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FISHERIES OF VENEZUELA, 1970



International Activities Staff

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## Fisheries of Venezuela, 1970

The 1970 Venezuelan catch was approximately 135,000 metric tons (MT), an increase of 1,188 MT over 1969. The value increased 15.6% from \$22.8 million in 1969 to \$26.4 million in 1970. The increased value is principally due to the increase in catch and value of shrimp.

### LOCATION OF MAJOR ACTIVITY

Venezuela's fishing industry may be divided into two basic areas of operations, marine and inland. The major commercial landings are marine, both for local consumption and export. On the other hand, the inland catch, of considerably less commercial value, has significance in terms of protein intake for the local population.

The marine catch represented 93.6% of all fish production in Venezuela in 1968. This sector of activity may be divided into three zones-the Eastern (Oriente), Central, and Western (Occidente).

The Eastern Zone is the most productive of marine regions and has the most fishermen and vessels. The major canning and fish meal operations also are concentrated in the sector. In 1969 the zone produced approximately 60% of the national catch. The zone extends from Unare to Punta Araya and includes the Cumana fishing and canning center, Corupano, Guiria, Porlamar, Pampatar, Punta de Piedras, Puerto La Cruz, and El Hatillo.

The Central Zone extends from the Paraguana Peninsula to Cape Codera and includes Puerto Cabello, La Guaira, and Higuero. This is considered the least productive area. The rate of yield over the last years has not reach 4% of the annual national rate. This can be partially attributed to the unfavorable character of the continental shelf.

The Western Zone comprises the Lake Maracaibo region and the Gulf of Venezuela. The area includes Maracaibo, Carirubana, San Carlos del Zulia, and La Vela de Coro. In 1969 the Western Zone represented approximately 30% of the national production; however, the value of the catch was almost twice that of the Eastern Zone because most of the shrimp, a high value product, are caught in the Western Zone.

The other basic area of operation is the inland region, in lakes, rivers and streams, principally the Orinoco and Apure River systems. The major landing centers are Ciudad Bolivar, San Fernando de Apure, Barinas, San Cristobal, Guanare, El Baul, and Puerto Ayacucho. The inland fishing zone, although not important in economic terms, constitutes a substantial source of protein for the population located in the marginally integrated rural areas. Production of this area is destined for local consumption, salted or preserved and, in small quantities, fresh. The production of the zone accounts for 6% of national production, or 8% of the value of total landings.



## FLEET

There are 9,200 fishing vessels of all types fishing from Venezuela. However, of this number only 3% have sufficient tonnage to be economically productive (20 or more GRT). During 1962-1967, the sardine and shrimp fleet dominated the field with the most vessels and tonnage. Despite this, in 1968 fresh fish still constituted approximately 56% of the national production. In 1969 the number of trawlers increased from 116 to 163; however, Ministry of Development officials still feel that this is not sufficient to properly use Venezuela's marine fish resources. Dr. Luciano Rondon, Compania Venezolana de Fomento (CVF) fisheries expert, estimates that with a 50% increase in vessels Venezuela would be able to increase her catch 100% to 200%.

## LABOR

Venezuelan fishermen (including their families) were estimated in 1969 at 195,000, or 2% of the total population. Data from the Oficina Nacional de Pesca place the total work force involved in the fishing industry in 1969 at 38,174. This figure does not distinguish full-time from part-time employment. Levels of employment may be defined as follows:

Full-time employment - fishermen who secure 90%, more or less, of their livelihood from active fishing;

Part-time employment - fishermen who secure at least 30% of their livelihood from fishing;

Occasional employment - those who secure less than 30% of their livelihood from fishing.

Artisanal fishermen totaled 33,949, of which 19,056 were engaged in marine fishing, the remainder in freshwater fishing. Fishermen engaged in modern (mechanized) fishing totaled 4,325.

## PRODUCTION

The 10 principal commercial species in Venezuelan waters, in order of importance, are sardines, shrimps, croaker, red snapper, swordfish, tuna, sea bass, corocoro, manamana, and mullet.

The catch is used for immediate local consumption (including fresh as well as salted fish), intermediate demand (canned and fish meal) and export. Sardine and shrimp constitute the two major export items and supply the canned and frozen fish processors.

### Sardine

This oceanic species, principally found within 20 miles of the coast is one of the more abundant fish found in Venezuelan waters and the species most consumed locally. Sardine lead in the fish canning industry and supply over 80% of the Caracas market. Its offal is used for fish meal



production along with mullet, catfish, yellowtail, and offal from processed tuna. Small quantities of fresh sardines also are consumed locally. In addition, approximately 3,000 tons a year are used as bait.

During 1970 the canning industry used 45,517 tons of sardines, of which 28,316 tons were packed locally, producing 124.6 million cans. From the 17,200 tons of sardine offal 4,119 tons of fish meal were produced. Total fish meal production from all species in 1970 was 7,524 tons.

### Shrimp

The principal areas of exploitation in Venezuela are Lake Maracaibo, the Gulf of Venezuela, and the sub-zone of the Orinoco River delta. Frozen shrimp represents over 85% of Venezuela's fish exports. The species of shrimp most preferred are white, brown, and pink. Venezuela first exported shrimp in 1959.

Shrimping in the Gulf of Venezuela has expanded notably in the past 15 years. In 1970, 149 shrimp boats landed 6,212 tons of shrimp and 3,887 tons of fish. In Lake Maracaibo, some 2,000 small vessels produced 1,667 tons of shrimp and 22,197 tons of fish in the same year.

Shrimp production in 1970 (preliminary) totaled 8,900 metric tons valued at US\$10.6 million

### Tuna

Of tunas landed in Venezuela 70% are yellowfin, 20% albacore and the remaining 10% bigeye. During the last few years the tuna catches have totaled about 2,300 tons per year, of which 80% are canned and the rest consumed fresh. In 1969, the tuna fleet consisted of 97 vessels with 657 crew and fishermen.

### Fish Meal and Fish Oil

Venezuela's fish meal production has proved inadequate for its needs, and therefore most fish meal used in Venezuela is imported from Peru. Local production is said to supply only 1/5 of actual consumption. Fish oil production is too minimal to be of importance to the market. (It should be noted here that due to Government restriction on the direct use of sardines for fish meal, development of a fish meal industry has been impossible.)

### INDUSTRY

Two major companies, Productos Mar, C.A. and Alimentos Margarita, C.A. control 80% of the local market and 90% of the Venezuelan canned fish exports to the United States.

#### Alimentos Margarita, C.A.

Alimentos Margarita, C.A. claims 40% of the local market. The company maintains two plants in full operation, one manufacturing cans and the



other processing. Plant equipment is of U.S. Can Company and Koger-Hammer (W. Germany) manufacture. The canning operation is located in Mariguitar, Sucre State. Major products are sardine and tuna.

Alimentos Margarita has a wholly owned fleet of some 20 vessels all fishing sardine and tuna. The catch is approximately 12,000 MT per year. Approximately 80% of the catch is processed, the remaining residue used for fish meal. The company does not salt or dry fish.

Alimentos Margarita claims 10% of the Venezuelan fish export market. Chief customers are in the northeast United States. Some exports go to Europe, principally West Germany. At present, the company has two agents in western Europe exploring new markets. They are particularly interested in penetrating the Italian market, and have one full-time agent discussing trade opportunities with Italian importers and wholesalers. At the end of August 1971 the company had exhibits in the Berlin and Cologne trade fairs.

The company employs some 800 people, 10% in the home office in Caracas, the remainder at the Mariguitar plants and on the water. Approximately 300 employees are engaged in fishing, including 40 sailors. The non-Venezuelan work force is composed of Spanish and Portuguese technicians.

The company's sanitation and quality control methods are based on U.S. Food and Drug Administration (FDA) requirements and procedures developed by the State of Maine. Company officials claim that the general uniform size of the sardine catch makes it possible to can from four to seven fish with no need for sorting. This is not in accord with the Ministry of Development's observations which indicate no relative uniformity in size of the sardine taken in Venezuelan waters and, therefore, private industry must employ sophisticated grading techniques to assure maximum content requirements per can.

Alimentos Margarita officials complain that tariff restrictions and FDA regulations on can construction and labeling present a considerable obstacle to their efforts to expand their market in the United States. At present their volume of business amounts to \$300,000 per year. Company officials are optimistic on the next 5 years. To this end, new markets will be explored, and the fleet expanded. There are no plans to increase work force or plant facilities.

#### Productos Mar, C.A.

Productos Mar C.A. the largest fishing and processing company in Venezuela, controls 40% of the local market. It maintains three fully equipped plants—one for manufacturing cans, one for canning, and one for fish meal. Fishing and canning operations are located in Cumana. Major species utilized are sardine, with some tuna.

The company maintains 10 vessels, of which 3 are tuna boats. However, the bulk of its operating fleet is boats contracting with the company. The company claims a yearly catch of 18,000 tons, of which 90% is canned and the residue made into fish meal.



Productos Mar, C.A. claims 10% to 15% of the Venezuelan canned fish export market. Its chief customers are the United States (Miami), Dominican Republic, and Surinam.

The company employs some 600 to 800 people, the number fluctuating with the fishing season. The majority of the work force is located in Cumana; 95% are employed in non-technical fields, 60% are fishermen, and 40% crew. The work force is 90% Venezuelan, the remainder foreign technicians, mainly from Spain and Portugal.

Productos Mar, C.A. has received some assistance from the Government in the form of cash subsidies in 1960-1963. At present it receives no assistance other than the protective tariffs on fish oil, fish meal and sardine imports.

The company maintains a high standard of quality control observing minimum Venezuelan Government health code standards and FDA requirements.

Productos Mar foresees an increase of 10% in local and foreign markets, including a similar expansion in their U.S. market. While the company does not envision an increase in fleet size or work force in the near future, it plans to expand and modernize its plants.

#### EXPORTS

Frozen shrimp represents over 95% of the value of Venezuela's fish exports. Other exports include canned sardines and specialty products. Whereas approximately 90% of the tuna and sardine landed is consumed locally, almost all of the shrimp catch (90%) is processed for export.

Canned fish production and exports, principally sardines, are still relatively small. The traditional markets are Colombia, Curacao and the United States. In addition, Puerto Rico, Trinidad, Jamaica, Surinam, the Dominican Republic, and Guyana receive some exports.

#### IMPORTS

Venezuelan fish imports dropped substantially during the period 1960-1968, from 8 MT to 0.2 MT or 98%. The principal factors behind the reduction were the short increases in local production over the same period and the imposition of protective tariffs. There were, nevertheless, certain exceptions to this general trend, as in 1960 when imports rose 100% as a result of an 18% drop in local production and increase in consumption of 10%.

#### Tariffs and Import Duties

In recent years Venezuela has moved to protect its fishing industry by placing higher import tariffs on certain selected fish and fish products and by excluding other items from the import market.

## TRADE EXPORT OPPORTUNITIES

As cited above, the two major fish handling companies anticipate large increases in the market with concomitant expansion in plant and/or fleet facilities. With the recent construction of an international fishing port at Guiria additional opportunities exist for U.S. producers of storage, freezing and fish handling equipment, also navigational equipment for newer and modern fishing boats.

For additional information the following sources may be consulted:

Dr. Luis Pietrantoni  
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Table 1.--Venezuelan Fish Production and Value, 1966-70  
(in thousands)

Year	Fresh		Salted*		Total	
	Quantity (M.T.)	Value (US\$)	Quantity (M.T.)	Value (US\$)	Quantity (M.T.)	Value (US\$)
1966	91.7	14,226.8	8.4	2,187.0	116.8	16,413.8
1967	92.6	15,677.7	6.9	1,747.9	113.2	17,425.6
1968	103.4	16,669.6	7.6	2,096.3	126.2	18,765.9
1969	106.2	20,204.7	9.3	2,593.6	134.1	22,798.3
1970**	110.8	24,205.2	8.2	2,151.1	135.3	26,356.3

Source: Ministry of Agriculture, Memoria y Cuenta 1970.

\*To obtain live weight, multiply by three.

\*\*Preliminary.

Table 2.--Venezuelan Shrimp Landings and Exports, 1959-70

Year	Landings (M.T.)	Value (1,000 Bs) <sup>1/</sup>	Exports (M.T.)	Value (1,000 Bs) <sup>1/</sup>
1959	1,637	2,325	1	4
1960	1,413	1,627	133	325
1961	2,490	3,163	1,405	3,312
1962	3,826	6,323	3,572	10,487
1963	3,900	6,208	3,374	8,119
1964	4,329	7,848	4,267	11,285
1965	7,481	14,249	7,060	21,176
1966	3,405	12,767	1,597	7,899
1967	5,057	19,088	3,326	16,450
1968	4,597	17,890	3,022	17,658
1969	5,360	25,222	3,782	23,641
1970 <sup>2/</sup>	8,600	44,700	7,050	43,000

Source: Ministry of Agriculture, Anuario Estadístico Agropecuario, 1969, P. 545

<sup>1/</sup> US\$1 = Bs. 4.48

<sup>2/</sup> 1970 figures are provisional and were provided by Compañía Venezolano de Fomento (CVF) officials.



Table 3.--Canned Fish Production, Exports and Value of Exports, 1969-70

<u>Year</u>	<u>Production</u> (M.T.)	<u>Exports</u> (M.T.)	<u>Value of Exports</u> (1000 Bs.) <sup>1/</sup>
1960	14,352	23	88
1961	11,011	1,150	1,924
1962	15,782	3,598	5,649
1963	19,385	2,071	3,292
1964	21,280	64	106
1965	25,044	367	530
1966	20,944	338	559
1967	23,220	439	844
1968	21,966	536	842
1969	22,500	783	1,346

Source: Ministry of Agriculture, Anuario Estadístico Agropecuario, 1969 (Caracas, 1970)  
<sup>1/</sup> US\$1-Bs. 4.48

Table 4.--Venezuelan Exports of Fish and Fish Products

	1969		1970 <sup>1/</sup>	
	<u>Quantity</u> (M.T.)	<u>Value</u> (1,000 US\$)	<u>Quantity</u> (M.T.)	<u>Value</u> (1,000 US\$)
<u>Fish</u>	4,143.6	5,441.2	5,938.5	8,074.8
<u>Fish, n.e.s.</u> <sup>2/</sup>	360.6	187.0	323.5	204.9
U.S.A.	62.9	61.2	92.8	115.4
Netherlands Antilles	297.7	125.8	229.8	88.7
Canada	-	-	-	-
<u>Sardines</u>	1.0	0.5	-	-
U.S.A.	0.5	0.3	-	-
Netherlands Antilles	0.5	0.2	-	-
<u>Crustacea and Mollusks</u>	3,142.0	5,253.7	5,615.0	7,869.9
U.S.A.	3,250.6	4,483.5	4,989.0	6,916.6
Japan	462.5	590.1	542.7	657.9
Other countries	68.9	180.1	82.4	207.4
<u>Fish, Crustacea and Mollusks</u> <u>and their preparations, canned</u> <u>or not</u>	783.4	299.1	322.4	135.6
<u>Sardines</u>	783.4	299.1	322.4	135.6
U.S.A.	147.6	62.5	242.4	103.1
Colombia	432.7	163.3	-	-
Other countries	203.1	73.3	80.0	32.5
U.S. Share of Market (%)	18.8	20.9	75.2	76.0

<sup>1/</sup> January - September 1970. <sup>2/</sup> n.e.s.-not elsewhere specified.

Fig. 5. Venezuelan Imports of Fish and Fish Products

	1969		1970	
	Quantity (M.T.)	Value (1000 US\$)	Quantity (M.T.)	Value (1000 US\$)
<u>Fish, Crustacea and Mollusks, fresh or simply preserved</u>	<u>811.2</u>	<u>605.71</u>	<u>539.3</u>	<u>473.1</u>
<u>Herring</u>	<u>1.6</u>	<u>2.0</u>	<u>3.0</u>	<u>3.0</u>
U.S.A.	1.6	2.0	1.4	2.0
Other countries	-	-	1.6	1.0
<u>Tuna</u>	<u>65.0</u>	<u>26.7</u>	<u>21.5</u>	<u>6.5</u>
U.S.A.	-	-	-	-
San Martin (South Pacific)	-	-	13.0	3.9
Guadeloupe and Dependencies	65.0	26.7	8.5	2.6
<u>Codfish</u>	<u>356.9</u>	<u>268.8</u>	<u>288.7</u>	<u>165.5</u>
U.S.A.	-	-	-	-
Spain	16.3	20.0	4.6	5.6
Norway	340.6	248.8	224.1	159.9
<u>Salmon</u>	<u>3.5</u>	<u>8.0</u>	<u>3.1</u>	<u>8.5</u>
U.S.A.	3.2	6.9	2.6	6.4
Canada	0.3	1.1	0.5	2.1
<u>Fish, n.e.s.</u>	<u>46.9</u>	<u>74.0</u>	<u>51.2</u>	<u>100.7</u>
U.S.A.	7.8	40.5	8.8	45.5
Netherlands	12.1	14.6	-	-
Spain	19.6	8.2	15.8	12.7
Other countries	7.4	10.7	26.6	42.5
<u>Caviar and other edible fish eggs</u>	<u>6.4</u>	<u>35.7</u>	<u>0.7</u>	<u>24.2</u>
U.S.A.	0.2	1.0	0.4	8.6
Spain	5.5	6.7	-	-
Iran	0.3	14.5	9.1	5.6
Other countries	0.4	13.5	0.2	10.0
<u>Crustacea and Mollusks, n.e.s.</u>	<u>318.4</u>	<u>149.0</u>	<u>222.3</u>	<u>134.4</u>
U.S.A.	63.0	81.8	63.8	62.3
Spain	262.9	66.2	151.6	64.2
Other countries	2.5	1.0	6.9	7.9
<u>Fish for Aquariums</u>	<u>12.5</u>	<u>41.5</u>	<u>8.8</u>	<u>30.3</u>
U.S.A.	9.0	39.0	8.6	29.4
Other countries	3.5	2.5	0.2	0.9
U.S. Share of Market (%)	10.5	28.3	15.9	32.6