

## The Polish Fishing Industry

Polish fishermen caught about 700,000 metric tons (t) in 1980. The Polish catch has been as high as 800,000 t, but has declined as a result of the 200-mile extensions by coastal countries.

The NMFS Division of Foreign Fisheries Analysis foresees no large increase in future Polish fisheries catch and any increase in per capita consumption will probably have to come from imports. Consumption of fishery products is now 7 kg per capita; consumption by 1985 is planned at 12 kg, but Polish officials believe that this figure will not be reached until at least 1990. The Government has been trying to increase per capita fisheries consumption for years, but Polish consumers have resisted, preferring freshwater fish (i.e., carp and trout) to unfamiliar marine species.

Poland has one of the larger fleets fishing in U.S. waters. Fish plays an important role in the Polish diet as a supplementary source of protein and as a source of hard currency. One of the directors of Rybex<sup>1</sup> stated that because of the poor state of Polish agriculture, it will be cheaper for Poland to obtain protein by fishing rather than by increasing supplies of meat for at least the next 15 years, even though labor and especially fuel costs will continue to rise.

Poland hopes to increase fish supplies for the domestic market during the next decade and beyond. Consumption of fish is now 7 kg per capita. The planned consumption by 1985 is 12 kg per capita but officials of the Central Board stated that this figure will probably not be reached at least until 1990. The government has been trying to increase per

capita fish consumption for years. The problem is that Poles prefer such freshwater fish as carp and trout over unknown Pacific ocean and Antarctic species. A much more intensive public relations and educational program will have to be conducted before per capita consumption significantly increases.

Total annual catch in the past has been as high as 800,000 t but the estimate of the 1980 catch was closer to 700,000. No large increase in the annual catch is foreseen and any increase in per capita consumption will have to come from imports. Present domestic consumption of processed fish is about 240,000 t. An additional 40,000 t are exported.

In 1981, 418,000 t of herring, 227,000 t of cod and 60,000 t of sprats were permitted to be caught in the Baltic. Poland's allocations were 80,000 t of herring, 60,000 t of cod, and 13,000 t of sprats.

Poland's annual Baltic catch is about 200,000 t, 25-30 percent of the total annual Polish catch. Of this amount, about 29,000 t, 15 percent of the total annual catch, is caught by private fishermen. These people own their own boats and can hire help. They can sell privately or to the government-owned Centrala Rybna fish stores.

Centrala Rybna must purchase the fish if a fisherman wants to sell to the government. It is hard for individuals to sell privately as the government retail price for fish is heavily subsidized and has not been increased in 20 years. For example, 1 kg of cod fillet sells for 20 zloties (about 65 cents), less than half of its actual cost. Private sales of smoked or fried fish are usually made to tourists during the summer. An additional 43,000 t, 20 percent of the total annual catch, is caught by cooperatives whose boats are jointly owned. Approximately one-third



of the total Baltic annual catch, therefore, is made by non-state boats.

The number of vessels in the Baltic fleet exceeds needs by about 25 percent, however, there is a shortage of properly equipped boats. State-built vessels are reportedly fitted with too much and too expensive navigational equipment for the Baltic fleet. These ships are more appropriately equipped for deep-sea fishing. There is also a shortage of processing equipment such as ice factories and cold storage facilities. The shortages are felt most severely in early spring during the cod season.

There is also a shortage of deep-sea vessels. When the 200-mile limit was put into effect, Polish fishing companies "temporarily" halted orders for new ships. They wanted to wait to determine what would be the best suitable vessel(s) as their chief future fishing activity was not known. It still is not known and the fleet is gradually growing older and smaller.

There are now about 300 boats in the Baltic fleet (excluding those less than 30 feet long) and about 130 deep-sea vessels. Morocco has closed its waters to Polish fishing vessels and the Polish-Senegalese joint venture ended in late 1980 when Senegal refused to renew the agreement.

The Poles presently have three joint ventures with Peru but feel unsure about future Peruvian cooperation. A joint

<sup>1</sup>Rybex is the foreign trade enterprise of the Polish Central Fisheries Board.

venture agreement has been signed with New Zealand and the Poles will soon start fishing there. But the ships formerly fishing off Africa are not suitable for New Zealand waters. Poland will have an excess of coastal fishing vessels if new cooperative ventures are not established. As a result, the U.S. market and fishing allocations are becoming very essential to Poland.

Poland's chief fish imports are fresh and salted herring, carp at Christmas, and mackerel. The biggest problem is money for imports. Money for imports is allocated by the Ministry of Agriculture and the Ministry of Food Supplies. Until 1980, there had been sufficient funds available. Starting in 1980 and continuing into 1981 (and likely in the future as well), insufficient monies were available to complete requisite purchases. This has caused an inability to buy fish when the price is low and results in an even greater foreign currency drain as higher prices must be paid for smaller amounts of fish.

Carp, the sine qua non of the Polish Christmas Eve dinner, is in short supply and is usually only available at Christmas. 12-13,000 t were needed for 1980 but Poland only produced 5,500 t and only planned on importing 3,500 t (which had to be paid for in hard currency). Two 1 kg carp are considered necessary for a family of four.

In 1980 there were shortages of carp in southern Poland and in small villages. Carp is sold live starting about 10 days before Christmas and a separate retail apparatus must be set up for this short period of time. Carp is sold whole, sometimes gutted or headless, but fillets are not suitable. In recent years, some frozen carp has been sold because it could be purchased abroad at a lower price.

The prospect of U.S. carp sales to Poland does not look promising. Polish carp has no or few scales and the flesh is white. U.S. carp is called wild carp (sazan) instead of carp (kar). It is fully scaled, bonier, has darker flesh and a different taste.

Poland in the past has exported fish fillets to other European countries. The Poles are now being underpriced by large

sales of cheap fish fillets from Argentina. Moreover, Polish fishermen have recently won a 15 percent wage increase. One Polish official expressed the opinion that subsidies for the price of fish should be shifted to salaries so that there can be higher retail fish prices. As things stand now, coastal areas have a geographic subsidy because of greater availability and consumption of fish there.

Poland catches a lot of squid but it is not eaten in Poland and the EEC has a high tariff on squid. The price of squid is very low in Poland in order to make it economically attractive and there is a small education program whose aim is to inform people how to cook squid and other seafood not traditionally eaten.

Poland sells jack mackerel, blue whiting, hake, and sardinella to African countries, but Rybex expressed concern about port congestion and unsureness of payment.

Cost of fuel, not wage increases, is the most significant source of increased costs for the Polish fleet. Fuel must be paid for in hard currency. Older ships with less powerful engines can fish off Norway or Africa but those in the Pacific or Antarctic need powerful engines which consume large amounts of fuel.

The head of the Odra fishing company bemoaned the fact that Polish vessels were not permitted to offload or transship in U.S. ports fish caught on the high seas. He felt that the protection afforded to U.S. fishermen by this law was no longer applicable because of the existence of the 200-mile limit and the present system of U.S. fish allocation. He stated that the law caused several problems for the Poles. First, it resulted in considerably higher transport costs as fish usually had to be transported to a Polish port. Second, the quality of the fish suffered from excessive handling.

Eight of Odra's 48 ships and 4 of Gryf's 27 ships fish in U.S. waters. In addition, Dalmor has boats in U.S. waters. These three fishing companies and Transocean (the company whose vessels supply the fishing fleet) use Vancouver, B.C., as their port for repairs, supplies, fuel, etc. The head of Odra, however, reportedly would like to use Seattle, Wash., and/or other U.S. west coast ports for these services.

Fishing crews are changed every 5 months. Odra alone spends over \$800,000 annually on supplies and repairs in Vancouver and an additional \$2,500,000 on fuel. Gryf spends about half of these amounts, and Dalmor and Transocean spend considerable sums as well.

### **EEC Lowers Tariffs on Cod and Whiting Imports**

From 1 January to 31 December this year, the EEC will allow a total of 2,000 metric tons (t) of whiting, *Merluccius bilinearis*, whole, headless, or in pieces, to enter the EEC at the reduced tariff rate of 8 percent instead of the normal import tariff rate of 15 percent. A complicated share-out system was established to determine each Member State's allocation, primarily using estimates of the previous year's needs and usage.

Two installments were established: The first installment of 1,310 t was implemented 1 January 1981; a second installment of 690 t will constitute a reserve which will be drawn on by Member States after they have used up their initial share out.

The first installment of 1,310 t is as follows: Benelux (Belgium, Holland, and Luxembourg), 10 t; Denmark, 305 t; Germany, 552 t; Greece, 1 t; France, 194 t; Ireland, 5 t; Italy, 9 t; and the United Kingdom, 234 t.

In a similar decision, the EEC is allowing 10,000 t of frozen cod fillet imports to enter the EEC at a reduced tariff rate of 8 percent instead of the normal import tariff rate of 18 percent. In the first installment, 61 percent of the quota is allocated to Member States according to historic usage with the remaining 39 percent constituting the reserve. As a Member State exhausts its initial allocation, it will be allowed to draw on the reserve until the 10,000 t quota is exhausted.

The initial quota allocations for each Member State are: Belgium, Holland, and Luxembourg, 25 t; Denmark, 500 t; Germany, 1,800 t; Greece, 5 t; France, 1,000 t; Ireland, 5 t; Italy, 10 t; and the United Kingdom, 2,500 t.

# Uruguayan Fish Catch and Exports Climb

## Exports

Uruguayan fishermen reported a record catch of 120,000 metric tons (t) in 1980 even though they have to pay some of the world's highest prices for diesel fuel. They were also expected to set another catch record in 1981.

### Catch

The Uruguayan fishing industry in 1981, unlike the industry in neighboring Argentina, has had an excellent year despite some problems which developed in 1980. The weather in early 1980 was unusually warm and affected the annual migration of hake, the most important species Uruguayan fishermen catch. When the hake finally reached the coastal grounds, it appeared in record quantities. This catch in 1980 was so large that processing plants were unable to handle the quantities landed. The hake catch in 1981 was also reported good. The Uruguayan Government was concerned, however, about sea trout stocks and had reportedly closed that fishery until 1982. Even so, most local observers believed that fishermen would again set new catch records, perhaps reaching as much as 150,000 t (Table 1). The sig-

fuel has to be imported and the country has serious balance of payments difficulties. Industry trade associations are extremely critical of the government's failure to provide more relief from the high fuel prices. They especially complain that the Argentine fishermen with whom they compete are able to buy fuel at cheaper prices and receive higher export subsidies. Even though the Uruguayan Government had been rebating 40 percent of fuel costs to the fishermen, they still complained of the extensive paperwork required.

### Domestic Market

A very small part of the Uruguayan catch is marketed domestically. In 1979, about 13,500 t, or 12 percent of the catch, was sold in Uruguay. A decline in beef prices in 1980, however, adversely affected 1980 fishery sales, because many consumers apparently increased purchases of relatively cheaper beef.

The Uruguayan fishing industry is dependent on foreign markets; from 85 to 90 percent of the catch is generally exported. Export shipments have increased rapidly in recent years and may have hit \$60 million last year (Table 1). Uruguayan exporters were concerned that high interest rates in the United States were affecting export sales. United States importers were having difficulty financing imports and turned to cheaper domestically caught species. Uruguayan exporters were also affected by higher import duties placed on fishery imports by Brazil. The latter was reportedly trying to protect its domestic poultry industry. Brazilian consumers increased fish consumption because of rising poultry prices. Even with these problems, exporters continued to increase export shipments. Local observers reported in early 1981 that Uruguayan exporters were finding a ready market at higher prices. (Source: IFR-81/122.)

Table 1.—Uruguay's fish catch and fishery exports, 1975-1981<sup>1</sup>.

Year	Catch <sup>2</sup> in 1,000 t	Exports	
		Amt. <sup>3</sup> (1,000 t)	(US\$1 million)
1975	26.2	8.0	3.4
1976	33.6	11.0	5.2
1977	48.3	17.7	10.3
1978	74.2	32.7	22.5
1979	108.1	47.8	36.2
1980	120.0	67.0	50.0
1981 <sup>4</sup>	150.0	75.0	60.0

<sup>1</sup>Source: FAO "Yearbook of Fishery Statistics," 1979 (1975-79 data) and U.S. Embassy, Montevideo, for 1980-81 data.

<sup>2</sup>Live weight.

<sup>3</sup>Product weight.

<sup>4</sup>Projection.

nificant catch increase since 1975 has made the Uruguayan fishing industry one of the most rapidly growing in the world.

### Fuel Prices

Uruguayan fishermen have to pay some of the highest prices in the world for diesel fuel. Almost all of Uruguay's

## France Helps Finance Salvadoran Tuna Port

France is helping El Salvador build a modern tuna port at La Union, a port on the Gulf of Fonseca. The French Government in 1978 helped El Salvador finance the first stage of the project, constructing a 250 m pier and 10,000 m<sup>3</sup> cold store at La Union and purchasing two tuna purse seiners.

The French Government has now secured additional loans for El Salvador from French Government agencies and banks at preferential interest rates. The Bank of Paris and other banks are loaning \$38.8 million at 7.5 percent interest. The French National Credit Institution is loaning \$8.4 million at 3.5 percent interest. The Bank of Paris is also loaning \$6.8 million at 1.75 percent interest. These funds have already been disbursed to French and Salvadoran subcontractors who have been awarded contracts for both planning and construction.

The Salvadoran Government is now

negotiating another substantial loan to continue the expansion of the port. Information on the current status of these negotiations is not yet available. The port was originally scheduled to open in 1981, but various difficulties have reportedly delayed construction, and the port will now probably not be opened until sometime later this year.

Three French companies have been the primary contractors in the La Union project. Orniem Technique Urbanisme et Infrastructure and SOFREMER have planned the project. Morillon Corcol Courlot Enterprise has supervised the construction. SOFREMER has also been responsible for ordering the 69 m purse seiner *Justicia* from the French shipyard Ateliers et Chantiers de la Manche. The *Justicia* is currently operating off El Salvador with a French crew. Local sources estimate that it can catch over 3,000 t of tuna annually. A second purse seiner is still under construction in a French shipyard.

France is the only country involved in

the port construction project at La Union. The Canadians are training fishermen at La Union, but as part of a separate project. A U.S. tuna company had signed a contract to buy tuna at \$1,200 per ton for the remainder of 1981. The Salvadoran Government estimates that landings at La Union (tuna and other species) will total \$16 million in the first year of operation, and \$19 million and \$21 million in each succeeding year. (Source: IFR-81/139.)

### **Fish Research Off Chile, Peru, and Ecuador Funded**

The Inter-American Development Bank (IADB) has announced the approval of a \$977,000 technical cooperation grant to help carry out a research program to determine the availability and productivity of pelagic fishes off the coasts of Ecuador, Peru, and Chile. The technical cooperation was extended from the Fund for Special Operations.

The southeastern Pacific is one of the more productive marine areas in the world, notes the IADB, producing pilchards, jack mackerels, Pacific mackerels, etc. Although existing data indicate that fishing potential of these three species is greater than current levels of exploitation, more complete information is needed to ensure that investments in future exploitation will avoid the risk of overfishing.

The project is designed to determine the availability and productivity of the pelagic species in an area of approximately 100 n.mi. beyond the coasts of Ecuador, Peru, and Chile. It will consist of two exploratory research expeditions which will be carried out for periods of 30 days each during two different seasons of the year, as well as a research program on population parameters.

The objective of the expeditions is to determine the biomass and maximum sustainable yield of the pelagic species, the distribution and concentration of the shoals of these species, their biological characteristics, and their environment. The expeditions will be carried out simultaneously in the three countries by a research ship supported by two com-

mercial fishing boats per country. The population parameter study, to be carried out along with the fishing expeditions, will supplement the biomass figures in the computation of accurate estimates for the potential catch.

The Bank resources will finance the expenditures related to the research expedition, rental of the two fishing boats, the research on population dynamics in Ecuador and Peru and the acquisition of equipment, and related features of the project. Bank funds will also be used to contract a consultant to review the work program and other preliminary activities to hire institutions and obtain the services of a specialized firm to carry out supervisory functions of the project.

The total cost of the project is estimated at \$2,286,000, of which the Bank's technical cooperation will cover \$977,000, Ecuador \$653,000, and Peru the remaining \$656,000.

### **FAROESE FISHERY EXPORTS LISTED**

The Faroe Islands, self-governing but under Danish jurisdiction, are located in the northeastern Atlantic between the United Kingdom (UK) and Iceland. The Faroese economy is dependent on the fishing industry to provide the export earnings and employment for the Islands' population of 43,000. Nearly one-tenth of the Faroese working force is employed as fishermen.

The export of fishery products accounted for approximately 92 percent of the \$192 million<sup>1</sup> worth of total exports earned during 1980 (Fig. 1). The value of fish and fishery exports increased from \$127 million in 1979 to \$176 million in 1980, or by 38 percent. The quantity of such exports during 1980 was 176,000 metric tons (t), a 5.5 percent increase over the quantity exported in 1979. One-half of the 1980 export value came from fish caught in Faroese-claimed fishing grounds. Nor-

wegian and Greenland fishing grounds contributed approximately \$10 million each to the 1980 Faroese export earnings.

European Community (EC) countries imported nearly 77 percent of the Faroese fishery exports in 1980 with a value of \$136 million. Denmark was the largest EC importer and purchased nearly \$39 million worth of Faroese fishery products. The 29 percent increase in the value of 1980 Faroese fishery exports to the EC is due to the increase in Faroese saithe (coalfish) production, for which there is a considerable market in the EC. The UK and the Federal Republic of Germany imported \$28.9 million and \$23.8 million worth of fish and fishery products from the Faroe Islands, respectively.

Faroese exports of fishery products to the United States decreased from 9,240 t in 1979 to 7,219 t in 1980, or by 22 percent. Because of higher prices, however, the export value of Faroese fishery products increased slightly (from \$19.9 million in 1979 to \$20.3 million in 1980).

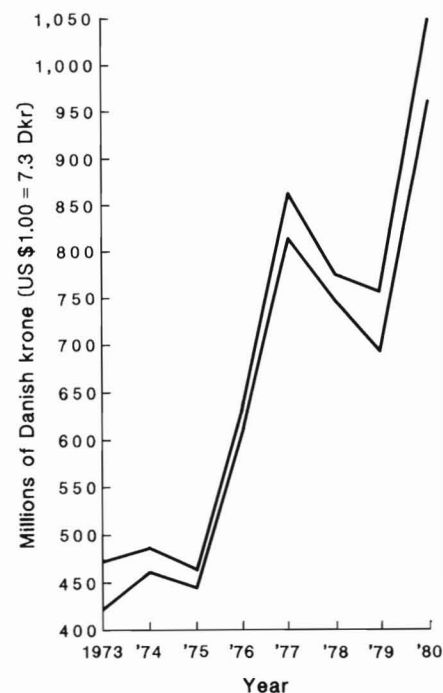


Figure 1. — Faroese fishery and total exports, 1973-1980.

<sup>1</sup>Throughout this report all values are given in U.S. dollars unless otherwise indicated.

Frozen fish fillets accounted for 99 percent of the total U.S. fishery imports from the Faroe Islands. (Source: IFR-81/123.)

### **Bangladesh Sets New 5-Year Fishery Plan**

Bangladesh is reported planning to increase its fisheries catch fivefold by 1985. The major goal of the 1981-85 plan is to substantially increase the number of vessels in the fleet in order to increase the fisheries catch. The largest increase is projected for the inland fisheries (from an estimated 0.6 million t to 2.6 million t). The marine fisheries catch is expected to increase from an estimated 100,000 t in 1979 to 400,000 t in 1985. (Source: IFR-81/138.)

### **French Tuna Canneries Close**

Twenty-four French tuna canneries have discontinued operations during the last 30 years, resulting in over 2,000 lost jobs. The closures were reportedly mostly caused by the transfer of canning operations to the Ivory Coast and Senegal where labor is cheaper and the fishing grounds are closer to processing centers. Low prices of tuna imports from Japan have also contributed to the closings. (Source: IFR-81/138.)

Note: Unless otherwise credited, material in this section is from either the Foreign Fishery Information Releases (FFIR) compiled by Suneo C. Sonu, Foreign Reporting Branch, Fishery Development Division, Southwest Region, National Marine Fisheries Service, NOAA, Terminal Island, CA 90731, or the International Fishery Releases (IFR) or Language Services Biweekly (LSB) reports produced by the Office of International Fisheries Affairs, National Marine Fisheries Service, NOAA, Washington, DC 20235.

### **EEC Fish Processors Ask for Unrestrained Imports**

The EEC fish processors association (AIPCEE) elected a new president, Dirk Ahler, at its annual meeting held last November. Ahler, manager and partner of F. Schottke and Co., Bremerhaven, West Germany, declared that AIPCEE would oppose all protectionist measures which would impede imports on which the European fish community was highly dependent. Protectionist methods such as custom's duties and reference price systems reportedly only increase consumer prices for fish products and discourage increased consumption.

### **Taiwan's Tuna Fishery off Southern Africa**

Taiwan's longliners caught 120,000 metric tons (t) of fish, mostly tuna, in 1980. Most of the catch was taken in the Pacific, but nearly 20 percent of Taiwan's longline catch comes from fishing grounds off South Africa, one of the few countries with which Taiwan maintains diplomatic relations. The waters off the western coast of South Africa also account for half of Taiwan's catch of 29,671 t in the Atlantic Ocean.

Because of South African restrictions on cod, Taiwan has only tuna longliners in this area. Of a fleet of 54 ships in the area, about 30 are permanently stationed there while the others follow the migratory species. In almost all cases, however, because of the almost 7,000 n.mi. between Cape Town and Kaohsiung, the crew live on the ships and are rotated periodically.

In 1980, total landings in South Africa by Taiwanese fishing boats amounted to 14,300 t, about 80 percent of which was albacore. With the price of albacore being over US\$2,000 per ton (compared with an average over US\$1,000 per ton for other fish), one fishing trip could realize from US\$180,000 to US\$400,000 in total revenues with a net profit of about one-third of the revenue. Reasons for this high rate of profits include high fish prices caused by the increase in oil prices and cessation of South Africa's surcharges on fuel oil.

Two fishing companies buy and ship the catch to the United States, Europe, and Japan, with the United States being the major market. Almost all of the albacore is transhipped to Puerto Rico, canned there, and then exported to the United States. Italy, Spain, and Japan are the main markets for fish other than albacore.

Taiwan currently has a fleet of 651 tuna longliners with 594 of them active. In 1980, the Atlantic Ocean catch of 29,671 t accounted for 25 percent of Taiwan's total tuna harvest. South African waters provided half of the total harvest in the Atlantic Ocean. One hundred sixty-one ships operated in the Atlantic Ocean in 1980, representing 27 percent of the tuna fishing fleet.

Taiwan signed a bilateral fishery agreement with South Africa on 20 October 1977, just before South Africa's announcement to enforce its 200-mile economic zone. The highlights of the agreement are as follows: 1) The 10-year agreement will expire in 1987, but is renewable; 2) South Africa agrees that Taiwan's tuna longliners can fish within the 200-mile economic zone without any restriction; 3) Taiwan's Government must supply statistics concerning its fishing off South Africa to the Government of South Africa; 4) Taiwanese trawlers must apply for prior permission to fish in South Africa's territorial waters; 5) Every ship operating in waters off South Africa should pay US\$324 per year for a license; and 6) There is no limitation on catches, except for cod; the cod quota for Taiwanese fishing boats is 2,000 t per year. (Source: IFR-81/83.)

### **Egypt Plans To Develop Fisheries**

Egypt is planning to further develop its fisheries and harvest as much as 700,000 t of fishery products annually. A long-term plan to develop Mediterranean and Red Sea fisheries has been prepared. The Egyptian fisheries catch was 137,000 t in 1979, of which 75 percent came from freshwater fisheries. The United States of America exported 1,990 t of fishery products, worth \$5,347,000 to Egypt in 1980. (Source: IFR-81/138.)