Food Board was discontinued in 1946, and certain of its functions passed to the International Emergency Food Council.

"Under and by virtue of the powers conferred by Section 7 of the Newfoundland Fisheries Board Act 1936, as amended, and of the Regulations made thereunder dated the 14th day of August, A. D. 1942, The Board hereby gives notice to all licensed exporters that:

- (1) All licensed exporters are hereby required to participate in the said Group Marketing System to the full extent of their collection of fish of 1947 production of the types referred to above.
- (2) All licensed exporters are required to carry out the instructions given them from time to time by the Board, or by the Marketing Administration Committee with respect to declaration of stocks, preparation, packing, marking, and exporting, and all other matters connected with the sale for export of fish of 1947 production.
- (3) No licensed exporter shall make sales, for export, of fish of the types referred to herein. All sales shall be made by or through marketing groups on whom the exclusive right to sell and export will be conferred by the Board."



Nova Scotia

FISHERIES: The production of the Nova Scotia fisheries for February 1947 was 1,312,900 pounds of fish with a landed value of \$117,681, according to the American Consulate General, Halifax, Nova Scotia. This is a decrease of 8,619,200 pounds, and \$361,493 in value from the catch of February 1946. This decline is due, in part, to labor disputes which have tied up the deep-sea fishing fleet since December 29, 1946.

The discontinuance of import permit requirements for shipments of salt fish destined to the United States was greeted enthusiastically by Nova Scotia exporters of that product. They state that the removal of this restriction will allow them to relieve the present oversupply by direct shipment from warehouse stocks. This will obviate the necessity of drying the fish and shipping it to the West Indies, the principal previous market outlet for this product.

The economic consequences of the labor dispute referred to above cannot yet be estimated. January and February landings of cod, haddock, halibut, and pollock fell 11,948,500 pounds and \$619,523 from the same period in 1946. Approximately 500 fishermen and 1,000 fish handlers have been unemployed, principally in Halifax and Lunenburg. Small business firms in both places, dependent upon the trade of these people, have been seriously affected. Announcement was made on March 20, 1947, that work stoppage was over.

Salt fish stocks are heavy with demand light. Pickled fish stocks are low, with demand light. Fresh fish stocks are very low with moderate demand. Cold-storage stocks are heavy with fish bought at high prices. The recent drop in the Boston market has caused the owners to hold their shipments until prices have become more stable.

The Canadian Department of Fisheries has announced a new plan for the re-organization of the Fisheries Field Service. Since 65 of 100 newly appointed inspectors are to be assigned to Maritime waters to assist fishermen, it appears that the Nova Scotia industry will receive some benefits. The new appointees, all veterans of World War II, who have received special training for this purpose, will teach the fishermen modern methods of fishing, and of handling and processing the catch. The Department of Fisheries believes that this program will both increase the catch and improve the quality standards of production above present levels.