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Foreign Fisheries Leaflet No. 76-2

Fisheries of Denmark, 1975

Office of International Fisheries
WASHINGTON, D.C.
November 1976

Library
Northwest Fisheries Center
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U.S. DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
National Marine Fisheries Service

FISHERIES OF DENMARK, 1975

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ABSTRACT

The Danish annual fisheries catch was 1.86 million metric tons in 1975, down slightly from the 1.96 million tons landed in 1974. The decline is due to a reduction in landings by foreign vessels and in fish taken for fish meal. Foodfish catches by Danish vessels improved slightly. The value of cod and haddock landings declined. A decline in world prices of fish meal caused a most precipitous drop in value of fish for reduction. Denmark's commercial fishing industry should remain in a strong position providing the 200-mile regime does not close the North Sea fishing grounds to its fleet and if fisheries management programs are able to maintain adequate stocks of fish.

1. LANDINGS

Danish fishermen landed 1,729,178 metric tons of fish in 1975 valued at 1,219,668 Danish kroner (U.S.\$198 million) according to prelimi-

nary fishery statistics. Table 1 shows fish and shellfish landings.

Table 1.--Denmark's fishery landings, 1974-75

SPECIES	1975		1974	
	Metric tons	Dkr 1,000	Metric tons	Dkr 1,000
By Danish vessels in Danish ports:				
Cod	135,723	303,485	132,651	368,691
Eel, silver	1,523	38,562	1,378	33,281
Eel, yellow	1,646	26,428	1,436	22,325
Fish for reduction	1,437,389	416,332	1,537,937	761,135
Flatfish	41,701	165,775	39,811	155,184
Haddock	7,608	20,491	7,317	23,502
Herring	35,647	60,845	23,733	43,152
Lobster, Norwegian	2,613	37,871	1,734	23,693
Mackerel	6,502	7,372	1,735	2,484
Salmon	1,466	35,924	1,501	28,072
Shrimp	2,133	11,279	1,042	8,187
Other	55,227	95,304	55,081	82,263
Subtotal (1)	1,729,178	1,219,668	1,805,356	1,551,969
By Danish vessels in foreign ports:				
Cod	755	2,445	1,036	3,386
Fish for reduction	1,290	384	8,237	3,820
Plaice	248	921	676	2,540
Salmon	157	3,579	207	3,619
Other	90	261	551	2,284
Subtotal (2)	2,540	7,590	10,707	15,649
By foreign vessels in Danish ports:				
Cod	2,173	5,398	3,660	10,056
Fish for reduction	33,964	9,794	38,005	19,567
Herring	67,738	122,389	89,762	175,175
Mackerel	12,158	12,221	16,606	19,318
Other	13,273	28,073	10,693	28,532
Subtotal (3)	129,306	177,875	158,726	252,648
Total ^{1/}	1,858,484	1,397,543	1,964,082	1,804,617

^{1/} Total includes subtotals 1 and 3.

Currency conversion rates: U.S.\$1.00=Dkr 6.05 - 1973
6.09 - 1974
6.15 - 1975

Statistics were obtained from the Danish Fisheries Ministry, Copenhagen.

These figures show declines of 5 percent in tonnage and nearly 23 percent in value, compared with 1974. While production and prices of food-fish remained fairly steady (except cod prices), the value of fish landed for reduction declined nearly 45 percent. Although preliminary figures indicate a 7-percent decline in the tonnage of fish landed for reduction, this figure will probably improve when final figures have been tabulated. The decrease in earnings can be attributed to the continued decline in world

prices of fish meal and fish oil from their peak in 1973. By the end of 1975, prices to the industrial fleet were beginning to recover slightly. Average monthly prices for selected species are shown in figures 1-3.

2. FOREIGN TRADE

Danish fishery exports in 1975 increased by 5 percent to 625,478 t but decreased by 9 percent in value to Dkr 2,457,707 (U.S.\$400 million). Table 2 shows the composition of 1974-75 Danish exports.

Table 2.--Denmark's fishery exports, 1974-75

COMMODITY	1975		1974		1975	1974
	Metric tons	Dkr 1,000	Metric tons	Dkr 1,000	Ave. price per Dkr per kg	
<u>Fish</u>						
Cod	26,581	148,440	19,149	117,382	5.58	6.13
Cod, fillets	12,698	56,239	10,210	47,999	4.43	4.70
Eel	3,401	81,013	3,676	81,817	23.83	22.26
Flatfish, fresh fillets	7,974	109,190	8,014	104,817	13.69	13.08
Flatfish, mixed	5,894	60,696	5,507	52,639	10.30	9.56
Herring	19,498	53,706	23,061	62,643	2.75	2.72
Herring, fresh fillets	39,634	145,197	45,108	172,136	3.66	3.82
Mackerel	12,187	24,001	7,374	14,907	1.97	2.02
Plaice	7,079	38,865	7,154	34,986	5.49	4.89
Roe and liver	632	4,163	838	6,245	6.59	7.45
Salmon	2,291	54,359	2,283	47,994	23.73	21.02
Trout, pond	15,601	192,867	12,665	168,988	12.36	13.34
<u>Processed fish</u>						
Fish, canned or processed	25,787	292,379	26,560	270,257	11.34	10.18
Fish, mixed salted	7,602	56,229	6,535	41,559	7.40	6.36
Fish, smoked or salted	9,655	118,299	6,234	88,902	12.25	14.26
Fish and offal for reduction	14,710	6,370	21,096	12,497	0.43	0.59
Fish meal	275,735	454,366	247,895	703,484	1.65	2.84
Fish oil	69,919	149,608	74,143	223,153	2.14	3.01
Fish solubles	20,110	12,998	20,360	20,994	0.65	1.03
<u>Mollusks and crustaceans</u>						
Crustaceans	6,635	97,401	2,552	43,022	14.68	16.86
Mollusks	1,901	1,826	1,680	1,454	0.96	0.87
<u>Other</u>	39,954	299,495	40,606	374,013	7.49	9.21
Total	625,478	2,457,707	592,700	2,691,888	3.93	4.54

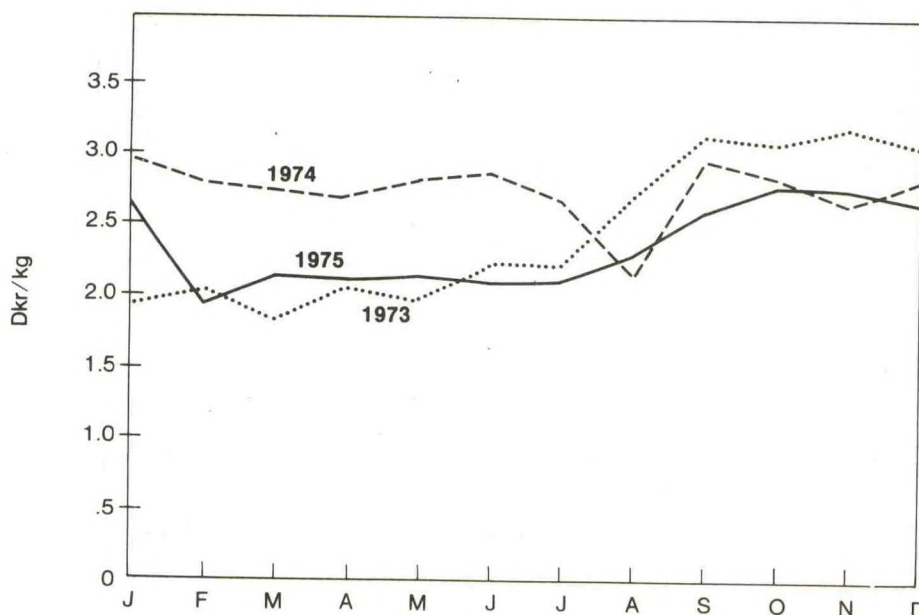


Figure 1.--Average Danish monthly cod prices, 1973-75.

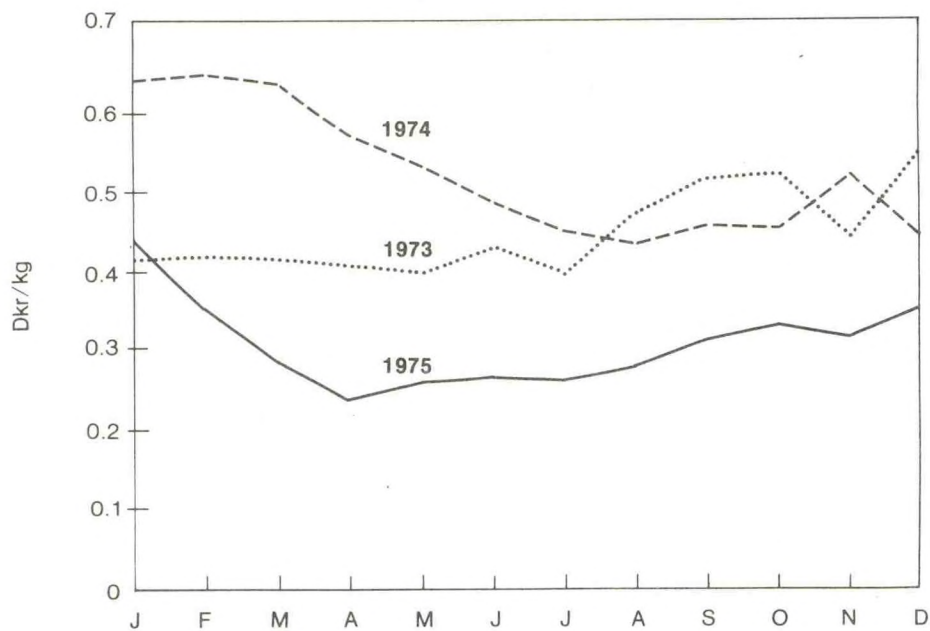


Figure 2.--Average Danish monthly prices of fish for reduction, 1973-75.

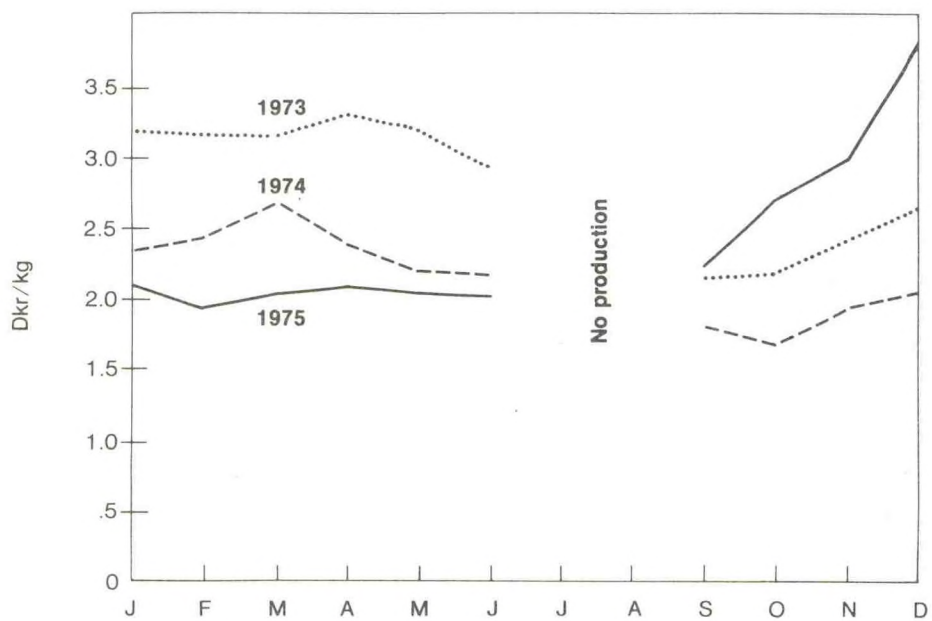


Figure 3.--Average Danish monthly salmon prices, 1973-75.

Again, this decline can be mainly attributed to the decrease in fish meal prices during 1975. The value received for exports of fish meal, fish oil, and fish solubles combined dropped 35 percent.

Danish imports in 1975 decreased 4 percent in quantity to 264,406 tons and 10 percent in value to Dkr 679,537 (U.S.\$110 million). Herring imports, the major commodity, remained essentially unchanged.

3. REDUCTION FISHERY

Contrary to many predictions that production of Danish fish meal would decline in 1975, the industry has had another excellent year, although earnings declined owing to world market conditions. Preliminary figures indicate a 10-percent increase in fish meal exports, but the final figure could show an increase up to 15 percent over 1974 (table 3).

Table 3.--Denmark's landings of fish for reduction, 1973-75

Month	1975	1974	1973
	-----Metric tons-----		
January	69,168	63,279	62,698
February	136,255	91,881	70,966
March	89,513	92,926	106,251
April	49,236	109,577	56,606
May	195,479	203,556	186,429
June	177,749	206,349	142,951
July	191,420	98,089	135,075
August	193,686	232,172	150,014
September	116,718	117,798	113,484
October	126,790	168,296	79,847
November	69,872	123,431	69,807
December	53,467	63,603	25,005
Total	1,469,353	1,570,957	1,199,133

Over the past 10 years, Danish production of fish meal has grown from less than 100,000 tons per year to nearly 300,000 tons in 1975. This has been accomplished by a significant increase in processing plants and fishing vessels. Most of the new vessels are individually owned, and many of the plants are managed by fishery cooperatives. In 1975, the drop in prices for

fish for reduction made it difficult for the fishermen to meet the payments on their vessel building loans. To keep solvent, the fishermen worked harder, producing more fish and trying to keep their earnings at a level where they could meet their obligations. Therefore, final production figures may show an increase.

4. FAEROE ISLANDS

Faeroese landings and exports continued to increase. The estimated total production rose from 255,000 tons in 1974 to 284,000 tons in 1975, an increase of 29,000 tons. Exports increased in quantity but declined in value (table 4).

All segments of the Faeroese fisheries increased except the herring fishery, which declined slightly because herring stocks in the North Sea were poor. The sprat fishery increased sharply: production rose from 4,100 tons in 1974 to 43,000 tons in 1975. Faeroese vessels also fished for capelin off the coast of northern Norway and ling and cusk off Rockall. Cod is still the most valuable fishery. There were appreciable increases in exports of frozen fillets and blocks to the United States and the United Kingdom, and of wet-salted cod to Italy, Greece, Portugal, and Spain.

In 1974, the Faeroese signed an agreement with Belgium, France, the Federal Republic of Germany, the Netherlands, Norway, Poland, and the United Kingdom, which provides for control of fishing in waters 12 to 36 miles off the Faeroe Islands. The agreement specifies that certain areas that have spawning or juvenile stocks will be periodically closed to all fishing. A total allowable catch of 32,000 tons of cod and 20,000 tons of haddock will be permitted for only Faeroese and British vessels. U.K. vessels can take up to 19,000 of the 52,000-ton total. The other signatories to the agreement can fish for only redfish and saithe and agreed to keep their total catch to no more than 10 percent greater than their best annual catch of the 5 previous years.

Nearly 80 percent of the Faeroese catch comes from distant waters, including Greenland, Iceland, Newfoundland, Rockall, and especially the North Sea.

Table 4.--Faeroe Islands fishery exports, 1974-75

	1975		1974	
	Metric tons	Dkr 1,000	Metric tons	Dkr 1,000
Fish, frozen	12,578	90,754	8,432	67,025
Fish, wet-salted	23,142	168,978	18,655	161,824
Fish meal	24,644	39,322	22,565	71,370
Herring, fresh	22,851	40,692	27,297	55,844
Shrimp	4,238	36,495	2,364	21,757
Other	81,068	65,892	40,801	83,907
Total:	168,521	442,133	120,114	461,727

Table 5.--Greenland fishery landings, 1974-75

	1975		1974	
	Metric tons	Dkr 1,000	Metric tons	Dkr 1,000
Cod	19,988	32,087	20,225	26,498
Salmon	1,186	11,919	1,162	11,648
Shrimp	9,898	24,963	10,243	22,430
Other	16,980	14,079	19,608	13,293
Total	48,052	83,048	51,238	73,869

5. GREENLAND

Greenland's fishery landings for 1975 support its concern over overfishing and environmental changes in their waters. Landings declined 6 percent from 51,238 tons in 1974 to 48,052 tons in 1975 (table 5).

In recent years, oceanographers reported a noticeable increase in Greenland's coastal water temperatures, which unfortunately has precipitated migration of the important cod and shrimp stocks to offshore waters. As Greenland's native fishing fleet is not equipped to pursue these stocks, unexpected hardships are being created among the small coastal villages. At the same time there are reports of an increase of foreign fishing vessels working both fish and shrimp stocks beyond the 12-mile limit.

To offset the offshore movement of fish stocks, the Royal Greenland Trade Department plans to gradually change Greenland's fleet composition from small, artisanal boats to large vessels with greater catch potential, capable of working offshore. Simultaneously, local Greenland interests are seeking an exclusive coastal economic zone of 100 to 200 miles, but the chances for success appear minimal at this time.

6. PROSPECTS

Denmark is clearly the dominant fishing nation within the Common Market and is diligently working on all fronts to maintain its leadership. However, it is beset by strong forces that could alter this position. Among these are unpredictable fluctuations in fish stocks, the trend towards a 200-mile ocean economic regime, escalating operation costs, and fluctuations in world market prices.

The Danish fishing fleet depends on the North Sea for nearly 70 percent of its catch, both of food fish and fish for reduction purposes. Other areas fished include the Baltic Sea, the Straits of Kattegat and Skagerrak, and the sounds contiguous to the Danish coast. Over the years, the combination of increased fishing and changes in environment has reduced stocks of several indigenous species. Fluctuations in the herring and cod population have seriously affected the industry. In recent years herring stocks have declined severely; juvenile herring now make up most of the catch. Catches have

dropped from several million tons a years to less than 200,000 tons. To replace herring in their industrial catch, the Danes started fishing heavily for sprat, sand eels, and Norway pout during the 1960s. Currently, these stocks are not in danger of depletion, but scientists are concerned that because of its short life span, sprat could be depleted by overfishing before corrective measures could be taken.

Cod is fished heavily, but for the present, the reduction of quotas has enabled catch rates to remain steady. During 1975, fishermen reported increased numbers of cod in both the North Sea and the Baltic. Various reasons have been given for this sudden unexpected increase, from a heavy flow of beneficial nutrients from adjacent river systems, to an increased survival rate of cod stocks due to the above-mentioned decline of adult herring, since herring reportedly feed on cod eggs.

The Danish fishing industry is seriously concerned about prospects of a 200-mile regime which would restrict Danish vessels from fishing in some areas, particularly the North Sea. The Danes heartily endorse an EC proposal to maintain all waters adjacent to EC countries from 12 to 200 miles for the unrestricted use by those countries. As most fishing in the North Sea takes place in what will be U.K. waters in a 200-mile regime, the U.K. is understandably reluctant to entirely endorse the EC scheme, although an equitable settlement on this issue is expected.

Demand for food fish is expected to remain good, but the fish meal industry faces fluctuations in the world market and heavy competition from agricultural products, notably soybean meal. The Danish price of fish used for reduction has fluctuated as much as 200 percent during the last 3 years, and although new markets are opening, competition is expected to remain keen.

In summary, Denmark's fishing industry is expected to remain healthy, provided its fishing fleet will continue to have access to North Sea resources and effective management programs are enforced to maintain fish stocks.