

8 per cent of fishery market is located in North America

By A. PROULX.
Canadian landings of fish and shellfish have been relatively stable, at about two billion pounds, during each of the last ten years, with 1.3 billion pounds being landed on the Atlantic Coast and 120 million pounds on the freshwater areas. The marketed value of all fishery products, which was about \$175 million in 1953, has increased steadily during the last ten years and reached an estimated \$250 million in 1962, as a result of rising prices and a larger proportion of high priced species in the total catch.

Except for salted and pickled fish, the market for Canadian fishery products is dominated by demand in North America. The value of all exports in 1962 was \$157 million, leaving \$93 million as the value of fishery products retained in Canada for consumption. Canadian exports to the United States were valued at \$114 million in that year. On the basis of these figures, the North American market accounted for about 80 per cent of the marketed value in 1962.

16 COUNTRIES
The remaining 20 per cent finds an outlet in some 50 other countries: \$23 million to Europe (mainly United Kingdom, France, Italy, Belgium), \$17 million to the Caribbean area (mainly Jamaica, Puerto Rico, Dominican Republic, Trinidad) and \$4 million to other countries (mainly Australia and New Zealand).

This group includes groundfish filets and blocks, lobster and scallops from the Atlantic Coast, salmon and halibut from the Pacific Coast and the freshwater fishery.

The production of groundfish filets and blocks in Canada developed in response to demand in the United States and has been associated with the general trend in the use of frozen foods. In 1962, out of a production of some 185 million pounds, 141 million pounds (75 per cent) were exported to the United States, 15 million pounds to the United Kingdom and the balance (42.5 million pounds) sold on the domestic market.

Canada supplies about 60 per cent of United States imports of these products, with Iceland, Norway and Denmark making up the balance. There is a close relationship between the consumption of groundfish filets and population growth in the United States during the last 14 years. Consumption per person remained stable at about 1.5 pounds per annum throughout the period. No similar trend is found in Canada.

LOBSTERS STABLE
The annual supply of lobsters, at 45 million pounds, has been stable during the last ten years. Some 30 million pounds are marketed in the shell, either alive or frozen, which about 20 million pounds are exported, mainly to the United States. In 1962 exports to European countries, particularly France and Belgium, amounted to more than a \$60,000 pounds and represented a five per cent increase over previous years.

The rise of population and income in North America, combined with a relatively inflexible supply of lobsters, has raised the price of these products to the luxury level. Consumption generally is restricted to the higher-class restaurants and clubs, where lobster steak is featured in the most expensive meals listed.

Nearly a three-fold expansion in the scallop fishery took place during the last three or four years. Landings increased from five million pounds in 1959 to approximately 14 million pounds in 1962. About 50 per cent of this production is exported to the United States and the remaining 50 per cent consumed at home. During 1962 and 1963, demand was strong in the United States and prices remained firm.

SALMON, HALIBUT
Of fresh and frozen salmon and halibut products, the bulk of Canadian production of 36 million pounds of halibut (60 per cent) and 25 million pounds of salmon (50 per cent) is absorbed by the market in the United

States. A steadily expanding demand, based on population growth, is associated with a relatively inflexible supply or with a supply that increases more slowly than the apparent growth in demand.

In 1960 and 1961, more than a million pounds of frozen halibut were exported annually to the United Kingdom. In 1962, however, because of the high prices obtained on the U.S. market, exports to the U.K. were reduced substantially.

The United Kingdom and France are important outlets for frozen salmon, mostly coho. In 1962, about two million pounds were sold to each of the two countries.

The United States market dominates almost completely the

trade in lake or freshwater fishery products. The demand for lake fish is closely associated with Hebrew religious observances. The seasonal pattern of sales is thus subject to wide variation, depending on the incidence of fast days and similar occasions.

CURED FISH
The most important item in this group, salted and dried cod, has always been an export commodity. The principal markets are found in the Caribbean area (mainly Jamaica and Puerto Rico) and in the Mediterranean region (Portugal, Italy and Spain).

Since it is based primarily on the trap fishery in Newfoundland, the production of salted cod is subject to rather wide fluctuations.

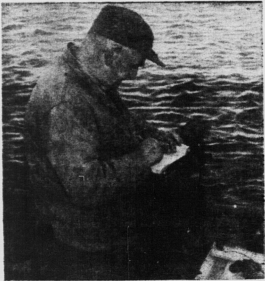
During the last fifteen years, however, there has been a steady downward trend, from 138 million pounds (dried weight equivalent) in 1948 to 34 million pounds in 1962 for the Atlantic Coast as a whole. This decline was brought about mainly by the diversion of raw material to the fillet trade and by other factors affecting supply.

Countries bordering the Mediterranean used to be large importers of Canadian salted cod but now they accommodate only sporadic sales at buyers' prices. In countries like Spain and Portugal, salt cod is an important element in the national diet. The trend toward self-sufficiency in those two countries has adversely affected Canadian exports. In 1962, of total salt-cod exports

valued at \$15 million, only 10 per cent in value went to Mediterranean countries with Italy being the largest buyer.

LOSS OF CUBA
With the loss of the Cuban market, Jamaica, Puerto Rico and the lesser Caribbean islands are now the main outlets for Canadian salted cod. In 1962, close to 60 per cent of our exports was sold to these countries where salt cod is used, mainly as a condiment in an otherwise bland vegetable diet, by plantation workers and other low-income groups.

Canadian sales of salt cod to Jamaica, the most important single market, remained at about 16 million pounds during the period 1955 to 1960 and in 1962. **CONTINUED ON PAGE 22-A**



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