

MEMORANDUM

DATE: December 7, 1979

TO: Council Members, Scientific & Statistical Committee
and Advisory Panel

FROM: Jim H. Branson

SUBJECT: Suspended Coverage of World Developments in the "WORLD
FISHERIES REPORT"

Done

ACTION REQUIRED

Comment on suspension and budget cuts. Urge NMFS to re-instate coverage if its decided its worthwhile.

BACKGROUND

We receive and distribute a monthly report from the Office of International Fisheries Affairs/Foreign Fisheries Analysis Division - called the "LATEST DEVELOPMENTS IN WORLD FISHERIES." The November, 1979, Part II issue contained an item of interest concerning the suspension of the coverage of various world developments.

To quote from the report:

II, III, IV, V

"The coverage of world developments in joint ventures, fishing incidents and seizures, tuna fisheries, and marine mammal and endangered species has been temporarily suspended. Due to personnel constraints, the Division of Foreign Fisheries Analysis has not been able to replace the two fulltime specialists, whose positions have recently been abolished. These reductions have forced the Division to curtail regular coverage of developments in the above subjects until the staffing situation improves."

XI

"The coverage of Soviet and Eastern Europe fishery developments has been suspended. Due to personnel constraints it has not been possible to replace the full time specialist whose position was recently abolished. Until the full time employee is replaced, detailed reporting on Soviet and East European fisheries will have to be suspended."

A number of people have objected to the reduced coverage and have asked that we place it on the agenda for any comments or support the Council may wish to give.

Attachment

The November, 1979 Part II Report

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AGENDA ITEM H-8, DEC 1979

UNITED STATES DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
 National Marine Fisheries Service
 Washington, D.C. 20235
 Office of International Fisheries Affairs
 Foreign Fisheries Analysis Division

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THE LATEST DEVELOPMENTS IN WORLD FISHERIES (NOVEMBER 1979, PART II)

The Division of Foreign Fisheries Analysis, Office of International Fisheries Affairs, which follows trends in world fisheries for the National Marine Fisheries Service, NOAA, has prepared the following summary of recent significant developments.

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I. FISHERY AGREEMENTS AND QUOTAS

Japan-Soviet talks--Japan announced recently that negotiations will begin in Moscow on November 15 on 1980 reciprocal fishery quotas. According to Japanese Government sources, Japan is expected to press for a fish quota of 800,000 metric tons (t) in the Soviet Union's 200-mile fishing zone, 50,000 t more than its 1979 quota, while the Soviet Union will attempt to lower Japan's quota to 650,000 t, the same as the Soviets' in Japan's 200-mile zone. (BB)

European fishermen ignore mackerel quotas--A European Economic Community (EEC) report on European mackerel fisheries estimates that the total 1979 mackerel catch in EEC waters will exceed the TAC of 450,000 t by 225,000 tons. The EEC is recommending that the 1980 mackerel TAC within the EEC 200-mile fishery zone be reduced by 40 percent. (MM)

Norway bans United Kingdom haddock fishery--Norwegian fishery authorities have banned haddock fishing by UK vessels in Norwegian waters from November 4 to the end of 1979, claiming that UK fishermen have already taken their quota. The ban would seriously affect Scottish distant-water fishing vessels. Norway and the Soviet Union have already agreed to a general ban on directed Barents Sea haddock fishing in 1980, permitting only an incidental catch of 50,000 t of haddock. (MM)

Polish-Irish economic agreements--Poland and Ireland are negotiating long-term economic and trade agreements in Warsaw which may include the transfer of Polish-constructed fishing vessels to Irish flag. (AM)

Namibia goes 200 miles--Southwest Africa's Administrator General announced on November 5 the Government's intention to proclaim a 200-mile fishing zone to protect the heavily-exploited fishery resources. The date on which the new zone will become effective will be announced shortly. The Administrator General also decided to recognize the historical presence of foreign nations who fish in the area and will accommodate them "according to internationally accepted criteria." He added that fishing stocks will be managed in



accordance with accepted scientific principles and with due regard for the advice of international fisheries commissions concerned with the area. (NB)

II. JOINT VENTURES

III. SEIZURES AND INCIDENTS

IV. TUNA

V. MARINE MAMMALS, ENDANGERED SPECIES

The coverage of world developments in joint ventures, fishing incidents and seizures, tuna fisheries, and marine mammals and endangered species has been temporarily suspended. Due to personnel constraints, the Division of Foreign Fisheries Analysis has not been able to replace the 2 full-time specialists, whose positions have recently been abolished. These reductions have forced the Division to curtail regular coverage of developments in the above subjects until the staffing situation improves.

VI. AQUACULTURE

French culture shrimp in the Caribbean--The French Pacific Oceanographic Center (COP) has conducted successful research on freshwater shrimp (Macrobrachium rosenbergii). The French National Center for the Exploitation of the Oceans (CNEOX) is promoting the culture of this species in Martinique, Guadeloupe, and French Guiana. CNEOX's affiliate, France-Aquaculture, will help local authorities adopt COP's findings to local conditions. (DW)

Costa Rican shrimp culture project--The Costa Rican shrimp culture company, Maricultura, plans to expand its facilities at Chomes on the Pacific coast. The \$10 million ^{1/} expansion project is partly financed by US investors and should increase the catch of shrimp from 145 t to 1,000 tons. (DW)

Jamaica expands aquaculture--The Jamaican Government has two aquaculture research centers. Facilities at one of these centers have recently been enlarged and have produced over 100,000 fingerlings in 1978. These centers used to supply fingerlings to 42 test ponds. (DW)

Italian eel culture--Italian aquaculturists near Trieste have reportedly succeeded in using salt-water pens to raise eels. After years of experimenting, the Italians claim that the above eel-raising technique has been perfected beyond their most optimistic expectations. (MM)

UK fish farmers losing money--Many UK fish farms are still operating at a loss, according to a recent Reading University study which covered 160 rainbow trout farms, of which only 80 were of commercial size. (MM)

VII. FISHERIES IN WESTERN EUROPE AND CANADA

European cod quotas reduced--Cod quotas in Icelandic, Norwegian and European Economic Community (EEC) waters will be sharply lower in 1980, reducing the cod catch from these three major European cod fishing grounds by as much as 150,000 - 200,000 tons. The decline will probably be most severe in the

^{1/} Throughout this report, all values are given in US dollars unless otherwise indicated.

Barents Sea north of Norway where the current Norwegian cod quota is 285,000 tons. Total cod quotas in the North Sea will decline from the current 247,000 t to 200,000 t in 1980; in Iceland, the estimated 1979 cod catch of 340,000 t may decrease to about 300,000 tons. (MM)

UK seafood marketing--The UK fishing industry spends an estimated \$300,000 annually on advertising for an industry with annual gross receipts of \$700 million. The turkey industry, by comparison, spends \$2 million to advertise a \$250-million-per-year industry. Recent research shows that younger housewives are turning away from seafood. (MM)

Norwegian vessels sold to the UK--Norwegian foreign trade officials have reported that 25 fishing vessels have recently been sold to UK fishing companies. Most of the vessels are purse seiners to be used in the UK mackerel fishery. (MM)

Illegal European herring fishing--UK and French fishermen have been accused of illegal directed herring fishing in the North Sea. The charges result from recent evidence that large quantities of herring are being landed in Denmark and Boulogne, France. The total ban on North Sea herring fishing became effective in 1977 and will continue at least until 1980. (MM)

Dispute over Scottish herring fisheries--UK freezer trawlers have been accused of catching large quantities of herring while fishing mackerel west of Scotland where directed herring fishing is prohibited. Some vessels have reportedly taken 75 percent herring and the remainder other species, mainly mackerel. (MM)

Scotland to import more from Iceland--Scottish (UK) fish wholesalers have urged Iceland's Ambassador in London that Icelandic trawlers land their catch in Fleetwood rather than in the UK North Sea ports like Grimsby and Hull. The Scottish merchants are short of raw fish supplies and are arguing that Icelandic vessels would use less fuel if they landed their catch in Fleetwood. (MM)

Norwegian fishery catch projections--Norway's fishery authorities have projected that annual catches in the 1980s will not exceed 2.5 million t, mainly because of the poor state of the Barents Sea resources. The 1977 fisheries catch was 3.1 million tons. (MM)

Netherlands using more mackerel--Netherlands fish smokers are turning increasingly to mackerel to replace the depleted herring. The above development has been encouraged by the Dutch fisheries administration and research agencies. Smoked mackerel is also gaining popularity in the United Kingdom (UK). In the Federal Republic of Germany (FRG), processors have been using pilchard to replace herring. (MM)

France's 1980 fisheries budget up--France's Ministry of Transportation has budgeted \$45 million for fisheries in 1980, a 37 percent increase over the current fiscal year budget. Outlays to aid investments in modern and improved fishing vessels will be tripled. Spending on aquaculture will also increase substantially. (MM)

Spanish mussel products--Spanish mussel merchants are seriously considering major efforts to develop new mussel products. Possible new products include burgers, sausages, and meatballs, all made of minced mussel meat. (MM)

Italian-Libyan joint venture--The Governments of Libya and Italy are discussing the creation of a joint fishing company whose shares will be 51 percent owned by Libyan and 49 percent by Italian companies. Libya is requesting that the Italian Government also participate in the venture. The company, to be headquartered in Tripoli, will have an initial capital investment of \$50 million. (NB)

Canadian fisheries delegation in Spain--A delegation of about a dozen Canadian Government and fishing industry officials visited Madrid and Vigo in mid-July. Discussions were held with Spanish fishing industry leaders on the joint development of Canadian cod and squid fisheries. The Spaniards agreed in principle to visit Canada in October 1979. (MM)

Canadian salmon landings decline--Canada's British Columbia salmon landings through August were 6 percent below 1978 levels for the same period. Net fishermen suffered the greatest declines. (MM)

Canadian tax incentives--Several Canadian provincial leaders, including Nova Scotian Premier John Buchanan, have joined in proposing tax incentives to stimulate increased investment in commercial fisheries. Under the Nova Scotian proposal, investors would be permitted to write off for federal tax purposes 150 percent of their fisheries investments. (MM)

VIII. FISHERIES IN ASIA AND THE PACIFIC

Australia's 200-mile fishing zone--Australia's new 200-mile fishing zone went into effect on November 1, 1979. All foreign fishing vessels will be required to pay access fees to fish in the new zone, which is almost as large as the Australian Continent. (BB)

Australian-Soviet joint venture--Australia's Craig Mostyn and Co. Ltd., and a joint Soviet-Singapore Company, Marisco Pty. Ltd. have been granted approval to conduct a feasibility fishing project off the northern coast of Western Australia. Three Soviet trawlers will assess shrimp and pelagic fish resources to determine the commercial feasibility of their utilization. Most of the catch will be exported, some of it processed on-shore and the remainder on board the Soviet vessels. (BB)

Japan to increase imports of US king crab--Japanese importers are reportedly planning to import as much as 14,000 t of Alaska king crab in 1979, or 2,000 t more than in 1978, in anticipation of receiving lower tanner crab quotas by the US in the Bering Sea in 1980. The US may reduce Japan's 15,000 t 1979 tanner crab quota by as much as half in 1980. (SS/BB)

Japanese pollock prices up sharply--Exvessel prices of the first pollock to be landed by Japanese fishermen from the Soviet Union's 200-mile fishing zone at the beginning of September 1979 ranged between \$362 and \$384 per metric ton (\$0.16-17 per pound), or about three times the early-pollock-season prices in 1978. The high prices reportedly result from lower catch and low cold storage holdings of surimi in Hokkaido. By contrast, Japanese processors announced only recently that they would initially be prepared to pay only \$0.065 per pound for pollock caught by US fishermen and delivered to Japanese factory vessels in the US 200-mile zone. (SS/BB)

Japan's coastal salmon catch up--Japan's fall season salmon catches off Hokkaido totaled 13,869 t by the end of September 1979 after 20 days' fishing, an increase of 30 percent over the 1978 level and 5 percent ahead of the record high catch of 13,219 t caught during the same period in 1975. (SS/BB)

Japanese fishermen protest oil storage plans--Twenty Japanese fishing vessels from Kamigoto, Nagasaki Prefecture, demonstrated recently against plans by the Japan Petroleum Development Corporation to build a 1.6 billion gallon floating oil storage facility on their fishing grounds. Whether or not the oil depot will be built depends on the decision of the 347-member Kamigoto Fishing Cooperative. (BB)

Republic of Korea's (ROK) canned exports decline--ROK's exports of canned fishery products were \$10.3 million during the first 7 months of 1979, a decrease of 50 percent below January-July 1978 exports. The country's 1979 export goal for these products of \$40 million was fulfilled by only 26 percent. One of the major factors in this decrease is the sharply reduced export of canned oysters to the US and other major importing countries where there is an oversupply. ROK's exports of canned oysters totaled \$6.5 million, or only 26 percent of the 1979 export goal of \$25 million. (BB)

Republic of Korea's (ROK) squid exports--ROK's exports of squid were \$25 million during the first 8 months of 1979, more than twice as much as a year ago, according to the Korea Frozen Seafood Exporters Association. The sharp increase in squid exports stems largely from increased demand in Japan, the ROK's leading customer, and from the government's relaxing export controls following high domestic squid catches. (BB)

Malaysia's catch increases in 1978--Malaysia's 1978 fisheries catch totaled 705,100 t, an increase of about 14 percent over 1977. Malaysia's fishery exports, meanwhile, were worth \$99 million in 1978, an increase of 20 percent over those in 1977. (BB)

Taiwan to explore Antarctica--Taiwan's Council for Economic Planning and Development announced plans for a fisheries research cruise to the Antarctic, marking the first time that a private Taiwanese research vessel was sent to this area. The government's exploratory fishing vessel, Haikung, has twice previously visited the Antarctic. (BB)

IX. FISHERIES IN LATIN AMERICA

Mexico exports squid--Mexico has begun to export whole frozen squid for the first time. The squid exports to French and Spanish markets totaled 4,500 t in 1978. Future exports may also be shipped to Italy. It is believed that much of this exported squid was caught in the US FCZ off New England. (DW)

Poles fish off Argentina--Press reports indicate that up to 25 Polish factory trawlers are fishing off Argentina, outside the country's 200-mile limit. The vessels are reportedly catching hake north of 40°S. (DW)

Argentina concerned about Polish fishing--Argentine authorities have asked Uruguay to stop giving logistical support to the Polish stern factory trawlers fishing outside Argentina's 200-mile zone. Uruguay reportedly allows the Poles to resupply and buy low-priced fuel in Montevideo. (DW)

Argentine shipbuilders form association--The major Argentine shipbuilding companies, Alianza, Astarsa, Corrientes, Forte, Mestrina, Principe, and Menghi and Tar, have decided to form a trade association. The association will be patterned after other such groups already established in Spain and in Brazil. The association may be formed from the already existing Union de Constructores Navales. (PD)

Argentine fleet expands--Two Argentine-Spanish joint ventures, Pesquera San Carlos and Pesquera Santa Margarita, have acquired three Spanish trawlers, the Caaveiro, the Folias, and the Corcubion. The Caaveiro, a 92-meter(m) stern factory trawler, was reportedly one of the most modern in the Spanish fishing fleet, and has a storage capacity of 1,300-1,500 tons. The combined annual catch of the three vessels is expected to be 17,000 tons. (PD)

Uruguay expands hake and squid fishing--Uruguayan fishermen caught 41,000 t of hake in 1978, over half of the country's total fisheries catch of 74,000 tons. The 1978 hake catch was nearly double the 23,000 t caught in 1977. The squid catch was 22,000 t in 1978, but the 1977 catch was less than 400 tons. Japanese companies have expressed great interest in Uruguayan and Argentine squid. (DW)

Chilean cooperative movement--Chile has 68 cooperatives with 7,726 members, or about 36 percent of the 21,000 artisanal fishermen in the country. Artisanal fishermen land only about 8 percent by quantity of Chile's fisheries catch, but that accounts for over 30 percent of the total value of all Chilean fishery products. (CN)

Haiti ends lobster ban--The Haitian Ministry of Agriculture has revoked a 1976 ban on the harvest of berried female and juvenile lobsters. The only remaining regulations are those concerned with sanitary conditions in the packing plants. (DW)

Belizian lobster catch declining--Belizian fishermen reported a lobster catch of 540 t in 1978, significantly below the record 800 t caught in 1972. The 1978 catch was, however, slightly above the 528 t caught in 1977. The establishment of a new cooperative in Dangriga may increase the catch in 1980. (DW)

Bermuda fisheries development--Bermuda imports about two-thirds of its seafood annually. The Government, with the assistance of the UNDP/FAO, is trying to reduce imports and increase job opportunities. One project includes a plant where new products from species unfamiliar to local consumers but available in Bermuda's 200-mile zone (shark, tuna, flying fish, and marlin) will be made. (DW)

X. FISHERIES IN AFRICA AND THE MID-EAST

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