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Background paper

EXPORT TRADE IN FISHERY PRODUCTS FROM DEVELOPING COUNTRIES

Presented by the secretariat of the United Nations  
Conference on Trade and Development

GE.67-15728

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## CHAPTER I. EXPORTS OF FISHERY PRODUCTS FROM DEVELOPING COUNTRIES:

## GENERAL CHARACTERISTICS AND PROBLEMS

A. The present share of developing countries in world exports of fishery products

1. Since the end of the second world war, world fish production has expanded at a very rapid pace. In 1965, it exceeded 52 million tons,<sup>1/</sup> double the quantity taken twelve years earlier. About two-fifths of the fish caught were sold (in fresh or processed form) in foreign markets, as against about one-fifth as recently as 1957.
2. In the short period from 1958 to 1965, the value of world exports<sup>2/</sup> of fishery products<sup>3/</sup> rose by over 70 per cent, from \$1,123 million to \$1,911 million (Table 1). As compared with exports from countries with developed market economies and socialist countries, fishery exports from developing countries increased considerably faster (by more than 128 per cent over the seven-year period). In 1965, with a value of \$476.5 million, fishery exports of developing countries accounted for one-fourth of world exports (in 1958, for less than 19 per cent). About nine-tenths of 1965 shipments from developing countries were destined for markets in developed countries.
3. On the structure of world fishery exports, Tables II and III indicate that during the period 1958-65 the share of products<sup>4/</sup> preserved in other than chilled or frozen form (in spite of an increase in absolute value by 53 per cent) declined in value in comparison with the share of the exports of fresh, chilled or frozen products.<sup>5/</sup>
4. In contrast to this over-all trend, the exports of fishery products preserved in other than chilled or frozen form from developing countries, which accounted for less than 58 per cent of the total value of fishery exports of this group of countries in 1958, increased to 61 per cent in 1965. It should be pointed out that this trend primarily reflects the spectacular growth of their exports of fishery products for

<sup>1/</sup> Nominal catch (live weight).

<sup>2/</sup> Aggregate value of gross exports of the 150 countries reporting fishery trade statistics to FAO.

<sup>3/</sup> SITC groups 031, 032; sub-groups 411.1 and part of sub-group 081.4.

<sup>4/</sup> SITC sub-groups 031, 2, 032.0, 411.1 and part of 081.4.

<sup>5/</sup> In 1965, with a value of \$1,097 million, products other than fresh, chilled or frozen fish accounted for 57 per cent of the world's exports as against 64 per cent in 1958.

**TABLE I**  
**Value of world exports of fishery products<sup>a/</sup>**  
**(million US \$ and percentages)**

	1958		1961		1962		1963		1964		1965	
	Value	%	Value	%	Value	%	Value	%	Value	%	Value	%
World, total	1 123.0	100	1 280.0	100	1 506.0	100	1 531.0	100	1 744.0	100	1 911.0	100
Total developing countries	208.6	18.6	298.2	23.3	386.4	25.7	400.8	26.2	467.6	26.8	476.5	24.9
Of which, developing countries in:												
Africa	55.7	5.0	61.3	4.8	62.3	4.1	58.8	3.8	66.4	3.8	56.7	3.0
Asia	53.9	4.8	62.9	4.9	75.6	5.0	86.3	5.6	100.5	5.8	101.9	5.3
South America	38.0	3.4	95.2	7.4	154.2	10.2	155.3	10.1	208.1	11.9	228.5	12.0
North and Central America	53.9	4.8	67.7	5.3	83.2	5.5	88.5	5.8	80.2	4.6	81.5	4.3
Three leading exporters (1965) among developing countries	80.7	7.2	147.1	11.5	209.1	13.9	212.5	13.9	251.6	14.4	255.1	13.3
Nine leading exporters (1965) among developing countries	116.0	10.3	191.1	14.9	271.9	18.1	286.3	18.7	345.4	19.8	340.9	17.8

Source: FAO Yearbook of Fishery Statistics, 1965.

a/ The grouping "fishery products" covers the commodities included under the following headings of the SITC: 031, 032, 411.1, part of 081.4.

TABLE II  
Value of world exports of fresh, chilled or frozen/  
and otherwise preserved or processed<sup>a/</sup> fishery products  
(million US\$ and percentages)

	1958		1961		1962		1963		1964		1965	
	Value	%	Value	%	Value	%	Value	%	Value	%	Value	%
World, total	1 123.0	100	1 280.0	100	1 506.0	100	1 531.0	100	1 744.0	100	1 911.0	100
Fresh, chilled or frozen	405.9	36.1	509.4	39.8	616.6	40.9	650.7	42.5	721.7	41.4	813.4	42.6
Otherwise processed, total	717.1	63.9	770.6	60.2	889.4	59.1	880.3	57.5	1 022.3	58.6	1 097.6	57.4
of which												
for human consumption <sup>b/</sup>	528.7	47.1	545.7	42.6	621.6	41.3	585.8	38.3	638.8	36.6	657.0	34.4
for industrial use <sup>c/</sup>	188.4	16.8	224.9	17.6	267.8	17.8	294.5	19.2	383.5	22.0	440.6	23.1
Developing countries	208.6	18.6	298.2	23.3	386.4	25.7	400.8	26.2	467.6	26.8	476.5	24.9
Fresh, chilled or frozen	88.1	7.8	118.2	9.2	155.3	10.3	169.6	11.1	174.2	10.0	186.1	9.7
Otherwise processed, total	120.5	10.7	180.0	14.1	231.1	15.3	231.2	15.1	293.4	16.8	290.4	15.2
of which												
for human consumption <sup>b/</sup>	79.4	7.1	98.6	7.7	97.6	6.5	95.1	6.2	100.4	5.8	85.7	4.5
for industrial use <sup>c/</sup>	41.1	3.7	81.4	6.4	133.5	8.9	136.1	8.9	193.0	11.1	204.7	10.7

Source: FAO Yearbook of Fishery Statistics, 1965.

a/ SITC sub-groups 031.1, 031.3

b/ SITC sub-groups 031.2, 032.0, 411.1 and part of 081.4

c/ SITC sub-groups 031.2 and 032.0

d/ SITC sub-groups 411.1 and part of 081.4

**TABLE III**  
**Value of exports of fishery products by five commodity groups and sub-groups separately for world and for developing countries**

(million US \$ and percentages)

	1958		1961		1962		1963		1964		1965	
	Value	%	Value	%	Value	%	Value	%	Value	%	Value	%
<u>Fish fresh, chilled or frozen<sup>a</sup></u>												
World	283.0	100	341.0	100	415.0	100	427.0	100	482.0	100	546.0	100
Developing countries	23.2	8.2	31.0	9.1	43.7	10.5	45.6	10.7	48.5	10.1	48.8	8.9
<u>Fish processed<sup>b</sup></u>												
World	485.8	100	495.6	100	565.3	100	521.4	100	568.2	100	582.5	100
Developing countries	73.3	15.1	91.3	18.4	88.1	15.6	83.6	16.0	89.0	15.7	74.8	12.8
<u>Crustaceans and molluscs fresh, frozen, dried, salted<sup>c</sup></u>												
World	122.9	100	168.4	100	201.6	100	223.7	100	239.7	100	267.4	100
Developing countries	64.9	52.8	87.2	51.8	111.6	55.4	124.0	55.4	125.7	52.4	137.3	51.3
<u>Crustaceans and molluscs, preparations<sup>d</sup></u>												
World	42.7	100	50.6	100	55.7	100	63.2	100	70.6	100	74.1	100
Developing countries	6.1	14.3	7.1	14.0	9.8	17.6	10.8	17.1	10.9	15.4	12.2	16.5
<u>Industrial products<sup>e</sup></u>												
World	188.4	100	224.9	100	267.8	100	294.5	100	383.5	100	440.6	100
Developing countries	41.1	21.8	81.4	36.2	133.5	49.9	136.1	46.2	193.0	50.3	204.7	46.5

Source: FAO Yearbook of Fishery Statistics, 1965

<sup>a</sup> SITC 031.1

<sup>b</sup> SITC 031.2 and 032.0(1)

<sup>c</sup> SITC 031.3

<sup>d</sup> SITC 032.0(2)

<sup>e</sup> SITC 411.1 and part of 081.4



**TABLE IV**  
**Trends in world exports of fishery products**  
(Base year 1958 = 100)

	1958	1961	1962	1963	1964	1965
<b>World, total</b>	100.0	114.0	134.1	136.3	155.3	170.2
<b>Developing countries</b>	100.0	143.0	185.2	192.1	224.2	228.4
<b>For industrial uses</b>						
World	100.0	119.4	142.1	156.3	203.6	233.9
Developing countries	100.0	198.1	324.8	331.1	469.6	498.1
<b>For human consumption</b>						
World	100.0	103.2	117.6	110.8	120.8	124.3
Developing countries	100.0	124.2	122.9	119.8	126.4	107.9
<b>Major product groups for human consumption:</b>						
- Fish, fresh, chilled or frozen						
World	100.0	120.5	146.6	150.9	170.3	192.9
Developing countries	100.0	133.6	188.4	196.6	209.1	210.3
- Fish, processed						
World	100.0	102.0	116.4	107.3	117.0	119.9
Developing countries	100.0	124.6	120.2	114.1	121.4	102.0
- Crustaceans and molluscs fresh, frozen, dried, salted						
World	100.0	137.0	164.0	182.0	195.0	217.6
Developing countries	100.0	134.4	172.0	191.1	193.7	211.6
- Crustaceans and molluscs, preparations						
World	100.0	118.5	130.4	148.0	165.3	173.5
Developing countries	100.0	116.4	160.7	177.0	178.7	200.0

Source: FAO Yearbook of Fishery Statistics, 1965

industrial uses, which, in 1965, accounted for just under one-half of world exports of industrial fishery products (in 1958 for less than 22 per cent). During the same period, exports of products for human consumption preserved in other than chilled or frozen form, from developing countries, declined sharply in relation to the total fishery exports of these countries, fall from 38 per cent in 1958 to less than 18 per cent in 1965.

B. Geographical concentration of the trade in fishery products of developing countries

5. The trade in fishery products between developing and developed countries is characterized by a high degree of concentration in the number of trading countries, both on the export and on the import side.

6. On the export side, the share of the total trade of developing countries accounted for by the nine leading exporters<sup>1/</sup> of this group of countries increased from 55.6 per cent in 1958 to 71.5 per cent in 1965. During this period the share of the three leading exporters (Peru, Mexico and Morocco) increased from 38.7 per cent to 53.5 per cent.

7. The most striking development was the spectacular expansion of the fishery exports of Peru, which, in 1965, accounted for 39 per cent of total exports of developing countries, as against only about 10 per cent in 1958. Peru's earnings in 1965 from its fishery export trade amounted to \$186.5 million, as against \$20.6 million in 1958, representing one-quarter of the total value of Peruvian commodity exports for the year (in 1958 just slightly above 7 per cent). Over this period, Peru became the dominant element in the world fish-meal market.

8. Other leading fish exporters among developing countries which considerably increased their trade from 1958 to 1965 were the following:

- (a) The Republic of Korea from \$2.4 million to \$17.7 million (exports of fresh, chilled or frozen fish and crustaceans being of the order of \$14.8 million in 1965). Japan is by far the most important customer;
- (b) Chile from \$2.5 million to \$14.6 million (fish meal and fish oils accounted for the major part of the value of these exports - \$10.6 million in 1965). EEC countries, in particular the Federal Republic of Germany and the Netherlands, constitute its principal customers;

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<sup>1/</sup> In 1965, these nine exporters were, by order of importance: Peru, Mexico, Morocco, Republic of Korea, Chile, Pakistan, India, Hong Kong, Malaysia.

- (c) Pakistan from \$5.1 million to \$14.0 million (exports of fresh, chilled or frozen fish and crustaceans alone were valued at \$8.4 million in 1965). The major customers among the developed countries are the United States and the United Kingdom.

Exports of fishery products from the other main exporters among developing countries also increased, but to a much smaller extent.

9. On the import side, the six leading importers of fishery products (United States, United Kingdom, Federal Republic of Germany, France, Italy and Japan) absorbed, over the period from 1958 to 1965, on an average about 72 per cent, in value terms, of the total world exports of fishery products (Table VI). In 1965 they took nearly three-quarters of the total fishery exports of developing countries. Their purchases plus Peru's fish meal and marine oil exports to other countries<sup>1/</sup> accounted for all but a marginal fraction of the fishery trade between developing and developed countries (Table VII).

10. A closer look at the imports of the six principal importing countries shows that the United States, ranks first among importers of fishery products and imports, on the average, about one-third of its total purchases abroad from developing countries. Six product classes (four of which are based on shrimp and tuna-like species) make up over 92 per cent of the imports from developing countries. During the period from 1958 to 1965, there has been more than a doubling of total imports of fresh, frozen, dried and salted crustaceans and molluscs, and a quadrupling of imports of fish meal (all comparisons in value terms).

11. The United Kingdom, ranking second among importers of fishery products, relies only to a small extent on developing countries for its supplies, and buys comparatively little fish for human consumption from them. The country's imports from developing countries, mostly products for industrial uses, account for about 6 per cent of its total purchases abroad. The Federal Republic of Germany imports about one-third of its total purchases abroad from developing countries but (as in the case of the United Kingdom) products for industrial uses constitute the bulk of these purchases. France

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<sup>1/</sup> In 1965, nearly one-half of Peru's fish-meal exports were sold to other countries, mostly developed countries; a sizeable proportion of Peru's oil exports went to Scandinavian markets.

purchases from developing countries slightly less than one-third of its total imports of fish products from all sources. Italy's imports of fishery products for human consumption from developing countries are of relatively modest size. In recent years, the country has substantially increased its fish-meal purchases abroad, and has become one of the major markets for Peruvian shipments (after the Federal Republic of Germany, the Netherlands and the United States).

12. Japan derives a larger proportion of its total fish and fishery imports from developing countries than any of the other five countries (on the average, about 60 per cent of its total purchases abroad are made in developing countries). Although Japan continues to be the world's leading exporter of fishery products,<sup>1/</sup> it also had the fastest growing import market for these products during the period from 1958 to 1965. Among the principal reasons for the steeply rising trend of Japanese fishery imports are the smaller supplies available for the domestic market as a result of a levelling-off of production and a continued rise in exports, as well as a desire to balance the trade with other countries of South-East Asia which have fishery products to offer in exchange for Japan's exports to them). Other developed countries play only a marginal role in the fishery trade with developing countries. Fishery imports of Eastern European countries from developing countries, of comparatively modest over-all volume, are in the bulk accounted for by shipments of fish meal from Peru (and, to a lesser extent from Chile) to Eastern Germany, Poland, Hungary and Czechoslovakia. The trend of this trade has been upward in recent years. Shipments increasing from 7,400 metric tons in 1961 to 135,100 metric tons in 1965.

C. The concentration of the fishery export trade of developing countries on a limited number of products

13. The fishery trade between developing and developed countries is characterized not only by concentration as far as the number of trading partners is concerned, but also by concentration with respect to the number of products traded. Two principal trade flows can be distinguished:

- (a) a flow of high unit-value exports (shrimp and other crustaceans) from a large number of developing countries to the United States and, to a much lesser extent, to a few other high-income countries;

<sup>1/</sup> In value terms. In quantity terms the fresh-fish equivalent of Peruvian exports of industrial products exceeds that of the Japanese exports.

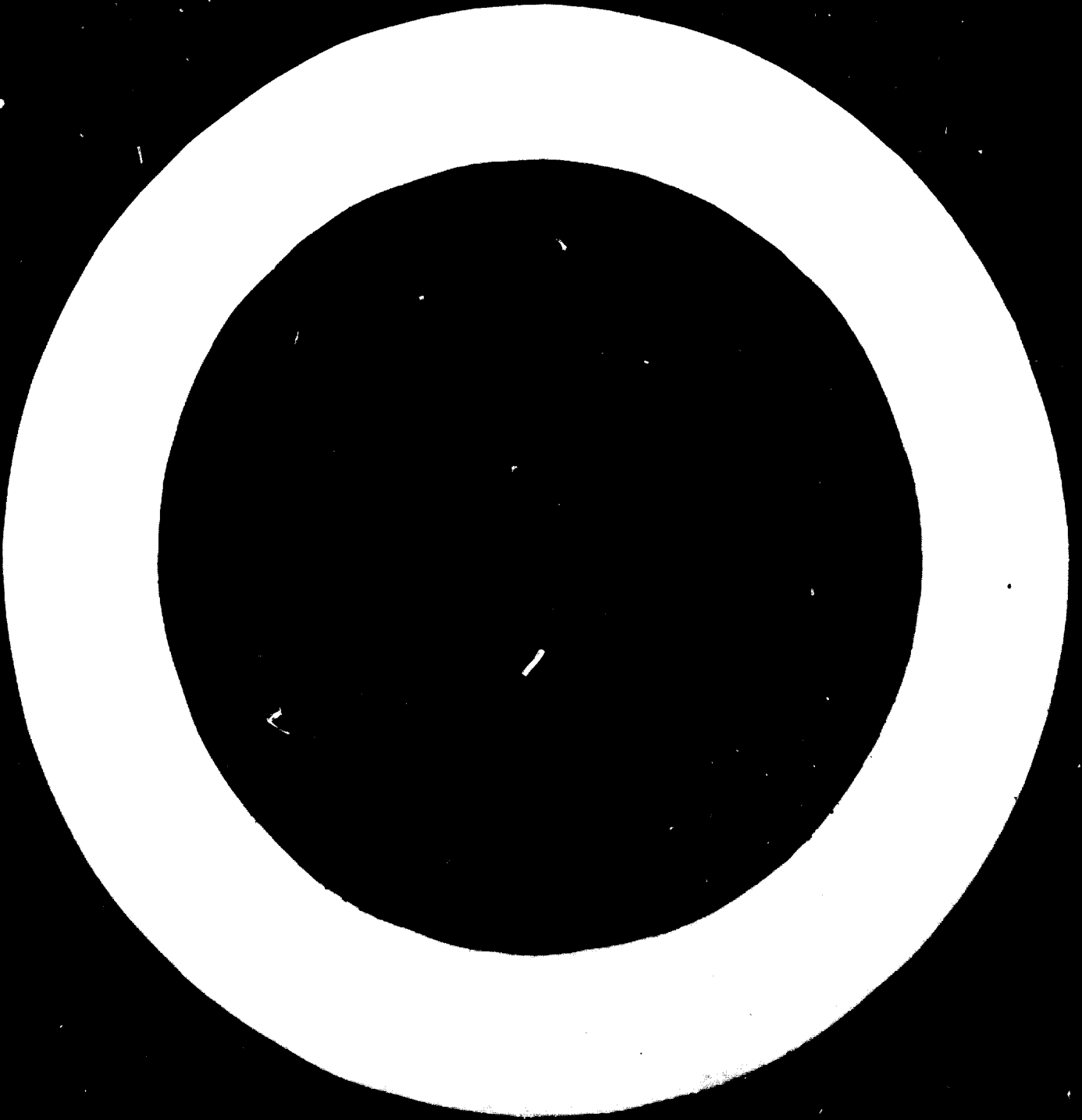


TABLE V  
Value of fishery exports of the leading exporters among  
the developing countries  
(thousand US\$ and percentages)

	1958		1961		1962		1963		1964		1965	
	Value	%	Value	%	Value	%	Value	%	Value	%	Value	%
Total exports of developing countries	208 600	100	298 200	100	386 400	100	400 800	100	467 600	100	476 500	100
Total, three leading (1965) exporters	90 732	38.7	147 138	49.3	209 112	54.1	212 536	53.0	251 584	53.8	255 105	53.5
Total, nine leading (1966) exporters	116 005	55.6	191 063	64.1	271 947	70.4	286 271	71.4	345 376	73.9	340 856	71.5
Peru	20 646	9.9	71 525	24.0	121 618	31.5	121 978	30.4	166 809	35.7	186 490	39.1
Mexico	35 914	17.2	46 504	15.6	56 070	14.5	63 876	15.9	51 205	11.0	50 116	10.5
Morocco	24 172	11.6	29 109	9.8	31 424	8.1	26 682	6.7	33 570	7.2	18 499	3.9
Republic of Korea	2 409	1.2	4 426	1.5	8 381	2.2	8 957	2.2	15 157	3.2	17 565	3.7
Chile	2 555	1.2	6 011	2.0	12 176	3.2	13 058	3.3	21 478	4.6	14 620	3.1
Pakistan	5 147	2.5	12 121	4.1	20 959	5.4	20 829	5.2	20 915	4.5	14 039	2.9
India	12 275	5.9	10 198	3.4	7 322	1.9	11 797	2.9	13 728	2.9	13 787	2.9
Hong Kong	7 943	3.8	5 345	1.8	7 918	2.0	12 325	3.1	12 270	2.6	13 290	2.8
Malaysia (Fed. of Malaya)	4 964	2.4	5 324	2.0	6 079	1.6	6 769	1.7	10 244	2.2	12 350	2.6

Source: FAO Year Book of Fishery Statistics, 1965.

TABLE VI  
Value of fishery imports of the leading importers among the developed countries  
 (thousand US \$ and percentages)

	1958		1961		1962		1963		1964		1965	
	Value	%	Value	%	Value	%	Value	%	Value	%	Value	%
<b>Total imports of developed countries</b>	976 426	100.0	1 148 282	100.0	1 358 080	100.0	1 426 592	100.0	1 665 431	100.0	1 826 900 <sup>a/</sup>	100.0
<b>Total, six leading importers</b>	687 393	70.4	814 819	71.0	1 003 936	73.9	1 032 818	72.4	1 206 018	72.4	1 334 559	73.1
United States	302 120	30.9	361 435	31.5	435 700	32.1	439 243	30.8	477 905	28.7	509 551	27.9
United Kingdom	190 688	19.6	175 364	15.3	234 601	17.3	206 457	14.5	276 022	16.6	294 773	16.1
Germany, Fed. Republic	80 128	8.2	113 840	9.9	131 557	9.7	128 107	9.0	157 849	9.5	192 087	10.5
France	54 041	5.5	81 458	7.1	99 792	7.3	114 385	8.0	123 456	7.4	136 700	7.5
Italy	55 725	5.7	69 015	6.0	82 912	6.1	97 952	6.9	99 883	6.0	118 157	6.5
Japan	4 691	0.5	13 707	1.2	19 374	1.4	46 674	3.2	70 903	4.2	83 291	4.6

Sources: United Nations Commodity Trade Statistics, Series D,  
OECD Foreign Trade - Trade by Commodities, Series C,  
FAO Yearbook of Fishery Statistics, 1964

<sup>a/</sup> Estimated

TABLE VII  
Fishery imports from developing countries of six leading importing countries  
as percentages of their total fishery imports  
(thousand US \$ and percentages)

Item	Year	Germany (F.R.)			France			Italy			United Kingdom			Japan			United States		
		World	D.C. 1/	% share	World	D.C.	% share	World	D.C.	% share	World	D.C.	% share	World	D.C.	% share	World	D.C.	% share
001 Fish, fresh chilled or frozen	1962	37 781	543	1.4	29 007	4 155	14.3	28 894	1 196	4.1	44 550	364	0.8	4 628	4 390	94.9	127 268	18 048	14.2
	1963	37 680	548	1.5	36 255	5 874	16.2	35 585	1 490	4.2	45 565	232	0.5	6 464	4 453	68.9	119 746	16 027	13.4
	1964	44 412	580	1.3	34 863	3 787	10.9	36 305	1 907	5.3	58 933	375	0.6	12 931	6 237	48.2	159 403	16 665	10.5
	1965	55 938	948	1.7	39 385	4 535	11.5	43 663	1 792	4.1	65 103	303	0.5	15 394	8 440	54.8	177 688	18 121	10.2
001.2 Fish, dried, salted or smoked	1962	5 617	23	0.4	3 483	1 127	32.4	28 134	148	0.5	1 574	20	1.3	1 761	457	26.0	14 774	279	1.9
	1963	6 095	29	0.4	4 493	661	14.7	30 790	181	0.6	1 336	31	2.3	3 399	1 094	32.2	14 929	230	1.5
	1964	6 197	7	0.1	3 832	515	13.4	31 434	205	0.7	1 772	35	2.0	5 528	728	13.2	14 896	205	1.4
	1965	9 022	106	1.2	4 670	402	8.6	33 098	202	0.6	2 002	35	2.0	7 009	920	13.1	15 526	300	1.9
001.3 Crustaceans and molluscs fresh, frozen, dried etc.	1962	1 100	156	14.2	14 693	2 858	19.5	2 886	683	23.7	7 957	1 151	14.5	6 905	4 395	63.6	159 132	99 931	62.8
	1963	1 263	154	12.2	17 455	3 882	22.2	4 365	1 464	33.5	7 499	890	11.9	24 467	17 297	70.7	166 462	108 480	65.2
	1964	1 484	113	7.6	23 908	4 494	18.8	3 791	1 004	26.5	10 166	1 763	17.3	37 499	22 110	59.0	165 719	103 874	62.7
	1965	1 895	-	-	24 918	5 478	22.0	6 499	728	11.2	10 227	1 374	13.4	45 128	26 646	59.0	191 922	113 050	58.9
002 Fish and crustaceans preparation	1962	23 138	4 344	17.3	35 091	22 340	63.7	14 590	4 131	28.3	115 118	3 151	2.7	666	358	53.8	101 024	8 286	8.2
	1963	23 024	4 132	17.9	40 578	24 145	59.5	16 985	4 981	29.3	85 764	3 307	3.9	1 094	423	38.7	92 417	9 509	10.3
	1964	27 300	4 628	17.0	39 700	20 485	51.6	13 800	3 326	24.1	117 000	3 187	2.7	1 100	298	27.1	86 100	18 696	21.7
	1965	23 715	4 969	14.7	40 569	20 037	49.4	16 545	3 364	20.3	111 946	3 114	2.8	3 559	2 463	69.2	83 572	19 961	23.9
411.1 Fish oils and fat	1962	17 201	4 645	27.1	6 458	920	14.2	2 443	318	13.0	24 015	2 724	11.3	380	249	65.5	8 730	547	6.3
	1963	19 610	4 245	21.6	5 397	787	14.6	2 126	330	15.5	25 606	1 723	6.7	182	126	69.2	3 156	1 706	6.3
	1964	23 174	9 164	39.9	6 534	1 738	26.6	2 484	327	13.2	33 083	2 221	0.7	180	45	25.0	7 241	511	7.1
	1965	25 260	10 456	41.4	10 492	4 078	38.9	16 545	672	31.4	40 869	-	-	194	-	-	5 908	745	12.4
001.4 (part) of	1962	44 720	34 470	77.1	11 060	9 930	89.8	5 965	5 594	93.8	41 387	10 537	25.5	5 034	4 415	87.7	24 772	18 920	17.4
	1963	40 445	28 736	71.0	10 207	7 960	78.0	8 101	7 438	91.8	40 687	9 367	23.0	11 068	8 457	76.4	37 533	28 989	77.2
	1964	55 282	40 187	72.7	14 619	9 337	63.9	12 069	10 461	86.7	55 068	11 935	21.7	13 665	11 263	82.4	44 546	35 284	79.2
	1965	66 257	48 415	73.1	16 726	9 696	58.0	16 214	13 473	83.1	64 626	10 684	16.4	12 007	9 714	80.9	34 855	23 911	68.6
Total fishery commodities	1962	331 557	44 201	33.6	99 792	41 330	41.4	82 912	12 070	14.6	234 601	17 947	7.7	19 374	14 264	73.6	435 700	146 011	33.5
	1963	328 107	37 847	29.5	114 385	43 309	37.9	97 952	15 884	16.2	206 457	15 550	7.5	46 674	31 850	68.2	439 243	164 941	37.6
	1964	357 849	52 679	33.4	123 456	40 356	32.7	99 883	17 230	17.3	276 022	17 316	6.3	70 903	40 681	57.4	477 905	175 235	36.7
	1965	392 087	64 914	33.8	136 700	44 226	32.4	118 157	20 029	17.0	294 773	15 415	5.2	83 291	48 183	57.8	509 551	176 088	34.6

SOURCE: United Nations Commodity Trade Statistics,  
and European Trade - Year by Commodity,  
Two Editions of Fishery Statistics

1/ D.C. = Developing countries  
2/ For 1965, the figures of fish-meal imports from developing countries are estimated



(b) a flow of low unit-value fish meal and marine oil exports from Peru and on a smaller scale, from Chile, Angola, Morocco and Pakistan to markets in a growing number of developed countries.

14. In spite of the number of other products taken from the seven-tenths of the surface of the earth covered by water, there is only one other item which occupies a significant place in the trade between developing and developed countries, viz., products based on tuna and tuna-like species.

D. Implications of commercial policy measures of developed countries on the trade in fishery products of developing countries

Tariffs

15. The tariff structures most relevant to the export trade in fishery products of developing countries are those of the United States, the European Common Market countries, the United Kingdom and Japan. An outline of the tariffs applied in the above-mentioned countries is given below.

16. In the United States of America imports of fresh, chilled or frozen fish are subject to duties ranging from nil to 3 cents per lb, according to the type of fish and the form of its keeping. Imports of canned fish are subject to tariffs ranging from 5 per cent to 35 per cent. Imports of crustaceans and molluscs are exempt from duty. Imports of crab meat attract a 15 per cent duty. Fish oils and fish meals also enter duty free. Thus, it would appear that tariff protection in the United States for processed fishery products is generally high. For example, the tariff rate on tuna - which is of substantial export interest to a number of developing countries - is nil for fresh tuna but is from 12.5 per cent to 35 per cent for canned tuna.

17. In the European Economic Community the Common External Tariff on fish products, with a range of 10 to 25 per cent, was fixed at a level below that of the original French and Italian tariffs, but well above that of the Benelux countries and the Federal Republic of Germany. The final adoption of the common tariff will thus give increased protection to the fishing industries of the Netherlands and the Federal Republic of Germany and lesser protection to those of France and Italy. The difference in the customs treatment between fresh, chilled or frozen products and canned products is not very pronounced.

18. In the United Kingdom there are three sets of tariff rates, full, EFTA and Commonwealth Preference, the last rate permitting duty-free imports. The full tariff ranges from nil to 10 per cent ad valorem on imports of fresh, chilled and frozen fish.

TABLE VIII

Tariffs applied by major importing developed countries to selected fishery products

	EEC Common External Tariff	Benelux	France	Germany (Fed. Rep.)	Italy	United Kingdom	United States	Japan
Frozen fish (BTN No. 0301)	5%, 10%, 14%, 15%, 16%, 18%, 20%, 25%	3-15%	7-28.2%	Free-19.3%	Free-22.20%	Free, 5%, 10%	Free-12.5%	Free-10%
Fish salted in brine and dried (BTN ex. No. 0302)	12%, 13%, 15%, 16%, 18%, 20%	7.2-12%	18.3-26%	5.7-15.9%	7.8-22.4%	Free, 5%, 10%	(0.4%)- 12.5-25%	15%
Canned fish (BTN No. 1604)	16%, 20%, 22%, 23%, 25%, 30%	9.6-30%	17-30%	15.8-30%	13.6-30%	5%, 8%, 10%, 30%	1¢/lb, 5-35%	20%
Frozen shrimp (BTN ex. No. 0303)	18%	10.8%	18%	26.4%	18%	10%	Free	10%
Canned shrimp (BTN ex. No. 1605)	20%	12%	13-27%	20%	12.3%	7.5%	Free	20%
Canned crustaceans (others) (BTN ex. No. 1605)	20%	12-22%	13-30.5%	20%	17.2-20%	7.5%, 10%, 15%, 30%	Free 26.3¢	20%
Fish meal unfit for human consumption (BTN ex. No. 2301)	4%, 5%	2.4%	6%	1.2-12.2%	5%	Free-10%	Free	Free

Source: GATT and International Customs Tariffs Bureau.

## Notes:

(a) % denotes ad valorem duty rates.

(b) ( ) denotes ad valorem equivalents of specific duties.

(c) Where more than one rate is shown (e.g. 5%, 8%, 15%) one or the other of these rates is applicable to different items under this heading. Where a range of duties is shown (e.g. 5-10%) different rates of duties ranging from 5% to 10% are applicable to different items falling under this tariff heading.

(d) For the member countries of EEC only the tariffs applied to imports from third countries are shown.

(e) For the UK only the full tariff is shown.

Canned fish attracts a full tariff ranging from 5 to 10 per cent, excluding caviar and its substitutes (30 per cent). In 1964 two-thirds of the shellfish imports subject to full tariff were canned and attracted a rate of from 7½ to 15 per cent. The remainder, except for oysters in shell, were subject to a tariff of 10-30 per cent. Imports of fish products such as meals and oils are mainly subject to a 10 per cent duty. The difference between the tariff rates applied in the United Kingdom on fresh and processed fishery products does not generally appear to be very pronounced.

19. Imports of fresh, chilled or frozen fish into Japan are subject to a tariff of 10 per cent. Imports of fresh, chilled or frozen crustaceans and molluscs attract duties ranging from 10 to 15 per cent. Canned fish and shellfish attract a tariff rate of 20 per cent.

The effects of differential customs treatment of unprocessed and processed products

20. The differential treatment accorded by developed countries to imports of processed and unprocessed commodities can be estimated to have the following effects on the fishery trade of developing countries.

- (a) In respect of shrimp - one of the two principal export products of these countries - the market for fresh and frozen shrimp is considerably larger than that for processed products. Furthermore, fresh, frozen or canned shrimp are imported free of duty into the United States, the main customer. Likewise, in the other main importing developed countries except Japan, the difference in the customs treatment of fresh, frozen shrimp and of canned shrimp is not very pronounced.
- (b) Concerning fish meal, the other important export product of developing countries, the shipping of "industrial fish" for processing in the importing developed country is economically not feasible. Customs duties, where such are levied, on the whole are not therefore considered significant barriers to fish-meal imports.
- (c) The difference in the customs treatment of fresh, chilled or frozen tuna and of canned tuna products in the principal import markets is generally pronounced, particularly in the United States and Japan. The differential has to a certain extent affected exports from certain developing countries.

TABLE IX

Quantitative restrictions applied by developed countries to fishery products

	Belgium/ Lux.	Den- mark	Fin- land	France	Germany (Fed. Rep.)	Italy	Japan	Nether- lands	Norway	Sweden	Switzer- land	United Kingdom	United States
Frozen fish (HS ex. 0301)	F	F	F	L	-	-	F	F	-	L	-	-	-
Fish salted in brine and dried (HS ex. 0302)	F	-	F	F	F	-	F	F	-	L	-	-	-
Canned fish (HS ex. 1604)	-	-	F	F	-	-	F	-	-	-	-	-	-
Frozen shrimp (HS ex. 0303)	-	-	-	-	-	-	-	R	-	-	-	-	-
Canned shrimp (HS ex. 1605)	-	-	-	-	-	-	-	-	-	-	-	-	-
Fish meal (HS ex. 2301)	-	-	R	-	-	-	R	-	M	M	-	-	-

Source: GATT

Notes: - denotes no quantitative restrictions.  
L, I denotes licensing requirement but imports are generally liberally licensed.  
R, F denotes import restrictions.  
M, N denotes State monopoly.

When small letters are used, the measure applies only to a part of the item against which it appears.

Quantitative restrictions

21. The following are the quantitative restrictions applicable by several developed countries to imports of certain fishery products:

- (a) All EEC countries except Italy have quantitative restrictions on imports of fish. The Federal Republic of Germany restricts only imports of herring and carp; the other countries have restrictions on most categories;
- (b) Japan applies restrictions to imports of fish meal from all sources and also applies restrictions to imports of certain kinds of frozen and salted fish from specific countries;
- (c) The United States and the United Kingdom do not apply quantitative restrictions to their fishery imports.

Preferential customs treatment

22. The preferential customs treatment which apply (a) between the United Kingdom and other countries of the Commonwealth; (b) between France and certain developing countries; and (c) between countries members of EFTA, have to a large extent influenced the direction of trade in certain fishery products.

- (a) As already mentioned, the Commonwealth Preference permits duty-free imports into the United Kingdom.
- (b) Fishery products originating in Morocco, as well as other countries in the franc zone, e.g. Algeria, Ivory Coast, Senegal and Gabon, are allowed into France free of customs duties on a quota basis, which is fixed annually for each country.
- (c) Within EFTA, the fish items on which zero tariffs will be applied in 1967 are canned fish, frozen fish fillets, fish meal and fish oils, which are treated in the Stockholm Convention as "industrial goods". Progressive tariff reductions have influenced the trade in fishery products. Between 1960 and 1964, Denmark, Norway and Portugal - the main fish exporters among the EFTA countries - increased by 32 per cent their EFTA exports in the fishery products on which tariff reductions have been made, whereas their exports to third countries grew by only 14 per cent.

Developing countries which have entered into association with EEC in recent years have an advantage over other countries exporting fishery products to this trading area, in particular when the common external tariff is fully implemented (as proposed in 1968).

CHAPTER II. CHARACTERISTICS AND PROBLEMS PECULIAR TO THE MARKETS FOR CERTAIN FISHERY PRODUCTS OF EXPORT INTEREST TO DEVELOPING COUNTRIES

A. Shrimp and other crustaceans

23. Shrimp and other crustaceans are found in coastal and inshore waters in all parts of the world; the investment in a shrimping operation is generally of more moderate size than that required for high seas fishing, and crew and skill needs can be much more easily met than for the launching, for instance, of a major purse-seine operation for some pelagic fish, such as tuna.
24. In 1964, sixty-six countries, nearly all from developing regions, supplied shrimp to the United States. Developing countries alone sold over \$122 million worth of fresh and processed crustaceans, mostly shrimp, in this market, this representing over 80 per cent of the value of all exports of crustaceans and molluscs from developing countries.
25. Mexico, which at one time had a virtual export monopoly in this market, supplied in recent years nearly one-half of the United States' requirements; in 1965 Mexican exports were smaller than in previous years; Venezuela and India, on the other hand, were able to increase their respective shares of the United States import market.
26. The steady and substantial increase in shrimp imports (from a growing number of countries) into the United States has created concern in the market over the impact on prices. Early in 1965, therefore, United States and Mexican shrimp interests, which for many years had been co-operating under the aegis of the Shrimp Association of the Americas, decided to launch an industry-wide advertising campaign in the United States. They established the International Shrimp Council, to collect funds from foreign producers, importers and domestic producers in support of a promotional campaign in the United States.
27. In addition to shrimp, the United States imports a variety of other high unit-value crustaceans and molluscs, notably rock lobster tails, lobsters, scallops, oysters, crabmeat, clams and abalone. Only a relatively modest proportion of these imports (less than 13 per cent in 1964) originates in developing countries.
28. Japan imported, in 1965, \$26.6 million worth of crustaceans and molluscs (fresh, frozen, dried, etc.), from developing countries. It ranked second as an importer of these products; the value of its imports, however, was only about one-fourth of that of United States imports from the developing countries.

TABLE X  
Crustaceans and molluscs (fresh, frozen, dried, etc.) a/  
Exports from developing countries  
(thousand metric tons product weight)

		1958	1961	1962	1963	1964	1965
World export		182.0	234.0	249.0	249.0	295.0	291.0
Of which from developing countries	Quantity	66.5	97.6	104.9	107.3	123.3	124.7
	As % of world export	36.5	41.7	42.1	43.1	41.8	42.9
Africa		2.1	2.8	4.3	4.4	4.0	4.7
Morocco		1.2	1.6	1.7	1.6	1.6	1.2
United Arab Republic		0.2	0.4	1.7	1.5	1.5	0.9
Senegal		..	0.1	..	0.3	0.4	0.7
Latin America		39.1	59.0	62.1	61.2	63.5	60.4
Mexico		26.8	37.6	36.0	35.7	33.2	28.2
Panama		3.7	4.4	4.7	4.3	5.6	4.8
Guyana		-	1.9	2.4	2.8	3.1	3.6
El Salvador		0.3	4.3	4.2	4.1	4.1	2.9
Venezuela		-	1.4	3.6	3.3	4.3	..
Ecuador		2.2	2.4	2.4	2.7	2.5	2.7
Chile		0.5	0.7	0.9	0.5	1.5	2.0
Brazil		0.4	1.8	2.1	1.8	1.7	1.9
Nicaragua		0.3	0.4	1.5	1.5	1.9	..
Asia		21.3	35.8	38.5	41.7	55.8	59.6
Korea (Rep. of)		4.2	7.8	9.4	7.7	16.1	12.1
India		5.2	6.0	4.9	6.9	9.1	8.9
Malaysia (Fed. of Malaya)		4.3	4.3	4.3	6.1	7.4	8.6
Hong Kong		5.9	4.7	5.6	7.2	7.5	8.4
Macao		..	4.8	3.8	3.4	3.7	4.9
Pakistan		..	1.6	1.7	1.2	2.7	4.1

Source: FAO Yearbook of Fishery Statistics, 1965  
p. 313-314

NOTE

In the context of the programme of work of the UNCTAD Committee on Manufactures, the UNCTAD secretariat has prepared studies on sectors of industry with a current or potential export interest to developing countries. The studies were to include, as far as possible, the consideration of the following points:

- (a) Present and prospective demand in both developed and developing countries;
- (b) Economic possibilities for the establishment or expansion of such industries in developing countries;
- (c) Obstacles to exports from developing countries, particularly to developed countries;
- (d) Possibilities for industrial co-operation between developed and developing countries;
- (e) Establishment of common markets and regional arrangements for facilitating economic integration and the establishment of regional or sub-regional industries in developing countries;
- (f) Capital outlay required for the establishment of an efficient industrial enterprise and probable period of amortization;
- (g) Possible need for and availability of assistance from developed countries for the production and export of products of developing countries.

The study on the export trade in fishery products from developing countries to developed countries has been prepared, within the above terms of reference, jointly by the secretariat of UNCTAD and the Food and Agriculture Organization (FAO).

The study reviews the general trend of exports of fishery products from developing countries with an indication of their share of these exports in world trade. It shows the extent to which the export trade in fishery products from developing to developed countries is concentrated in regard to the number of trading countries, both on the export and on the import side, as well as the number of products which occupy a significant place in this trade.

/...



TABLE XI

Crustacean and mollusc preparations <sup>a/</sup>  
exports from developing countries  
(thousand metric tons product weight)

	1958	1961	1962	1963	1964	1965
World export	38.0	44.0	49.0	53.0	54.0	58.0
Of which from developing countries	11.8	14.8	16.0	16.6	13.7	17.4
Quantity						
As % of world export	31.1	33.6	32.7	31.3	25.4	30.0
Africa	0.5	0.8	0.8	0.7	0.6	0.6
Morocco	0.2	0.2	0.3	0.2	0.2	0.1
Latin America	3.9	4.2	5.0	6.7	4.5	6.1
Mexico	2.4	3.0	3.3	3.8	2.9	3.7
Chile	0.2	0.4	0.6	0.9	0.2	0.4
Asia	7.4	9.8	10.2	9.2	8.6	10.7
Malaysia (Fed. of Malaya)	4.3	5.7	5.7	5.1	5.2	6.7
India	-	-	1.1	1.2	1.1	1.2
Singapore	2.2	3.3	3.0	2.5	2.1	1.7
Hong Kong	..	0.3	0.2	0.1	0.1	0.1
Korea (Rep. of)		-	-	0.1	0.1	0.3

Source: FAO Yearbook of Fishery Statistics, 1965

<sup>a/</sup> SITC 032.0 (2) = Crustacean and mollusc products and preparations, whether or not in airtight containers

29. France imported, in 1965, \$5.5 million worth of crustaceans and molluscs from developing countries.

30. Exports of developing countries of crustaceans and molluscs to most of the other high-income countries are still relatively small. As the demand for these items is growing in Europe, producers in developing countries and potential European customers might find it well worth while to explore how expansion of trade in these products could be successfully promoted.

31. United States current prices for shrimp and other crustaceans are comparable to those paid for the finer cuts of meat, which constitutes a strong incentive for developing countries to concentrate their export effort upon this market. Although shrimp continues to gain popularity in the United States, concern has been voiced about future prospects in this market, if shrimp deliveries from all over the world continue to expand at the rate attained in recent years.

32. Up to now, Western Europe has not received as much attention and interest from exporting developing countries as it deserves. Market prospects in the years just ahead appear to be very favourable because of the high rate of growth of consumption of speciality sea-foods such as shrimp in Western Europe, which is not expected to be matched by a corresponding increase in supply from the traditional European sources.

#### B. Fish meal

33. In recent years, the percentage of the world catch of fish used for reduction purposes has grown considerably. From 1958 to 1965, the world catch of fish increased from 32.8 to 52.4 million metric tons, i.e. by 60 per cent, whereas the quantity used for reduction rose from 4.3 to 15.3 million tons, i.e. by 256 per cent. For the most part, industrial fish (i.e. fish caught for reduction purposes) are species that cannot be readily sold for human consumption (taste and texture, size, etc., may not be accepted in the market). Most of these fish school densely and occur in vast quantities in certain waters and at certain periods of the year.

34. Up to 1956, fish-meal production was confined to a limited number of developed countries, the United States, Norway, Japan, South and South-West Africa, Denmark, the Federal Republic of Germany and Iceland. Of the developing countries, only Angola produced a significant quantity of fish meal. The main exporters were Norway, South and South-West Africa, Angola, Denmark, Iceland and Canada.

35. In 1956, the large-scale expansion of the Peruvian fish-meal industry started. From a production of 31,000 tons in that year, the Peruvian industry grew to a size which enabled it to put 1,282,000 tons on the market in 1965. Virtually all of the Peruvian fish meal is exported.
36. Mainly because of the development in Peru, the relative share of the developing countries in the world trade of fish meal has increased considerably in recent years (from 38.6 per cent in 1958 to 64.8 per cent in 1965, in volume terms). The principal importers of fish meal are the United States, the EEC countries and the United Kingdom. Japan, which at one time was a net exporter of fish meal, has in recent years imported significant quantities of the product (in 1964 imports covered approximately 20 per cent of supply needs). In the East European countries fish meal is also used in increasing volumes as an animal protein component of animal feeds.
37. As long as no completely adequate substitutes capable of replacing the nutritional values contributed by fish meal in balanced poultry and pig feeds are developed, the demand for fish meal can be expected to increase in the years to come.
38. The higher the price of fish meal is in relation to feed components in competition with it, the greater will be the incentive to replace it. Stable and rational price policies, therefore, will be essential to ensure the future growth of the industry just as much as continued attention to rationalization of production and marketing. In this connexion, it is worth mentioning that a market organization set up by the Peruvian fish-meal producers in 1960 has helped considerably in stabilizing conditions in the export market for the country's fishery products. The Consortio Pesquero del Perú was formed in 1960, at a time when the trading practices of newcomers to the industry, who had little experience in the marketing of fish meal, were held to have contributed to a serious crisis in the world market for the commodity. The Consortio is a co-operative marketing organisation which today sells roughly three-quarters of Peru's total fish-meal production in foreign markets, with the help of its own network of overseas agents.
39. Some large fishery enterprises are reported to be drawing up plans for further investment (in Latin America, on the Pacific Coast of North America, and possibly also in some European countries) in fish-meal operations; this indicates that they view the future of the fish-meal industry with confidence, in spite of a weakening in prices in 1966. Not many developing countries, it must be emphasized, are in a position

TABLE XII  
Fish-meal<sup>a/</sup> exports from developing countries  
(thousand metric tons)

	1958	1961	1962	1963	1964	1965
World exports	673.0	1 358.0	1 721.0	1 783.0	2 464.0	2 431.0
Of which from developing countries: As % of world exports	260.0	853.0	1 205.7	1 201.3	1 679.4	1 575.0
	38.6	62.8	70.0	67.4	68.2	64.0
<u>Africa</u>	98.1	69.3	49.1	48.4	76.5	56.1
Angola	81.2	50.3	32.8	28.3	54.4	47.9
Morocco	16.6	19.0	16.0	19.9	21.8	7.6
<u>Latin America</u>	159.6	775.6	1 144.7	1 140.5	1 527.1	1 499.0
Peru	107.5	713.5	1 059.7	1 041.7	1 428.6	1 414.0
Chile	11.0	42.5	73.8	88.5	148.9	70.3
Panama	0.5	1.2	0.8	0.7	2.1	4.5
<u>Asia</u>	2.3	8.1	11.9	12.4	14.8	19.9
Pakistan	..	0.9	3.9	3.0	5.5	9.5
Singapore	1.6	5.3	5.2	5.7	5.3	5.5
Malaysia (Fed. of Malaya)	0.2	0.1	0.1	1.2	2.1	2.0

Source: FAO Yearbook of Fishery Statistics, 1965

<sup>a/</sup> Meals, solubles and similar feedingstuffs, of aquatic animal origin

comparable to that of Peru with respect to fish-meal development possibilities. A primary requirement for developing an industrial operation based on the manufacture of fish meal and fish oil is a plentiful and low-cost source of raw material. This means that, except where there is sufficient waste from food fish for establishing reduction operations, only species of fish which occur in great abundance and are readily accessible to highly productive types of equipment, can be considered for launching economically viable operations.

C. Other fishery products of export interest to developing countries

40. The only other important group of fishery products in the trade between developing and developed countries, comprises tuna and tuna-like species.

41. Among the developing countries, Peru is the main exporter, having sold, in 1964, 13,000 tons of frozen tuna (and tuna-like species) and 15,000 tons of canned tuna, most of which went to developed countries. Also in Latin America, Mexico and Ecuador are important exporters of frozen tuna. In Africa, Morocco, the Ivory Coast, Senegal, Angola, Sierra Leone and Somalia are the principal exporters. In Asia, the principal exporters are China (Taiwan), Malaysia and the Republic of Korea.

42. The main markets of the developing countries for these products are the United States, France, and to a lesser extent, Japan, the Federal Republic of Germany, Italy and the United Kingdom.

43. Large-scale fishery operations based on tuna involve considerable requirements of capital, managerial talent and crew skills. For the introduction of these large-scale operations, most developing countries will, for some time to come, require financial and technical assistance from the developed countries. The major developed countries which have a good domestic market for these products, especially the United States, Japan, France and recently also the Soviet Union, have established and are continuing to establish overseas bases in developing countries for tuna fishing. The establishment of these bases has given developing countries the opportunity of participating in joint ventures.

44. Trade in other fin-fish frozen and canned products remains, up to now, largely between developed countries. Future development may enable some developing countries to increase their trade in these products. To expand their exports of these products to developed countries, developing countries will have to institute technical improvements and, in general, reduce costs at all stages of production and distribution, so that they can meet the quality and price competition from the countries already in

this trade. In some instances, it will also be necessary to find ways and means of introducing lines of products unfamiliar to consumers in the major import markets. An example of this kind may be the introduction of frozen hake products, for which a considerable production potential exists in some Latin American countries, for export to North American and European markets.

45. Although some of the more expensive fin fish, for instance salmon and halibut, are at present not fished in commercial quantities by developing countries, some of these may eventually be in a position to launch an export trade in these products. For high unit-value products, industries can be established even on the basis of limited fishery resources. In France, for instance, capitaine, a fish caught in the rivers and lakes of Central Africa and imported by air, is considered a delicacy.

## CHAPTER III. THE DEMAND FOR FISHERY PRODUCTS<sup>1/</sup> IN DEVELOPED COUNTRIES

### A. Fish consumption trends in different countries

#### General trends

46. Table XIII shows the level of fish consumption per capita in various developed countries and illustrates the changes that have taken place between 1957/58 and 1964/65.

(a) Western Europe<sup>2/</sup>. In 1964/65, Portugal, Sweden and Norway, with a per capita consumption, on an edible weight basis, of more than 20 kg, were the countries where fish figured most prominently in the diet. Consumption in Denmark and Spain was also relatively high. Per capita consumption in Greece, the United Kingdom and France would appear to have been above, and in the Federal Republic of Germany, the Netherlands, Belgium and Italy, somewhat below, the European average. The countries with the lowest fish consumption levels were Austria, Ireland and Switzerland, where per capita consumption ranged between 3.5 and 4 kg (in edible weight terms). Over the period 1958-64, per capita consumption rose in a number of countries, especially in France, Greece, the Netherlands, Norway, Portugal, Spain and Sweden. On the other hand, a decline was recorded in the Federal Republic of Germany, Ireland and the United Kingdom<sup>3/</sup>. In Belgium, fish consumption levels remained stable.

(b) North America. Both in Canada and the United States, fish consumption is relatively low compared with many countries of Western Europe and Japan. On a per capita basis, consumption has remained fairly constant over the period 1957-64. Minor fluctuations seem to have been attributable to changes in the price relationship between fish and competitive products, particularly meat, but were not indicative of any basic trend. Distinct changes in trends can be discerned in the competition of per capita consumption by form and type of product. These trend changes will be discussed in the next section.

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- 1/ This chapter deals only with the demand for fish for human consumption.
  - 2/ The methods used in computing total fish supplies vary greatly between countries due to the different weight basis used, and it is difficult to make exact inter-country comparisons in this respect. The figures given in Table XIII are only estimated.
  - 3/ In the United Kingdom, consumption of fish had been falling over a number of years at an annual rate of some 1.5 per cent, but increased in 1964/65, probably in response to high meat prices.

The composition of consumption in the main importing countries

47. From such data as are available, it appears that, in general, there has been a decline in the demand for salted and dried products and the less expensive varieties of fresh fish in the northern European countries. Meanwhile, the demand for better quality fresh and frozen<sup>1/</sup> fish and for the more expensive varieties of fish processed in other than frozen form has increased. These trends reflect, at least in part, increasing income levels in these countries. On the other hand, in Southern Europe, per capita consumption of salted fish rose appreciably over the period 1958-64.

48. In North American markets, substantial changes in the demand for different forms of fish products have taken place, while over-all per capita consumption has remained quite stable. There has been a fairly large decline in the relative consumption of salted, dried and smoked products, which has been compensated by increased consumption of fresh and frozen products and, to a lesser extent, of canned fish products. Separate statistics for fresh and frozen fish cannot be provided with any degree of accuracy, among other reasons because considerable quantities of frozen fish are thawed and kept on ice in retail establishments before they are eventually sold as "fresh fish". There is ample evidence, though, that within the group-aggregate, a marked shift from fresh fish to packaged quick-frozen fish has taken place.

49. As far as the consumption of "luxury items" (i.e. the higher-priced varieties of fin fish and crustaceans and molluscs) are concerned, rising incomes undoubtedly are, to a large extent, responsible for their growing share in the total consumption of fishery products in the United States.

50. In Japan - which, as pointed out earlier, has become one of the main importers of fishery products from developing countries - important changes in domestic market trends have taken place in the last few years. Improved standards of living have contributed to an "upgrading" of domestic market requirements, i.e. an increase in the demand for "luxury-type" products, and a reduction in that for "staple-type" products. These changes have been reflected in the trade pattern. There has been a steeply rising trend in Japanese imports - and a curtailment of deliveries to foreign markets - of products the demand for which has increased to a level where the home market is more remunerative than the export market.

Determinants influencing the demand for fishery products

51. Among the many factors influencing the demand for fishery products in developed countries, some are of particular significance in relation to an assessment of the export prospects for processed products from developing countries.

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<sup>1/</sup> Response to this demand has been facilitated by the general expansion of quick-freezing operations.



(i) Income and price elasticity of demand

52. As already mentioned, a general trend towards higher consumption of better quality fresh and frozen fish and more costly processed products can be observed in most of the higher-income markets of Western Europe and North America. It appears that in these markets, demand elasticities both with respect to price and income are higher for "luxury items", than for the bulk of the "staple" varieties of fish.

(ii) Cross-elasticity of demand

53. Meats are generally considered the nearest substitutes for fish. If the price of meat rises relative to that of fish, there will be a tendency to substitute fish for meat. According to a number of studies carried out in developed countries, cross-elasticity coefficients are relatively high, which suggests that price policies orientated toward taking account of changes in the markets for meat and other competitive animal protein products would tend to have a significant influence on the demand for fishery products.

(iii) Availability factors

54. The supply of sea fish on the market is contingent upon the ability of the fishing fleets to locate and catch the fish. This results in unforeseeable and often very large fluctuations in supply and, consequently, price. The demand for fish will tend to be adversely affected by irregularity and instability of supplies.

(iv) Consumer preferences and habits

55. Consumer preferences for different species and forms of products vary widely between countries and even inside one country as between different areas. In most developed countries, consumer preferences for fishery products, as for other foodstuffs, are shifting toward more elaborately processed or "ready-to-cook" products.

(v) Sales promotion

56. Sales promotion efforts can be among the most effective means of influencing the demand for fishery products. Consumer education campaigns and collective advertising of specific products have been carried out in certain countries, either under industry or government auspices. One example of efforts along this line was the establishment in 1965 of the International Shrimp Council in the United States, referred to in Chapter II.

57. The key to the success of promotional ventures in the long run lies in maintaining control of product quality. The development of quick freezing has helped in this respect, since frozen products can be more easily branded and since the manufacturer has a direct interest in protecting brand names associated with his enterprise.

B. Forecast of over-all trends in the consumption of fishery products

58. Per capita consumption levels in Western Europe and North America, it is generally believed, are not likely to change very significantly in the foreseeable future. The outlook is favourable for selected products in the "luxury" class, the demand for which is characterized by high income elasticities. Consumption of less expensive varieties of fish, on the other hand, may decline with continued improvement in real income levels.

59. Greater emphasis on quick freezing, advances in the field of processing technology, and in the transport, storage and distribution of perishable food products in general, and fish in particular, can be expected to widen the market for fishery products, especially in some European countries. Demand may also be stimulated by the introduction of new products, careful attention to price policies and trade practices in marketing, and by enhanced promotional activities.

60. Over the long term, the total demand for fishery products for human consumption in developed countries will be a function, in the first place, of population growth.

Merely to maintain present per capita consumption rates, the United States will, in all probability, have to increase both domestic production and imports. With a population, according to one estimate, due to exceed 230 million by 1975, fish and shellfish supplies will have to be at least 1.3 billion lb. larger than they have been in recent years, to meet consumer requirements.

61. It must be pointed out that, in the long run, the demand for fish in developed countries must be considered more elastic than in the short run. Primarily, this is because, over a period of time, consumer habits and preferences can be influenced by purposive action of the trade. Conversely, if promotion is neglected, competitive products are likely to reap the benefits of a general market expansion for animal protein products. To be successful, promotional activities must take into account trends in consumer habits, preferences, incomes, and the distribution and composition of the population.

The study next analyses the implications of the commercial policy measures of developed countries on the trade in fishery products of developing countries and, in particular, the impact of tariff structures and quantitative restrictions, whenever applicable, on imports from developing countries.

The fishery products which occupy a significant place in the trade among developing and developed countries, viz. shrimp and other crustaceans, tuna and tuna-like species, fish meal, are examined in greater detail in the light of the above considerations.

The demand structure of developed countries for fishery products is analysed, particularly with respect to those products which are of export interest to developing countries, with a view to determining the export prospects for these countries in these products.

Discussion of the opportunities for developing countries to meet the increased supply requirements of developed countries takes into account the potential catches of developing countries, and their requirements in terms of financial assistance, capital equipment and skills.

A number of export-oriented joint ventures are described as an illustration of the ways in which developed countries may assist the developing countries in exploiting their fishery resources.

A summary of the main findings of this study (document TD/B/C.2/28) is given at the end of the study, in paragraphs 99 to 111.

The information and statistics contained in the study were supplied by FAO. The secretariats of UNCTAD and FAO have maintained close collaboration in the compilation of the material and presentation of the work.

The description and classification of countries and territories and the arrangement of material should not be considered to imply any judgment by the secretariat of UNCTAD regarding the legal status of any country or territory, or in respect of the delineation of its boundaries, or regarding its economic system. Inclusion of a particular country or territory in any economic or geographical grouping (or its exclusion) has been dictated by considerations of availability of comparable data in statistics of the United Nations and other international agencies.

TABLE XIII

Per caput fish supplies available for human consumption  
in developed countries

(Kg. per year in estimated edible weight)

	1957/58 - 1959/60	1960/61 - 1962/63	1963/64	1964/65
<u>Western Europe</u>				
Austria	3.2	3.6	3.5	3.9
Belgium	5.9	5.3	6.0	(5.8)
Denmark	15.1	16.1	17.0	16.9
France	5.8	7.3	7.4	7.9
Germany (F.R.)	6.8	6.7	6.2	6.3
Greece <sup>a/</sup>	7.8	9.2	10.2	..
Ireland <sup>a/</sup>	4.0	4.2	3.5	..
Italy	4.6	5.1	5.2	5.3
Netherlands	4.2	5.6	6.4	6.3
Norway	17.9	20.0	20.4	20.2
Portugal <sup>a/</sup>	19.6	20.8	19.8	23.0
Spain	11.2	13.2	13.9	..
Sweden	17.9	19.6	20.5	21.3
Switzerland	3.0	3.7	4.0	
United Kingdom	10.3	9.6	9.3	10.2
<u>North America</u>				
Canada	6.0	5.6	6.6	6.8
United States <sup>a/</sup>	4.8	4.8	4.8	4.8
<u>Others</u>				
South Africa <sup>a/</sup>	8.2	8.8	..	..
Australia	4.7	5.2	5.4	..
New Zealand <sup>a/</sup>	7.0	6.6	6.4	6.6
Japan <sup>a/</sup>	24.7	26.6	27.8	24.8

Source: FAO, The State of Food and Agriculture, 1966

<sup>a/</sup> Calendar years: 1957-59, 1960-62, 1963, 1964

Note: These figures represent the average quantities available to the consumers per capita and per annum. They do not reflect exactly the amounts actually consumed.

TABLE XIV

Structure of fish consumption in the main  
importing developed countries

(Kg. per head, per year)

	Weight basis	Years <sup>a/</sup>	Fish, fresh, chilled, frozen	Fish, salted, dried, smoked	Fish, canned
Germany (F.R.)	Fillet weight (fresh fish)	1960/61	5.3	1.3	2.6
		1961/62	5.3	1.3	2.8
	Product weight (processed fish)	1962/63	5.2	1.2	2.8
		1963/64	4.8	1.2	2.6
		1964/65	4.9	(1.2)	(2.6)
France	Fillet weight (fresh fish)	1960/61	7.6	1.2	2.1
		1961/62	7.7	1.2	2.2
	Product weight (processed fish)	1962/63	8.0	1.2	2.3
		1963/64	8.0	1.2	2.3
		1964/65	..	..	..
Italy	Landed weight (fresh fish)	1960/61	4.3	1.5	1.3
		1961/62	4.5	1.5	1.2
	Product weight (processed fish)	1962/63	4.6	1.6	1.6
		1963/64	5.2	1.2	1.3
		1964/65	5.2	1.3	1.4
United Kingdom	Edible weight	1960/61	8.5	b/	1.2
		1961/62	8.2	b/	1.2
		1962/63	8.1	b/	1.4
		1963/64	8.1	b/	1.2
		1964/65	8.9	b/	1.3
United States	Edible weight	1960	2.6	0.3	1.8
		1961	2.7	0.3	2.0
		1962	2.6	0.2	1.9
		1963	2.6	0.2	1.9
		1964	2.7	0.2	2.0

Sources: Food Consumption in the OECD Countries, 1966,  
OSCE Statistiques de pêches, 1965

a/ All data for 1964/65 are provisional

b/ These data are included in the totals: "Fish, fresh, chilled, frozen"

TABLE XV

Availability of fish<sup>a/</sup> (fresh, chilled or frozen) in selected developed countries  
(thousand metric tons)

		Production	Changes in stocks	Foreign trade		Total availability	Production as % of total availability
				Gross exports	Gross imports		
Germany <sup>b/</sup> (Fed. Rep.).	1962/63	652	-	122	220	750	86.9
	1963/64	638	-	137	212	713	89.5
	1964/65	610	-	26	63	635	85.0
France	1961/62	592	-	26	69	635	93.2
	1962/63	595	-	26	84	657	90.6
	1963/64	..	..	..	..	..	..
Italy	1962/63	226	-	1	94	319	70.8
	1963/64	244	-	1	88	331	73.7
	1964/65	251	-	2	86	335	74.9
Netherlands	1962/63	206	-	69	39	176	117.0
	1963/64	246	-	66	37	217	113.4
	1964/65	244	-	78	37	203	120.2
Belgium - Luxembourg	1962/63	48	-	10	27	65	73.8
	1963/64	51	-	13	54	92	55.4
	1964/65	..	..	..	..	..	..
United Kingdom <sup>c/</sup>	1962/63	847	- 6	46	120	927	91.4
	1963/64	825	+ 3	42	145	926	89.2
	1964/65	872	- 3	47	151	979	89.1
United States	1962	279	-16	16	205	484	57.6
	1963	283	+12	17	232	486	58.2
	1964	286	+10	20	235	491	58.2

Source: OECD Food Balance Sheets of the OECD Countries, 1966

a/ Expressed in fillet weight for Germany (F.R.) and France; in landed weight for Italy, Netherlands, Benelux and United Kingdom; in edible weight for United States.

b/ Data also include crustaceans and molluscs.

c/ Data also include salted, dried and smoked fish.

Note: All data for 1964/65 are provisional.

TABLE XVI

Availability of fish<sup>a/</sup> (salted, dried, smoked) in  
selected developed countries

(thousand metric tons)

		Production	Changes in stocks	Foreign trade		Total avail- ability	Production as % of total availability
				Gross exports	Gross imports		
Germany <sup>b/</sup> (Fed. Rep.)	1962/63	138	-	50	32	120	115.0
	1963/64	139	-	53	30	116	119.8
	1964/65	135	-	50	35	120	112.5
France	1961/62	65	-	25	15	55	118.2
	1962/63	64	-	23	15	56	114.3
	1963/64	..	..	..	..	..	..
Italy	1962/63	9	-	-	70	79	11.4
	1963/64	3	-	-	60	63	4.8
	1964/65	5	-	-	62	67	7.5
Netherlands	1962/63	74	-	51	5	28	264.3
	1963/64	90	-	57	2	35	257.1
	1964/65	63	-	40	1	24	262.5
Belgium- Luxembourg	1962/63	3	-	6	17	14	21.4
	1963/64	..	..	..	..	..	..
	1964/65	..	..	..	..	..	..
United States	1962	28	+ 2	1	18	43	65.1
	1963	27	- 1	-	16	44	61.4
	1964	28	-	-	16	44	63.6

Source: OECD, Food Balance Sheets of the OECD Countries, 1966<sup>a/</sup> Expressed in product weight for France, Italy, Netherlands and Belgium-Luxembourg; in fillet weight equivalent for Germany (F.R.); in edible weight for United States.<sup>b/</sup> Data also include crustaceans and molluscs

Note: All data for 1964/65 are provisional

TABLE XVII

**Availability of canned fish<sup>a</sup> in selected developed countries**  
(thousand metric tons)

		Production	Changes in stocks	Foreign Trade		Total avail- ability	Production as % of total avail- ability
				Gross exports	Gross imports		
Germany <sup>b</sup> (Fed. Rep)	1962/63	191	-	7	44	228	83.8
	1963/64	172	-	9	41	204	84.1
	1964/65	170	-	10	45	205	82.9
France	1961/62	76	-	4	32	104	73.1
	1962/63	74	-	2	36	108	68.5
	1963/64	..	..	..	..	..	..
Italy	1962/63	54	-	1	30	83	65.1
	1963/64	39	-	1	29	67	58.2
	1964/65	42	-	1	31	72	58.2
Netherlands	1962/63	30	-	20	6	16	107.5
	1963/64	29	-	19	8	18	161.1
	1964/65	32	-	2	9	19	168.4
Belgium- Luxembourg	1962/63	4	-	6	16	14	28.6
	1963/64	3	-	3	12	12	25.0
	1964/65	..	..	..	..	..	..
United States	1962	303	+7	17	74	353	85.3
	1963	325	+24	21	77	357	91.0
	1964	307	-13	20	70	370	83.0

Source: IBCD, Food Balance Sheets of the IBCD countries, 1966.

<sup>a</sup> Expressed in product weight for France, Italy, Netherlands and Belgium - Luxembourg; in fillet weight equivalent for Germany (F.R.); in edible weight for United States.

<sup>b</sup> Data also includes crustaceans and molluscs

Note: All data for 1964/65 are provisional.



## CHAPTER IV. FUTURE FISH AND FISHERY PRODUCTS SUPPLIES FROM DEVELOPING COUNTRIES

### A. General Considerations

62. Assuming that demand trends in developed countries are roughly as described above, in what position are developing countries likely to be with respect to meeting increased supply requirements? The answer to this question cannot be given without careful assessment of fishery development possibilities in the various regions of the world. An assessment of this sort is at present under way under the auspices of the Indicative World Plan study carried out by the Food and Agriculture Organisation of the United Nations. While the results of this work will not be available for some time, the following general comments can be made on the basis of information already available.

63. There were already signs some years ago that some oceans, such as the North Atlantic and North Pacific - the traditional fishing areas of the North American and European fleets - were being overfished, at least as far as most of the commercially important species (i.e. cod, haddock, halibut and herring) were concerned. Although measures are in hand to remedy this situation, the "harvests" from North Atlantic and North Pacific waters cannot be expected to increase very appreciably in the foreseeable future.

64. The substantial increase in the world catch since the end of World War II was made possible by the development of fisheries in waters which hitherto had not been seriously exploited rather than through expansion of catches on traditionally exploited grounds. Among the new fisheries were those for tuna in the South Atlantic, for anchovy off Peru and Chile, for sardines off South Africa and for ground fish in the Barents Sea.

65. The size of future supplies of fish and fishery products will depend to a large extent on whether further efforts to locate and exploit stocks which have not yet been utilized will be crowned with success. Since the potential of the fishing areas of the northern hemisphere, after many years of systematic scientific data-collection, is reasonably well known, operations will have to be concentrated largely on discovery of resources in tropical and in southern hemisphere waters. Much remains to be learnt about the resources in these waters. Extensive new investigations which have been launched in recent years, e.g. off the west and east coasts of Africa, hold out some promise that gaps in oceanographic knowledge will be narrowed before long.

66. In general, the prospects for substantially expanding the fisheries of tropical waters must take into account the fact that the productivity of these waters is likely to remain lower than that of temperate waters, because of oceanographic conditions (high temperatures and temperature variations limit the productivity of the surface waters); the limited expanse of the continental shelf in most tropical areas; and the existence, over some of the shelf areas, of reef corals and their associated fauna, that preclude the operation of mechanized fishing vessels employing trawls or other bottom nets as catching gear. These obstacles would hamper, in a number of cases, the development of catches of low unit value; however, for such high-value items as crustaceans and molluscs, the prospects for further expansion of production in tropical waters seem generally good.
67. More favourable than for tropical waters are the prospects of developing new fisheries in the waters of the southern hemisphere, e.g., off the east and west coasts of South America, where large-scale expansion, partly based on fish-meal market opportunities, has already been in progress for the last decade.
68. Conservatively, the yearly potential world "harvest" of fish - based on continued employment of traditional "hunting-type" methods - was estimated at about double the 1964 world catch of 51 million tons. This goal, it is believed, could be attained without endangering stocks. An increasing share of these new supplies will be obtainable from sea areas bordered by developing countries.
69. Taking an over-all view of these forecasts and the progress in fisheries that has already been made by a number of developing countries in Asia, Latin America and Africa, the general conclusion is that there exists the potential for making available larger supplies for export, at least for a number of species of higher-priced fish and shellfish, the demand for which is expected to rise in the markets of the developed countries.
70. In this connexion, therefore, developing countries should be given further opportunities to participate more extensively in the exploitation of marine fishery resources in the proximity of their shores, for domestic use or export. However, as large-scale fishery operations cannot be launched by developing countries without financial and technical assistance from developed countries, it may be necessary to devise suitable arrangements under which developing and developed countries can co-operate in the exploitation of fisheries in these waters. As shown below, a number of developed countries are already actively supporting export-oriented ventures of developing countries.

B. Steps taken by some developing countries to increase the supply of fish available for the domestic market and for export

(a) The encouragement of exports versus development of production for the domestic market - question of priorities

71. In many developing countries, fishery development policies are directed towards improvement of nutritional standards, curtailment of the outflow of foreign exchange for food imports, and maintenance of employment opportunities for coastal populations. So far, however, the expansion of fisheries has been able to make only a relatively modest contribution towards the solution of problems in these spheres.

72. In contrast, the development of export-oriented operations for shrimp, tuna, and other high unit-value varieties, as well as operations providing the raw material for fish meal, have raised export earnings of some developing countries to a considerable extent.

73. A question arises on the relative emphasis to be given by governments in developing countries to encouraging production for the domestic market, as against supporting the development of industries with favourable export prospects. It is not always very easy to estimate future net social benefits from adoption of specific policies along these lines and a choice is especially difficult where both domestic and foreign markets prospects appear promising.

74. A bias in favour of policies based primarily on short-term nutritional or social criteria, it must be realized, could lead to a serious misallocation of public development funds. One Latin American country, for instance, enforced for some time trade regulations governing the trade in certain food fish; under the control provisions, the competent government agency could refuse the issue of export permits, as long as requirements of the domestic market were not satisfied. Since prices in the international market for the products in question were often higher than those prevailing in local markets, where the municipalities had price-fixing powers, the economy of the country sustained a net loss by failing to take advantage of export opportunities.

75. The question of the relative priority to be accorded to fishery industries serving domestic as against export markets should be considered in relationship to the objectives set out in the over-all development plans of the developing countries. Financial and technological factors as well as degree of support obtainable from foreign assistance agencies for different programmes merit careful consideration in this connexion.

(b) Capital inputs and opportunities for establishing related industries

76. One aspect that cannot be overlooked in calculating the net economic benefits from promotion of an export-oriented industry is the cost of capital inputs which, at an early stage of development must, in the majority, be imported. Unless financial assistance for these purposes is obtained from abroad, the import of fishing craft, processing plant, and other installations and equipment is likely to constitute a heavy drain on hard currency reserves, since the suppliers are, as a rule, found only among the technologically more advanced nations.

77. On the other hand, progressive expansion of fisheries in a developing country has had, in some instances, a special effect on industrial development through the establishment of new industries directly related to fisheries. Peru's fish-meal boom at one point provided employment for nearly 100 boat-building yards - from mid-1962 to mid-1963, some 500 vessels of 90 - 100 ft. in length were produced. Although boat construction has not maintained this pace, and although many inefficient builders have gone out of business more recently, the well-established firms have continued to expand. Virtually all the machinery and processing equipment for Peruvian fish meal is now manufactured locally and the equipment manufacturers have even successfully entered the export field. Exports of capital equipment in recent years included the provision of an entire \$250,000 fish-meal reduction plant and of boats valued at \$1 million.

(c) Examples of steps taken by governments to promote exports

78. What are some of the more common mechanisms of government regulatory and fiscal policies to steer the fisheries export trade into the desired maximum possible contribution to general economic development? A few examples of such measures can be cited.

79. Among special devices, export bonus systems have been established to create the incentive for the promotion of sales of fishery products in foreign markets. During the difficulties experienced by the South American fish-meal industry in 1965, the Chilean Government tried to provide relief to the industry by authorizing payments of part of the special bonus for the stimulation of exports. A year earlier, the Government of Peru had, for the same reasons, lowered taxes imposed on fish-meal exporters. To achieve a shift in export shipment from the United States to European markets, where higher prices prevailed, Chile changed export licensing policies for frozen crustaceans - mostly langostino tails. In 1966, in order to achieve the same objective, Mexico lowered the advalorem tax imposed on frozen shrimp exports to Western Europe.

80. Among the many other measures governments have at their disposal to encourage export-oriented industries are: exemption from or reduction of, taxes, e.g. excise taxes, on fuel needed for fishing operations and/or import duties on processing equipment, the corporate income tax relief for specified periods of time, the granting of permission to manufacturers to write off their plants at accelerated depreciation rates, etc.

81. Sometimes governments resort to direct control of trade instead of merely confining themselves to the use of fiscal machinery to influence industrial trade policy. Not so long ago, for example, Morocco decided to nationalize the export trade in fishery products.

(d) The place of export-oriented industries in fishery development plans of developing countries

82. Fishery development plans drawn up by developing countries in recent years have, in many instances, set high export targets.

83. Many countries of Asia and the Far East put considerable stress on the promotion of industries producing high unit-value items, notably shrimp and other crustaceans, destined for export (to the United States and, in increasing measure, also to Japan). Some examples are given below:

- (i) Pakistan plans to more than double its fishery exports by the end of its third five-year plan, 1965-70 (in 1964, it exported nearly \$21 million worth of fishery products);
- (ii) In India, under targets set in the country's fourth Five-Year Plan (1966-71), fish production is expected to increase by 500,000 tons over the level of 1,521,000 tons reached in 1965;
- (iii) Ceylon's ten-year draft plan provides for the development of its fishery industry, with foreign financial participation, and envisages eventual substitution of the country's dried fish imports, as well as expansion of export markets;
- (iv) In the Republic of Korea, a five-year development programme drawn up at the end of 1965 includes important export targets. The implementation of the programme is expected to proceed at a greatly accelerated pace as a result of an agreement concluded with Japan<sup>✓</sup>.

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✓ A description is given in the next section.

We regret that some of the pages in the microfiche copy of this report may not be up to the proper legibility standards, even though the best possible copy was used for preparing the master fiche.

A number of other fish-producing countries of the region such as the Republic of Viet-Nam, China (Taiwan), Burma and Malaysia, also envisage, in their development plans, considerable increases in fishery exports.

84. Several fish-exporting countries of Africa are currently intensifying explorations off the Atlantic and Indian Ocean coasts for tuna, shrimp, lobster and other high unit-value species, which have good export market prospects.

- (i) In Morocco, the Three-Year Plan (1965-67), estimates that the export of canned sardines and mackerel will rise to \$30 million in 1967/68 (an increase of about \$6 million over the level reached in 1964);
- (ii) In Tunisia, the Four-Year Plan (1965-68), calls for an increase of about 150 per cent in exports of canned fish by the terminal year, as compared with the export level of 1964, which amounted to \$1.3 million.

In Angola, Senegal, Ivory Coast, Nigeria, Mozambique and Somalia, recently drawn up development plans have also set high export targets for some of the above products.

85. In Latin America, a considerable number of countries are planning further expansion of export-oriented fishery industries.

- (i) In Venezuela, the Agricultural Plan (1965-68) has set an export target of 16,000 metric tons of fishery products for 1968, in particular shrimp and canned fish, which represents a four-fold increase of exports attained on the average in 1963-64;
- (ii) In Chile, the World Bank estimated that in 1971 exports of fish and sea food (crab, shrimp, etc.) will amount to \$10 million, or double the level reached in 1965. No significant increase was expected in the case of fish-meal and fish oil exports.

A number of other fish producing countries of the region, such as Mexico, Guiana, Ecuador and the Central American countries, hope to increase their shrimp production for export. Some of these, as well as other countries of the region, are well on the way to augmenting their foreign exchange earnings from the export of other fishery products, such as frozen tuna, frozen hake and shellfish products.

C. Ways and means by which developed countries may assist developing countries in the expansion of their export-oriented fishery industries

(a) General considerations regarding assistance.

86. For the initiation of large-scale fishery operations for export, most developing countries will, for some time to come, require financial and technical assistance.

Developing countries can ill afford risking the loss, because of lack of managerial talent and experience in technical matters, of scarce capital and other resources invested in such ventures, especially where the inputs could have been used for the promotion of less hazardous enterprise.

87. Before encouraging foreign participation in development, the governments of developing countries must make a careful assessment of the benefits that are likely to accrue to their economies from such collaboration. In some instances, the benefits may be no more than marginal. This may be the case where a firm which has its headquarters in a developed country establishes a base in a developing country that is no more than a trans-shipment point for the receipt of landings of a fishery fleet in which the developing country has no ownership interest and which employs none of its nationals, and where the fish is eventually processed and distributed abroad. Under these circumstances, income and employment generated in the developing country are likely to be marginal. Where arrangements for training of captains and crews, and for gradually increased financial participation, are included in the agreements, the developing country, on the other hand, may find it to its advantage to entrust the management of operations to foreign interests and to permit repatriation of profits - at least for specified periods of time.

(b) Examples of ways in which developed countries may assist developing countries

88. In recent years, a number of export-oriented ventures by developing countries have been launched with the help of Japan, which has taken a lead in sponsoring joint overseas enterprises in fisheries. Japan seeks to invest capital in areas where rich fishery resources are known to exist in the proximity of the coast lines of developing countries, for the purpose of relieving the pressure of operating large vessels by providing them with bases nearer their fishing grounds. Overseas fishery agreements are made on a basis of: joint companies to conduct fishing and processing operations; contracts on concession to supply fishery products to local markets or processing plants for export; technical assistance; exploratory fishing; refuelling or trans-shipment bases; or selling directly in a foreign port. A single agreement in a foreign country may consist of one or more of these arrangements. Some joint fishing enterprises are conducted at the request of a foreign country to train nationals in modern fishing methods, and some have been established primarily to explore the possibility of tuna-fishing in waters distant from Japan.



89. The agreement concluded in 1965 between Japan and the Republic of Korea provides an example of an integrated programme of collaboration and assistance. Under the terms of the agreement, as much as \$190 million may be made available to the Republic of Korea, for fisheries development purposes, in the form of reparation payments and longer-term credits. A five-year development programme which has been drawn up by the Government envisages a large expansion of distant water fishing operations as well as additions to, and technical improvements in, the near water and coastal fishing fleets. The production target to be reached by the end of the plan period is of the order of 1 million tons, or almost double the level of catches in recent years.

90. Another example of Japanese participation in fisheries development activities abroad is the joint venture that has been organized with Indian interests. In 1965, India proposed to Japan that the latter should establish various types of joint fishing ventures in India with major Indian fishing firms. The proposals were studied by the Japanese Overseas Fishery Co-operative Association (a government-sponsored organization). At the beginning of 1966, a Japanese fishing company, after surveying shrimp-fishing prospects in India, was reported to have started negotiations to establish a joint shrimp-fishing and processing enterprise in that country.

91. It may be mentioned that the first joint enterprise of this kind was set up in India almost twelve years ago by a large Japanese fishing company and an Indian firm. Initially, the enterprise trawled for bottom fish but, several years ago, it began to concentrate on shrimp fishing, following the discovery of good shrimp grounds off Cochin. Large shrimp are mostly frozen and exported to the United States, Western Europe and Japan.

92. The USSR is another country which has been very active in recent years in participating in fishery development activities abroad, notably in Africa (e.g. in Somalia, the UAR and Senegal). As a result of an agreement concluded in 1962 between the Soviet Union and Somalia, the construction of a tuna cannery was started in 1964 with Soviet technical assistance and credits. Construction machinery and transport equipment were supplied by the Soviet Union. Located in the Las Koreh zone of Somalia, the new plant has an estimated seasonal production capacity of 6 million cans of fish (or 2,100 metric tons).

93. More recently - in the spring of 1965 - an agreement was concluded between the Soviet Union and Senegal. Under this agreement, the Soviet Union undertook to build a

tuna industry complex and to train tuna boat crews in Senegal. The new project was to include a tuna fish cannery to be located in Dakar, equipped for the production, over a season, of 40 million cans of fish. The agreement includes plans for by-product production. A long-term credit of about \$6 million was granted by the USSR for the venture. Repayments are to be made, in part at least, in the form of deliveries of tuna products to the Soviet Union.

94. In the recent past, the United States also has increased its assistance to export-oriented fishery operations in developing countries. In India, for example, a United States firm undertook in 1963-64 a detailed survey - sponsored by the Agency for International Development (AID) - of Indian marine resources, fishery conditions and processing and marketing facilities. Preliminary conclusions suggested that six or seven separate establishments would be required for the exploitation of the resources which had been surveyed. At the beginning of 1966, an agreement was reportedly considered between a United States firm and the Indian Government on the establishment of a joint venture to exploit the shrimp resources off the south-east and south-west coasts of India. Reports indicated that the projects would have an authorized share capital of \$4,224,000 and an issued share capital of \$845,000. Another proposed project envisaged production of fish meal and oil as well as other fishery products, and was to be located in the Vizakapatnam and Cochin areas. In a number of West African countries, United States canning firms have been active over the last few years in establishing and operating tuna-freezing and storage facilities.

95. Recently, Iceland became interested in setting up an organization in India to produce fish for export. Under an agreement with Indian private interests, a modern processing and refrigeration plant for the export of fin fish and shrimp was to be constructed in Tuticorin. Scheduled for completion late in 1966, the project was estimated to cost \$1,590,000.

96. Norway is another country which has been active in India for many years and has given considerable help in developing the fisheries of that country.

97. United Kingdom interests recently have launched joint fishery enterprises in a number of countries in the Near East.

98. The above are only a few examples of the growing assistance given by governments and private interests in developed countries to the promotion of fishery activities (many of which aim primarily at the exploitation of attractive export opportunities) in developing countries.

CHAPTER V. SUMMARY AND CONCLUSIONS

99. There are favourable prospects for exports of a number of fishery products from developing countries to developed countries. Efforts for expanding exports to developed countries would have to pay special attention to the following: (a) types of products the demand for which is most likely to remain buoyant; (b) possibilities of finding new outlets in export markets; (c) promotion measures considered more effective in the markets selected for intensive development.

Products with the best export potential to developed countries

100. As already observed, rising incomes in developed countries tend to benefit markets for "luxury-type" products and products which are more elaborately processed and packaged, whereas the market potential for staple fishery products, the consumption of which is sometimes associated with a lower standard of living, tends to decrease.

101. Fishery development plans of many developing countries put considerable emphasis on increasing the export of shrimp. Market prospects in the years ahead appear to be favourable not only in the United States, the principal importer, but also in Western Europe. For the latter, the high rate of growth of consumption of speciality seafoods such as shrimp is not expected to be matched by a corresponding increase in supply from the traditional European sources.

102. There is also a potential demand in developed countries for a number of other varieties of high unit-value crustaceans and molluscs, notably rock lobster tails, lobsters, scallops, oysters, crab-meat, clams and abalone. Developing countries in a position to exploit such resources may find it economically feasible to establish processing industries even if the supply of these resources is limited.

103. Favourable prospects also exist for increasing exports from developing countries of frozen and canned tuna (and tuna-like fish). Nevertheless, large-scale fishery operations for tuna generally imply investments far larger than those needed for production of crustaceans and molluscs.

104. Other categories of high unit-value fin fish that exist in some developing countries can also find markets in the developed countries. For these high unit-value products, industries can be established even on the basis of limited fishery resources.

105. As regards the fish-meal operations in developing countries, it appears that prospects for expansion of exports are, in general, good in spite of a weakening in prices in 1966. In recent years, some importing countries, especially in southern and eastern Europe (including the USSR), have been appreciably expanding their purchases.

The countries of Western Europe and North America which are the principal importers of fish-meal are not likely to curtail their imports in the near future. But not many developing countries are in a position comparable to that of Peru with respect to fish-meal development possibilities. A primary requirement for developing an industrial operation based on the manufacture of fish-meal and fish oil is a plentiful and low cost source of raw material.

Possibilities of finding new outlets in export markets

106. The continued growth of exports of high-value fishery products from developing countries is largely contingent on increasing market outlets, not only in the United States, but also in other developed countries. Up to now, Western Europe as a potential market has not received from exporting developing countries as much attention and interest as it deserves. In contrast to the United States in which imports of frozen, dried and salted crustaceans and molluscs doubled between 1958 and 1962, the imports of these products in the most advanced European countries are still small. The imports of the United Kingdom and the Federal Republic of Germany from developing countries, as pointed out, consist chiefly of fish-meal and marine oil. It is here, as well as in other high-income countries of Western Europe, that developing countries might find opportunities for increasing their markets for high-grade "luxury" items. Sweden, ranking among the countries with the highest per capita income, for instance, imports virtually no fishery products (aside from marine oil) from countries in the developing areas.

107. Developments in foreign markets for fishery products, as well as for products in competition with fish, have to be followed closely to enable the industries of developing countries to take advantage of new trading opportunities. For instance, the increase in meat prices which has taken place during the last years in Western Europe may make it possible to expand the markets for fishery products of developing countries. On the other hand, fish-exporting countries must carefully watch for signs of import substitution in traditional foreign markets. This is especially important for countries the bulk of whose export shipments are destined for one market.

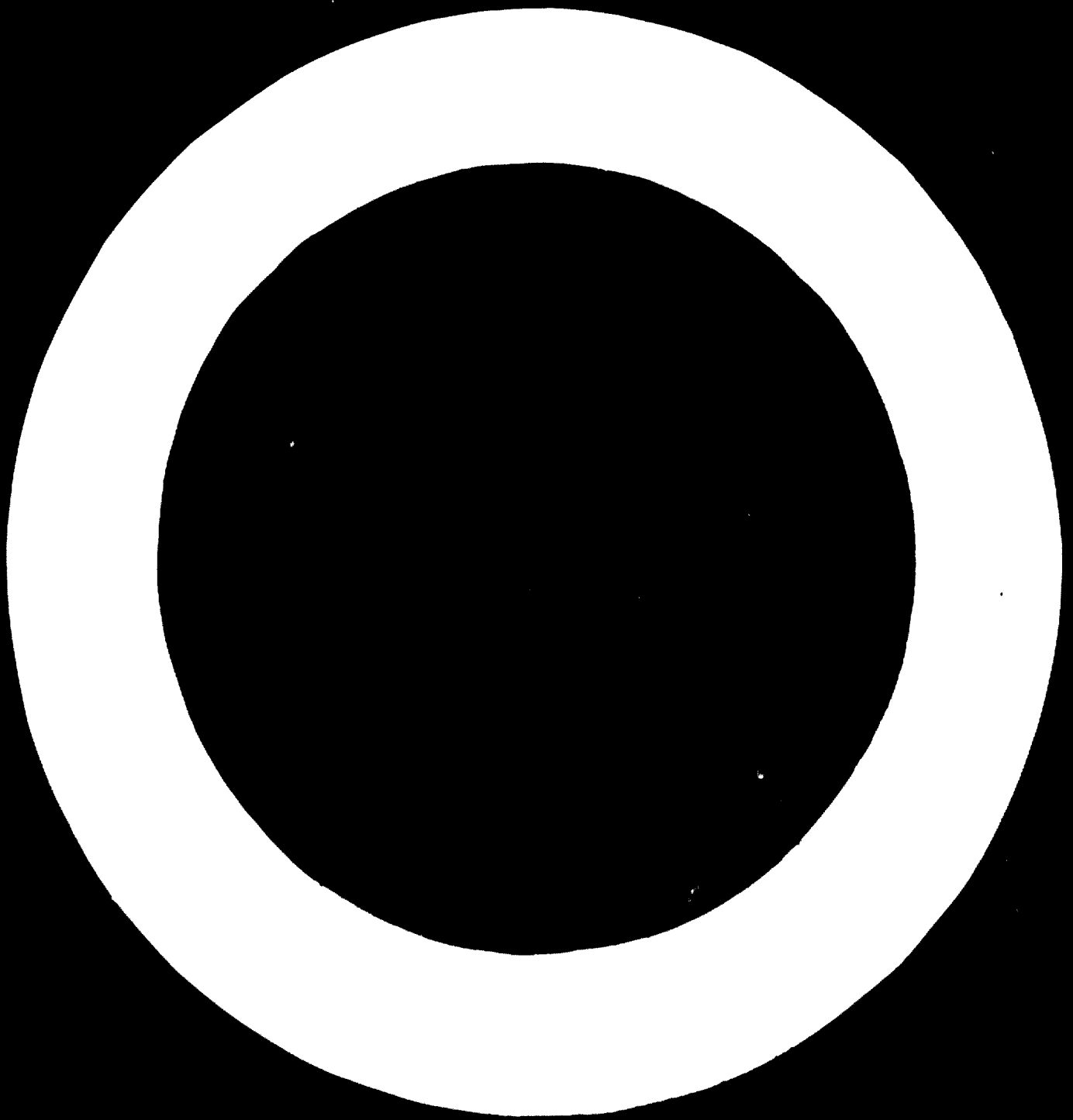
108. Diversification may not always be a solution for the problems of an exporting country. The possibility must be considered that a number of potential competitors diversify simultaneously in the same direction, in the hope of gaining entry into markets which appear promising at the time the plans for diversification are laid down. Recent examples of changes in trade flows due to competitive factors are the loss by Argentina to Japan of a relatively new market outlet for its frozen hake in Spain; Mexican competition is said to have caused a decline in Hong Kong's shrimp exports to Japan.

Market promotion measures

109. Developing countries which seek to increase their sales of fishery products to developed countries must be prepared to meet the competition of other suppliers, from the ranks of both developed and other developing countries. To make significant inroads into these markets, developing countries may have to reduce costs and make improvements at all stages of production and distribution so that they can meet the price and quality competition of the countries already in the trade.

110. Developed countries, as has been pointed out, can help developing countries in market development work. By establishing bodies similar to the above-mentioned International Shrimp Council of the United States in other countries, as well as for other products, they may relieve developing countries of much of the financial burden associated with export promotion. Another initiative which might be useful for the same purpose would be the preparation of rosters of reputable importing firms to facilitate contacts between potential trading partners.

111. In many cases, developing countries are not in a position to undertake the work connected with the assembly of market information and the conduct of market research in developed countries necessary for the expansion of trade relations. In other cases, developing countries which have established export promotion services abroad do not always find it easy to use these services for investigating prospects for products not yet introduced in the export market, such as fishery items, the manufacture of which is still in the planning stage. Developed countries might assist in this field by making available technical experts equipped to help in the conduct of the necessary market research.





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United Nations Conference on Trade and Development

TRADE AND DEVELOPMENT BOARD

Committee on Manufactures

Second session

Geneva, 4 July 1967

Item 6 of the proposed revised provisional agenda

MEASURES FOR THE PROMOTION, EXPANSION AND DIVERSIFICATION OF EXPORTS OF MANUFACTURES AND SEMI-MANUFACTURES FROM DEVELOPING COUNTRIES; CO-OPERATION WITH THE UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION (UNIDO) AIMED AT THE ESTABLISHMENT AND EXPANSION OF EXPORT-ORIENTED INDUSTRIES IN DEVELOPING COUNTRIES; OTHER FORMS OF ECONOMIC, INDUSTRIAL AND TECHNICAL CO-OPERATION

The export trade in fishery products  
from developing countries

Note by the UNCTAD secretariat

At its resumed first session, the Committee on Manufactures requested the secretariat to prepare, on the basis of item IV.5.(1) of the programme of work, for the second session of the Committee, in addition to the study on timber trends and prospects already presented, studies on other sectors of industry with a current or potential export interest to developing countries. The studies were to include, as far as possible, the consideration of the following points:

- (i) present and prospective demand in both developed and developing countries;
- (ii) economic possibilities for the establishment or expansion of such industries in developing countries;
- (iii) obstacles to exports from developing countries, particularly to developed countries;
- (iv) possibilities for industrial co-operation between developed and developing countries;
- (v) establishment of common markets and regional arrangements for facilitating economic integration and the establishment of regional or sub-regional industries in developing countries;
- (vi) capital outlay required for the establishment of an efficient industrial enterprise and probable period of amortization;



- (vii) possible need for and availability of assistance from developed countries for the production and export of products of developing countries (TD/B/69 - TD/B/C.2/14, paragraph 20).

It was further stated that each of these studies, when completed, would be considered by the Committee which might, if considered desirable, establish working parties similar to the one set up on forest and timber products (*ibid.*, paragraph 21). A study on the export trade in fishery products from developing countries to developed countries to developed countries has been prepared within the above terms of reference jointly by the secretariats of UNCTAD and FAO, and is herewith submitted to the Committee for its consideration.

The study reviews first of all the general trend of exports of fishery products from developing countries with an indication of their share of these exports in world trade. It shows the extent to which the export trade in fishery products from developing to developed countries is concentrated in regard to the number of trading countries, both on the export and on the import side, as well as to the number of products which occupy a significant place in this trade.

The study next analyses the implications of the commercial policy measures of developed countries on the trade in fishery products of developing countries, and in particular the impact of tariff structures and quantitative restrictions, whenever applicable, on imports from developing countries.

The fishery products which occupy a significant place in the trade among developing and developed countries, viz - shrimp and other crustaceans, tuna and tuna-like species, fish meal - are examined in greater detail in the light of the above considerations.

The demand structure of developed countries for fishery products is analysed, particularly with respect to those products which are of export interest to developing countries, with a view to determining the export prospects for these countries in these products.

Discussion of the opportunities for developing countries to meet the increased supply requirements of developed countries takes into account the potential catches of developing countries, and their requirements in terms of financial assistance, capital equipment and skills.

A number of export-oriented joint ventures are described as an illustration of the ways in which developed countries may assist the developing countries in exploiting their fishery resources.

A summary of the main findings is given at the end of the study, in paragraphs 92 to 104.

The designation employed and the presentation of the material in this work do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country or territory or of its authorities, or concerning the delimitation of its frontiers. The information and statistics contained in the study were supplied by FAO. The secretariats of UNCTAD and FAO have maintained close collaboration in the compilation of the material and presentation of the work.

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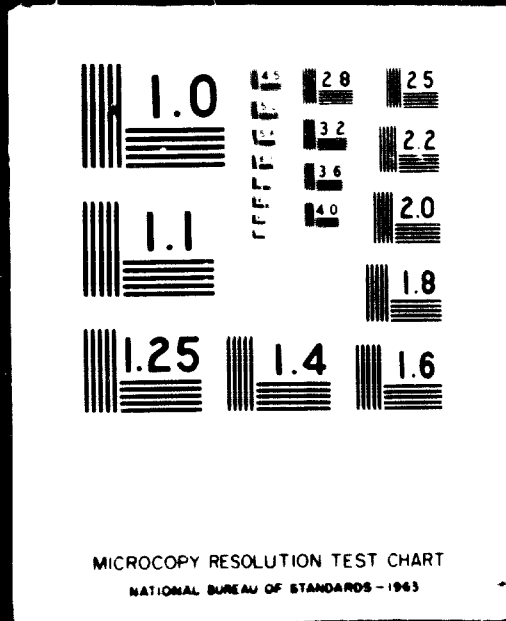
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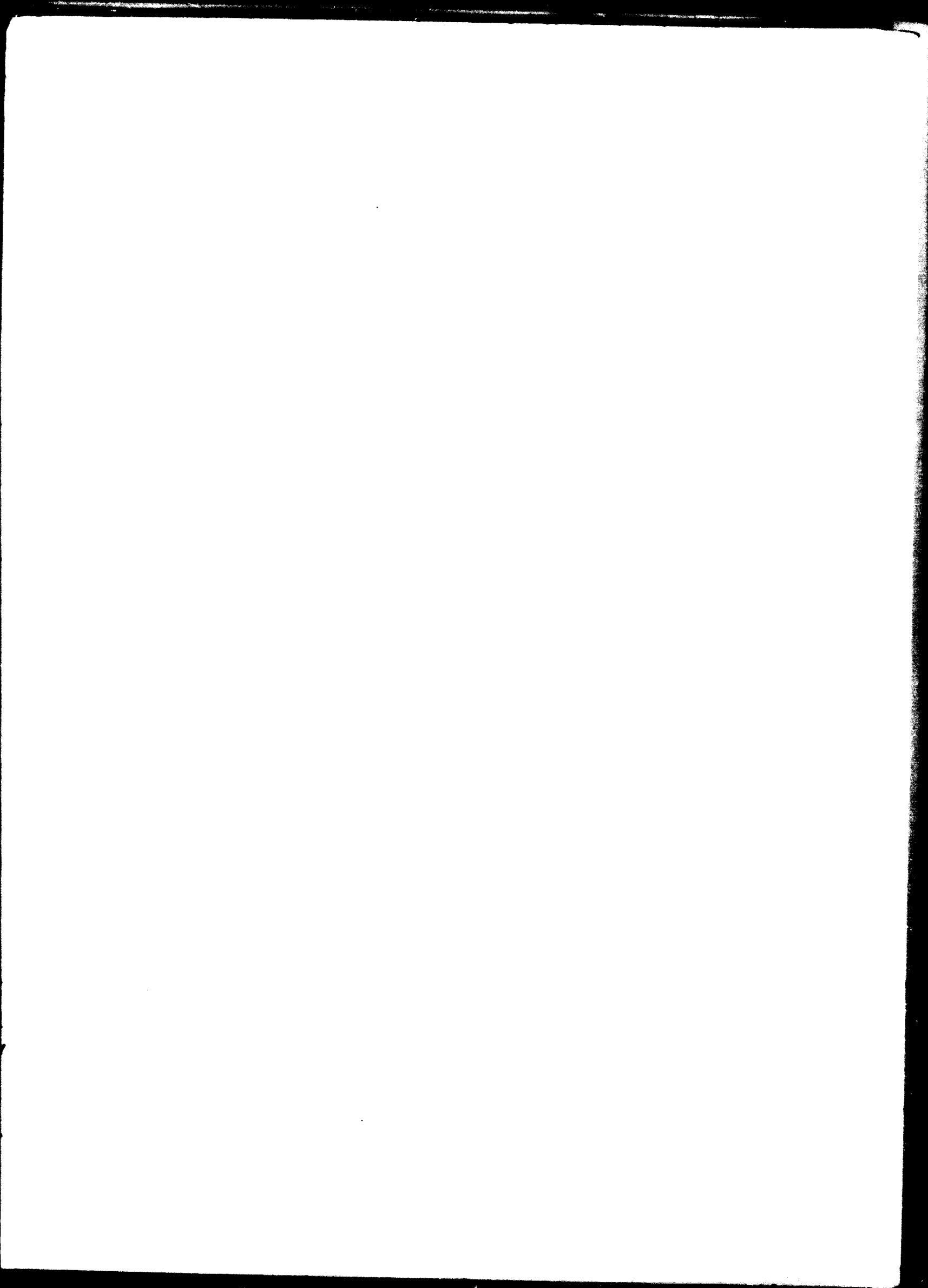
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APPENDIX V

Imports of Fish Oils and Fats from Developing Countries,  
into the Leading Developed Importing Countries  
(S.I.T.C. 411-1)

thousand US dollars and metric tons

Country of Origin	Importing Country	Federal Republic of Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries						
		1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965			
WORLD	V	17201	19610	23174	25260	6458	5397	6534	10492	2443	2126	2484	2138	38625	43615	52285	113803	24015	25606	33083	40869	8730	8156	7241	5988	380	182	180	194	71750	77539	92789	160854	V	WORLD	
	Q	126164	133491	119051	121487	41118	29989	31134	47922	13177	11340	10754	8662	281277	294270	281277	300801	170205	171116	164815	191616	N.A.	N.A.	35182	34923	1168	508	361	585	452650	465894	466914	527925	Q		
Total Developing Countries	V	4665	4245	7164	10456	920	787	1738	4078	318	330	327	672	9043	10642	18522	25600	2724	1723	221	-	547	1706	511	745	249	126	45	-	12563	14197	19299	26345	V	LDC	
	Q	40085	40132	39943	50778	7266	6807	9101	19683	1794	2139	1654	2857	80447	96719	80447	124400	19134	20558	1363	-	N.A.	N.A.	3652	5317	1048	422	115	-	100629	117699	105641	129717	Q		
As % of total imports	V	27.1	21.6	30.9	41.4	14.2	14.6	26.6	38.9	13.0	15.5	13.2	31.4	23.4	24.4	35.4	22.5	11.3	6.7	0.7	-	6.3	6.3	7.1	12.4	65.5	69.2	25.0	-	17.5	18.3	20.8	16.4	V	% Imports	
	Q	31.8	30.1	33.6	41.8	17.7	22.7	29.2	41.1	13.6	18.9	15.4	33.0	29.6	32.9	28.6	41.4	11.2	12.0	0.8	-	N.A.	N.A.	10.4	15.2	89.7	83.1	31.9	-	22.2	25.3	22.6	24.6	Q		
IN AMERICA																														IN AMERICA						
ARGENTINA	V	-	-	66																															V	ARGENTINA
	Q			378																															Q	
CHILE	V	1013	471	357	757	-	-	134	405				529	1548	1996	1628	2822	-	-	21				6	120	-								V	CHILE	
	Q	7494	3150	1969	3372			733	1436				2150	13271	12181	8790	12238			119				N.A.	N.A.									Q		
PERU	V	3419	3219	5904	8806	640	571	1023	3222	21	17	100		6629	7944	14870	21065	2641	1713	197				535	1584	510	739							V	PERU	
	Q	30377	32688	33087	42996	4831	5060	5120	15354	125	114	500		60255	76310	80831	73946	19062	20554	1235				N.A.	N.A.	3644	5282							Q		
Total in America	V	4432	3690	6327	9796	640	571	1157	3627	21	17	100	532	8177	9540	16582	24152	2641	1713	218				541	1704	510	739							V	Total America	
	Q	37871	35838	35434	47206	4831	5060	5853	17290	125	114	500	2162	73526	88491	90089	89448	19062	20554	1354				N.A.	N.A.	3644	5282							Q		
IN AFRICA																														IN AFRICA						
MOROCCO	V	11	132	133		270	216	299	347	274	302	224	140	579	657	676	525	8																V	MOROCCO	
	Q	123	1015	784		2397	1747	1817	1877	1526	1947	1139	695	4378	4787	3876	2776	57																Q		
NIGERIA	V															140																		V	NIGERIA	
	Q															672																		Q		
Other in AFRICA	V	208	387	684	639	-	-	275	103							213	398	1092	830															V	Other Africa	
	Q	1989	3009	3606	3256			1403	517							2040	3093	5692	3707															Q		
Total in AFRICA	V	219	519	817	639	270	216	574	430	274	302	224	140	792	1055	1908	1355	8	-															V	Total Africa	
	Q	2112	4024	4390	3256	2397	1747	3220	2394	1526	1947	1139	695	6418	7880	10240	6483	57																Q		
Total in Asia	V																																	V	Total Asia	
	Q																																	Q		
Total in OCEANIA	V	14	36	20	21	10	-	7	-	23	11	3	-	74	47	32	21	75	20	3				6	2	1								V	Total Oceania	
	Q	102	270	119	316	38	-	28	-	143	78	15	-	303	348	188	316	15	4	9				N.A.	N.A.	8								Q		

Sources - U.S. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodities.

APPENDIX VI

Imports of Fish Meals and Solubles from Developing Countries into the Leading Developed Importing Countries

(SITC: part of 061.4)

thousand U.S. Dollars and thousand metric tons

Importing Country Country of Origin	Federal Republic of Germany					France					Italy					E.E.C. - Total					United Kingdom					U. S. A.					Japan					Total of Listed Countries						
	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965		
World	V 20146	44720	40465	55282	66257	7288	11060	10207	14619	16726	2340	5965	8101	12069	16214	47311	89871	87237	114818	139069	22126	41387	40687	55068	64626	12759	24772	37533	44546	34855	-	5034	11068	13665	12007	82196	161064	176325	228097	250557	V	World
	Q 136.6	345.4	311.2	414.0	416.4	42.2	82.5	76.5	104.8	99.9	14.4	48.6	61.3	91.4	108.3	305.3	706.4	676.2	861.2	873.9	235.3	284.5	286.3	374.9	377.3	105.4	234.6	347.9	402.6	N.A.	-	38.5	84.3	102.3	85.2	546.0	1284.0	1394.7	1741.0	1336.4	Q	
Total Developing Countries	V N.A.	N.A.	28736	40187	48415	N.A.	N.A.	7960	9337	9696	N.A.	N.A.	7438	10461	13473	N.A.	N.A.	69860	88972	97307	N.A.	N.A.	9367	11935	10624	N.A.	N.A.	28989	35284	23911	-	N.A.	2657	11263	9714	N.A.	N.A.	116673	147454	141556	V	Total LDC
	Q 49.4	274.7	220.4	297.6	312.1	12.3	68.8	61.0	68.7	62.0	1.4	44.6	53.7	74.7	91.9	119.7	597.2	527.0	663.4	643.6	14.9	79.5	70.3	90.2	72.9	38.4	177.5	272.8	327.4	N.A.	-	31.0	64.0	83.5	69.9	173.0	885.2	934.1	1164.5	786.4	Q	
As % of Total Imports	V N.A.	N.A.	71.0	72.7	73.1	N.A.	N.A.	78.0	63.9	58.0	N.A.	N.A.	91.8	86.7	83.1	N.A.	N.A.	80.1	77.5	70.0	N.A.	N.A.	23.0	21.7	16.4	N.A.	N.A.	77.2	79.2	68.6	-	N.A.	76.4	82.4	80.9	N.A.	N.A.	66.1	64.6	56.5	V	% Imports
	Q 36.2	78.7	70.8	71.9	75.0	29.1	83.4	79.7	65.6	62.1	9.7	91.8	87.6	81.7	84.9	39.2	84.5	77.9	77.0	73.6	11.0	27.9	24.6	24.1	19.3	36.4	75.7	78.4	81.3	..	-	80.5	75.9	81.6	82.0	31.7	70.0	67.0	66.9	58.8	Q	
In America	V N.A.		543	4126	3382			192	1066	465			342	-	N.A.	3504	11132	9516	..	1049	1591	827			2575	1396	711				51				7128	14170	11054	V	In America			
Chile	Q 0.6	3.8	4.2	30.8	23.0	5.0	1.5	8.1	3.1				..	-	1.3	27.8	20.5	79.5	64.7	0.8	5.2	7.9	11.7	5.5	7.4	8.6	20.9	11.7	..					9.5	41.6	49.3	102.9	70.2	Q	Chile		
Peru	V N.A.		27099	33276	41210			6214	6442	6792			6120	9715	10454	N.A.	62649	72330	78137		8318	10344	9532			26353	33694	22393	N.A.	7998	11212	8222				105318	127580	118284	V	Peru		
	Q 36.6	255.2	207.6	247.2	266.6	56.6	48.3	50.1	46.2		39.2	46.5	74.7	69.1	66.9	543.6	478.9	552.8	518.3	14.1	74.3	62.4	78.5	65.0	31.0	168.9	251.9	315.7	58.0	27.4	60.3	83.5	112.0	814.8	833.5	1030.5	641.4		Q			
Total in America	V N.A.		27642	37402	44592			6406	7508	7297			6462	9715	10454	N.A.	66153	83462	87657		9367	11935	10559			28928	35090	23104		7998	11248	8222				112444	141750	129338	V	Total America		
	Q 37.2	259.0	211.8	278.0	289.7	61.6	49.8	58.2	49.3		39.2	46.5	74.7	69.1	68.2	571.4	499.4	632.3	583.1	14.9	79.5	70.3	90.2	70.5	38.4	177.5	272.8	327.4	..	27.4	60.3	83.5	121.5	855.8	902.8	1133.4	711.6		Q			
In Africa	V		582	584	518			1495	1542	2080							2093	2127	2598																2093	2127	2598	V	In Africa			
Morocco	Q 3.4	3.9	4.9	4.7	3.2	12.3	7.2	11.2	10.5	10.6						15.7	11.1	16.1	15.2	13.8													15.7	11.1	16.1	15.2	13.8	Q	Morocco			
Angola	V		512	2201	1359			59	287	-			976	746	1307		1614	3383	2770							61	194	289					459	-	151	2134	3977	3206	V	Angola		
	Q 8.8	8.8	3.7	14.9	7.5	..	..	-	1.4	5.4	7.2	..	8.7	35.8	14.7	11.5	15.9	16.9							..	..	..	3.6	3.7	-	1.0	35.8	14.3	15.2	15.9	17.9	Q					
Total in Africa	V		1094	2785	1877			1534	1829	2080			976	746	1307		3707	5510	5348							61	194	289					459	-	151	4287	9704	5804	V	Total Africa		
	Q 12.2	12.7	8.6	19.6	10.7	12.3	7.2	11.2	10.5	10.5	1.4	5.4	7.2	..	8.7	51.5	25.8	27.6	31.1	30.7						..	..	..	3.6	3.7	-	1.0	51.5	29.4	31.5	31.1	31.6	Q				

NOTE: The data in the above table are mainly estimative.

REFERENCES: U.S. - Commodity Trade Statistics  
O.E.C.D. - Foreign Trade - Trade by Commodities  
F.A.O. - Bulletin of Fishery Statistics



**23. 9. 71**

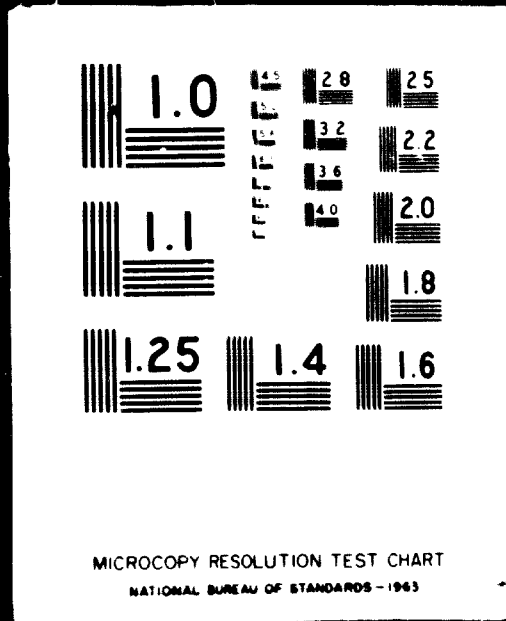


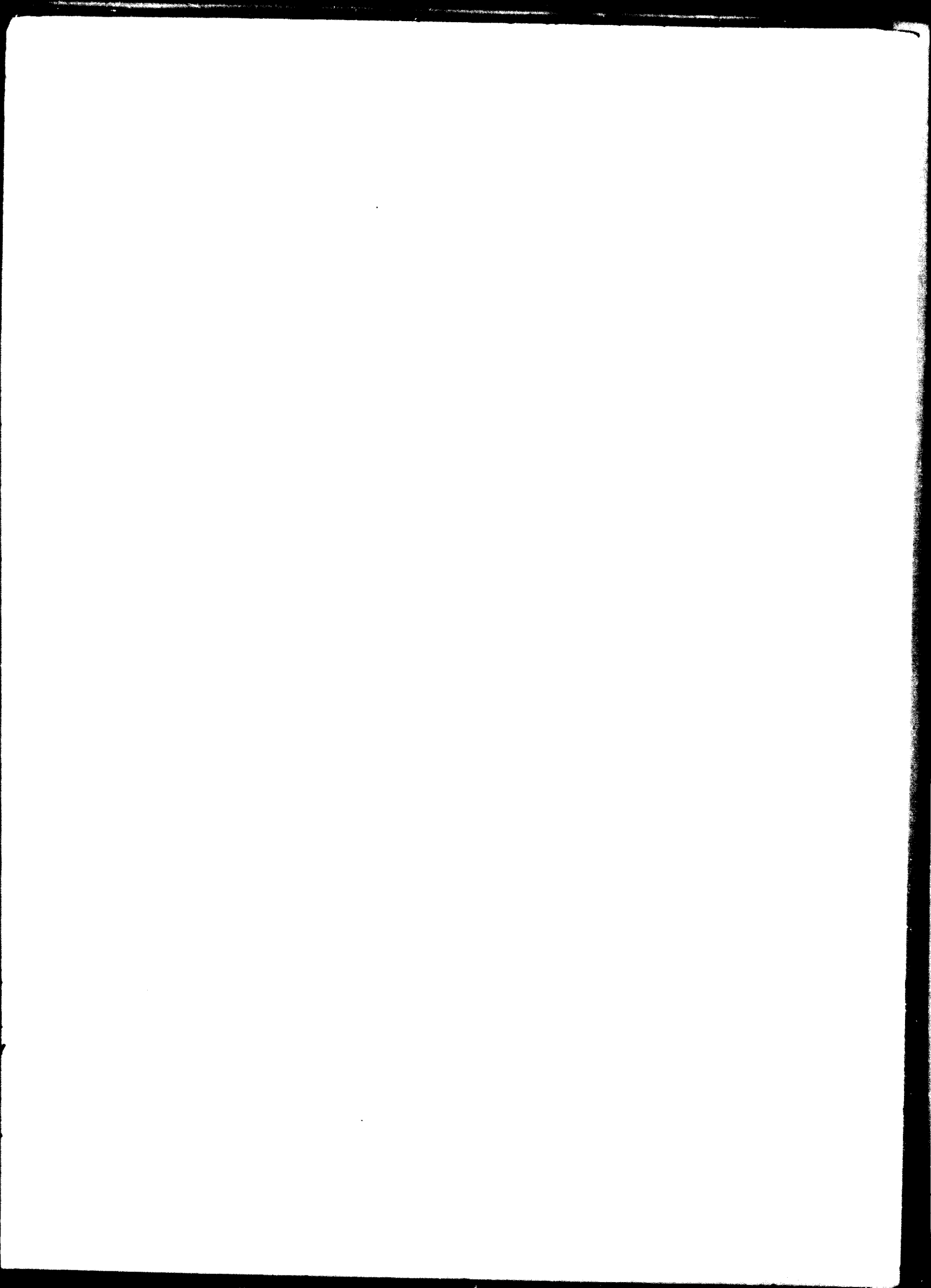
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**STATISTICAL**

**APPENDICES**

Imports of Fish (fresh, chilled or frozen) from Developing Countries,  
into the Leading Industrialized Countries

(SITC 011.1)

thousand US dollars and metric tons

Importing Country	Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries			
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965
<b>WORLD</b>	17781	17680	44412	59938	29007	36251	44853	39325	28894	35281	36305	43663	113666	130560	130371	167670	66590	45465	50933	65803	127268	119746	190403	177688	4628	6664	12931	15794	285266	302335	370438	454655
<b>Total Developing Countries</b>	343	555	880	968	4155	5874	7787	4133	1198	1480	1907	1792	6175	6895	6570	7811	36	212	175	303	18048	18027	16665	18121	4390	6453	6237	8640	28977	29007	29847	36801
<b>As % of total imports</b>	1.4	1.5	1.3	1.7	14.3	16.2	10.9	11.5	4.1	4.2	5.1	4.1	5.4	6.4	6.7	4.7	0.8	0.5	0.6	0.5	14.2	13.4	10.5	10.2	91.9	68.9	68.2	54.8	10.2	10.0	8.1	8.2
<b>IN EUROPE</b>	367	377	333	384	54	55	38		183	362	285	280	786	736	663	672	-	-	-	-	-	-	-	-	-	-	-	-	784	736	663	672
<b>IN AMERICA</b>	691	684	804	685	71	77	80		767	632	522	476	1529	1333	1382	1139	-	-	-	-	-	-	-	-	-	-	-	-	1549	1333	1382	1139
<b>IN AFRICA</b>	-	3	5	-	-	4	10		9	36	33	123	9	55	76	166	28	2	9		139	120	85	83	-	-	1		194	177	149	1001
<b>Other in America</b>	-	-	12	136	286	534	113	492	-	-	-	-	144	537	534	579	14	14	124		-	-	-	-	1	281	872	1964	952	912	1975	1569
<b>Total in America</b>	6	3	30	239	227	282	553	492	476	335	97	395	1037	889	751	779	45	18	145		690	1021	978	1042	-	100	53		2383	2208	1546	28452
<b>IN AFRICA</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>ALGERIA</b>	-	-	-	-	-	-	28		-	3	-	-	-	31	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>EGYPT</b>	-	-	-	-	-	-	22		-	-	-	-	-	38	282		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>IVORY COAST</b>	-	-	-	-	-	-	76	711	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1943	2805	-	-	-	-	473	2899	2838	7139
<b>LIBERIA</b>	-	-	-	-	-	-	96	9	-	-	-	-	379	587	253		475	576	253		-	-	-	-	-	-	-	-	-	-	-	-
<b>SENEGAL</b>	-	-	-	-	-	-	7		-	-	-	-	1189	1605	788		1612	1430	788		-	-	-	-	-	-	-	-	-	-	-	-
<b>SIERRA LEONE</b>	-	-	-	-	-	-	3		-	-	-	-	-	-	309	376	-	-	364	376	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOGO</b>	-	-	-	-	-	-	3		-	-	-	-	-	-	1988	1473	-	-	1601	1273	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other in Africa</b>	-	-	-	-	2364	2613	1920	2888	3	1	9		2366	2619	1976	2888	-	-	-	-	-	-	-	-	-	-	-	-	648	762	579	687
<b>Total in Africa</b>	-	-	-	-	6475	7626	5707	6667	4	1	9		6488	7626	5739	6667	-	-	-	-	-	-	-	-	-	-	-	-	1217	2887	238	617
<b>U.S.A.</b>	-	-	-	-	1384	6497	909	1055	2	-	2		1386	6497	911	1055	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other in Africa</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total in Africa</b>	-	-	-	-	1384	6497	909	1055	2	-	2		1386	6497	911	1055	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Importing Country Country of Origin		Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries									
		1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965						
IN ASIA																														IN ASIA									
CEYLON	V	-	-	26	-	-	-	1	-	-	-	1	-	-	-	60	23	-	-	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	70	23	V	CEYLON
	Q	-	-	1	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	-	-	Q	
CHINA TAIWAN	V	-	-	-	-	-	-	-	-	52	83	-	-	52	83	-	-	-	-	-	-	279	852	988	623	-	-	78	216	279	904	1149	839	V	CHINA TAIWAN				
	Q	-	-	-	-	-	-	-	-	152	231	-	-	152	231	-	-	-	-	-	-	-	-	-	-	-	-	140	524	-	-	152	371	Q	1935				
INDONESIA	V	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	53	-	-	-	-	-	-	-	53	-	V	INDONESIA				
	Q	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Q					
IRAN	V	-	-	-	-	-	-	-	-	-	11	-	-	-	11	-	-	-	-	-	-	208	291	213	229	-	-	-	-	208	291	224	227	V	IRAN				
	Q	-	-	-	-	-	-	-	-	-	18	-	-	-	18	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18	381	Q					
KOREAN REPUBLIC	V	-	-	-	-	-	-	5	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	2	-	4248	3848	5265	6989	4248	3848	5272	6989	V	KOREA REP.				
	Q	-	-	-	-	-	-	5	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	-	-	10841	9871	13610	17026	10841	9871	13615	17026	Q					
MALAYA FEDERATION	V	19	20	69	102	10	5	18	-	7	2	9	-	43	37	154	166	2	4	-	131	199	385	1234	1995	-	-	32	130	204	426	1549	1892	V	MALAYA FED.				
	Q	-	1	2	4	1	1	1	-	23	-	-	-	24	2	5	4	-	-	-	-	-	-	-	4384	-	-	39	8	24	2	44	4388	Q					
PHILIPPINES	V	-	-	3	-	-	-	-	-	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	V	PHILIPPINES				
	Q	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	32	-	-	-	41	-	-	-	78	-	Q					
THAILAND	V	-	-	56	-	-	-	6	-	-	-	1	-	-	-	106	51	-	-	-	-	-	-	-	-	-	-	47	-	-	-	403	170	V	THAILAND				
	Q	-	-	1	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	-	-	-	-	235	119	-	-	-	-	-	-	6	29	Q					
Other in Asia	V	-	-	27	166	-	-	8	-	-	-	6	-	-	-	80	206	-	-	64	106	-	-	55	149	-	-	188	163	1079	-	188	362	V	Other Asia				
	Q	-	-	1	3	-	-	1	-	-	-	12	-	-	-	15	3	-	-	N.A.	N.A.	-	-	-	175	-	-	138	64	2535	-	138	79	Q	2610				
of which																																							
HONG KONG	V	-	-	27	-	-	-	8	-	-	-	6	-	-	-	80	40	-	-	64	-	-	-	55	112	-	-	163	274	-	-	298	426	V	of which HONG KONG				
	Q	-	-	1	-	-	-	1	-	-	-	12	-	-	-	15	-	-	-	-	-	-	-	-	50	-	-	64	132	-	-	79	182	Q					
Total in ASIA	V	19	20	181	268	10	5	38	-	7	54	111	-	43	89	504	446	2	4	198	-	646	1528	2812	2715	4248	4036	5626	9414	4939	5657	9140	11812	V	Total ASIA				
	Q	-	1	5	7	1	1	7	-	23	152	261	-	24	154	278	7	-	-	-	-	-	-	-	6401	10841	10009	14008	20093	10865	10163	14286	26369	Q					
Total in OCEANIA	V	171	193	35	77	273	264	230	-	307	223	267	-	927	1015	599	980	125	199	32	-	3676	1348	1336	1574	-	314	558	-	4728	2886	2485	3325	V	Total OCEANIA				
	Q	171	51	3	44	993	445	433	-	821	728	470	-	1613	1599	906	1534	-	-	-	-	-	-	-	5018	-	1783	1981	-	1613	334	2887	7900	Q					

Sources: U.N. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodity.

APPENDIX II

Imports of Fish (salted, dried or smoked) from Developing Countries,  
into the Leading Developed Importing Countries

(SITC 031.2)

thousand US dollars and metric tons

Importing Country Country of Origin	Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries						
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965		1962	1963
WORLD	V	5617	6055	6197	9022	3483	4493	3832	4670	28134	30790	31434	33098	41925	45036	45028	50752	1574	1336	1772	2002	14774	14929	14896	15526	1761	3399	5528	7009	60034	64700	67224	75289	V	WORLD
	Q	18585	20197	19199	21543	14965	15195	10769	13233	67641	63160	61937	61853	120074	113698	104792	109241	5257	3929	4392	5052	35439	34647	33876	33881	3010	4692	7772	8637	163780	156966	150832	156811	Q	
Total Developing Countries.	V	23	25	7	106	1127	661	515	402	148	181	205	-	1334	896	748	532	20	31	35	-	279	230	205	300	457	1094	728	920	2090	2251	1716	1752	V	LDC
	Q	99	8	1	595	3971	1395	1404	967	498	531	521	-	4710	1986	1969	1600	17	17	20	-	246	158	187	275	689	1242	803	1081	5662	3403	2979	2956	Q	
As % of total imports	V	0.4	0.4	0.1	1.2	32.4	14.7	13.4	8.6	0.5	0.6	0.7	-	3.2	2.0	1.7	1.0	1.3	2.3	2.0	-	1.9	1.5	1.4	-	26.0	32.2	13.2	-	3.5	3.5	2.6	-	V	% imports
	Q	0.5	-	-	2.8	26.5	9.2	13.0	7.3	0.7	0.8	0.8	-	3.9	1.7	1.9	1.5	0.3	0.4	0.5	-	0.7	0.5	0.6	-	22.9	26.5	10.3	-	3.5	2.2	2.0	-	Q	
IN EUROPE																																			EUROPE
YUGOSLAVIA	V									-	24			24																-	24	-	-	V	YUGOSLAVIA
	Q										98			98																-	98	-	-	Q	
IN AMERICA																																			AMERICA
Total America (other America)	V					-	-	37						-	-	37						-	-	37						-	-	74	-	V	Total America
	Q					-	-	84						-	-	84						-	-	87						-	-	171	-	Q	
IN AFRICA																																			AFRICA
ALGERIA	V					1039	502	149	228	131	94	4		1170	596	153	228													1170	596	153	228	V	ALGERIA
	Q					3633	1018		558	442	310			4075	1328		558													4075	1328	483	558	Q	
IVORY COAST	V											136				136																136	-	V	IVORY COAST
	Q																															352	-	Q	
MOROCCO	V							312	112			1				313	112															313	112	V	MOROCCO
	Q								365								365															839	365	Q	
Total Africa	V					1039	502	461	384	131	94	141		1170	596	602	384													1170	596	602	384	V	Total Africa
	Q					3633	1018		933	442	310			4075	1328		933													4075	1328	1674	933	Q	
IN ASIA																																			ASIA
KOREA REPUBLIC	V																						401	923	628	920	401	923	628	855	V	KOREA REP.			
	Q																						644	1074	709	1081	644	1074	709	1005	Q				
Other Asia	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	172	-	23	11		216	288	154	254	V	Other Asia
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	80		21	11		117	126	77	156	Q	
of which HONG KONG	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	164	-	-	11		216	205	154	178	V	of which HONG KONG
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	71		-	11		117	105	77	80	Q	
Total Asia	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	172	401	946	639	920	617	1151	788	1109	V	Total ASIA
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	80	644	1093	780	1081	761	1200	786	1161	Q	
Total Oceania	V	19	19	-	106	88	158	17		17	63	64		149	257	100	106	12	20	27		86	55	42		-	148	89	-	247	480	298	104	V	Total Oceania
	Q	97	6	-	595	338	377	5		56	123	162		614	539	206	595	13	12	15		154	79	44		-	147	83	-	782	777	348	595	Q	

Sources: U.N. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodities.





**STATISTICAL**

**APPENDICES**



Importing Country Country of Origin	Federal Republic of Germany				France				Italy				E.E.C. - Total				United Kingdom				U.S.A.				Japan				Total of Listed Countries										
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965							
In Asia	V	2	1		1	7	1		1				6	11	10		27	22			3825	996.2	4137	6910			890	1198	3831	5980	5059	8108	V	In Asia					
India	Q	1	1		1	6			1				5	10	8		23	20			2610	..	..	..			690	853	2615	33	718	853	Q	India					
Iraq	V				3								3								403		459	4400			406			459	4400	V	Iraq						
Korea	Q			9				28	167	150		5	46			34	233	150		10	112			1124	523	608	927	1196	3159	4431	927	2354	3925	5301	V	Korea			
China (Taiwan)	Q			10				44	201	182		5	142			50	357	188		6	60			N.A.	N.A.	..	2394	2024	5577	6558	2394	2074	5940	6800	Q	China (T)			
Kuwait	V																				223	2713	3539	3829												V	Kuwait		
Malaya	Q																				188	N.A.	N.A.	..													Q	Malaya	
North Borneo, Sarawak	V			1																																		V	North Borneo Sarawak
Pakistan	Q	1	6	1				9		2						11	6	11		17	1			2185	2310	2623	4111		263	232	359	2196	2996	2897	4470	V	Pakistan		
Philippines	Q	1	3	2				7		1						9	3	38		16	1			1448	N.A.	N.A.	..		129	137	212	1457	148	176	212	Q	Philippines		
Saudi Arabia	V																																					V	Saudi Arabia
Syria	Q																																					Q	Syria
Thailand	V							5	4	13						5	4	14						191	995	571	1777		1155	2989	3774	196	2154	3974	5551	V	Thailand		
Vietnam Republic	Q							12	3	9						12	3	9						113	N.A.	N.A.	..		545	1515	1976	125	548	1524	1976	Q	Vietnam Rep.		
Other Asia	V	49	26	48				3	1	30	234		48	13		129	139	189	114	434	148	312	562	1826	426	119	266	798	5683	3697	5712	3189	6396	4317	6854	V	Other Asia		
of which:	Q	28	15	24				2	1	20	248		33	14		76	86	144	101	232	78	151	383	1131	N.A.	N.A.	..		2708	1889	3085	1879	2872	2184	3969	Q	of which:		
Hong Kong	V	49	26	48				3	1	-	-		48	13		129	139	159	189	434	148	312	435	829	426	119	177	798	5108	3611	4971	2190	5821	4201	5778	V	Hong Kong		
	Q	28	15	24				2	1	-	-		33	14		76	86	124	108	232	78	151	219	310	N.A.	N.A.	..	440	2393	1844	2996	1058	2557	2144	2917	Q			
Total in Asia	V	58	33	64				21	40	369	517		54	59		154	194	627	597	434	192	448	674	8623	13510	12365	2374.1	2118	9318	12287	14470	11399	23214	29727	41199	V	Total Asia		
	Q	30	19	39				24	54	439	533		39	136		104	152	771	466	232	117	231	340	548.8	N.A.	N.A.	..	3099	9939	10232	13187	9833	6808	11234	14026	Q			
Total in Oceania	V	20						139	305	29	-	66	116	28		242	460	97		94	137	16		540	793	31	-	-	75	7	-	84	1425	111		V	Total Oceania		
	Q	13	2					202	274	16	-	179	262			405	597	86		45	74	7		319	N.A.	N.A.	-	-	5	-	-	749	631	98		Q			



Importing Country Country of Origin	Federal Republic of Germany				France				Italy				E.E.C. - Total				United Kingdom				U.S.A.				Japan				Total of Listed Countries					
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965		
In Asia																																		
China (Taiwan)	V																																	
	Q																																	
India	V	6	5	2		3	-	4	438	26	28	23		37	44	30	462	187	177	140	430													
	Q	3	4	4		1	-	1	326	30	22	16		36	31	22	341	148	133	93	314													
Iran	V	189	83	128	191	398	431	480	381	7	6	9		605	545	653	772	145	152	128														
	Q	11	4	6	7	18	20	20	14	1	-	-		30	24	30	21	6	8	4														
Korea Rep.	V		39	73	100		7	177	140			3		-	46	244	289	-	49	28														
	Q		29	51	49		6	122	98			2		-	35	179	173		25	18														
Malaysia Fed.	V	211	-	26										211	-	29				7														
	Q	405	-	52										405	-	55				14														
Pakistan	V							1							1	1																		
	Q							1							1	1																		
Philippines	V							1							1	1																		
	Q							1							1	1																		
Other Asia	V	15	1	2	134	1	4	6	266	2				45	30	35	366	342	117	65	383	674	780	882	1081	311	39	3	823	1372	986	965	2971	
of which:	Q	11	2	1	160	1	3	5	111	3				35	35	30	332	182	89	35	282	381	425	513	653	311	31	3	841	908	544	381	2024	
Hong Kong	V	2	1	2		1	4	6						30	30	35	64	233	117	65	124	649	780	882	879	-	-	3	432	915	887	965	1599	
	Q	1	2	1		1	3	5						22	35	30	41	128	89	35	69	365	425	513	517	-	-	3	378	515	523	382	1205	
Total Asia	V	421	128	231	425	402	442	649	1125	35	34	35	-	898	686	1023	1687	843	651	559	1166	1386	2078	2408	2962	311	39	43	2313	3438	3478	6833	10428	
	Q	430	39	114	216	20	29	150	349	34	22	18	-	507	385	318	847	433	294	254	695	442	899	2520	2942	311	32	29	2589	3623	3549	1151	7896	
Total in Oceania	V	25	86	-	2	42	127	43	-	59	155	9	-	145	346	57	2	128	74	4	-	70	392	112	-	-	31	289	-	385	1233	382	2	
	Q	2	152	-	-	28	80	15	-	71	186	19	-	129	432	39	-	116	49	4	-	208	453	145	-	-	264	186	-	323	954	394	-	

U.S. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodity.

APPENDIX V

Import of Fish Oils and Fats from Developing Countries,  
into the Leading Developed Importing Countries

(S.I.T.C. 411-1)

thousand US dollars and metric tons

Importing Country	Federal Republic of Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries						
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965			
<b>WORLD</b>	V	17201	19610	23176	25260	6458	5397	6534	10492	2443	2126	2484	2138	38625	43615	52285	113803	24015	25606	33083	40869	8730	8156	7241	5988	380	182	180	194	71750	77559	92789	160854	V	<b>WORLD</b>
	Q	126164	133491	119051	121487	41118	29989	31134	47922	13177	11340	10754	8662	281277	294270	281277	300801	170205	171116	164415	191616	N.A.	N.A.	35182	34923	1168	508	361	585	452690	465894	466914	527925	Q	
<b>Total Developing Countries</b>	V	4665	4245	7164	10456	920	787	1738	4078	318	330	327	672	9043	10642	18522	25600	2724	1723	221	-	547	1706	511	745	249	126	45	-	12563	14197	19299	26345	V	<b>LDC</b>
	Q	40085	40132	39943	50778	7266	6807	9101	19683	1794	2139	1654	2857	80447	96719	80447	124400	19134	20558	1363	-	N.A.	N.A.	3652	5317	1048	422	115	-	100629	117699	105641	129717	Q	
<b>As % of total imports</b>	V	27.1	21.6	30.9	41.4	14.2	14.6	26.6	38.9	13.0	15.5	13.2	31.4	23.4	24.4	35.4	22.5	11.3	6.7	0.7	-	6.3	6.3	7.1	12.4	65.5	69.2	25.0	-	17.5	18.3	20.8	16.4	V	<b>% Imports</b>
	Q	31.8	30.1	33.6	41.8	17.7	22.7	29.2	41.1	13.6	18.9	15.4	33.0	29.6	32.9	28.6	41.4	11.2	12.0	0.8	-	N.A.	N.A.	10.4	15.2	89.7	83.1	31.9	-	22.2	25.3	22.6	24.6	Q	
<b>IN AMERICA</b>																																			<b>IN AMERICA</b>
<b>ARGENTINA</b>	V	-	-	66										-	-	84	29															84	29	V	<b>ARGENTINA</b>
	Q			378												468	155											468	155	Q					
<b>CHILE</b>	V	1013	471	357	757	-	-	134	405				529	1548	1996	1628	2822	-	-	21		6	120	-						1554	1716	1649	2822	V	<b>CHILE</b>
	Q	7494	3190	1969	3372			733	1436				2190	13271	12181	8790	12238			119		N.A.	N.A.							13271	12181	8909	12238	Q	
<b>PERU</b>	V	3419	3219	5904	8806	640	571	1023	3222	21	17	100		6629	7944	14870	21065	2641	1713	197		535	1584	510	739					9805	11241	15577	21804	V	<b>PERU</b>
	Q	30377	32688	33087	42996	4831	5060	5120	15354	125	114	500		60255	76310	80831	77946	19062	20554	1235		N.A.	N.A.	3644	5282					79317	96864	85710	79228	Q	
<b>Total in America</b>	V	4432	3690	6327	9796	640	571	1157	3627	21	17	100	532	8177	9540	16582	24152	2641	1713	218		541	1704	510	739					11399	12937	17310	24891	V	<b>Total America</b>
	Q	37871	35838	35434	47206	4831	5060	5853	17290	125	114	500	2162	73526	88491	90089	89448	19062	20554	1354		N.A.	N.A.	3644	5282					92588	109045	99087	94730	Q	
<b>IN AFRICA</b>																																			<b>IN AFRICA</b>
<b>MOROCCO</b>	V	11	132	133		270	216	299	347	274	302	224	140	579	657	676	525	8												587	657	676	525	V	<b>MOROCCO</b>
	Q	123	1015	784		2397	1747	1817	1877	1526	1947	1139	695	4378	4787	3876	2776	57												4435	4787	3876	2776	Q	
<b>NIGERIA</b>	V															140																140		V	<b>NIGERIA</b>
	Q															672																672		Q	
<b>Other in AFRICA</b>	V	208	387	684	639	-	-	275	103					213	398	1092	830													213	398	1092	830	V	<b>Other Africa</b>
	Q	1989	3009	3606	3256			1403	517					2040	3093	5692	3707													2040	3093	5692	3707	Q	
<b>Total in AFRICA</b>	V	219	519	817	639	270	216	574	430	274	302	224	140	792	1055	1908	1355	8	-											800	1055	1908	1355	V	<b>Total Africa</b>
	Q	2112	4024	4390	3256	2397	1747	3220	2394	1526	1947	1139	695	6418	7880	10840	6483	57												6475	7880	10840	6483	Q	
<b>Total in Asia</b>	V																									199	-	31		199	-	31		V	<b>Total Asia</b>
	Q																									374	-	55		374	-	55		Q	
<b>Total in OCEANIA</b>	V	14	36	20	21	10	-	7	-	23	11	3	-	74	47	32	21	75	10	3		6	2	1		-	-	24		195	39	30		V	<b>Total Oceania</b>
	Q	102	270	119	316	38	-	28	-	143	78	15	-	303	348	188	316	15	4	9		N.A.	N.A.	8		-	-	68		528	332	239		Q	

Sources - U.S. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodities.

APPENDIX VI

Imports of Fish Meals and Solubles from Developing Countries into the Leading Developed Importing Countries

(SITC: part of 061.4)

thousand U.S. Dollars and thousand metric tons

Importing Country Country of Origin	Federal Republic of Germany					France					Italy					E.E.C. - Total					United Kingdom					U. S. A.					Japan					Total of Listed Countries						
	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965	1958	1962	1963	1964	1965		
World	V 20146	44720	40465	55282	66257	7288	11060	10207	14619	16726	2340	5965	8101	12069	16214	47311	89871	87237	114818	139069	22126	41387	40687	55068	64626	12759	24772	37533	44546	34855	-	5034	11068	13665	12007	82196	161064	176325	228097	250557	V	World
	Q 136.6	345.4	311.2	414.0	416.4	42.2	82.5	76.5	104.8	99.9	14.4	48.6	61.3	91.4	108.3	305.3	706.4	676.2	861.2	873.9	235.3	284.5	286.3	374.9	377.3	105.4	234.6	347.9	402.6	N.A.	-	38.5	84.3	102.3	85.2	546.0	1284.0	1394.7	1741.0	1336.4	Q	
Total Developing Countries	V N.A.	N.A.	28736	40187	48415	N.A.	N.A.	7960	9337	9696	N.A.	N.A.	7438	10461	13473	N.A.	N.A.	69860	88972	97307	N.A.	N.A.	9367	11935	10624	N.A.	N.A.	28989	35284	23911	-	N.A.	2657	11263	9714	N.A.	N.A.	116673	147454	141556	V	Total LDC
	Q 49.4	274.7	220.4	297.6	312.1	12.3	68.8	61.0	68.7	62.0	1.4	44.6	53.7	74.7	91.9	119.7	597.2	527.0	663.4	643.6	14.9	79.5	70.3	90.2	72.9	38.4	177.5	272.8	327.4	N.A.	-	31.0	64.0	83.5	69.9	173.0	885.2	934.1	1164.5	786.4	Q	
As % of Total Imports	V N.A.	N.A.	71.0	72.7	73.1	N.A.	N.A.	78.0	63.9	58.0	N.A.	N.A.	91.8	86.7	83.1	N.A.	N.A.	80.1	77.5	70.0	N.A.	N.A.	23.0	21.7	16.4	N.A.	N.A.	77.2	79.2	68.6	-	N.A.	76.4	82.4	80.9	N.A.	N.A.	66.1	64.6	56.5	V	% Imports
	Q 36.2	78.7	70.8	71.9	75.0	29.1	83.4	79.7	65.6	62.1	9.7	91.8	87.6	81.7	84.9	39.2	84.5	77.9	77.0	73.6	11.0	27.9	24.6	24.1	19.3	36.4	75.7	78.4	81.3	..	-	80.5	75.9	81.6	82.0	31.7	70.0	67.0	66.9	58.8	Q	
In America	V N.A.		543	4126	3382			192	1066	465			342	-	N.A.	3504	11132	9516	..	1049	1591	827			2575	1396	711				51				7128	14170	11054	V	In America			
Chile	Q 0.6	3.8	4.2	30.8	23.0	5.0	1.5	8.1	3.1				..	-	1.3	27.8	20.5	79.5	64.7	0.8	5.2	7.9	11.7	5.5	7.4	8.6	20.9	11.7	..					9.5	41.6	49.3	102.9	70.2	Q	Chile		
Peru	V N.A.		27099	33276	41210			6214	6442	6792			6120	9715	10454	N.A.	62649	72330	78137		8318	10344	9532			26333	33694	22393	N.A.	7998	11212	8222				105318	127580	118284	V	Peru		
	Q 36.6	255.2	207.6	247.2	266.6	56.6	48.3	50.1	46.2		39.2	46.5	74.7	69.1	66.9	543.6	478.9	552.8	518.3	14.1	74.3	62.4	78.5	65.0	31.0	168.9	251.9	315.7	58.0	27.4	60.3	83.5	112.0	814.8	833.5	1030.5	641.4		Q			
Total in America	V N.A.		27642	37402	44592			6406	7508	7297			6462	9715	10454	N.A.	66153	83462	87657		9367	11935	10559			28928	35090	23104		7998	11248	8222				112444	141750	129338	V	Total America		
	Q 37.2	259.0	211.8	278.0	289.7	61.6	49.8	58.2	49.3		39.2	46.5	74.7	69.1	68.2	571.4	499.4	632.3	583.1	14.9	79.5	70.3	90.2	70.5	38.4	177.5	272.8	327.4	..	27.4	60.3	83.5	121.5	855.8	902.8	1133.4	711.6		Q			
In Africa	V		582	584	518			1495	1542	2080							2093	2127	2598																	2093	2127	2598	V	In Africa		
Morocco	Q 3.4	3.9	4.9	4.7	3.2	12.3	7.2	11.2	10.5	10.6						15.7	11.1	16.1	15.2	13.8															15.7	11.1	16.1	15.2	13.8	Q	Morocco	
Angola	V		512	2201	1359			59	287	-			976	746	1307		1614	3383	2770							61	194	289							459	-	151	2134	3977	3206	V	Angola
	Q 8.8	8.8	3.7	14.9	7.5	..	..	-	1.4	5.4	7.2	..	8.7	35.8	14.7	11.5	15.9	16.9							..	..	..	3.6	3.7	-	1.0	35.8	14.3	15.2	15.9	17.9	Q					
Total in Africa	V		1094	2785	1877			1554	1829	2080			976	746	1307		3707	5510	5348							61	194	289							459	-	151	4287	9704	5804	V	Total Africa
	Q 12.2	12.7	8.6	19.6	10.7	12.3	7.2	11.2	10.5	10.6	1.4	5.4	7.2	..	8.7	51.5	25.8	27.6	31.1	30.7						..	..	..	3.6	3.7	-	1.0	51.5	29.4	31.5	31.1	31.6	Q				

NOTE: The data in the above table are mainly estimative.

REFERENCES: U.S. - Commodity Trade Statistics  
O.E.C.D. - Foreign Trade - Trade by Commodities  
F.A.O. - Bulletin of Fishery Statistics



**23. 9. 71**



Imports of Fish (fresh, chilled or frozen) from Developing Countries,  
Less the Leading Developing Importing Countries

(SITC 011.1)

thousand US dollars and metric tons

Importing Country	Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries			
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965
WORLD	17781	17680	44412	59938	29007	36251	43853	39325	28894	35281	36305	43663	113666	130560	130371	167670	66590	45465	50933	65803	127268	119766	190603	177688	6628	6664	12931	15794	285266	302335	370638	454655
Total Developing Countries	543	555	880	968	4155	5874	7787	4133	1198	1480	1907	1792	6175	6895	6570	7811	36	212	175	303	18068	18027	16665	18121	6390	6653	6237	8660	28977	29007	29867	36801
As % of total imports	1.4	1.5	1.3	1.7	14.3	16.2	10.9	11.5	4.1	4.2	5.1	4.1	5.4	6.4	6.7	4.7	0.8	0.5	0.6	0.5	14.2	13.4	10.5	10.2	91.9	68.9	68.2	56.8	10.2	10.0	8.1	8.2
IN EUROPE	367	377	333	386	56	55	38		103	362	285	280	786	736	663	672	-	-	-	-	-	-	-	-	-	-	-	-	786	736	663	672
YUGOSLAVIA	691	684	804	685	71	77	80		767	632	522	676	1529	1333	1182	1139	-	-	-	-	-	-	-	-	-	-	-	-	1529	1333	1182	1139
IN AMERICA	-	3	5	-	-	4	10		9	36	33	123	9	55	76	166	28	2	9		139	120	85	83	-	-	1		194	177	149	1001
ARGENTINA	-	30	12	-	1	14	98		11	107	99	466	33	178	221	585	-	-	-		-	-	274	-	-	-	2		13	180	283	799
CHILE	-	-	4	305	-	-	3		-	-	12	-	-	19	305	-	-	-	6		-	-	37	-	-	-	-		-	-	63	298
COLOMBIA	-	-	17	292	-	-	7		-	-	39	-	-	83	292	-	-	-	-		-	-	-	-	-	-	-		-	-	47	-
COSTA RICA	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
ECUADOR	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
EL SALVADOR	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
HONDURAS	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
PARAGUAY	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
PERU	2	2	9	-	1	2	2		129	157	52	128	154	175	77	152	3	1	5		-	-	-	-	-	-	-		649	729	148	1080
URUGUAY	-	-	-	-	-	-	-		668	719	160	386	668	719	160	326	-	-	-		-	-	-	-	-	-	-		-	-	76	-
VENEZUELA	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
Other in America	4	-	12	136	286	534	113	492	164	537	536	579	376	14	14	124	-	-	-		1	-	-	110	-	-	-		337	162	-	110
Total in America	6	3	30	239	227	282	553	492	476	335	97	395	1037	889	751	779	65	18	145		690	1021	972	1042	-	100	53		2383	2208	156	2845
IN AFRICA	-	-	-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
ALGERIA	-	-	-	-	-	-	28		-	3	-	-	-	31	-	-	-	-	-		-	-	-	-	-	-	-		-	-	31	-
EGYPT	-	-	-	-	-	-	28		-	5	-	-	-	36	-	-	-	-	-		-	-	-	-	-	-	-		-	-	36	-
ETHIOPIA	-	-	-	-	-	-	22		-	-	-	-	-	38	222	-	-	-	-		-	-	-	-	-	-	-		-	-	38	222
GUINEA	-	-	-	-	-	-	76	711	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	76	711
IVORY COAST	-	-	-	-	-	-	96	9	379	587	253	-	475	576	253	-	-	-	-		-	-	1963	2805	-	-	-		475	2899	2878	-
LIBERIA	-	-	-	-	-	-	263	7	1189	1605	788	-	1612	1630	788	-	-	-	-		-	-	-	-	-	-	-		-	-	263	788
MALI	-	-	-	-	-	-	3	3	-	309	376	-	-	362	376	-	-	-	-		-	-	-	-	-	-	-		-	-	362	376
SENEGAL	-	-	-	-	-	-	3	3	-	1988	1473	-	-	1601	1273	-	-	-	-		-	-	-	-	-	-	-		-	-	1601	1273
SIERRA LEONE	-	-	-	-	2366	2613	1920	2888	3	1	9	-	2366	2613	1976	2888	-	-	-		-	-	-	-	-	-	-		-	-	-	-
TUNISIA	-	-	-	-	6475	7628	5707	6667	6	1	9	-	6488	7628	5735	6667	-	-	-		-	-	-	-	-	-	-		-	-	-	-
ZAMBIA	-	-	-	-	726	2227	679	817	1	-	1	-	727	2227	688	817	-	-	-		-	-	-	-	-	-	-		-	-	-	-
ZIMBABWE	-	-	-	-	1386	4697	909	1055	2	-	2	-	1386	4697	911	1055	-	-	-		-	-	-	-	-	-	-		-	-	-	-
Other in Africa	-	-	1	-	15	1	96		187	188	288	-	182	181	288	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
Total in Africa	-	-	3	-	288	276	286	119	28	29	37	-	317	306	283	288	-	-	-		-	-	-	-	-	-	-		288	276	286	119
U.S.A.	-	-	-	-	176	156	128	162	29	26	66	-	269	188	178	169	-	-	-		-	-	-	-	-	-	-		-	-	-	-
Other in Africa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-	-	-		-	-	-	-
Total in Africa	-	-	3	-	288	276	286	119	28	29	37	-	317	306	283	288	-	-	-		-	-	-	-	-	-	-		288	276	286	119

Importing Country		Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries							
Country of Origin		1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965				
IN ASIA																														IN ASIA							
CEYLON	V	-	-	26	-	-	-	1	-	-	-	1	-	-	-	60	23	-	-	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	70	23
	Q	-	-	1	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	..	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	-	-
CHINA TAIWAN	V	-	-	-	-	-	-	-	-	52	83	-	-	52	83	-	-	-	-	-	-	279	852	988	623	-	-	78	216	279	904	1149	839	-	-	-	-
	Q	-	-	-	-	-	-	-	-	152	231	-	-	152	231	-	-	-	-	-	-	..	..	..	1411	-	-	140	524	..	152	371	1935	-	-	-	-
INDONESIA	V	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	53	-	-	-	-	-	-	-	53	-	-	-	-	-
	Q	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	..	-	-	-	-	-	-	-	-	-	-	-	-	-
IRAN	V	-	-	-	-	-	-	-	-	-	11	-	-	-	11	-	-	-	-	-	-	208	291	213	229	-	-	-	-	208	291	224	227	-	-	-	-
	Q	-	-	-	-	-	-	-	-	-	18	-	-	-	18	-	-	-	-	-	-	..	..	..	382	-	-	-	-	..	..	18	381	-	-	-	-
KOREAN REPUBLIC	V	-	-	-	-	-	-	5	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	2	-	4248	3848	5265	6989	4248	3848	5272	6989	-	-	-	-
	Q	-	-	-	-	-	-	5	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	..	-	10841	9871	13610	17026	10841	9871	13615	17026	-	-	-	-
MALAYA FEDERATION	V	19	20	69	102	10	5	18	-	7	2	9	-	43	37	154	166	2	4	-	131	199	385	1234	1995	-	-	32	130	204	426	1549	1892	-	-	-	-
	Q	-	1	2	4	1	1	1	-	23	-	-	-	24	2	5	4	..	..	-	-	..	..	..	4384	-	-	39	8	24	2	44	4388	-	-	-	-
PHILIPPINES	V	-	-	3	-	-	-	-	-	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Q	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	32	-	-	-	41	-	-	-	78	-	-	-	-	-
THAILAND	V	-	-	56	-	-	-	6	-	-	-	1	-	-	-	106	51	-	-	-	-	-	-	-	-	-	-	47	-	-	-	403	170	-	-	-	-
	Q	-	-	1	-	-	-	-	-	-	-	-	-	-	-	2	-	-	-	-	-	-	-	235	119	-	-	-	-	-	-	6	29	-	-	-	-
Other in Asia	V	-	-	27	166	-	-	8	-	-	-	6	-	-	-	80	206	-	-	64	106	-	-	55	149	-	-	188	163	1079	-	188	362	1672	1672	1672	1672
	Q	-	-	1	3	-	-	1	-	-	-	12	-	-	-	15	3	-	-	N.A.	N.A.	-	-	..	175	-	-	138	64	2535	-	138	79	2610	2610	2610	2610
of which																																					
HONG KONG	V	-	-	27	-	-	-	8	-	-	-	6	-	-	-	80	40	-	-	64	-	-	-	55	112	-	-	163	274	-	-	298	426	-	-	-	-
	Q	-	-	1	-	-	-	1	-	-	-	12	-	-	-	15	-	-	-	-	-	-	-	..	50	-	-	64	132	-	-	79	182	-	-	-	-
Total in ASIA	V	19	20	181	268	10	5	38	-	7	54	111	-	43	89	504	446	2	4	198	-	646	1528	2812	2715	4248	4036	5626	9414	4939	5657	9140	11812	-	-	-	-
	Q	-	1	5	7	1	1	7	-	23	152	261	-	24	154	278	7	..	..	..	-	..	..	..	6401	10841	10009	14008	20093	10865	10163	14286	26369	-	-	-	-
Total in OCEANIA	V	171	193	35	77	273	264	230	-	307	223	267	-	927	1015	599	980	125	199	32	-	3676	1348	1336	1574	-	314	558	-	4728	2886	2485	3325	-	-	-	-
	Q	171	51	3	44	993	445	433	-	821	728	470	-	1613	1599	906	1534	..	..	..	-	..	..	..	5018	-	1783	1981	-	1613	334	2887	7900	-	-	-	-

Sources: U.N. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodity.



APPENDIX II

Imports of Fish (salted, dried or smoked) from Developing Countries,  
into the Leading Developed Importing Countries

(SITC 031.2)

thousand US dollars and metric tons

Importing Country Country of Origin	Federal Republic Germany				France				Italy				EEC - Total				United Kingdom				U. S. A.				Japan				Total of listed Countries						
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965		1962	1963
WORLD	V	5617	6055	6197	9022	3483	4493	3832	4670	28134	30790	31434	33098	41925	45036	45028	50752	1574	1336	1772	2002	14774	14929	14896	15526	1761	3399	5528	7009	60034	64700	67224	75289	V	WORLD
	Q	18585	20197	19199	21543	14965	15195	10769	13233	67641	63160	61937	61853	120074	113698	104792	109241	5257	3929	4392	5052	35439	34647	33876	33881	3010	4692	7772	8637	163780	156966	150832	156811	Q	
Total Developing Countries.	V	23	25	7	106	1127	661	515	402	148	181	205	-	1334	896	748	532	20	31	35	-	279	230	205	300	457	1094	728	920	2090	2251	1716	1752	V	LDC
	Q	99	8	1	595	3971	1395	1404	967	498	531	521	-	4710	1986	1969	1600	17	17	20	-	246	158	187	275	689	1242	803	1081	5662	3403	2979	2956	Q	
As % of total imports	V	0.4	0.4	0.1	1.2	32.4	14.7	13.4	8.6	0.5	0.6	0.7	-	3.2	2.0	1.7	1.0	1.3	2.3	2.0	-	1.9	1.5	1.4	-	26.0	32.2	13.2	-	3.5	3.5	2.6	-	V	% imports
	Q	0.5	-	-	2.8	26.5	9.2	13.0	7.3	0.7	0.8	0.8	-	3.9	1.7	1.9	1.5	0.3	0.4	0.5	-	0.7	0.5	0.6	-	22.9	26.5	10.3	-	3.5	2.2	2.0	-	Q	
IN EUROPE																																			EUROPE
YUGOSLAVIA	V									-	24			24																-	24	-	-	V	YUGOSLAVIA
	Q										98			98																-	98	-	-	Q	
IN AMERICA																																			AMERICA
Total America (other America)	V					-	-	37						-	-	37						-	-	37						-	-	74	-	V	Total America
	Q					-	-	84						-	-	84						-	-	87						-	-	171	-	Q	
IN AFRICA																																			AFRICA
ALGERIA	V					1039	502	149	228	131	94	4		1170	596	153	228													1170	596	153	228	V	ALGERIA
	Q					3633	1018		558	442	310			4075	1328		558													4075	1328	483	558	Q	
IVORY COAST	V											136				136																136	-	V	IVORY COAST
	Q																															352	-	Q	
MOROCCO	V							312	112			1				313	112															313	112	V	MOROCCO
	Q								365								365															839	365	Q	
Total Africa	V					1039	502	461	384	131	94	141		1170	596	602	384													1170	596	602	384	V	Total Africa
	Q					3633	1018		933	442	310			4075	1328		933													4075	1328	1674	933	Q	
IN ASIA																																			ASIA
KOREA REPUBLIC	V																						401	923	628	920	401	923	628	855	V	KOREA REP.			
	Q																						644	1074	709	1081	644	1074	709	1005	Q				
Other Asia	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	172	-	23	11		216	288	154	254	V	Other Asia
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	80		21	11		117	126	77	156	Q	
of which HONG KONG	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	164	-	-	11		216	205	154	178	V	of which HONG KONG
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	71		-	11		117	105	77	80	Q	
Total Asia	V	4	6	7	-	-	1	-	-					15	19	9	17	8	11	8		193	175	126	172	401	946	639	920	617	1151	788	1109	V	Total ASIA
	Q	2	2	1	-	-	-	-	-					21	21	5	..	4	5	5		92	79	56	80	644	1093	780	1081	761	1200	786	1161	Q	
Total Oceania	V	19	19	-	106	88	158	17		17	63	64		149	257	100	106	12	20	27		86	55	42		-	148	89	-	247	480	298	104	V	Total Oceania
	Q	97	6	-	595	338	377	5		56	123	162		614	539	206	595	13	12	15		154	79	44		-	147	83	-	782	777	348	595	Q	

Sources: U.N. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodities.



Importing Country Country of Origin	Federal Republic of Germany				France				Italy				E.E.C. - Total				United Kingdom				U.S.A.				Japan				Total of Listed Countries						
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965			
In Asia	V	2	1		1	7	1		1				6	11	10		27	22		3825	996.2	4137	6910			890	1198	3831	5980	5059	8108	V			
India	Q	1	1		1	6			1				5	10	8		23	20		2610	..	..	..			690	853	2615	33	718	853	Q			
Iraq	V				3								3							403		459	4400					406		459	4400	V			
Korea	Q				2								2							328		N.A.	..					330		N.A.	..	Q			
Korea	V			9				28	167	150		5	46			34	233	150			1124	523	608	927	1196	3159	4431	927	2354	3925	5301	V			
Korea	Q			10				44	201	182		5	142			50	357	182			N.A.	N.A.	..	2394	2024	5577	6558	2394	2074	5940	6800	Q			
China (Taiwan)	V																					46	370			384	692	413		384	738	783	V		
China (Taiwan)	Q																					N.A.	..			172	321	184		172	321	184	Q		
Kuwait	V																			223	2713	3539	3829					223	2713	3539	3829	V			
Kuwait	Q																			188	N.A.	N.A.	..					188	N.A.	N.A.	..	Q			
Malaya	V			1											3							42	252				333			481	252	V			
Malaya	Q			-											1							N.A.	..				232			286	..	Q			
North Borneo, Sarawak	V																							105				105				V			
North Borneo, Sarawak	Q																							51				91				Q			
Pakistan	V	1	6	1		9		2					11	6	11		17	1		2185	2310	2623	4111		263	232	359	2196	2996	2897	4470	V			
Pakistan	Q	1	3	2		7		1					9	3	38		16	1		1448	N.A.	N.A.	..		129	137	212	1457	148	176	212	Q			
Philippines	V																																V		
Philippines	Q																																Q		
Saudi Arabia	V																						203	677							203	677	V		
Saudi Arabia	Q																						N.A.	..							N.A.	..	Q		
Syria	V							28							28								3								31		V		
Syria	Q							114							114								N.A.	..							114		Q		
Thailand	V				5	4	13						5	4	14					191	995	571	1777		1155	2989	3774	196	2154	3974	5551	V			
Thailand	Q				12	3	9						12	3	9					113	N.A.	N.A.	..		545	1515	1976	125	548	1524	1976	Q			
Vietnam Republic	V			5				128	133						139	133						47	218	288	637	239	583	288	637	425	934	V			
Vietnam Republic	Q			3				94	103						100	103						N.A.	..	174		143	319	174		243	422	Q			
Other Asia	V	49	26	48		3	1	30	234			48	13		129	139	189	114	434	148	312	562	1826	426	119	266	798	5683	3697	5712	3189	6396	4317	6854	V
Other Asia	Q	28	15	24		2	1	20	248			33	14		76	86	144	181	232	78	151	383	1131	N.A.	N.A.	..		2708	1889	3085	1879	2872	2184	3969	Q
of which:	V	49	26	48		3	1	-	-			48	13		129	139	159	189	434	148	312	435	829	426	119	177	798	5108	3611	4971	2190	5821	4201	5778	V
of which:	Q	28	15	24		2	1	-	-			33	14		76	86	124	188	232	78	151	219	310	N.A.	N.A.	..	440	2393	1844	2996	1058	2597	2144	2917	Q
of which:	V	21	33	64		21	40	369	517			54	59		154	194	627	597	434	192	448	674	8623	13510	12365	2374.1	2118	9318	12287	14470	11399	23214	29727	41199	V
of which:	Q	30	19	39		24	54	439	533			39	136		104	152	771	466	232	117	231	340	5818	N.A.	N.A.	..	3099	9939	10232	13187	9833	4808	11234	14026	Q
Total in Asia	V	2	1		1	7	1		1				6	11	10		27	22		3825	996.2	4137	6910			890	1198	3831	5980	5059	8108	V			
Total in Oceania	V	28	15	24		21	40	369	517			54	59		154	194	627	597	434	192	448	674	8623	13510	12365	2374.1	2118	9318	12287	14470	11399	23214	29727	V	
Total in Oceania	Q	28	15	24		21	40	369	517			54	59		154	194	627	597	434	192	448	674	8623	13510	12365	2374.1	2118	9318	12287	14470	11399	23214	29727	Q	

APPENDIX

Imports of Fish, Crustacean and Mollusc Products and Preparations from Developing Countries, into the Leading Developed Importing Countries

(SITC 032)

thousand U.S. Dollars and metric tons

Importing Country Country of Origin	Federal Republic of Germany				France				Italy				E.E.C. - Total				United Kingdom				U.S.A.				Japan				Total of Listed Countries							
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965				
	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q	W	Q				
World	25138	23024	27300	33715	35091	40578	39700	40569	14590	16985	13800	16545	99008	102974	106900	121187	115118	89764	117000	111964	101024	84117	86100	83577	666	1094	1100	3599	309144	292249	311100	320264				
Total Developing Countries	4344	4132	4628	4969	22340	24115	20485	20037	4131	4981	3336	3364	32452	35488	31108	31062	3151	3307	3187	3114	8286	9509	18696	19961	358	423	298	243	46277	48727	53283	56580				
As % of Total Imports	17.3	17.9	17.0	14.7	63.7	59.5	51.6	49.4	28.3	29.3	24.1	20.3	34.9	34.5	29.1	25.6	2.7	3.9	2.7	2.8	8.2	10.3	21.7	23.9	53.8	38.7	37.1	69.2	14.3	17.3	17.1	17.7				
In Europe	1494	1192	1302	1270	632	755	935	692	682	759	604	526	3558	3601	4077	3691	115	63	225		49	95	18						3722	3799	4280	3691				
Yugoslavia	3109	2401	2527	1834	970	1080	1232	853	1355	1414	1081	812	6700	6638	6761	5488	155	92	283		60	110	19						6955	6694	7043	5488				
In America	196	141	226	341	7	11	27						309	212	320	499	338	610	433	426	33	139	182	281					980	961	935	1206				
Chile	122	79	118	163	4	5	11						129	115	144	243	187	332	239	218	10	63	99	154					326	510	502	615				
Colombia																							148	129							348	129				
Ecuador	1												14		13		22	38	10		90	1160	2633	1821					964	1198	2656	1821				
Mexico	2	7	23		5		3			10			7	40	26			2			11	1668	4424	4693	46	150			18	1710	4496	4843				
Peru	197	314	380	448	388	369	228	206	152	154	141	105	1154	1338	1164	1165	1386	1827	1805	1508	2369	1700	1471	1042					4907	4865	4438	3715				
Cuba	334	854	644	598	529	210	240	200	271	246	243	170	1805	2079	1788	1617	1914	2376	2328	2000	4096	2802	2435	1805					7815	7255	6545	5422				
Panama	5	1	1		495	632	564	1047		3			505	644	571	1047	1		18										197	302	270	463				
Venezuela	2		1		192	288	260	443		1			197	302	262	443																				
Other America					70				52				2				124		90		128		962	881					286		690	646				
Total in America	401	449	630	899	895	812	831	1305	155	167	141	107	1892	2281	2111	2846	1745	2477	2354	1934	4431	4882	12911	13540	46	150			8068	9640	17421	18470				
In Africa					926	939	379	159	2		28		938	939	407	139													938	939	407	139				
Algeria					1198	1226	490	181	2	1	55		1200	1227	525	181			2										1200	1227	525	181				
Ivory Coast					848	940	821	784			24		848	940	845	784													848	940	845	784				
Libya					771	985	880	971			30		771	985	980	971													771	985	980	971				
Morocco									288	277	112		288	277	112														288	277	112					
Senegal									279	269	94		279	269	94														279	269	94					
Somalia																																				
Tunisia					1961	2441	1308	306	3				1964	2441	1308	306													1964	2441	1308	306				
U.S.A.			1	1		134	184	91						165	284	78		3	28			5	9							279	328	78				
Other Africa					36				13	73	97	226	150	76	94	239					704	729	730	786					704	729	730	786				
Total in Africa					2322	2678	2247	1695	3	119	200	287	211	124	289	294					1307	987	2827	1281					2322	2678	2247	1695				

Importing Country Country of Origin	Federal Republic of Germany				France				Italy				E.E.C. - Total				United Kingdom				U.S.A.				Japan				Total of Listed Countries					
	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965	1962	1963	1964	1965		
In Asia																																		
China (Taiwan)	V																																	
	Q																																	
India	V	6	5	2		3	-	4	438	26	28	23		37	44	30	462	187	177	140	430													
	Q	3	4	4		1	-	1	326	30	22	16		36	31	22	341	148	133	93	314													
Iran	V	189	83	128	191	398	431	480	381	7	6	9		605	545	653	772	145	152	128														
	Q	11	4	6	7	18	20	20	14	1	-	-		30	24	30	21	6	8	4														
Korea Rep.	V		39	73	100		7	177	140			3		-	46	244	289	-	49	28														
	Q		29	51	49		6	122	98			2		-	35	179	173		25	18														
Malaysia Fed.	V	211	-	26										211	-	29				7														
	Q	405	-	52										405	-	55				14														
Pakistan	V							1							1	1																		
	Q							1							-	1																		
Philippines	V							1								1																		
	Q							1								1																		
Other Asia	V	15	1	2	134	1	4	6	166	2				45	30	35	346	342	117	65	383	674	780	882	1081	311	39	3	823	1372	986	965	2971	
of which:	Q	11	2	1	160	1	3	5	111	3				35	35	30	322	182	89	35	282	381	425	513	653	311	31	3	841	908	544	381	2024	
Hong Kong	V	2	1	2		1	4	6						30	30	35	64	233	117	65	124	649	780	882	879	-	-	3	422	915	887	965	1599	
	Q	1	2	1		1	3	5						22	35	30	61	128	89	35	69	345	425	513	517	-	-	3	378	515	323	382	1205	
Total Asia	V	421	128	231	425	402	442	649	1125	35	34	35	-	898	646	1023	1687	843	621	559	1166	1386	2078	2408	3260	311	39	43	2313	3438	3476	6833	10428	
	Q	430	39	114	216	20	29	150	349	34	22	18	-	507	385	318	847	433	224	224	693	442	879	2320	2942	311	32	29	2389	2623	1349	3151	7876	
Total in Oceania	V	25	86	-	2	42	127	43	-	59	155	9	-	145	346	57	2	128	74	4	-	70	392	112	-	-	31	289	-	305	1233	382	2	
	Q	2	152	-	-	28	80	15	-	71	186	19	-	129	422	39	-	116	69	4	-	208	453	145	-	-	264	166	-	323	954	374	-	

U.S. - Commodity Trade Statistics.  
O.E.C.D. - Foreign Trade - Trade by Commodity.