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THE EEC FISHING INDUSTRY

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Introduction

The surface area of the earth is 510 million square kilometres, and the sea accounts for 361 million square kilometres (about 71%) of this total - 155 million in the northern hemisphere and 206 million in the southern. To date, however, only a relatively small proportion of the vast expanse of the earth's oceans is exploited by the fishing industry.

On the "high seas" beyond the shallow coastal waters, which make up by far the greater part of the total water area, only small-scale fishing is practised today - the catch being fish that swim in schools, such as tunny and the Clupeidae (herring, sardines, anchovies). For the rest fishing is mainly concentrated along the coasts (shallow waters up to 200 metres depth).

The catch is today fourteen times as large as it was at the beginning of the century. With the advent of steam power and motor power, combined with the trawl and other modern devices, developments over the last sixty years have been greater than in the previous two thousand years.

This year the EEC Commission is to elaborate proposals for a common fishery policy. The present article on fish supplies in the Community is intended to provide a certain amount of preliminary information.

The development of fisheries

Agricultural Statistics No. 7/1964, published by the Statistical Office of the European Communities, is entirely devoted to fishing. This is the first publication to give a complete survey of the economic development of this industry in EEC countries since the war. It includes supply balance sheets, broken down by type of fish, for fresh fish, smoked, salted and dried fish, fish products and canned fish for 1959/60, 1960/61, 1961/62 and 1962/63.

Part I also gives information on production, processing and foreign trade for the same period. The tables in Part II give a detailed survey of developments over the last ten years, relating to landings of fresh fish, the unit value of landings and the structure and manning of the fleet.

These data are summarized below.

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I. Landings

Production in this publication is taken to mean fish landed by a given country's ships irrespective of where the fish are landed. In other words, landings in foreign harbours are included in the production figures of the country to which the ships belong, while landings of foreign ships in a given country's ports are counted not as production but as imports.

A closer examination of production figures for 1953-63, which are given below, shows the following trend: German landings have fallen considerably, French landings have on the whole risen sharply, Italy's figures have remained steady, and there has been some decline in Dutch and Belgian landings.

The overall result for the Community is a slight decline in landings over these years.

Landings of herring in particular have fallen off (see Table I). The decline is most marked in Germany, where production dropped from 329 000 tons in 1953 to as little as 117 000 tons in 1963. Total herring landings now total a mere third of those of ten years ago. This means that herring, which accounted for about one half of all fish landed in Germany in 1953, now represents only about a quarter of total production.

Landings of the herring family in the other EEC countries have also declined - severely in France, the Netherlands and Belgium, but less so in Italy, where most landings of this kind are not of herring itself but of sardines and anchovies.

It should not be forgotten that landings of herring and the like in many of these countries constitute a much lower proportion of the total. In France, for instance, they made up only about one seventh of total landings in 1963, and in Belgium they came to one tenth in 1963 as against one third to one quarter in 1953. In these two countries in particular, the reduction in the herring catch has affected total landings much less than in Germany. In the Netherlands the herring catch is relatively important, constituting about a half of total production; the decline in herring catch, however, is partly offset by increased production of other fish.

The overall trend for shellfish is the opposite of that for wet fish. Landings in the Netherlands rose 30% and in Italy more than 50%. The biggest relative increase was in France, where landings trebled between 1953 and 1963. Production in Germany remained more or less level. The only country with reduced landings was Belgium. One of the major causes of this last year was probably severe frost. And landings of shellfish in Belgium is in any case slight in comparison with those of wet fish.

These trends are shown clearly in the following table.

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Table I: Landings of fresh fish and shellfish 1953-63

	'000 kg landed weight										
	1953	1954	1955	1956	1957	1958	1959	1960	1961	1962	1963
<u>All species</u>											
Germany	654 641	605 838	693 590	641 267	634 412	593 937	619 109	536 552	463 994	470 903	446 368
France	-	383 670	398 991	420 024	403 095	411 813	427 530	434 104	440 571	438 780	450 888
Italy	-	-	-	-	-	145 357	147 451	149 989	171 143	151 560	165 031
Netherlands	230 855	218 663	200 930	191 618	193 721	195 492	205 213	203 916	210 633	172 600	211 368
Belgium	65 479	63 424	69 539	57 031	53 368	54 948	48 973	53 349	52 557	51 765	53 562
Luxembourg	(500)	(500)	(300)	(300)	(300)	(400)	(300)	(300)	(400)	(600)	-
EEC	-	-	-	-	-	1 401 947	1 448 576	1 377 910	1 339 298	1 286 208	-
<u>Herring, etc.</u>											
Germany	329 260	298 862	322 585	245 546	249 594	233 746	253 897	175 496	122 023	131 024	117 176
France	107 339	91 283	81 097	96 583	52 624	64 249	67 647	57 867	65 608	67 008	67 105
Italy ⁽¹⁾	69 145	69 296	67 647	75 873	67 138	51 437	50 816	48 919	63 809	49 451	53 878
Netherlands	161 431	151 306	127 904	118 841	115 387	115 212	114 545	113 311	116 653	80 523	121 708
Belgium	18 551	18 199	20 843	10 194	3 988	3 809	4 292	4 208	3 710	2 162	3 750
Luxembourg	-	-	-	-	-	-	-	-	-	-	-
EEC	685 726	628 946	620 076	547 037	488 731	468 453	491 197	399 801	371 808	330 168	363 617
<u>Shellfish</u>											
Germany	47 950	38 710	53 065	38 688	40 858	38 368	40 540	37 324	36 983	30 546	46 130
France	46 169	42 394	36 062	42 675	55 004	48 778	139 206	148 524	154 736	146 928	141 422
Italy	28 465	34 794	39 594	38 101	40 066	44 085	45 579	42 080	45 972	47 196	45 230
Netherlands	76 960	80 338	74 553	70 574	71 827	81 813	79 501	85 365	91 547	109 385	102 187
Belgium	2 662	2 210	2 876	3 807	1 955	1 957	2 380	1 696	2 182	1 466	1 895
Luxembourg	-	-	-	-	-	-	-	-	-	-	-
EEC	205 206	198 445	206 150	193 945	169 644	215 001	307 206	314 989	331 420	335 521	336 864

(1) 1953-57 including mackerel.

II. Pattern of supply

This is the first time that supply balance sheets for fish have been published in the Agricultural Statistics series; these show the breakdown of production and consumption and the ways in which fish is processed.

As the available data do not extend beyond the last four accounting years (1 July - 30 June), only a brief outline will be given of the trends that can be discerned. It will be confined in the main to the structure of the industry on the basis of the supply balance sheets for 1962/63, especially Table 1, which gives production and consumption figures based on nominal catch, i.e. the live weight equivalent of landings.

a. Availabilities

Total availabilities can be shown in the following condensed version of the tables included in the relevant issue of Agricultural Statistics; landings, imports and quantities from other sources are expressed as a percentage of total availabilities.

Table II: Fresh fish landings and imports as percentage of total availabilities

	Germany	France	Italy	Netherlands	Belgium/ Luxembourg	EEC
<u>Landings by own vessels</u>						
Fresh fish ⁽¹⁾	75.6	87.1	64.6	83.9	69.5	78.5
Herring, etc.	50.7	82.5	89.5	89.5	24.8	67.3
Roundfish ⁽²⁾	93.3	87.8	91.8	62.4	71.0	88.4
Flatfish	57.7	81.3	36.4	97.5	85.3	80.2
Shellfish	96.3	71.8	85.1	93.3	7.1	77.2
<u>Imports</u>						
Fresh fish	24.4	12.9	35.4	16.1	30.5	21.5
Herring, etc.	49.3	17.5	10.5	10.5	75.2	32.7
Roundfish	6.7	12.2	8.2	37.6	29.0	11.6
Flatfish	42.3	18.7	63.6	2.5	14.7	19.8
Shellfish	3.7	28.2	14.9	6.7	92.9	22.8

(1) Including 0.9% from other sources for Germany and 0.5% for the EEC.

(2) Including 0.9% from other sources for Germany and 0.3% for the EEC.

This table shows that the share of imports in total availabilities is heaviest in Italy and Belgium/Luxembourg, it also shows that of the various kinds of fish, roundfish is the type imported in the smallest quantities. The herring family accounts for most imports, and under this head the country with the highest percentage is Germany - itself one of the major herring producers.

b. Processing

Here too, the data in the original tables can be rearranged to provide information on the way in which the supply is utilized.

To begin with total consumption, a table has been worked out showing the percentage of total availabilities consumed direct as fresh fish, the percentage processed industrially (subdivided into products for human consumption and other products) and the percentage exported.

Table III: Breakdown of fish consumption

	Germany	France	Italy	Netherlands	Belgium/ Luxembourg	EEC
	(in % of total consumption)					
<u>All species</u>						
Consumed fresh	27.3	54.6	58.5	26.8	53.9	41.3
Consumed processed	66.1	41.6	41.2	42.4	24.9	50.4
Used as						
animal feed	0.5	-	-	2.5	1.3	0.6
Exported	6.1	3.8	0.3	28.3	19.9	7.7
<u>Herring, etc.</u>						
Consumed fresh	4.3	36.2	65.5	6.0	25.7	17.0
Consumed processed	94.7	62.8	34.4	72.6	56.5	77.8
Used as						
animal feed	0.4	-	-	-	-	0.2
Exported	0.6	1.0	0.1	21.4	17.8	5.0
<u>Roundfish</u>						
Consumed fresh	38.9	56.7	85.6	71.6	62.5	53.7
Consumed processed	51.0	40.5	13.7	5.4	19.1	39.0
Used as						
animal feed	0.4	-	-	-	1.5	0.3
Exported	9.7	2.8	0.7	23.0	16.9	7.0
<u>Flatfish</u>						
Consumed fresh	90.0	100.0	100.0	36.8	44.6	75.7
Consumed processed	7.5	-	-	-	23.4	3.7
Used as						
animal feed	-	-	-	-	1.0	0.1
Exported	2.5	-	-	63.2	31.0	20.5

This shows clearly that the proportion of total supplies consumed directly is greatest in the case of flatfish, the remainder being nearly all accounted for by exports; conversely, the herring family has the smallest proportion of supplies consumed direct or exported. The proportion of industrial processing to total supplies varies greatly from country to country - from 34.4% in Italy to 94.7% in Germany; factors such as consumer habits and the particular kind of Clupeidae landed obviously have a part to play in explaining this.

The way in which the quantities for processing are ultimately made available to the consumer is also of importance. We have accordingly established what proportion of total fish supplied to industry is salted, smoked, canned, deep-frozen or processed into fish oil or meal.

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Table IV: Industrial processing of fish by form

	Germany	France	Italy	Netherlands	Belgium/ Luxembourg	EEC
	(in % of total processed)					
<u>All species</u>						
Salted	15.0)))		8.1)	
Dried	0.2)	61.0)	12.6)	71.1	15.3)	37.9
Smoked	9.3)))		28.4)	
Canned or other- wise preserved	34.7	33.9	74.5	20.8	6.3	37.0
Deep-frozen	21.9	5.1	12.9	-	-	13.9
Fish oil or meal	18.8	-	-	8.1	41.9	11.2
<u>Herring, etc.</u>						
Salted	13.9)))		22.8)	
Dried	-)	39.2)	65.2)	76.7	-)	38.2
Smoked	10.0)))		47.4)	
Canned or other- wise preserved	58.5	53.8	34.8	17.6	21.0	48.7
Deep-frozen	-	7.0	-	-	-	0.9
Fish oil or meal	17.6	-	-	5.7	8.8	12.2
<u>Roundfish</u>						
Salted	18.4)))		5.6)	
Dried	0.6)	86.6)	0.6)	-	15.6)	49.7
Smoked	7.3)))		14.4)	
Canned or other- wise preserved	7.7	7.4	8.3	48.4	2.2	7.8
Deep-frozen	52.0	6.0	91.1	-	-	33.4
Fish oil or meal	14.0	-	-	51.6	62.2	9.1
<u>Flatfish</u>						
Salted	-	-	-	-	-	-
Dried	-	-	-	-	43.5	32.8
Smoked	86.7	-	-	-	13.0	31.1
Canned or other- wise preserved	-	-	-	-	-	-
Deep-frozen	13.3	-	-	-	-	3.3
Fish oil or meal	0.0	-	-	-	43.5	32.8

Here it can be seen that most herring is salted, dried, smoked or canned. Only a small proportion of roundfish is canned, but a great deal is deep-frozen.

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Most of the small quantity of flatfish processed by industry is dried, smoked or used to produce fish oil and meal.

c. Consumption per head of population

Over the four years covered by the supply balance sheets, consumption per head increased slightly for the EEC as a whole, mainly because of expansion in France and Italy.

Table V: Consumption per head of population (nominal catch)

	Germany	France	Italy	Netherlands	Belgium/ Luxembourg	EEC
1959/60	11.4	12.7	8.7	8.8	11.6	10.8
1960/61	10.8	13.1	8.9	9.0	11.2	10.8
1961/62	11.1	13.4	8.7	8.7	11.3	10.9
1962/63	10.9	13.9	10.0	8.9	10.0	11.3

d. Degree of self-sufficiency

As consumption rose somewhat in certain countries while on the whole production either dropped slightly or failed to keep pace with this rise in consumption, there was some decline in self-sufficiency.

Table VI: Degree of self-sufficiency

(Production as percentage of available supplies)

	Germany	France	Italy	Netherlands	Belgium/ Luxembourg	EEC
1959/60	90	100	41	169	56	86
1960/61	85	97	42	188	57	84
1961/62	83	95	42	194	53	83
1962/63	84	90	37	168	58	78

III. Prices

Figures are available for the years 1953-63 on unit value, i.e. total value of landings divided by total weight landed. The following table gives details for some of the major types of fish. Comparison between countries is difficult in view of the differences in market structure and currency.

The figures show that prices in the period under review generally increased.

Table VII: Prices of various types of fish
(Changes from 1953 to 1963)

	Germany			France			Italy			Netherlands			Belgium		
	DM/kg		% change	FF/kg		% change	Lit./kg		% change	Fl./kg		% change	Bfrs./kg		% change
	1953	1963		1953	1963		1953	1963		1953	1963		1953	1963	
Fresh herring	0.24	0.30	+ 25.0	0.31	0.79	+ 154.8	-	-	-	0.22	0.27	+ 22.7	2.67	4.73	+ 77.2
Salted herring	0.60	0.53	- 11.7	0.42	-	-	-	-	-	0.32	0.48	+ 50.0	-	-	-
Fresh sardines	-	-	-	0.99	1.48	+ 49.5	121 ^{a)}	146 ^{a)}	+ 20.7	-	-	-	-	-	-
Salted sardines	-	-	-	0.84	-	-	-	-	-	-	-	-	-	-	-
Fresh cod	0.31	0.65	+ 109.7	0.97	1.55	+ 59.8	-	-	-	0.68	0.79	+ 16.2	6.87	9.96	+ 45.0
Salted cod	0.78	1.00	+ 28.2	0.65	1.21	+ 86.2	-	-	-	-	-	-	-	-	-
Plaice	0.59	0.79	+ 33.9	1.10	1.17	+ 6.4	-	-	-	0.37	0.41	+ 10.8	5.29	7.68	+ 45.2
Flounder	0.54	0.66	+ 22.2	-	-	-	-	-	-	0.26	0.28	+ 7.7	-	-	-
Sole	1.57	3.50	+ 122.9	4.00	6.75	+ 68.8	-	-	-	1.52	2.98	+ 96.1	23.33	32.12	+ 37.7
Mackerel	0.26	0.41	+ 57.7	0.66	1.11	+ 68.2	-	-	-	0.29	0.41	+ 41.4	4.52	5.89	+ 30.3
Tunny	1.20	-	-	1.95	-	-	357	413	+ 15.7	-	-	-	-	-	-

(a) Sardines and mackerel.

It must be borne in mind that these are average annual prices of products that are often subject to sharp seasonal fluctuations.

IV. Miscellaneous

In conclusion a number of observations can be made on the other statistics in Agricultural Statistics No. 7/1964 - particularly those on manning and composition of the fishing fleet.

The differences in the way statistics on manning are compiled and broken down unfortunately makes it impossible to give a summary for the Community as a whole. It is however possible to give a general picture of the number of vessels in member countries' fishing fleets and of total gross registered tonnage (smaller vessels that are not mechanically propelled are not included). Here too, however, it must be noted that there are still considerable differences between the various countries as regards how vessels are classified by size and type.

Much of the time of the working party concerned is therefore devoted to improving the comparability of statistics among the EEC countries.

Table VIII: Steam and motor fishing fleets in EEC countries 1953-63

	1953	1954	1955	1956	1957	1958	1959	1960	1961	1962	1963
Germany	2 336	2 328	2 309	2 277	2 242	2 228	2 209	2 221	2 160	2 007	1 951
France	11 590	11 969	12 002	12 279	12 460	12 116	14 706	14 315	14 213	14 074	13 829
Italy	7 905	8 668	9 592	10 384	11 190	11 874	12 958	13 969	14 974	15 527	-
Netherlands	1 931	1 914	1 914	1 857	1 779	1 762	1 790	1 854	1 938	1 985	2 071
Belgium	410	421	430	437	446	441	433	419	416	398	396
EEC	24 172	25 300	26 247	27 234	28 117	28 421	32 096	32 778	33 701	33 991	-
	<u>Gross registered tonnage</u>										
Germany	150 313	155 168	164 198	164 974	168 894	170 951	167 734	171 296	167 351	158 487	151 505
France	201 189	200 202	204 519	230 782	240 062	259 791	254 070	255 181	251 722	261 910	268 646
Italy	87 137	94 089	99 188	103 738	108 738	110 772	113 335	119 571	126 685	132 761	-
Netherlands	85 852	86 557	88 900	88 116	87 120	85 364	89 068	93 295	98 352	100 341	105 266
Belgium	25 670	26 781	26 350	27 687	29 229	29 105	27 908	29 065	29 713	30 170	28 869
EEC	550 161	562 797	583 155	615 022	634 043	655 983	652 115	668 408	673 823	683 669	-