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GREECE'S FISHERIES IN 1970

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MONTHLY REVIEW OF GREEK SEA RESOURCES

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EDITOR: **BAS. D. CASTRIOTIS**
51 STADIOU STR. ATHENS (121) TEL. 314.970

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FISHING DURING THE YEAR 1970

Data obtained until early January 1971, which are coming always from private sources concentrated by reporters of «Alicia» review point out that the total fish production of Greece i.e. seawaters, halfsalted waters and fresh waters has reached during 1970, 113,268 tons, as compared with 122,300 tons for the year 1969. In the above total figure are included for the 1970, a quantity of 10,000 tons and for the year 1969 12,000 tons deriving from amateur fishing.

The above quantities are reported in this year's communication in an indicative form for the purpose of giving a complete picture, for ulterior confirmation at the time of final preparation of relevant statement, always provided the quantities of fish have not been sent for consumption through the legal commercial means.

1. Consequently the production, without amateur fishing, has reached during 1970 103,268 tons, against 110,300 tons for 1969, with a shortage of 7,032 tons, viz a percentage of 6,38 % of the previous year's production.

The following statement number one (1) shows the National fish production of 1970, in comparison with the one of 1969, always in tons:

TABLE NUMBER 1 (PRODUCTION)

	1970	1969	Differ. %
1. Atlantic Fishing	33.268	26.100	+ 29,47
2. Mediterranean Fishing	3.000	5.200	- 42,30
3. Mid Waters »	45.000	52.000	- 13,45
4. Coastal Fishing	15.000	18.000	- 16,70
5. Fresh Waters & fish lagoons	7.000	9.000	- 22,20
6. Amateurs fishing	10.000	12.000	- 16,70
TOTAL	113.268	122.300	- 7,39
Less amateur productions	10.000	12.000	-
Nett totals	103.268	110.300	- 6,38

In order to verify the factors of fresh fishing operated in the greek waters, we give here under table number two (2) from which «Alicia»'s readers can ascertain the average of reduction in the territorial waters fishing, which has reached 16,89 % during the last year in tons, against the one of 1969.

TABLE NUMBER TWO (2) (FRESH FISHING)

	1970	1969	Differ. %
1. Mediterranean Fishing	3.000	5.200	- 42,30
2. Mid Waters »	45.000	52.000	- 13,45
3. Coastal Fishing	15.000	18.000	- 16,70
4. Fresh Waters & fish lagoons	7.000	9.000	- 22,20
TOTAL	70.000	84.200	- 16,89

From the above figures it would seem as though the considerable reduction of the territorial fishing grounds

is due rather to a shortage of favourable natural conditions necessary for the development of fish production, a fact which has given rightly to the 1970 the term of «Fishless year».

2 Prices: The serious reduction of local production or what may be called fresh fish, would have resulted in considerable less in the local fishing, if a fortunately the Government did not give as from 15.7.1970 (market regulation 26) the freedom in prices and from 5.8.1970 (market bulletin 9) the possibility of new increased market prices.

The above regularizations of prices question has remained in force during the whole year 1970, with an average increase in fresh fish prices of 20 % upon prices ruling for 1969.

The same thing has happened with Atlantic Fishing (frozen fish) as explained in detail in another column of this issue.

The following table number three (3) refers to the ruling prices of fresh and frozen fish.

TABLE NUMBER THREE (3) PRICES PER KILO IN DRACHMAE

	1970	1969	Differ. %
1. Atlantic Fishing (froz.)	16,24	14,20	+ 14,36
2. Mediterranean Fishing	25,70	18,50	+ 39
3. Mid Waters »	13,-	10,50	+ 23,80
4. Coastal Fishing	30	22.	+ 36,20
5. Fresh Waters-Lagoons	32	25	+ 28.
Average General price	18,17	14,81	+ 22,70

3. Revenue. On the basis of the above prices and outputs, the greek fishing during 1970 in all branches has realized a revenue (value of product in the hands of producer) of drachmas 1.876.270.000 or U.S. dollars 62.542.330, as compared with a revenue of drs 1.633,8 million for 1969 (52,7 million dollars) notwithstanding the fact that the production has been reduced by 6,38 %.

The following table number four (4) shows the revenue per branch of exploitation and its total.

TABLE NUMBER FOUR (4) (REVENUE)

	Production in tons (1970)	Average Price per kilo in Drs.	Revenue in /ooo Drs.
1. Atlantic Fishing	33.268	16,24	540.270
2. Mediterranean	3.000	25,70	77.000
3. Mid Waters Fishing	45.000	13.	585.000
4. Coastal Fishing	15.000	30.	450.000
5. Fresh Waters-Lagoons	6.000	32.	224.000
Total	103.268	18,17	1.876.270

4. Although production of national waters during

1970 has been reduced, i.e., lower by 16,89 % than the one of 1969, still upon the total of national fish production (including the Atlantic Fishing) the Mid Waters fishing has participated with the greater percentage (43,36 %), second being atlantic fishing (32,06 %).

The following table number five (5) shows the participation percentage of each branch in the total production.

TABLE NUMBER FIVE (5) (PARTICIPATION IN PRODUCTION)

	Production in tons	Percentage 2%
1. Mid Waters fishing	45.000	43,36
2. Atlantic fishing	33.268	32,06
3. Coastal fishing	15.000	14,46
4. Fresh waters fishing fish lagoons	7.000	6,74
5. Mediterranean fishing	3.000	3,38
Total	103.268	100.—

The participation percentage of each branch of national fish production in each total during 1969, is shown in table number six (6) as follows.

TABLE NUMBER SIX (6) (PARTICIPATION IN PRODUCTION %)

	1969	1970
1. Mid Waters fishing	47,15	43,36
2. Atlantic fishing	23,66	32,06
3. Coastal fishing	16,32	14,46
4. Fresh waters - fish lagoons	8,16	6,74
5. Mediterranean fishing	4,71	3,38
Total	100.—	100.—

The percentage of Mediterranean fishing shows the greatest decline (42,30 %) due to the prohibition of fishing in the coasts off Libya, and the small production realized is due to international Mediterranean waters, where fishing activity of our Mediterranean fishing fleet has already been restricted.

RESULTS OF ATLANTIC FISHING 1970

Atlantic fishing production, as mentioned in another column of this Review, has reached during last year the figure of 33268 tons. We must emphasize right away that, with the exception of some cases of actually high productivity in deep waters, generally speaking the productions has been rather restrained and has been ranging between narrow limits, especially in what concerns selected qualities. This is in agreement also with the general opinion that fishing grounds in which have been operating our atlantic trawlers during the year 1970 have been scantily productive in red snappers and in some kind of grey groupers, due to their over - fishing.

Likewise, during that year it has been noticed that composition of sea breams is getting from bad to worse, small sea breams percentage is increasing southwards, with a corresponding reduction in the percentage of larger sea breams northwards. Other fish items, such as soles and John dory have started to be scarce, whilst other fish items which were previously taken in huge quantities, such as grey breams, and squids, have also marked during the whole 1970 a dangerous rarefaction, if not a total scarcity.

Generally, we can safely state that fish production off the Mauritanian shores for the year under review, has been definitely discouraging, which has resulted in the fact that, in some cases, fishing permits' value itself has not been covered, we mean those permits that have been issued by Mauritania's Authorities to our trawlers. From the above comments it follows clearly that productions at the shores off North-western African countries have a clear tendency to decline and lead to a definite point where the exploitation of fishing grounds shall become absolutely inoperative, and without profit at all.

The cancellation of tariff prices, for the selected fish on the one hand and the increase granted to such fish as is still maintained under tariff rules, on the other hand, (the latter has been applicable with a considerable delay) have, it is true, improved the finances of fishing enterprises, but this financial benefit has been eliminated since a long time by the increase in certain factors, such as oil, crews' salaries, insurance premiums and the like.

Fortunately, the equilibrium of disposal prices with the increased production cost, has come gradually but has somewhat improved the operational conditions of corresponding enterprises. However, the substantial difference which has taken place in favour of relevant enterprises, has resulted from the increased volume of production which has been realized during 1970. The comparatively greater production is due exclusively to the steady

endeavour of production enterprises towards attaining better financial results at all cost, with a view to covering the continual rise in the cost of various productive factors. That achievement, which we wish to underline particularly in our present review, is attributable to the continual trawlers' operations and their continual bushing at the fishing grounds, on the one hand, and to the system generally adopted of transshipping fish products in reefer vessels, which has contributed to the increase of working days number.

In the circumstances, there is no doubt that for greek freezer - trawlers which unfortunately do not dispose of other fishing grounds, as usually do all other trawlers, there is an immediate need of meeting with the problem, in the form of finding out new grounds through the conclusion of bilateral agreements with coastal governments of North-Western Africa states.

During the year 1970 we have done nothing in the above direction since the interested enterprises and the responsible Government factors have remained silent, and inactive notwithstanding the fact that «ALIEIA» Review has been emphasizing since ten years the necessity of this measure.

It is obvious that we must turn to that end, and the matter is extremely urgent.

There is certainly a small home in this questions: That the Middle East crisis may be solved which would lead in the re-opening of the road towards Indian Ocean. But this is somewhat difficult and, under ruling conditions, we fail to see how that solution can be obtained.

In case where that solution might be achieved, we might have different prospects for our atlantic fishing future, although we are not quite sure that the Indian Ocean could offer some useful employment for our freezer - trawlers. In fact, in that case too, we must remember that in the Indian Ocean region take place each day extensions of territorial waters in favour of coastal governments, and moreover we shall have to count also the co-existence with Japanese and Russian fishing fleets, taking into consideration that their trawlers are operating extensive fishing in such grounds where we could send our own units. In the circumstances, to-day the only thing we can do is to ensure suitable fishing grounds, through the conclusion of bilateral agreements, as suggested above.

Fishing during December 1970.

A small number of trawlers have been working at

southern regions. Some of these have gone to Dakar for repairs, and others have proceeded to regions situated between 17° and 20°.

Fish taken were small sea breams, small red snappers and red mullets. Some trawlers during their displacements have been trying at the areas 13° to 14°, however, the results although of good qualities (red snappers, grey groupers, red mullets, and the like), have been low as regards quantities and trawlers have pursued their navigation towards northern grounds.

At the area 17° and 18° fair results have been attained by certain freezer-trawlers, especially those which have been operating with «bobines» in the rough's bottom. Fish was found rather at shallow than deep waters.

Results have been moderate at the region 19° and at Laguna, the composition of fish caught was qualitatively poor (black fish was abundant) whilst shrimp was taken in rather small quantities, and was small in size. This fact has not allowed our trawlers to work steadily at the Laguna, which has compelled them to go southwards or northwards to find out other operating areas.

Areas situated at Cavo Blanco, viz from Kavesa northwards was fishless, and octopuses absence was total.

At the ground north of Kavo Barba, at shallow and deep waters, little or no fishing has been realized, but still this has satisfied those who have been working there. Precisely, some of these trawlers, at Rio De Oro's shallow waters, have concentrated sufficient octopuses which, at that time, had a great value.

At Rio de Oro's deep waters, especially at the 24°, at the area well known between 34° to 36° fathoms, some trawlers have completed their cargoes with fish in which grey breams were abundant. Likewise, the production in corackers, especially at the northern grounds, has been satisfactory.

It is authoritatively reported that a greek fishing trawler, of a great radius action and independence, has turned towards South American coasts, where she is pursuing hake's fishing with success.

Considering prices' development during last year, we can ascertain with satisfaction the following facts.

Due to the Government's measure of freeing some fish articles from tariff prices, and the increase in prices of the remaining fish items, there has been an average increase of the order of 25 % approximately. That increase was absolutely indispensable and imperative, owing to the cost-price advance which has taken place since a long time in the production, on the one hand, and the reduction of fish production itself, on the other hand.

However, the most important fact has been that,

despite the comparatively small increase in the consumption of frozen fish, the liquidation of stocks and of the current production must be considered rather satisfactory, and with the contribution of prices' advance, it has been, as a matter of fact, beneficial for the financing of productive enterprises.

Nevertheless, regulation of prices has had a considerable influence also upon consumption, which in its entirety has succeeded in satisfying existing requirements with frozen fish of fresh fishing (fresh fish) of superior quality.

If the influence of the said factors continues also during 1971, it will be necessary for Atlantic fishing to expect the conquest of new consumptive masses and a further improvement of its finances. This is amply shown by the influence of the above beneficial results sufficiently good and encouraging, and it has been immediately apparent, on the one hand, from the purchase of new trawlers, and on the other hand, from the turning of fishing activities towards the hake sections, with a view to covering the ever increasing consumption of that article also.

December 1970. During the last month of 1970, movement of the frozen fish market has been, generally speaking, good, in spite of the general fasting of the Greek population usual during Christmas time, and the increased consumption of molluscs items, as compared with the other fish.

The octopuses's scarcity was apparent during the fasting period and its prices have been maintained in high levels (Drs 24 per kilo for wholesale). Here we must point out that the movement in the sale of cuttle fish and shrimp has been also satisfactory.

Red mullets' offer during December has been brisk, with a corresponding decline in prices, whilst red snappers, grey groupers and big red sea breams were more restrained in their prices. Also smooth hound (dog fish) and flounders have been marked by a fair offer and satisfactory prices.

Squids' requirements have been covered at once and absolutely from the limited stocks coming from greek trawlers's production, but mainly from stocks accumulated by importers.

Squids' offer from Western Africa from Japanese companies still continues at Las Palmas, where there has been question of prices varying from 400 to 450 Dollars per ton on a F.O.B. basis.

Last but not least, purchase of fish of second quality, despite their abundant offer and the comparatively low prices, has appeared exceedingly slack during the whole of December 1970.

ATLANTIC FISHING PRODUCTION DURING 1970

During December 1970, six freezer-trawlers arrived in Piraeus and three reefer vessels which have brought a total cargo of 4.330 tons frozen fish of Greek fishing.

The total cargo of frozen fish and molluscs during December 1969 has reached the figure of 1720 tons, originating from three freezer trawlers of Atlantic fishing and two reefer vessels, whilst in December 1968 the figure was 2.431 tons.

In the circumstances, during the year 1970, we had arrivals of total cargoes weighing 33.268 tons frozen fish, as compared with a total production in 1969 consisting of 25.678 and 34.403 tons for 1968. The later production has been the larger one since the creation in Greece of Atlantic fishing branch (frozen fish).

From the above data, it follows that the production of Greek Atlantic fishing during 1970, has been superior to the one of 1969, by 7.590 tons or 29,47 %, being short

only by 1.135 tons or 3,3 % of the 1968 production which has been the greater production realized so far.

This very considerable increase of Atlantic fishing production during 1970, is due to three basic reasons, viz:

A) To the active service of all laid up trawlers and the addition of new units after the partial release of prices of articles of fishing from the higher limits previously in force.

B) To the generalization of the transshipment system by large trawlers, which has resulted in the increase of working days for all the fleet, due to their continuous stay at the fishing grounds.

C) To the intensification of hake fishing. The new active service of laid up trawlers is due to the release by the Government of certain fish-articles prices, also to the small increase authorized in the prices of the

remaining fish items, which remained under the tariff. Consequently the measure taken has proved to be extremely efficient, aiming at a greater activity of the branch also at a partial financial improvement, due to the important rise of the fish production which has taken place in the meantime.

Later on, the generalization of the transshipment system, which has been extended to trawlers of large capacity has considerably influenced the increase of production. This is fully ascertained by the small number of arrivals of the main fishing trawlers 1970, and from the larger number of arrivals of reefer vessels, in comparison with those of the immediately preceding year, as witnessed by the following small table :

	1969	1970
Arrivals of Freezer-trawlers	46.—	38.—
Arrivals of Reefer Vessels	22.—	32.—

The increase of prices which we point out above, has marked the following development.

During the period from 1.1.70 to 15.7.70, there has been a small natural increase of wholesale prices, owing to the continual improvement of average quality fish, due to the selected fishing.

Thus, the average price per kilo, has increased during the above period from Drs. 14,20 to 14,75, in other words, there has been an increase of about four per cent (4 %) which has taken place out of the increased production in the first quality fish.

On the contrary, after the issue of the new market bulletin number 6/11/70 for the period from 15.7.70 to 31.12.70, we have had a general increase in prices which has been ranging from 22 % to 25 %, the final average price being Drs. 17,75 per kilo.

From the above periods for the whole year 1970, the increase has been limited to a percentage of 14,36 %, and the general average price of frozen fish has been Drs., 16,24 per kilo against Drs. 14,20 for 1969.

The revenue realized from Atlantic fishing production during 1970, on the basis of above data, has reached 540,2 million Drachmae, as compared with 370,6 million Drachmae for 1969. In other words, there has been an increase by 169,6 million Drachmae corresponding to a percentage of 45,7 %.

This considerable increase in the revenue of Atlantic fishing is attributable mainly to the production increase by 7.590 tons, against the year 1969 (proportion of increase 29,47 %) and in the second place to the increase of the average price.

The above figures are characteristic of the important result which has been achieved in favour of the Greek national finances, and in the second place in favour of the individual finances, due to the regularization of the prices question, which have remained without change since the year 1963, although in the meantime the production cost has risen by 60 %, in view of the improvement of oil prices, salaries level, insurance premiums and some others disbursements. The average monthly production of atlantic fishing of 1970 has reached 2.772 tons, as compared with 2.140 tons 1969 and 2.867 tons in 1968.

SUMMARY

VARIATION OF THE PARTICIPATION PERCENTAGE OF FOREIGN EXCHANGE IN THE COST OF FROZEN FISH PRODUCTION IN RELATION TO THE PRODUCTION LEVEL

by C.I. ANANIADIS and C.G. CHONDRONICOLAS

An important part of the expenses of the Greek Far Water Fisheries enterprises, is spent in foreign currency, due to the long stay of their fishing boats out of the country. The foreign exchange spent for payments in salaries, fishing permissions, agential fees, harbour dues, fuels etc., has amounted in 1967 to about \$ 2.548.000, which represents 23 % of the total cost of frozen fish production.

The amount of foreign currency used for this purpose was equal in value to that spent in the same year, in order to import 8958 tons of frozen fish from other countries.

The total amount of foreign exchange spent both, for the production and the imports needed to cover home demands, amounted to \$ 3.572.600 (\$ 1.024.600 only for imports). A significant difference in the cost / price index is resulting from the comparison between fish produced by Greek boats and the imported one from other countries. The high expenses in foreign currency under the existing conditions, are quite inevitable. They could be reduced only by raising the production level by economies of scale, obtained with the cooperation of the various fisheries enterprises. The coordinated productive effort between cooperating boats on the basis of a rational distribution of the fishing operations, would result to the decrease of the general expenses and the reduction of those spent in foreign exchange.

In this paper are exposed the economic results been obtained from the echelonment of the productive efforts of more than one fishing boats. The optimal level of equilibrium (giving the maximum profit to the enterprise) is realized with the cooperation of 8 boats each of which disposes a 300 cm³ weight carrying capacity.

In order to obtain cost of fish equal to the cost of the imported one (viz \$ 28,5 per ton), frozen fish production should be brought to the level of 53,200. In this level, apart from the other advantages (general cost reduction etc.) the percentage of expenses in foreign exchange falls from 29,5 to 23 %. The decrease of cost, being the result of returns to scale, is been obtained by the coordinated effort of 50 units working by groups of 8 fishing boat.