

CERTAIN FISH

**Report to the President on
Investigation No. TA-201-41
Under Section 201 of
the Trade Act of 1974**



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JANUARY 1980

UNITED STATES INTERNATIONAL TRADE COMMISSION

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USITC ADVISES PRESIDENT: THAT GROUNDFISH IMPORTS NOT A CAUSE OF SERIOUS INJURY TO DOMESTIC INDUSTRY

The United States International Trade Commission has reported to the President its determination, by a 3-to-0 vote, that imports of groundfish are not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat of serious injury, to the domestic industry harvesting and processing the like or directly competitive products.

Concurring in the unanimous determination were Vice Chairman Bill Alberger and Commissioners George M. Moore and Paula Stern. Chairman Catherine Bedell did not participate.

The investigation was undertaken to determine whether cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic ocean perch, Pacific rockfish (including Pacific ocean perch), flounder, turbot, and all other flatfish, except halibut, which are fresh, chilled, or frozen (provided for in subpart A of part 3 of schedule 1 of the Tariff Schedules of the United States) are being imported in such increased quantities as to be a substantial cause of serious injury to the domestic industry harvesting and processing the like or directly competitive products. These fish are commonly collectively referred to as groundfish because they are generally found and caught at or near the ocean bottom.

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USITC ADVISES PRESIDENT: THAT GROUND FISH IMPORTS NOT A CAUSE OF SERIOUS
INJURY TO DOMESTIC INDUSTRY

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The U.S. industry consists of approximately 900 major fishing vessels which are devoted to the harvesting of groundfish. Some 600 boats operate from the Northeastern United States, and another 300 boats have homeports in California, Oregon, and Washington.

In 1978, the estimated value of U.S. landings was \$156 million, and the apparent value of U.S. consumption at the first stage of handling in the United States was \$851 million. U.S. landings of groundfish increased from 395 million pounds in 1974 to 576 million pounds in 1978, or by 46 percent, and were higher in the first 9 months of 1979 than in the corresponding period of 1978.

The fresh, chilled, or frozen groundfish of this investigation enter the United States in three general categories: fresh, chilled, or frozen groundfish; fresh, chilled, or frozen groundfish fillets; and frozen groundfish blocks. However, the Commission determined that only imports of fresh or chilled whole groundfish and imports of fresh or chilled groundfish fillets were like or directly competitive with the U.S.-produced product.

The Commission's investigation revealed that, while imports of these products might be a problem to the U.S. fishing industry, the overly rapid expansion of the fishing fleet on the west coast is the primary problem of west coast U.S. fishermen, and the conservation quotas on the east coast are the primary problem of east coast fishermen. The Commission concluded that increased imports were not a substantial cause of serious injury, or the threat thereof, to the domestic industry within the meaning of the Trade Act of 1974.

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USITC ADVISES PRESIDENT: THAT GROUND FISH IMPORTS NOT A CAUSE OF SERIOUS
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The investigation was instituted by the Commission on September 5, 1979, under the authority of section 201 of the Trade Act of 1974, following receipt of a amended petition from the Fishermen's Marketing Association of Seattle and the Coast Draggers Association of Westport, Washington. A public hearing in connection with the investigation was held on November 13 and 14, 1979, in Seattle Washington.

The Commission's public report, Certain Fish (USITC Publication 1028), contains the views of the Commissioners in the investigation (No. TA-201-41). Copies may be obtained by calling (202) 523-5178; from the Office of the Secretary, 701 E Street NW., Washington, D.C. 20436; or at the USITC's New York Office, 6 World Trade Center, Suite 629, New York, N.Y. 10048, telephone (212) 466-5599.

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Note.--The whole of the Commission's report to the President may not be made public because it contains certain information considered to be confidential or sensitive. This published report is the same as the report to the President except that the above mentioned information has been omitted. Such omissions are indicated by asterisks.

United States International Trade Commission,
January 17, 1980

REPORT TO THE PRESIDENT

To the President:

In accordance with section 201(d) (1) of the Trade Act of 1974 (19 U.S.C. 2251(d) (1), 88 Stat. 1978), the United States International Trade Commission herein reports the results of an investigation relating to certain fish.

On the basis of the information developed in investigation No. TA-201-41 the Commission (Chairman Bedell not participating) determines that cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic Ocean perch, Pacific rockfish (including Pacific Ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in items 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.55, 110.57, and 110.70 of the Tariff Schedules of the United States, are not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

The Commission instituted this investigation under the authority of section 201(b) (1) of the Trade Act on September 5, 1979, following receipt on August 20, 1979, of an amended petition filed by the Fishermen's Marketing Association of Washington, Inc., Seattle, Washington, and the Coast Draggers Association, Westport, Washington.

The investigation was undertaken to determine whether cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic Ocean perch, Pacific rockfish (including Pacific Ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in items 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.55, 110.57, and 110.70 of the Tariff Schedules of the United States, are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

A public hearing in connection with the investigation was held in Seattle, Washington, on November 13 and 14, 1979. All interested persons were afforded the opportunity to be present, to produce evidence, and to be heard. A transcript of the hearing and copies of briefs submitted by interested parties in connection with the investigation are attached. 1/ Notice of the investigation and hearing was duly given by publishing the notice in the Federal Register of September 12, 1979 (44 F.R. 53112). A corrected notice of investigation was issued on September 20, 1979, and published in the Federal Register of September 26, 1979 (44 F.R. 55442).

The information contained in this report was obtained from fieldwork, from questionnaires sent to domestic producers and importers, and from the Commission's files, other Government agencies, and information presented at the hearing and in briefs filed by interested parties.

1/ Attached to the original report sent to the President, and available for inspection at the U.S. International Trade Commission, except for material submitted in confidence.

Views of the Commission 1/

On the basis of information developed during this investigation, we determine that certain groundfish as described in the Commission's notices, are not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or threat of serious injury, to the domestic industry producing the like or directly competitive products.

The Trade Act of 1974 (Section 201(b)(1)) requires that each of the following conditions be met before an affirmative determination can be made.

- (1) There are increased imports (either actual or relative to domestic production) of an article into the United States;
- (2) A domestic industry producing an article like or directly competitive with the imported article is seriously injured, or threatened with serious injury; and
- (3) Such increased imports of an article are a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Specifically, we find that neither the second nor the third criteria under section 201(b)(1), as set forth above, have been met. We generally do not reach the third issue (causation) unless the first two are satisfied, but in this case we thought it appropriate to discuss issues frequently raised during the investigation.

The domestic industry and the imported articles of concern

The petitioners are two fishermen's associations in the state of Washington, the Fishermen's Marketing Association, Seattle, Washington, and the Coast Draggers Association, Westport, Washington. However, the petition is supported by all

1/ Vice Chairman Bill Alberger and Commissioners George M. Moore and Paula Stern. Chairman Catherine Bedell did not participate.

major fishermen's associations on the west coast and two major fishermen's associations on the east coast. The domestic industry consists of those fishermen in the entire United States whose vessels are devoted to the harvesting of certain fish, specifically cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic Ocean perch, Pacific rockfish (including Pacific ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in TSUS item 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.55, 110.57, and 110.70. The above described fish are collectively referred to in these views as "groundfish" because they are generally found or caught on or near the sea bottom (the "ground"). The articles under investigation are only those groundfish that are fresh, chilled, or frozen and provided for in subpart A of part 3 of schedule 1 of the TSUS. They enter the United States in three general categories: (1) whole groundfish -- whole, or processed by removal of heads, viscera, fins, or scales, or any combination thereof, but not otherwise processed; (2) groundfish blocks -- frozen blocks of fish that have been skinned and boned, whether or not divided into pieces, and frozen into blocks, each weighing over 10 pounds; and (3) groundfish fillets -- fresh, chilled, or frozen fish in other forms, virtually all in the form of fillets.

A domestic industry producing an article like or directly competitive with an imported article

Whole groundfish -- In 1978, nearly 60 percent of the U.S. imports of fresh, chilled, or frozen whole groundfish were imported in frozen form. While the level of imports of frozen fish in 1978 was higher than in any of the preceding four years, the U.S. fishermen that comprise the affected industry sell virtually all of their catch in fresh or chilled form, at substantially higher prices than could be obtained for frozen whole fish. In 1978, imports of the like and directly competitive products, fresh or chilled whole groundfish, were lower

in volume than during any of the 4 preceding years. As discussed more extensively in the following section on groundfish fillets, the fresh or chilled products of the fisheries industry are not like or directly competitive with the frozen products.

Groundfish fillets.-- During the period January 1974 - September 1979, 97.5 percent of all imports of groundfish fillets were frozen. On the other hand, the U.S. fishermen sell nearly all their groundfish to wholesalers or processors at a price geared for the fresh whole fish and fresh fillet market. Since a fresh fillet is considered to be a better fish product than a frozen fillet, it commands a much higher price. Thus U.S. fishermen can obtain a premium price for fresh groundfish because processors can cover these costs and make a profit at current fresh fillet prices.

The price differential between fresh and frozen whole fish and fresh and frozen fillets is significant. For example, although prices of fresh domestic cod fillets and imported frozen fillets have both increased since 1974, the price differentials between the products and the rates of increase have varied sharply. The average monthly wholesale price of fresh domestic cod fillets at the New York City Fulton fish market was \$1.02 in 1974 while the average wholesale price for packages of frozen Canadian cod fillets was \$.71, a 31 cent differential. During the next year, the fresh fillet price rose to \$1.26 while the frozen fillet price fell to 63 cents thus widening the margin to 63 cents. In the following three years, fresh fillet prices rose much more rapidly than those for imported frozen fillets further widening the margin between the two products. By June of 1978, the last period for which comparisons are possible, fresh fillets were selling at \$2.23 per pound, compared with only 89 cents for imported frozen fillets. Because movements in prices of domestic fresh fillets

and imported frozen fillets are not related, these products are not truly like or directly competitive with each other.

U.S. production of frozen fillets occurs only when processors are unable to sell their fresh fillets in the market prior to spoilage. Once the fillet is frozen, the processors suffer a loss on the product because they have already paid a "premium" (or "fresh") price for the groundfish from the fishermen and are forced to sell at the lower frozen price.

To sell frozen fillets successfully, the entire processing operation must be geared to the production of frozen fillets. The groundfish should be purchased in volume at low prices and then processed by machines and quickly frozen to retain as much texture and flavor as possible. Few groundfish processors in the United States engage in such operations. Rather, they freeze their fillets only as a last resort. Thus, it is clear that the vast majority of groundfish fillet imports, and the increasing imports of frozen whole groundfish, are not competitive with the U.S. produced article.

Groundfish blocks.-- For the past several years, the United States has imported over 99 percent of its consumption of groundfish blocks. Until 1978, production of groundfish blocks in the United States was only an intermediate step by seafood processors in the production of their own fish sticks and fish portions. In late 1978 and 1979, two U.S. companies bought the production machinery necessary to commercially produce groundfish blocks. Their basic problem at present is securing a high volume of low-priced groundfish from U.S. fishermen. Furthermore, "prevention of establishment of an industry" is not an issue in investigations under section 201 of the Trade Act of 1974.^{1/}

^{1/} Section 337(a) of the Tariff Act of 1930, as amended, (19 U.S.C. 1337) provides in relevant part that "Unfair methods of competition and unfair acts . . . the effect or tendency of which is . . . to prevent the establishment of such an industry . . . are declared unlawful." Under section 701(a)(2)(B) (countervailing duties) and section 731(2)(B) (antidumping) of the Trade Agreements Act of 1979, the Commission determines whether "the establishment of an industry in the United States is materially retarded". This investigation, however, is under a statute in which these issues are not relevant.

Clearly, increasing imports of fish blocks during 1974-78 were not like or directly competitive with the products of a U.S. industry. It is too early to tell how well the new U.S. fish block industry will compete with established import competition.

Increased imports

In the categories which we find directly competitive with domestic products, imports increased slightly from 1974 through 1978. However, imports of fresh or chilled whole groundfish and groundfish fillets during the first three-quarters of 1979 exceeded imports for all of 1978. The import to consumption ratio for these categories climbed to 9.44 percent for January-September 1979 compared to 6.33 percent for the same period in 1978. Clearly, imports are increasing within the meaning of section 201(b)(1).

Serious injury

The second criterion concerns whether the domestic industry is suffering "serious injury or the threat thereof." The Trade Act does not define the term "serious injury," but instead provides guidelines in the form of economic factors which the Commission is to take into account. Section 201(b)(2) of the Trade Act provides that the Commission, in determining whether there is serious injury, is to take into account, "all economic factors which it considers relevant, including (but not limited to). . . the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry. . . ." We have also considered the following economic factors: prices, production, cost of production and lost sales.

The information before us demonstrates that the economic health of the domestic fishermen improved in the years immediately prior to 1979. However, in 1979 the economic situation was not as positive.

Capacity and capacity utilization -- After the introduction of the "200 mile limit", the U.S. industry started to modernize and expand the ground-fishing fleet. Spurred by government guaranteed loans, the west coast ground-fishing fleet increased by 95 new boats in 1979 alone. There have also been increases in the size of the fishing fleets in New England. Thus U.S. capacity to harvest groundfish has risen significantly. However, government conservation quotas on the east coast and trip limits by groundfish processors on the west coast have severely limited the utilization of the newly expanded fishing fleet. U.S. landings of groundfish have increased over the comparable period in 1978, but there are more vessels and thus each boat is catching fewer fish.

Profit-and-loss experience -- From the limited number of questionnaires received from the U.S. fishermen, it appears that prior to 1979 the entire industry was on an upswing. As U.S. landings increased and prices also increased, the financial picture of the U.S. industry rapidly improved. The increased profitability probably contributed to the decision by many boat owners to invest in newer and larger boats. However, in 1979, the financial picture started to reverse itself. Factors which have aggravated the fishermen's financial situation in 1979 have included large increases in the cost of fuel, ice, and groceries. The Commission did not receive any financial data from east coast fishermen.

Employment -- Although the Commission received sparse employment data from U.S. fishermen, it is believed that the expansion of the fishing fleets has brought with it a large increase in employment in the groundfishing industry.

Prices -- In general, prices received by U.S. fishermen have risen significantly in recent years. The largest increases have occurred in west coast markets. Between January of 1976 and January of 1979, prices of most classes of fresh groundfish rose by 50 to 100 percent. The largest increase was recorded for dressed black cod (sable fish), which more than tripled, rising from 24 cents per pound to 75 cents per pound during this period. By comparison, the U.S. Labor Department's wholesale price index for meat, fish, and poultry increased by only 26 percent between January of 1976 and January of 1979.

Partly as a result of seasonal factors and short term fluctuations caused by storms, trends in prices received by U.S. fishermen in east coast markets are difficult to analyze during the most recent three-year period. However, the data presented in tables 11b-14 of the report indicate that east coast prices for all classes of fresh fish surveyed rose significantly between January of 1974 and October of 1979. The largest increase was recorded for ocean perch, which climbed by more than 100 percent from 9.9 to 21.4 cents per pound during this period.

Prices of most types of imported fresh and frozen fillets and groundfish blocks have also risen significantly in recent years. Thus, there is no evidence from the data that these products, which compete in varying degrees with U.S. fresh fish, have been suppressing domestic prices.

Production -- U.S. landings of groundfish increased from 395 million pounds in 1974 to 576 million pounds in 1978--an increase of 46 percent. As previously stated U.S. landings of groundfish in the first nine months of 1979 were higher than in the comparable period of 1978.

Cost of production -- The doubling in fuel costs in 1979 severely affected the U.S. fishermen in their efforts to remain profitable. Furthermore large

increases in the cost of ice and groceries increased the "costs of production" for groundfishing. These factors will continue to be a problem in the near future.

Lost sales -- Although there were allegations of lost sales made at the public hearing in Seattle, Washington, the Commission did not receive any material to support such allegations.

Considering all these factors, we do not find that serious injury exists within the meaning of the Trade Act.

Substantial cause

The only issue remaining is whether increased imports of whole fish (in 1979) and fresh fillets (in 1979) are a substantial cause of serious injury or threat thereof (neither of which were found to exist) to the U.S. industry that is dedicated to the "fresh fish market".

Imports might well be a problem to the U.S. fishing industry but our investigation has revealed that a too-rapid expansion of the fishing fleet on the west coast is the primary problem of west coast U.S. fishermen, and that the conservation quotas on the east coast are the primary problem for east coast fishermen.

In 1979, 95 new boats entered the Pacific fishing fleet, and more are currently being built. A number of new groundfish processors have entered the groundfish market to service many of the new boats. However, west coast landings have increased substantially and strict "trip limits" have been imposed by processors unable to sell all of the fish supplied to them by fishermen. Overproduction has glutted the west coast market which has not grown as rapidly as production.

On the east coast, the issue is fairly simple. Conservation quotas on cod, haddock and flounder, which dominate the catches of New England fishermen,

have resulted in substantial reductions in capacity utilization of the New England fleet. The New England fishermen sell all that they are allowed to harvest and could sell more if the quota were liberalized. Their current problems are clearly the conservation quotas and not the small quantity of imports of fresh whole groundfish and fresh fillets.

Conclusion

We conclude that the domestic industry is not being "seriously injured" within the meaning of that term in the Trade Act. While some factors indicate problems in this industry, they are not caused by import competition.

INFORMATION OBTAINED IN THE INVESTIGATION

Summary

On August 20, 1979, the United States International Trade Commission received an amended petition from the Fishermen's Marketing Association of Washington, Inc., Seattle, Wash., and the Coast Draggers Association, Westport, Wash., for import relief under section 201 of the Trade Act of 1974. Accordingly, on September 5, 1979, the Commission instituted investigation No. TA-201-41 under section 201(b) of said act to determine whether cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic ocean perch, Pacific rockfish (including Pacific ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in items 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.55, 110.57, and 110.70 of the Tariff Schedules of the United States (TSUS), are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles. In this investigation, the statutory deadline for the completion of the investigation is February 20, 1980. However, the Commission has decided to expedite the investigation and is currently scheduled to report its determination to the President on January 17, 1980. In connection with the investigation, a public hearing was held in Seattle, Wash., on November 13 and 14, 1979.

The above described fish are commonly collectively referred to as groundfish because they are generally found or caught on or near the sea bottom (i.e., at or near the ground) in cold or temperate waters. This investigation covers only groundfish which are fresh, chilled, or frozen and provided for in subpart A of part 3 of schedule 1 of the TSUS. The fish of concern enter the United States in three general categories: (1) whole, or processed by removal of heads, viscera, fins, or scales, or any combination thereof, but not otherwise processed; (2) as frozen fish blocks (that is fish that have been skinned and boned, whether or not divided into pieces, and frozen into blocks, each weighing over 10 pounds; and (3) fresh, chilled, or frozen fish in other forms, virtually all in the form of fillets.

Nearly all of the U.S. fishermen and fishing vessels catching such fish are based in New England and on the Pacific coast between San Francisco and the Canadian border. About 600 major fishing vessels (over 40 feet in length) land groundfish on the New England coast. The five major groundfishing ports or port areas in New England are as follows: Gloucester, Mass.; New Bedford, Mass.; Southeastern Maine; Point Judith, R.I.; and Boston, Mass.

Approximately 300 major fishing vessels land groundfish at ports located on the west coast. The vast majority of these landings are in ports north of San Francisco, Calif. All of the vessels that are docked in California and Oregon are part of the Fishermen's Marketing Association of Eureka, Calif. (approximately 200 boats). The Washington boats are part of the Fishermen's Marketing Association of Washington, headquartered in Seattle, Wash. and the Coast Draggers Association of Westport, Wash.

U.S. landings (i.e., U.S. production) of groundfish decreased from 421 million pounds in 1973 to 395 million pounds in 1974. However, total landings of groundfish increased each subsequent year to 576 million pounds in 1978, or by 37 percent compared with landings in 1973. In January-September 1979, U.S. landings of groundfish were 3 percent higher than landings in the corresponding period of 1978, as shown in the following tabulation.

	<u>Quantity</u> <u>(1,000 pounds)</u> <u>landed weight</u>
1973-----	421,310
1974-----	395,389
1975-----	424,102
1976-----	440,608
1977-----	498,555
1978-----	575,679
January-September--	
1978-----	429,409
1979-----	441,955

U.S. imports of whole groundfish (fresh, chilled, or frozen) increased from 27 million pounds in 1974 to 30 million pounds in 1976, but then declined by 17 percent to 25 million pounds in 1977. Thereafter, U.S. imports of whole groundfish increased to 30 million pounds in 1978, and import statistics for January-July 1979 show a 24-percent increase compared with imports in the corresponding period of 1978.

Imports of groundfish fillets (fresh, chilled, or frozen) jumped from 269 million pounds in 1974 to 360 million pounds in 1976. Thereafter, imports of groundfish fillets declined slightly to 337 million pounds in 1977 and then increased again to 365 million pounds in 1978. From 1973 to 1978, imports of groundfish fillets increased 96 million pounds, or by 36 percent. Imports of groundfish fillets decreased by 1 percent in January-September 1979 compared with imports during January-September 1978.

Imports of groundfish blocks increased from 266 million pounds in 1974 to 387 million pounds in 1978, or by 45 percent. However, imports of groundfish blocks in January-September 1979 declined slightly when compared with imports during the corresponding period of 1978.

Apparent U.S. consumption of groundfish increased each year, from 662 million pounds in 1974 to 934 million pounds in 1978, or by 41 percent. However, in January-September 1979, apparent U.S. consumption for the period declined slightly compared with consumption during the corresponding period of 1978. During 1974-78, total imports of groundfish (by product weight) increased each year, from 543 million pounds in 1974 to 761 million pounds in 1978, representing an increase of 40 percent. Total imports (by product weight) declined by 11 million pounds in January-September 1979 compared with imports during the corresponding period of 1978. More importantly, U.S.

landings, by product weight, during the 1974-79 period increased each year, from 119 million pounds in 1974 to 173 million pounds in 1978, or by 45 percent.

U.S. imports of groundfish have maintained at least an 81.5-percent share of the U.S. market throughout the 5-year period from 1974-78. It should be noted that U.S. imports have actually suffered a slight decline in market share, from 82.1 percent in 1976 to 81.5 percent in 1978.

The aggregate net operating profit for the only six groundfishing vessels to report profit-and-loss data for the entire January 1975-September 1979 period, increased each year from \$86,000 in 1975 to \$377,000 in 1978. However, in January-September 1979, net aggregate profit was sharply down to \$169,000 from \$298,000 in the corresponding period of 1978. Among the chief reasons for the sharp decline in aggregate net operating profit has been the limits the west coast processors have put on their supplying fishing vessels.

On the west coast, where fishermen's associations negotiate prices with processors, prices of most groundfish have climbed sharply in recent years. However, on the east coast, where prices are determined at auctions, and thus, are subject to the uncertainties of short-term market forces, performances have been mixed.

Price increases for most varieties of fresh fish in west coast markets significantly outpaced increases in the U.S. Labor Department's wholesale price index for meat, fish, and poultry between January 1976 and January 1979. Fresh fish prices generally rose by 50 to 100 percent or more during this period, while the Labor Department index registered an increase of only 26 percent.

Price trends for east coast groundfish are difficult to analyze because of seasonal factors and the impact of storms. Prices are typically lower during the summer, when landings are at peak levels in contrast to the less productive winter months. However, these patterns are often disrupted by sharp, temporary upsurges in prices, caused by storm-related curtailments in landings.

Employment in a specific fishery fluctuates widely, depending upon such factors as weather and market conditions. Sources contacted by the Commission have indicated that there has been a decrease in recent months in the number of fishermen who depend primarily on groundfish on the Atlantic and Pacific coasts and Alaska who depend primarily on groundfish. Accurate data on employment in the groundfishing industry, however, are not available.

Introduction

On August 20, 1979, the United States International Trade Commission received an amended petition filed in proper form from the Fishermen's Marketing Association of Washington, Inc., Seattle, Wash., and the Coast Druggers Association, Westport, Wash., 1/ for import relief under section 201(a)(1) of the Trade Act of 1974. Accordingly, on September 5, 1979, the Commission instituted investigation No. TA-201-41 under section 201(b) of said act to determine whether cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic ocean perch, Pacific rockfish (including Pacific ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in items 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.55, 110.57, and 110.70 of the Tariff Schedules of the United States (TSUS), are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

The Trade Act of 1974 directs the Commission to complete its investigations under section 201 at the earliest practical time, but no later than 6 months after the date of the receipt of the petition. In this investigation, the statutory deadline for the completion of the investigation is February 20, 1980. However, the Commission has decided to expedite this investigation and is currently scheduled to report its determination to the President on January 17, 1980.

Notice of the institution of the investigation and the public hearing was issued on September 7, 1979 (a corrected notice of investigation was issued on Sept. 20, 1979), and was given by posting copies of the notices at the Office of the Secretary, U.S. International Trade Commission, Washington, D.C., and at the Commission's office in New York City, and by publishing the original notice in the Federal Register of September 12, 1979 (44 F.R. 53112) and the corrected notice in the Federal Register of September 26, 1979 (44 F.R. 55442). 2/ A public hearing in connection with this investigation was held in Seattle, Wash., on November 13 and 14, 1979.

The Commission has conducted two recent investigations with respect to imports of certain related fish and fish products. On September 27, 1978, the

1/ Supporting this petition to date are the following organizations:

- (a) Fishermen's Marketing Association, Inc.; Eureka, Calif.
- (b) National Federation of Fishermen/Western Region
- (c) Pacific Coast Federation of Fishermen's Associations; Sausalito, Calif.
- (d) Western Fishboat Owners Association; San Diego, Calif.
- (e) Otter Trawl Commission of Oregon; Astoria, Oreg.
- (f) Marine Construction & Design Co.; Seattle, Wash.
- (g) Point Judith Fishermen's Cooperative Association, Inc.; Narragansett, R.I.

2/ A copy of the Commission's notice of investigation and hearing and a copy of the corrected notice of investigation is presented in app. A.

Commission determined unanimously 1/ that an industry in the United States was not being injured by reason of the importation of certain duty-free fish from Canada, upon which the Treasury Department had determined a bounty or grant was being paid (Inv. No. 303-TA-3, under section 303(b) of the Tariff Act of 1930, as amended). On April 9, 1979, the Commission again determined unanimously that an industry in the United States was not being injured by reason of the importation of certain other duty-free fish not covered by investigation No. 303-TA-3 and certain duty-free shellfish from Canada, upon which the Treasury Department had determined a bounty or grant was being paid (Inv. No. 303-TA-9, under section 303(b) of the Tariff Act of 1930, as amended). Both of the aforementioned investigations by the Commission were conducted under the former U.S. countervailing duty law (sec. 303 of the Tariff Act of 1930, as amended), which provides for Commission injury investigations with respect to duty-free imports, the foreign production or exportation of which are found by Treasury to be subject to foreign bounties or grants.

The petition submits that the domestic fishermen are suffering serious injury, that the serious injury is substantially caused by increased imports, and that the remedy provided should be (1) a quantitative restriction on groundfish imported into the United States set at 25 percent round weight equivalent of U.S. consumption, 2/ (2) a duty imposed on all groundfish imported into the United States at a rate of 50 percent ad valorem, 3/ and (3) such further relief as appears appropriate and just.

Description and Uses

This investigation covers cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic ocean perch, pacific rockfish (including Pacific ocean perch), flounder, turbot, and all other flatfish, 4/ except halibut. The foregoing fish are commonly collectively referred to as groundfish because they are generally found and caught at or near the ocean bottom (i.e., at or near the ground). When referred to collectively, such fish will hereinafter be referred to as groundfish. Such fish are found in temperate or cold water.

1/ Commissioner Minchew not participating.

2/ During the public hearing, the petitioners recommendation for quantitative restrictions was revised. The petitioners then recommended a fiscal year quota set at the pre-1978 level, with the quota for each subsequent year to be reduced by 10 percent for the remainder of the 5-year period.

3/ During the public hearing, the petitioners revised their request for increased duties downward to an immediate imposition of a 30-percent rate of duty on all groundfish articles under investigation.

4/ Flatfish are horizontally flattened fish, with both eyes on the upper side of the body; they include flounder, sole, dabs, fluke, turbot, plaice, and halibut. Although the investigation includes some minor species of halibut, the two major species of halibut--Pacific halibut (Hippoglossus stenolepis) and Atlantic halibut (H. hippoglossus)--are not included.

This investigation covers only such groundfish which are fresh, chilled, or frozen and provided for in subpart A of part 3 of schedule 1 of the TSUS. More specifically, the investigation covers such fish whether whole or processed by removal of heads, viscera, fins, or any combination thereof, but not otherwise processed (items 110.15 and 110.35); 1/ scaled (whether or not heads, viscera, fins, or any other combination thereof have been removed), but not otherwise processed (items 110.40 and 110.45); skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (item 110.47); 2/ and otherwise processed (whether or not heads, viscera, fins, scales, or any combination thereof have been removed) (items 110.50, 110.55, 110.57, and 110.70). 3/

This investigation does not cover groundfish if dried, salted, pickled, smoked, or kippered (provided for in subpart B), such fish in airtight containers (provided for in subpart C), or such fish if in the form of "other fish products" (such as fish balls, cakes, puddings, pastes, and sauces; fish sticks, fillets other than those that are fresh, chilled, or frozen; other portions of fish breaded or similarly prepared, and fish otherwise prepared or preserved, all provided for in subpart D).

For every species of whole fish under investigation, except Atlantic ocean perch and other fillets, imports enter the United States as either fresh, chilled, or frozen. Owing to the speed with which it spoils, almost all Atlantic ocean perch is frozen before it enters the United States. Whole groundfish can be marketed fresh, chilled, or frozen, or may be dried, smoked, kippered, or further processed. Larger whole groundfish may be cut into steaks. However, most whole imported and domestically harvested groundfish are processed into fillets by domestic processors. Whole fish are filleted by cutting the sides of the fish away from the backbones so that they are boneless, or nearly so. The term "fish fillet" as used in this report should be differentiated from the fish portions cut from pieces of frozen fish blocks that are often labeled fillets at the retail level.

Imports of groundfish fillets are also included under the scope of this investigation. Groundfish fillets of cod, cusk, haddock, hake, pollock, wolf fish, and flatfish (except halibut) all enter the United States as either fresh, chilled, or frozen. Canada and Mexico, by virtue of their proximity, are the largest exporters of fresh or chilled groundfish fillets to the United States. According to industry sources a few Canadian exporters of fresh or chilled groundfish fillets have treated the fillets with a sodium nitrate or sodium nitrite solution (food preservatives), which adds approximately 4 or 5

1/ Fresh, chilled, or frozen groundfish that are whole or processed by the removal of heads, viscera, fins, or scales, or any combination thereof, but which are not otherwise processed (items 110.15, 110.35) are referred to in this report as whole fish.

2/ Imports of articles covered by item 110.47 are referred to in this report as groundfish blocks.

3/ Virtually all imports in this category consist of fresh, chilled, or frozen fillets, and are referred to in this report as groundfish fillets.

extra days of shelf life to the product. U.S. groundfish processors cannot add preservatives to their fresh fillets because of Food and Drug Administration regulations.

Fresh, chilled, and frozen fillets are sold through retail outlets, restaurants, and institutions. In general, fresh or chilled fish (whether whole or processed into fillets) command the highest price. Because of the price differential, most U.S. processors freeze groundfish fillets only when there is an oversupply of fresh fillets on the market. The Commission has been informed by industry sources that domestically produced groundfish fillets which have been frozen cannot compete in terms of price with imported frozen groundfish fillets because (1) of the higher fresh fish price paid by processors for groundfish in the United States and (2) most U.S. processors are not geared toward large-volume production of frozen groundfish fillets which would produce low unit costs. As a consequence, most of the frozen groundfish marketed in the United States is imported.

The frozen fish blocks covered by this investigation are skinless and boneless fish meat--usually fillets or pieces of fillets--compacted together and frozen to form blocks or slabs each weighing over 10 pounds. Frozen fish blocks made of minced fish flesh, and frozen fish blocks weighing under 10 pounds are not included. Among the blocks covered by the investigation are blocks of cod, flatfish, haddock, pollock, whiting, and Atlantic ocean perch.

The fish blocks covered by this investigation must be made from fish which are skinned and boned. However, Canada exports most of its frozen blocks of Atlantic ocean perch with the skin on; thus, these blocks are generally classified as other fish products under TSUS items 113.58 or 113.60. Although the skin is not a great detraction in the quality of the block, purchasers definitely prefer skinless blocks.

Imported and domestically produced groundfish blocks are used by fish processors in manufacturing fish portions and fish sticks such as those sold in fast-food outlets or frozen dinners. The retail consumer can only identify the species in a fish portion by reading the package label. It is virtually impossible to determine the species of fish in a fish stick by taste alone.

Two U.S. fish processors in New England produce saltwater blocks for commercial sale--Stinson Canning Co., Rockland, Maine; and Global Seafoods, Inc., Point Judith, R.I. Neither Stinson nor Global manufactures fish sticks or fish portions. However, a few New England processors produce blocks for their own internal consumption in the manufacture of fish sticks and fish portions. Thus, a substantial portion of domestic production of groundfish blocks is probably not reported as blocks in official production statistics; those blocks are only intermediate products for the firms that purchase whole fish in order to produce fish sticks and fish portions. Saltwater fish blocks are consumed by five major U.S. producers (also called converters) of fish sticks and fish portions which account for about 80 percent of U.S. fish stick and fish portion production, and by at least 30 small processors. The National Marine Fisheries Service of the U.S. Department of Commerce (NMFS) has no record of any U.S. production of freshwater fish blocks.

The groundfish species predominantly landed at the New England ports are cod, haddock, flounder (flatfish), ocean perch, and pollock. Pacific coast landings are dominated by cod, rock cod (rockfish or snapper), black cod (sable fish), dover, English and petrale sole. The Atlantic and Pacific cod fish are biologically similar and are thus commercially interchangeable. However, other aforementioned Atlantic fish such as hake and cusk are completely different from Pacific fish such as rock cod and black cod and are not readily commercially interchanged. It has been alleged by east coast fishermen and processors that Atlantic groundfish is superior in taste and texture to the Pacific counterparts. This allegation has not been confirmed; however, it should be noted that substantial quantities of Atlantic groundfish are shipped into Los Angeles and San Francisco, as well as the rest of the nation, while very little Pacific groundfish is marketed in the large eastern urban areas. The west coast groundfish industry primarily serves the local or regional fresh fish market; 80 percent of the production is sold in California. However, a few products, such as sablefish, successfully compete in the national and world markets. U.S. markets for Alaskan groundfish mainly consist of commercial outlets purchasing frozen fillets. An unknown quantity of Alaskan groundfish is also used as bait for other fisheries.

U.S. Tariff Treatment

The whole groundfish under consideration in this investigation are provided for under the provisions of TSUS items 110.15 (includes fresh, chilled, and frozen cod, cusk, haddock, hake, and pollock) and 110.35 (includes fresh, chilled, and frozen Atlantic ocean perch, flounders, and other flatfish (except halibut), and all other groundfish). Whole groundfish classified under TSUS item 110.15 enter the United States duty-free under the column 1 rate (applicable to most-favored-nations), while the column 2 rate of duty (applicable to certain designated Communist-dominated countries) is 1 cent per pound. Whole groundfish classified under TSUS item 110.35 are dutiable at a rate of 0.5 cent per pound under column 1, while the column 2 rate is 1 cent per pound.

Scaled groundfish in bulk are classified under item 110.40 of the Tariff Schedules of the United States (TSUS) and enter duty free under the column 1 rate of duty, but are dutiable at a rate of 1.25 cents per pound under column 2. Scaled groundfish not in bulk are classified in TSUS item 110.45 with a column 1 rate of duty of 6 percent ad valorem and a column 2 rate of duty of 25 percent ad valorem. Groundfish blocks are dutiable under the provisions of item 110.47 of the TSUS. Since 1972, fish blocks have been imported duty free from countries with most-favored-nation status. The column 2 rate of duty is 1.25 cents per pound.

Groundfish fillets and steaks are classified under items 110.50, 110.55, 110.57, and 110.70 of the TSUS. All of the aforementioned tariff items have the same column 2 rate of duty of 2.5 cents per pound. The column 1 rates of duty are as follows:

- . 110.50--1.875¢ per pound (in effect since 1939)
- . 110.55--2.5¢ per pound (in effect since 1930)
- . 110.57--duty-free (in effect since 1972)
- . 110.70--duty-free (in effect since 1972)

The only groundfish product scheduled for a tariff-rate reduction as a result of the recently concluded Tokyo round of trade negotiations is item 110.55 (fresh and frozen groundfish fillets and steaks including cod, cusk, haddock, hake, pollock, and Atlantic ocean perch). The duty on item 110.55 is scheduled to be reduced in stages to 1.875 cents per pound by 1987.

Channels of Distribution

Groundfish landed in the United States moves from the fishing boat to either a primary processor, who cuts fillets from whole fish, or is sold to wholesale fish dealers as whole fish. The processor then sells either to wholesalers or to brokers, who in turn sell the product to the next level--restaurants, fast-food carryouts, retail food chains, fresh fish markets, and schools or other institutions.

Groundfish sticks and portions follow a relatively simple distribution system. The processor produces the product from imported frozen fish blocks and distributes it to the above outlets directly. This operation is conducted by relatively few firms and is carried out on a large scale.

On the east coast, the distribution of fresh fish is basically from north to south. Trucks enter Maine from Canada (both on mainland routes and by ferry from Nova Scotia). Most of the fish goes to Boston and New York for processing or repacking. A significant share of the fish goes to other U.S. fish-processing centers such as Gloucester or New Bedford. The distribution flow of the New England fish catch follows a similar pattern--from Maine ports and from Gloucester and Provincetown to Boston and New York. Landings at New Bedford, Mass. and Rhode Island ports go roughly 75 percent to New York and to the eastern Massachusetts markets (25 percent). Fishing vessels make sizable landings in Boston and New York as well. Much of the distribution reaching Boston and New York is consumed there, and the remainder is distributed throughout the United States. Some of the fresh imports from Canada go directly to markets in other northeastern areas as well. According to industry sources, approximately five Boston processors ship large amounts of Atlantic cod, haddock, and flounder fillets to Los Angeles and San Francisco. These fillets are both U.S. and Canadian in origin and compete directly with the groundfish species landed on the west coast.

While the prices in eastern Canada normally are considerably lower than in the United States, resulting in a flow of fresh fish from Canada to the United States, there are rare occasions when prices for Canadian fish are higher than U.S. prices, resulting in a reversal in the flow of fresh whole fish, with shipments going from the United States to Canada.

On the Pacific coast, the main flow of distribution is also from north to south for fresh fish. Fish in excess of local market needs are shipped southward from British Columbia, Washington, Oregon, and northern California. Much of it moves down to central and southern California, where San Francisco and Los Angeles are the largest markets for Pacific groundfish. Fish in excess of fresh-market demand is frozen and may be sold anywhere throughout the country, but most is marketed along the Pacific coast. Imports of frozen groundfish go directly to major markets, such as San Francisco and Los Angeles.

On both coasts, fresh fish generally go to small- and medium-sized plants for processing or repacking; from there the product goes to the retail or institutional trade. The frozen products (mostly imports) generally go to the larger firms for repacking or further processing; the fish is then distributed, mainly to retail stores throughout the United States. Imports of frozen fish from Canada enter through interior customs districts as well as coastal ones. The large dealers of Canadian frozen fish are headquartered mainly in the Northeast, but they distribute throughout the United States.

U.S. Industry

Nearly all of the U.S. fishermen and vessels catching groundfish are based in New England and on the Pacific coast from San Francisco northward to the Canadian border.

New England

An estimated 605 major fishing vessels (over 40 feet in length) land groundfish on the New England coast. There are some commercial landings of groundfish in eastern ports south of New York, but such landings are generally either incidental to other fishing operations or represent concentrated efforts for only a short period of each year. The five major groundfishing ports in New England are as follows:

1. Gloucester, Mass--200 boats
2. New Bedford, Mass--130 boats
3. South Eastern Maine--100 boats
4. Point Judith, R.I--70 boats
5. Boston, Mass--15 boats

Gloucester, Mass--Gloucester has the largest groundfishing fleet in New England, consisting of 200 boats of various lengths. If the weather conditions are cooperative, groundfish vessels average 25 trips per year, with each trip generally lasting 7 to 8 days. A large number of the crewmen in Gloucester are unionized and are represented by the Seafarers International Union. Almost all of the groundfishing vessels have been represented to the Commission as individually owned and operated. In the past few years the Gloucester fleet has been modernized. Older boats have been replaced by new larger trawl vessels that have greater fishing capacities. Furthermore, the fleet is

constantly expanding each year as new vessels are added to the fleet. In contrast to New Bedford, the Gloucester fleet specializes in cod and haddock, which are currently under conservation quotas. These quotas have forced the fishing vessels to extend their fishing trips from 7 days to 10 days, in order to catch 2 weeks allowance of cod and haddock, thus making the trip practical within a commercial sense. According to industry sources in Gloucester, when a vessel has exceeded its quota allowance it will often dock at 2:00 a.m. and unload the catch. Overages of the quota allowance are listed on the ship invoice as pollock or ocean perch, which are not under quota. A number of citations have been given by the U.S. Government fish wardens, but the fines have been mitigated to nominal sums.

There are several large fish processors in Gloucester. The largest is Gorton's of Gloucester, which, in addition to its own line of groundfish products, supplies the * * * with its fish fillets. Gorton's has informed the Commission that * * *. Other large Gloucester groundfish processors are O'Donnell-Usen, Empire, and Ocean Crest. Gloucester follows the Boston and New Bedford prices for U.S.-landed groundfish.

New Bedford, Mass—New Bedford has the second largest groundfishing fleet in New England, with 130 boats. These boats are generally larger than those based in Gloucester, and consequently have larger capacities to catch fish. The crewmen in New Bedford are represented by the Teamsters Union Local No. 59, which, according to Union sources, has secured one of the highest incomes in their industry for the crewmen. The reason for the higher-than-average incomes for crewmen in New Bedford is the "share arrangement" that the union has negotiated with the boat owners. On groundfishing vessels in New Bedford, the crew receives, after deductions for pensions (4 percent), food, fuel and ice, 60 percent of the remaining proceeds from the landings. In the early 1970's New Bedford experienced an influx of fishermen from Portugal. These Portugese immigrants at first became crewmen in the New Bedford fleet, and in the past few years they have become owners of new trawl vessels. The influx of the Portugese fishermen was the catalyst for the expansion and modernization of the New Bedford groundfishing fleet. Also during this period, several processors expanded their New Bedford operations, and several new processors have started groundfish processing plants.

New Bedford has an auction system for the sale of domestically landed groundfish. Typically the processors bid for the "catch" of each boat. Thus, it is possible that the prices will differ from boat to boat. This is in contrast to Boston's system, which has one price set for each species each day by auction. New Bedford at one time was considered a flatfish port, but in the past few years, the processors and boat owners have reduced their dependence on flatfish (flounders) and concentrated on all forms of groundfish. The New Bedford auctions, however, set the prices for flatfish in New England.

A few of New Bedford's processors have become large importers of Canadian cod fillets, which are repacked from 50-pound packages to smaller retail cartons. These processors informed the Commission that they could not afford to buy U.S.-landed whole cod, process them, and then sell the fillets at a profit. Their imports seem to consist only of cod fillets and do not include haddock or flounder fillets.

Southeastern Maine.--The largest groundfishing ports in Maine are Portland, with 60 groundfishing vessels, and Rockland, with approximately 30 vessels. The groundfishing vessels in Maine are, for the most part, smaller in size and capacity than their counterparts in Massachusetts. There are also many small processors who handle 15,000 pounds or less of groundfish per day. Since the boats are smaller, the crewmen in Maine earn less than their counterparts in Massachusetts. Furthermore, the Maine crewmen are not unionized, which also tends to hold down their share of the landings.

In Rockland, Maine, Stinson Canning Co., a herring processor, started groundfish operations in 1978. The groundfish processors in Rockland have informed the Commission that they have had difficulty in securing a constant supply of groundfish for their plants. The fishermen in Maine generally receive the Boston prices, but processors often attempt and succeed in paying less than the Boston price if the supply is abundant. Currently, lobster, which is not included in this investigation, is still the most important seafood product in Maine.

The Government of the State of Maine feels that Canadian Government subsidies to Canadian fishermen, as well as State and U.S. Government subsidies to southern New England fishermen has contributed to the problems experienced by the Maine fishing industry. In July 1978, the Maine Department of Transportation wrote in its proposal for an EDA grant that--

Subsidized development of pier and on-shore facilities in major Southern New England fishing ports has also had an impact on the current economic circumstances of Maine's fisheries. Government funding support of the Boston Fish Pier, the Gloucester Pier, and the waterfront facilities in New Bedford and Point Judith (R.I.) has strengthened the relative economic position of the fishing industry in those areas and acted as a necessary catalyst to private initiative in fisheries development. The lack of similar facilities in Maine, backed with funding from the public sector, has contributed substantially to the deterioration of the local fishing industry.

Point Judith, R.I.--All of the 70 fishing vessels in Point Judith are members of a cooperative that was founded in 1947. The cooperative takes title to the fish when landed, and employs two-full time fish salesmen, who attempt to find the best markets for the fish. Currently, only 35 percent of the total landings of the Point Judith fleet are groundfish; the majority of the landings are herring. In 1978, the cooperative joined * * * to form Global Seafoods Inc. Global Seafoods started the production of fish blocks made of whiting in late 1979. The company has recently purchased * * * at a cost of * * *, which have the combined capacity to produce *** to *** pounds of fish blocks per 8-hour shift. According to a study prepared for the NMFS, 1/ existing market conditions indicate that U.S. fish processors could

1/ Earl R. Combs, Inc., Venture Analysis and Feasibility Study Relating to Whiting and Atlantic Mackerel, for the New England Fisheries Development Program and the NMFS Northeast Region, contract No. 03-7-073-35121, December 1977.

produce 6 million pounds of whiting blocks a year at prices competitive with imports. In 1978, total U.S. commercial production of fish blocks, as reported by the U.S. Department of Commerce, amounted to only 2.1 million pounds.

Boston, Mass—In 1961 there were 65 groundfishing vessels in the Boston fleet. However, because of an increase in the number of foreign trawlers harvesting fish off the U.S. coast prior to the enactment of the 200-mile fishing conservation zone, the fleet shrank to 15 larger trawlers having crews averaging 9 to 11 men for the larger boats and 5 to 8 men for the smaller boats. The auction in Boston, according to industry sources, sets the prices for cod and haddock. Unlike the New Bedford auctions, however, the auction price covers all boats landing their fish at Boston that day. There are 25 groundfish processors around the Boston fish pier, a majority of which import whole groundfish and groundfish fillets from Canada in order to meet market demand. The Commission has been informed that many of the Boston processors will enter the auction already committed to a few truck containers of Canadian fillets. The contract price of the Canadian fillets is 2 to 3 cents below the auction price. Furthermore, the processors in Boston, New Bedford, and Gloucester must pay the fishermen within a few hours for the landed fish. Thus, the processors, needing a constant cash flow, borrow the money at the current short-term interest rates. In contrast, the Canadian fillets have 30-day payment terms. Thus, the U.S. processor can sell the fillets before paying for them, avoiding the use of costly short-term borrowed capital.

The Pacific coast

Approximately 300 major fishing vessels land groundfish at ports located on the west coast. The vast majority of these landings are in ports north of San Francisco, Calif. The major west coast fishing ports for groundfish, from south to north, are as follows:

1. San Francisco, Calif—20 boats
2. Bodega Bay, Calif--10 boats
3. Fort Bragg, Calif—20 boats
4. Eureka, Calif--40 boats
5. Crescent City, Calif—20 boats
6. Brookings, Oreg--10 boats
7. Coos Bay, Oreg--20 boats
8. Newport, Oreg--25 boats
9. Astoria, Oreg—30 boats
10. Westport, Wash--15 boats
11. Seattle-Bellingham, Wash--30 boats

All of the vessels enumerated above that are docked in California and Oregon are part of the Fishermen's Marketing Association of Eureka, Eureka, Calif. The Washington boats are part of the Fishermen's Marketing Association of Seattle, Wash., and the Coast Dragger's Association, Westport, Wash. In contrast to New England prices which are determined by auction, all

of the west coast associations negotiate set prices for their groundfish. Thus, the fishermen are assured a specified price for their fish before they leave port, helping to bring a certain stability to the groundfish market. During the spring of 1979, the fish processors in Eureka, Westport, and Seattle put their fishermen on trip limits which meant that the fishermen were unable to utilize the full capacities of their vessels.

These limits were drastically reduced in November 1979, and a few processors ceased buying any groundfish. Processors have had the painful choice of selling their fresh fillets at "distressed prices" or freezing the fillets hoping for an improved market. A number of large processors are reportedly in deep financial trouble. Accordingly, the processors have asked to renegotiate downward the groundfish prices with the respective fishermen's marketing associations. There have been suggestions of a two-tier pricing system--one for fish to be marketed as fresh and one for fish to be marketed as frozen.

A large number of new groundfishing vessels have been built for the west coast fleet in the past few years, and there are numerous additional boats on order. A few of these new boats are more than 100 feet in length, and some have freezing capacities. It is anticipated that the boats will continue to increase in size as the Alaska fisheries are developed. Currently there are six trawl vessels fishing in the Alaska Gulf.

It should be noted the Alaskan crab-fishing fleet is, for the most part, distinctly different from the groundfish fleet. The crab fleet currently consists of approximately 226 boats that, in September of each year, set out for King Crab off the coast of Alaska. After the quota of King Crab is caught (the entire season lasted 5 weeks this year), the crab fleet then fishes for other less desirable species of crab. The petitioners have emphasized that the crab fleet does not, as a general rule, do any commercial groundfishing. A few of the new larger crab boats with certain gear modifications have the ability to catch groundfish. Some of these boats have freezing and processing equipment aboard. However, according to several fishermen, it is still more profitable to fish for crab than for groundfish.

The largest groundfish processors on the west coast are located in Eureka, Astoria, and Bellingham. A number of the fish processors have part interests in groundfish vessels. In contrast to New England fish processors, all west coast processors south of Seattle use only domestically landed groundfish.

Primary groundfish-processing firms

There are approximately 100 "primary" groundfish-processing firms in the United States. Massachusetts has the largest number of firms (45), followed by New York (15), Washington (10), California (8), Oregon (7), Maine (7), and New Jersey (4). Generally, there is one plant for each firm, with a few exceptions in Oregon, California, Maine, and Massachusetts. These firms have several processing plants within their respective geographical areas. All of the processing firms buy the domestically landed groundfish from the fishing

trawlers and then process the fish into fillets, which may be sold as a fresh or frozen product. In some instances, the fillets are further processed into smaller pieces for "fish and chips" or into fish blocks, which are later used for fish sticks and fish sections. The filleting operation entails a considerable amount of hand labor. A few firms have filleting machines, but in the normal processing situation, such machines are not as economical as cutting the fillets by hand. Production varies somewhat from day to day, depending largely on the supply of raw fish. The firms attempt to sell their output in the fresh form as much as possible. However, when they have a surplus that can't be sold fresh, they freeze the fillets or have the fillets frozen for them. Many firms, especially the smaller ones, do not have freezing equipment.

The filleting operations differ within the various ports and firms within each port. Some firms may operate on the basis of almost 40 hours a week; some may work overtime frequently, and others employ their filleting personnel at well below 40 hours a week. Many of the New England plants operate virtually entirely on groundfish, supplementing their production, to a greater or lesser extent, with other items such as swordfish, herring, scallops, or lobsters. Further south—New York and beyond—the processing firms generally are much more dependent upon shellfish and upon fish other than groundfish. Along the west coast, there are a few major firms that operate predominantly on groundfish, but most are diversified heavily into other seafoods such as salmon, halibut, crabs, or shrimp. Groundfish and scallops tend to be year-round operations, whereas the other items are seasonal.

As previously stated (see page A-7), there are currently two primary processing firms that commercially produce groundfish blocks—Stinson Canning Co., Rockland, Maine, and Global Seafoods Inc., Point Judith, R.I. Stinson started its block operation in 1978 by investing over * * * in * * * plate freezers, filleting machines, and skinning machines. * * *. Stinson currently has the capacity to produce approximately * * * pounds of fish blocks a year with one shift a day. * * *. The Stinson plant is currently producing cod and pollock blocks.

Global Seafood, which has * * * plate freezers, started whiting block production in the fall of 1979. Currently, the firm is experiencing * * *. Stinson and Global have a combined production capacity (2 shifts a day, 48 weeks a year) of approximately * * * pounds of groundfish blocks a year. * * *.

Fish block processors

Fish block processors, or "converters" as they call themselves, are a billion dollar industry in the United States: These firms process the fish blocks into fish sticks and portions. The fish blocks are cut to specific sized strips, depending on the product desired, by electric band saws. The frozen strips are then breaded, cooked, refrozen, and packaged. The interiors of the fish strip are not actually cooked until the consumer heats the fish sticks or portions in their ovens at home.

The largest converters of fish blocks are the Gorton Group, Gloucester, Mass.; Mrs. Paul's Kitchens Inc., Philadelphia, Pa.; Van De Kamp's Frozen Foods, Santa Fe Springs, Calif.; Rich-Seapak Corp., St. Simon Island, Ga.; and Cold Water Seafoods Corp., Scarsdale, N.Y. The aforementioned converters use imported frozen fish blocks almost exclusively. The largest consumer of fish portions is McDonald's, which has been estimated by industry sources to consume approximately * * * pounds of fish blocks a year. * * *.

Sources and channels of distribution of imported groundfish

Canada's fish landings, by areas, are estimated at roughly 50 percent by Newfoundland, 30 percent by Nova Scotia, over 10 percent for other Atlantic provinces, and less than 10 percent for British Columbia. The catches of the smaller boats are made in the general vicinity of the home ports. The larger vessels, however, fish in the Gulf of St. Lawrence or off the coasts of Labrador, Newfoundland, Nova Scotia, or New England, depending on the season or the species sought. Groundfish and groundfish products are exported to the United States by truck, including many trucks from Nova Scotia which enter Maine by ferry. Other trucks carrying fish from Canada enter through northern Maine, upstate New York, and Detroit. Canada's west coast groundfish are caught mainly off the coast of British Columbia, though some are caught off the Alaskan coast. Groundfish from northern British Columbia are shipped by rail through Minnesota into Chicago for further distribution. Groundfish from southern British Columbia are shipped by truck into Washington State, much of this groundfish moves further down the coast into Oregon and California. There also are air shipments that go from southern British Columbia to southern California.

Other than Canada, countries fishing for groundfish in the north Atlantic make the vast bulk of their catches near their own shores, now that 200-mile fishing limits have become almost universal. However, sizeable quantities continue to be taken off the east coast of the United States and Canada by fishing boats from Europe, Asia, and Cuba. Most of such groundfish goes back to the home country before further distribution, but some is unloaded at St. Pierre and Miquelon (off Canada) for storage first; originally, this was destined for shipment to the United States, but now it is believed that most goes to the home country. The bulk of the Pacific groundfish are taken off the coast of Alaska, where boats from Asia, Europe, and Mexico operate. Sizeable quantities of groundfish also are taken off the North American coast from California to British Columbia, and off the coast of Asia. Of the major foreign fleets working off the U.S. coast, the U.S.S.R. catches groundfish primarily for its own consumption, while much of the catches of South Korea, Poland, and Japan go to the U.S. market. Most of the catch goes to the home country for further distribution, but the Polish catch is known to be off-landed in Mexico for eventual shipment into the United States. Most imports, whether from the Atlantic fishing grounds or the Pacific, enter through the New England Ports of Boston, Gloucester, and New Bedford. Other ports are significant as well. Philadelphia, for instance, is particularly important for shipments from Iceland, while San Francisco and Los Angeles are significant mainly for shipments from Asian countries. Imports from countries

other than Canada are mainly transported by freighter; there are significant amounts, however, shipped from Europe by air.

Government Regulation of Fisheries

Concern over the depletion and overfishing of fisheries off the U.S. coast led to the enactment of the Fishery Conservation and Management Act of 1976 (FCMA). The FCMA, which was signed on April 13, 1976, and became effective March 1, 1977, established an extended 200-mile fishing conservation zone (FCZ) and provided for exclusive jurisdiction of the United States over this zone under a new fisheries management system.

The FCMA established eight regional councils, whose members consist of industry and Government officials appointed by the Department of Commerce. The officials are charged with the development and administration of a series of fishery management plans (FMP's). The FMP's, each of which deals with a specific species for domestic and foreign fishermen separately within the geographical area managed by the council, attempt to define the level of fishing that will permit the optimum yield from the fishery without depleting the fish stocks. The provisions of the act provide authority for the councils to establish quotas or limit access to the fisheries by combinations of restrictions on the number of fishing vessels and limits to the seasons or zones for fish harvesting. An inherent problem which must be considered by the councils when developing the FMP's is the conflict between the goals of preserving and rebuilding the fish stocks for the future while insuring the current health of the domestic fishing industry. The eight regional councils, which have been in operation since the end of 1976, are listed below:

New England
Mid-Atlantic
South Atlantic
Caribbean
Gulf of Mexico
Western Pacific
Pacific
North Pacific

The Department of Commerce's National Marine Fisheries Service (NMFS) anticipates that approximately 70 FMP's will be developed and implemented; by January 1979, eight plans had been adopted, and six were under review by the Secretary of Commerce. Table 1 indicates the status of FMP preparation, by councils, for those types of fish under investigation.

Under the FCMA, foreign fishermen are not permitted to fish within the fishery conservation zone unless the foreign country has first negotiated a Governing International Fishery Agreement (GIFA) with the United States. Under the terms of this agreement, the foreign country acknowledges the 200-mile FCZ and agrees to abide by the regulations of the United States. To date, GIFA's have been negotiated with Bulgaria, Cuba, the European Economic

Table 1.--Status of Fishery Management Plan (FMP) preparation, by councils,
for those species of fish under investigation

Fishery Council and species	Date plan preparation began	Completion date by council (Draft FMP)	Date FMP to be sent to Washington	Remarks
New England:				
Pollock-----	January 1978	October 1980	1/	
Red fish (ocean perch)-----	January 1978	1/	1/	
Hake (silver)-----	October 1977	December 1980	1/	
Other hake-----	April 1978	1/	1/	
New England groundfish (cod, haddock, and yellowtail flounder)-----	-	-	-	Plan adopted March 1977.
Mid-Atlantic:				
Butterfish-----	December 1977	1/	1/	FMP was disapproved by Secretary of Commerce in April 1979; revised ver- sion submitted in late June 1979.
Bluefish-----	June 1978	1/	1/	
Tilefish-----	December 1978	October 1980	1/	
Other flounders-----	January 1979	1/	1/	
Scup-----	1/	1/	1/	
Sea Basses-----	September 1979	July 1981	1/	
Dog fishes-----	September 1979	January 1982	1/	
American shad, hickory shad, and river herring--	September 1979	June 1982	1/	
Fluke-----	1/	1/	1/	
Summer flounders-----	1/	1/	1/	
Gulf of Mexico:				
Groundfish-----	September 1977	September 1979	December 1979	Final draft plan being prepared.
Western Pacific:				
Bottomfish-----	April 1977	September 1980	April 1981	
Seamount groundfish-----	April 1977	August 1980	June 1981	
Pacific Council:				
Groundfish-----	April 1977	November 1979	October 1980	Council intends to hold public hearings on the draft FMP in December 1979.
North Pacific:				
Bering Sea and Aleutian Island groundfish-----	April 1977	July 1978	April 1979	The FMP is under secretarial review.
Groundfish-Gulf of Alaska--	-	-	-	Plan adopted April 1978.

1/ Not available.

Source: Projected Plan Development Schedule of National Marine Fisheries Service (Oct. 3, 1979).

Community, the German Democratic Republic, Japan, Korea, Mexico, Poland, Romania, Spain, Taiwan, and the U.S.S.R. If foreign fishermen from countries which have negotiated a GIFA file an application to fish in a fishery not regulated by an FMP, a preliminary management plan (PMP) is prepared and implemented by Commerce; PMP's will eventually be replaced by FMP's prepared and administered by the appropriate regional council. The management plans allocate to foreign fishermen that portion of the optimum yield of the fishery that will not be harvested by domestic vessels. As of August 6, 1979, the following PMP's and FMP's for fish under investigation were in effect:

Atlantic PMP's

Hake Fisheries of the Northwestern Atlantic
(42 F.R. 10146, Feb. 18, 1977)

Finfish Caught Incidental to the Foreign Trawl Fisheries
of the Northwestern Atlantic
(42 F.R. 9950, Feb. 17, 1977) 1/

Pacific PMP's

Sablefish Fishery of the Eastern Bering Sea and the
Northwestern Pacific
(42 F.R. 8534, Feb. 10, 1977)

Seamount Groundfish Fishery of the Pacific
(42 F.R. 8568, Feb. 10, 1977) 1/

Trawl Fisheries of Washington, Oregon and California
(42 F.R. 8578, Feb. 10, 1977) 1/

Trawl Fisheries and Herring Gillnet Fishery of the Eastern
Bering Sea and Northwest Pacific
(42 F.R. 9298, Feb. 15, 1977)

FMP's

Atlantic fisheries (groundfish) cod, haddock, yellowtail
flounders
(42 F.R. 13998, Mar. 14, 1977)

Groundfish of the Gulf of Alaska
(43 F.R. 17242, Apr. 21, 1978)

1/ Will still be in effect in 1980.

For species of fish under investigation, table 2 presents the optimum yield for each species, the capacity of U.S. fishing vessels and processing plants to harvest the species, the reserve stock and the total allowable level of foreign fishing (TALFF) in 1978. As shown in table 2, foreign fishermen are restricted to harvesting silver and red hake and butterfish on the northwest Atlantic coast; only incidental catches of other finfish by foreign fishermen were permitted under the regulations contained in the FMP for 1978. Canadian fishermen were allocated a small amount of haddock. On the Washington, Oregon, and California coasts, Pacific whiting is the only species that may be fished for by foreign vessels; incidental catches of other species of groundfish are allowed. Although several other species besides whiting are considered to be underutilized on the Pacific coast, no TALFF has been set for them because of the nature of trawl fishing. Trawl fishing, which is the predominant gear used to commercially harvest groundfish on the Pacific coast, results in large bycatches of all other species in addition to the target species. Because the underutilized species are largely intermingled with stocks such as Pacific sole, lingcod, and several species of rockfishes which are fully utilized, foreign catches of the underutilized species are not permitted. Pacific whiting can be harvested by midwater trawls without a large incidental catch of other species. From the Gulf of Alaska and the Bering Sea (including the Aleutian Island area) all species of groundfish may be harvested by foreign vessels until the TALFF is reached. In the Bering Sea and Aleutian Island area, the 1978 breakouts contained in the PMP show that U.S. fishermen and processors have no capacity to harvest, process, or market Alaska pollock, flounders, Pacific ocean perch, sablefish, Pacific cod, or other finfish.

Current conservation quotas of cod, haddock, and flounder in the northwest Atlantic (off the New England coast) have become a severe problem for New England fishermen. Many of the fishermen have claimed that without the quotas, they would be able to catch the necessary volume of fish to become profitable operations.

U.S.-Canadian Fishery Agreements

Atlantic coast of the United States

The harvesting of fish off the northeastern United States was, until January 1, 1977, regulated under the terms of the International Commission for the Northeast Atlantic Fisheries (ICNAF) which was entered into by 18 nations, among which were Canada and the United States. On December 31, 1976, the United States withdrew from ICNAF after it negotiated the FCMA. In January 1977, Canada also established a 200-mile offshore fishing zone; until 1977, neither the United States nor Canada claimed any jurisdiction over fishing beyond 12 miles from the coast. However, when the United States and Canada calculated the 200-mile limits for the New Brunswick and Nova Scotian coastlines and the New England coastline, the boundaries intersected. Included in the disputed zone is the Georges Bank, one of the most lucrative fishing grounds in the Atlantic.

Table 2.--Optimum yield, U.S. capacity, reserve, stock and TALFF,
by areas and by species, 1978

(In metric tons, round weight)

Area and species	: Optimum : yield	: U.S. : capacity	: Reserve:	: TALFF
Northwest Atlantic:	:	:	:	:
Cod-----	1/ 28,000	56,000	-	2/ 3,000
Haddock-----	1/ 18,000	40,000	-	3/ 3,100
Yellowtail flounder-----	3/ 8,100	40,000	-	0
Silver hake-----	97,000	46,600	0	50,400
Red hake-----	36,500	9,100	0	27,400
Butterfish-----	18,000	14,000	0	4,000
Other finfish-----	247,000	200,200	0	2/ 46,800
Washington, Oregon, and California:	:	:	:	:
Pacific whiting-----	130,000	10,000	0	120,000
Flounders-----	31,000	30,880	0	2/ 120
Rockfish (including Pacific ocean perch)-----	19,960	19,000	0	2/ 960
Sablefish (black cod)-----	7,000	6,879	0	2/ 121
Other-----	4,200	3,600	0	2/ 600
Seamount Groundfish Fishery of the Pacific-----	2,000	0	0	2,000
Gulf of Alaska:	:	:	:	:
Alaska pollock-----	168,800	17,700	0	151,100
Flounders-----	33,500	9,200	0	24,300
Pacific ocean perch-----	25,000	1,100	0	23,900
Other rockfishes (except Pacific ocean perch)-----	7,600	2,000	0	5,600
Sablefish (black cod)-----	15,000	4,000	800	10,200
Pacific cod-----	40,600	15,500	0	25,100
Other finfish-----	16,200	0	500	15,700
Bering Sea and Aleutian Island area:	:	:	:	:
Alaska pollock-----	950,000	0	0	950,000
Yellowfin sole-----	126,000	0	20,000	106,000
Other flounders-----	159,000	0	0	159,000
Pacific ocean perch-----	21,500	0	0	21,500
Sablefish (black cod)-----	4,500	0	100	4,400
Pacific cod-----	70,500	0	500	70,000
Other finfish-----	100,600	0	0	100,600

1/ Commercial harvesting only; does not include recreational fishing.

2/ Incidental catch only.

3/ Allocation for Canada only.

Source: U.S. Department of State, Office of Fisheries Affairs.

During 1977 an interim fishing agreement allowed for reciprocal United States and Canadian fishing rights within the newly established 200-mile fishing zones while the Governments were negotiating the status of the disputed area. Since June 1978, when this agreement expired, Canada has banned American fishermen from its Atlantic waters, and the United States has similarly prohibited Canadian fishermen from fishing in its zone. Both nations have continued to fish in the disputed area.

On March 29, 1979, two agreements were signed by the United States and Canada; on May 3, 1979, the agreements were submitted to the Senate for ratification. One agreement provides for binding arbitration by the International Court of Justice over the maritime boundary; the other agreement establishes management responsibilities and share entitlements for each species. Reciprocal fishing rights are also restored. Under the terms of the fisheries agreement, the United States receives primary management responsibility for the important groundfish stocks of the Georges Bank. The United States and Canadian entitlement shares are 83 and 17 percent, respectively, for cod; and 79 and 21 percent, respectively, for haddock. ^{1/} The joint management of some stocks (e.g., pollock) is given to the U.S./Canadian East Coast Fisheries Commission, which is to be established.

The terms of the agreements differ in some respects from the system established for the treatment of "foreign" nations under the Fishery Conservation and Management Act of 1976. However, it is expected that the positions that will be adopted by the United States in the U.S./Canadian Fishery Commission, which will also monitor the agreement, will be based on the FMP's developed by the regional councils.

Pacific coast of the United States

Prior to the enactment of the FCMA, reciprocal fishing by U.S. and Canadian groundfish vessels was permitted by an executive agreement. From 1965 through 1974 it is estimated that an average of 75 percent of the total catch of Washington groundfish vessels was harvested from Canadian waters. Reciprocal fishing rights were continued in 1977 under an amendment to the FCMA, but were temporarily withdrawn in 1978. The present United States-Canadian agreement permits the United States to primarily harvest rockfish in the Canadian fishery zone until 1981, when the zone will be closed to U.S. fishermen. The temporary 1978 closure of Canadian waters to U.S. fishermen resulted in a southern movement of the groundfish fleet into the waters which extend from northern Washington to central Oregon. It is projected that a similar shift will occur when the Canadian grounds are again closed to U.S. fishermen in 1981. Currently, the major Pacific cod fisheries are in the Canadian zone. The inability to harvest Pacific cod has forced the U.S. fishermen to seek other species of groundfish, which may hurt their ability to alternate species in response to changes in the market.

^{1/} Entitlement shares are subject to revision every 10 years; the total amount to be harvested is determined on an annual basis by the country having primary management responsibility for that species.

Canadian-United States Dollar Exchange Rates

Between 1973 and 1976 the U.S. dollar could buy between 0.98 to 1.02 Canadian dollars. From January-March 1977 to January-March 1979, the value of the dollar steadily increased when compared with the Canadian dollar. By January-March 1979, the U.S. dollar could buy 1.19 Canadian dollars, representing an increase in the value of the U.S. dollar of 16 percent since January-March 1977. Since February 1979, the value of the U.S. dollar declined irregularly from 1.20 to 1.17 in August 1979. The overall decline in the value of the Canadian dollar since early 1977 has probably tended to make Canadian groundfish products more competitive in the U.S. market than they were in earlier periods.

Government Benefits Available to U.S. Fishermen

In connection with the fishing industry, it is of interest to note that a number of Government-sponsored benefits are available. Those benefits for which all U.S. fishermen are eligible include:

1. The Fishing Vessel Obligation Guarantee Program.—Provides financing up to 87-1/2 percent of the cost of constructing, reconstructing or reconditioning fishing vessels. Generally, interest rates to purchase a \$350,000 vessel in this program are 2 percent less than commercially available rates. In 1978, \$74.9 million in guaranteed loans were approved; in 1979 that amount is expected to double;
2. The Fishing Vessel Capital Construction Fund Program.—A tax deferral program under which fishing vessel owners deposit operational income into the Fund to accrue capital to offset the cost of constructing, reconstructing, or reconditioning fishing vessels. Since the program began, a total of 1,530 fishing vessel owners have entered the program; 421 entered in 1978;
3. The Fishermen's Guaranty Fund Program.—Provides insurance for U.S. vessels that fish off foreign coasts. In 1978, 171 U.S. vessels were insured and 13 seizure claims were filed; none of the claims were for vessels harvesting groundfish;
4. The Fishing Vessel and Gear Damage Compensation Fund Program.—Reimburses fishermen for any damage to their vessels which was caused by a foreign vessel operating within 200 miles of the United States coast. In addition, the program provides direct compensation to fishermen whose fishing gear is lost or damaged by foreign or domestic vessels or natural causes;
5. The Fishermen's Contingency Fund.—Reimburses fishermen for damage to vessels and gear or economic loss resulting from oil and gas operations on the Outer Continental Shelf;

6. Free medical care is offered to fishermen by the U.S. Public Health Service; and
7. Foreign fishing vessels are prohibited from landing fish in U.S. ports.

The Fishing Vessel Obligation Guarantee Program has been one of the prime causes for the modernization and expansion of the U.S. groundfishing fleet. In 1979 alone, 95 new vessels were added to the Pacific fleet. Several fishermen's associations have expressed fears of overexpansion of the fishing fleet before the market is ready to accept the increased landings of fish. According to a few industry sources, there is a correlation between the expansion of the Pacific fleet and the current trip limits imposed by processors on the Pacific coast.

Worker Adjustment Assistance

In 1978, the Department of Labor reviewed petitions by fishermen and former fishermen of 28 New England groundfish vessels for certification of eligibility to apply for worker adjustment assistance as prescribed in section 222 of the Trade Act of 1974. No petitions were filed on behalf of fishermen harvesting fish off the mid- or southern-Atlantic, Gulf, or Pacific coasts. The crews of seven of these vessels, all operating from Provincetown, Mass., were granted eligibility to apply for adjustment assistance because Labor determined that imports from Canada contributed importantly to declines in sales for the vessels and to the unemployment and underemployment of the crews. The crews of six of the vessels fished primarily for cod. The remaining crew also harvested scallops, a species of shellfish not under consideration in this investigation. Of the 21 vessels denied eligibility, 20 fished for groundfish and 1 fished for groundfish and scallops.

Two petitions for worker adjustment assistance were reviewed by the Department of Labor through the end of the third quarter of 1979. One petition was filed on behalf of fishermen harvesting groundfish in New England; the other was filed on behalf of employees of a firm in New Jersey that is primarily engaged in the wholesaling and distribution of fresh and frozen fish. Fish fillets accounted for an insignificant percentage of the firm's sales. The workers in both petitions were denied eligibility to apply for assistance.

The Question of Serious Injury to the Domestic Industry

U.S. landings of groundfish

U.S. landings of groundfish decreased from 421 million pounds in 1973 to 395 million pounds in 1974. However, total landings of groundfish then increased each subsequent year (see table 3), from 424 million pounds in 1975 to 576 million pounds in 1978, or by 36 percent. During January-September

Table 3.--Groundfish: U.S. commercial landings of groundfish, by species, 1973-78, January-July 1978, and January-July 1979

Species	1973	1974	1975	1976	1977	1978	January-September--	
							1978	1979 <u>1/</u>
Quantity (1,000 pounds)								
Cod (Atlantic and Pacific)-----	59,562	67,774	67,723	67,789	86,481	97,447	76,294	82,464
Flounder and flatfish-----	162,581	155,911	156,324	164,682	169,603	180,720	118,372	120,080
Cusk, haddock, hake, and pollock---	37,835	43,128	54,319	57,053	79,002	108,837	70,022	71,597
Lingcod-----	9,378	8,885	9,177	7,484	7,545	6,588	5,500	6,000
Ocean perch (Atlantic and Pacific)-----	58,838	43,703	39,166	37,797	40,723	40,969	33,356	31,267
Rockfish-----	35,419	29,932	34,897	39,683	43,512	59,409	52,000	51,000
Sablefish (black cod)-----	13,366	15,689	19,278	17,406	25,376	29,188	22,000	28,000
Wolf fish-----	660	875	793	1,048	997	1,447	1,275	1,380
Whiting (Atlantic)-----	43,671	29,492	42,425	47,666	45,316	51,074	50,600	50,157
Total-----	421,310	395,389	424,102	440,608	498,555	575,679	429,419	441,945
Value (1,000 dollars)								
Cod (Atlantic and Pacific)-----	9,686	11,969	14,446	15,877	18,876	23,774	<u>3/</u>	<u>3/</u>
Flounder and flatfish-----	31,268	34,129	43,233	52,007	59,477	72,762	<u>3/</u>	<u>3/</u>
Cusk, haddock, hake, and pollock---	5,881	6,437	9,277	10,976	15,682	22,507	<u>3/</u>	<u>3/</u>
Lingcod-----	875	1,264	1,185	1,280	1,252	1,450	<u>3/</u>	<u>3/</u>
Ocean perch (Atlantic and Pacific)-----	4,638	3,567	4,028	5,114	6,136	7,096	<u>3/</u>	<u>3/</u>
Rockfish-----	3,451	5,262	5,544	5,360	7,462	12,760	<u>3/</u>	<u>3/</u>
Sablefish (black cod)-----	1,400	2,131	2,615	3,151	4,747	8,337	<u>3/</u>	<u>3/</u>
Wolf fish-----	41	62	63	99	88	162	<u>3/</u>	<u>3/</u>
Whiting (Atlantic)-----	3,394	2,487	3,740	3,973	4,224	7,188	<u>3/</u>	<u>3/</u>
Total-----	60,634	67,308	84,131	97,837	117,944	156,036	<u>3/</u>	<u>3/</u>

1/ West coast portion is estimated.

2/ Does not include west coast landings.

3/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce, National Marine Fisheries Service.

1979, U.S. landings of groundfish were higher than those in the corresponding period of 1978.

As shown in table 3, flounder was the primary groundfish caught by the U.S. fishing fleet in 1973, accounting for 39 percent of total U.S. landings of groundfish that year. However, the flounder landings stagnated from 1973 through 1978, and in 1978, flounder only accounted for 31 percent of total U.S. landings. Cod landings increased dramatically after the 200-mile limit was instituted in 1977—from 68 million pounds per year during 1974-1976 to 97 million pounds in 1978, or an increase of 43 percent. It should be noted that the entire increase in cod landings is due to landings of that species in New England. Pacific cod landings have remained basically stagnant from 1973 through 1978. Other species that have experienced increased landings are haddock, hake, and pollock, as shown in the following tabulation:

(1,000 pounds, landed weight)									
Species	1973	1974	1975	1976	1977	1978	January-July--		
							1978	1979	
Haddock--	8,310	8,225	16,221	12,797	28,553	39,054	31,684	32,362	
Hake-----	8,207	11,029	11,203	14,087	14,903	15,180	9,419	9,503	
Pollock--	14,854	19,652	20,976	24,304	29,091	37,840	23,310	22,133	

U.S. landings of groundfish on the Atlantic coast have increased irregularly from 295 million pounds in 1973 to 381 million pounds in 1978, or by 38 percent. On the Pacific coast, U.S. landings of groundfish increased from 134 million pounds in 1973 to 185 million pounds in 1978, representing an increase of 38 percent (tables 4 and 5). Both the Atlantic and Pacific coast landings increased in January-September 1979 over landings during the corresponding period of 1978.

The only Pacific ocean groundfish that is limited by a conservation quota in landings (currently only in effect in Oregon and Washington) is Pacific ocean perch. On the Atlantic coast, cod, haddock, and flounder have Federal conservation restrictions on the amount U.S. fishermen are allowed to catch.

Domestic harvesting and processing capacity of Atlantic coast groundfish

The New England groundfish fleet. 1/--The groundfish fleet is the most important of the east coast commercial fleets in number of vessels and

1/ This section is largely based on a report by the Comptroller General of the United States, The Fishery Conservation and Management Act's Impact on Selected Fisheries, April 1979.

Table 4.--Groundfish: U.S. commercial landings of Atlantic groundfish, by species, 1973-78, January-July 1978, and January-July 1979

Species	1973	1974	1975	1976	1977	1978	January-September--	
							1978	1979 <u>1/</u>
	Quantity (1,000 pounds)							
Cod-----	50,420	58,655	56,134	56,030	76,901	83,356	65,894	73,464
Flatfish-----	113,907	107,975	105,082	107,833	117,114	114,954	68,372	69,090
Cusk, haddock, hake, and pollock---	34,227	41,737	51,457	53,488	74,515	94,701	66,422	66,197
Ocean perch-----	53,677	41,487	32,064	32,144	35,023	35,562	29,356	27,267
Wolf fish-----	660	875	805	1,047	967	1,398	1,275	1,380
Whiting-----	42,514	29,513	42,315	47,685	45,315	50,884	50,600	50,157
Total-----	295,405	280,242	287,857	298,227	349,835	380,855	281,919	287,555
Value (1,000 dollars)								
Cod-----	9,045	11,306	13,214	14,626	17,341	20,734	15,589	20,169
Flatfish-----	26,587	27,690	35,710	42,090	49,780	58,042	32,955	33,020
Cusk, haddock, hake, and pollock---	5,899	6,418	9,632	10,860	15,622	21,638	15,480	19,224
Ocean perch-----	4,132	3,348	3,305	4,396	5,357	6,088	4,951	5,692
Wolf fish-----	41	62	66	99	86	154	135	196
Whiting-----	3,384	2,488	3,728	3,981	4,224	7,167	7,101	6,530
Total-----	49,088	51,312	65,655	76,052	92,410	113,823	76,211	84,831

Source: Compiled from official statistics of the U.S. Department of Commerce, National Marine Fisheries Service.

Table 5.—Groundfish: U.S. commercial landings of Pacific groundfish, by species, 1973-78, January-July, 1978, and January-July 1979

Species	1973	1974	1975	1976	1977	1978	January-September--	
							1978 1/	1979 1/
							Quantity (1,000 pounds)	
Cod-----	8,419	10,014	12,238	12,940	10,948	10,710	10,400	9,000
Flatfish-----	55,010	54,769	56,808	62,001	52,472	62,810	50,000	51,090
Pollock-----	109	126	46	504	712	3,892	3,600	5,400
Lingcod-----	8,378	8,884	9,178	7,833	7,545	6,588	5,500	6,000
Ocean perch-----	6,428	6,233	3,896	5,358	5,695	5,391	4,000	4,000
Rockfish-----	40,202	35,229	34,958	44,271	43,512	59,409	52,000	51,000
Sablefish (black cod)-----	12,366	15,633	19,378	17,587	25,376	29,188	22,000	28,000
Whiting 2/-----	2,595	5,265	3,398	4,240	3,600	7,267	7,500	11,000
Total-----	133,507	136,153	139,900	154,734	149,860	185,255	155,000	165,490
Value (1,000 dollars)								
Cod-----	784	1,259	1,389	1,724	1,781	2,258	3/	3/
Flatfish-----	6,487	8,145	8,659	10,315	9,685	13,384	3/	3/
Pollock-----	8	8	4	89	57	220	3/	3/
Lingcod-----	875	1,264	1,185	1,094	1,252	1,450	3/	3/
Ocean perch-----	550	651	401	632	781	1,003	3/	3/
Rockfish-----	3,689	4,361	4,415	6,254	7,462	12,760	3/	3/
Sablefish (black cod)-----	1,400	2,615	2,615	2,103	4,747	8,337	3/	3/
Whiting 2/-----	43	107	50	77	70	188	3/	3/
Total-----	13,836	18,410	18,718	22,288	25,835	39,600	3/	3/

1/ Estimate.

2/ Includes joint ventures. In recent years, much of the whiting was landed on foreign ships rather than on U.S. shores.

3/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce, National Marine Fisheries Service.

fishermen. According to the National Marine Fisheries Service (NMFS), over 75 percent of the value of the fish under investigation are harvested by otter trawl. The following tabulation shows that the number of vessels using otter trawl, as the principal gear in New England increased unevenly from 552 vessels in 1974 to 605 vessels in 1979.

<u>Vessels in the New England Otter Trawl Fleet over 5 tons</u>	
1974-----	552
1975-----	557
1976-----	565
1977-----	558
1978-----	575
1979 (estimated)-----	605

Among the new entries into the fleet are 45 vessels that were or are in the process of being built with Federal financial assistance. The majority of these vessels are modern trawlers with steel hulls. In 1980, it is estimated that an additional 15 new vessels will enter the New England groundfish fleet. According to the NMFS, numerous smaller vessels, such as shrimp trawlers, engage in groundfish fishery for at least part of the year. Because of their small size and storage capacity, these vessels are not believed to account for a large portion of the landings.

Processing plants. 1/--Available data indicates that the capacity of plants to process groundfish has increased since the passage of the FCMA. Table 6 shows that the number of plants processing cod, haddock, and flounder into fillets and blocks increased by 35 percent from 1973 to 1977. There were also sharp increases in the quantity and value of cod, haddock, and flounder fillets and blocks processed from 1973 to 1977.

Table 6.--New England plants processing cod, haddock, and flounder fillets and blocks, 1973 and 1977

Item	1973	1977
Number of plants-----	49	1/ 66
Quantity-----millions of pounds--	45.8	2/ 61.3
Value-----millions of dollars--	47.4	3/ 88.4

1/ 35-percent increase over 1973 figure.

2/ 34-percent increase over 1973 figure.

3/ 86-percent increase over 1973 figure.

Source: National Marine Fisheries Service, as reported in The Fishery Conservation and Management Act's Impact on Selected Fisheries, April 1979.

1/ This section is largely based on a report by the Controller General of the United States, The Fishery Conservation and Management Act's Impact on Selected Fisheries, April 1979.

Furthermore, there was a 12-percent increase in the number of plants and a 30-percent increase in the quantity of cod, haddock, and flounder processed from 1976 (the year before the FCMA took effect) to 1977.

Impact of the FCMA.--The New England groundfish FMP provides for the establishment of commercial quotas which restrict the amount of cod, haddock, and yellowtail flounder that can be harvested by U.S. fishermen. Although the quotas are intended to prevent overfishing, the quotas have been raised several times since they were instituted to prevent prolonged closure of the fishing grounds. Since the act, domestic landings of cod and haddock have increased; foreign fishing and total groundfish landings have decreased. The amounts of underutilized species harvested by both domestic and foreign fishermen decreased sharply from 411.6 million pounds in 1975 to 253.1 million pounds in 1977. Although domestic catches of underutilized species increased by 30 million pounds during this period, the increase in domestic effort did not compensate for the reduction in foreign fishing of underutilized species following the FCMA. According to the report of the Comptroller General, U.S. fishermen continue to concentrate their fishing efforts on cod and haddock because of established markets and higher prices.

The placement of quotas on the traditional groundfish species has met with resistance from U.S. fishermen. Most New England fishermen and processors contacted by the Commission have questioned the validity of the biological assessments of the fish stock sizes upon which the quotas are based. Industry sources have noted that, on one hand, capital investment was spurred with the passing of the FCMA, while low quotas restrict the size of the catch. Several fishermen have estimated that as much as 50 percent of the catches are discarded by fishermen on a regular basis. Other fishermen claim that fish caught above the quota are landed and sold as other species of groundfish. Processors interviewed by the Commission also objected to the disruption of their operations caused by the closures of the fishing grounds when quotas are exceeded. Canadian imports were cited as a means of insuring a constant supply of deliveries of groundfish to the processing plants.

Groundfish of the Pacific coast

Groundfish other than Pacific whiting and other underutilized species. 1/--In the draft Pacific coast groundfish management plan issued October 18, 1979, it is estimated that domestic harvests of groundfish, other than whiting and short-belly rockfish, will increase by 25 percent in 1979 over the amount harvested in 1978. This projection is based on the assumption that (1) there are adequate stock levels and (2) the catches can be successfully marketed. The increase in the domestic harvest is attributed to such factors as:

- (1) The shifting of many U.S. groundfish vessels south from Canadian fishing grounds to U.S. waters;

- (2) The entry of large numbers of vessels from other fisheries due to the closure of those fisheries once quotas are reached (e.g., shrimp trawlers and crab vessels can harvest groundfish with only minor gear modifications);
- (3) Technological changes (e.g., better electronic devices for locating fish and for navigation; higher rising rockfish nets);
- (4) Development of new or previously untrawled fishing grounds;
- (5) Increases in the average size of vessels (e.g., many new large multipurpose vessels are being built which have the capability to trawl for groundfish); and
- (6) Increases in fleet size.

According to industry sources, most Pacific coast and Gulf of Mexico boat yards are operating at full capacity. It is estimated for 1979 by the industry ^{1/} that 1,300 new commercial fishing vessels will enter the west coast fisheries (including Alaska); 125 or 9.6 percent of these will primarily trawl for groundfish. Table 7 presents data on the groundfish fleet (for all groundfish species), by states, in 1976-1977 and lists estimates for the number of new vessels that will enter the fishery in 1979.

Table 7.--Groundfish fleet size, age, and capacity,
1976-77, and new vessels, by states, 1979

State	1976-1977				1979 new vessels	Percent increase
	Number vessels	Average age	Average capacity: Pounds	Range in capacity Pounds		
California-----	126	28	35,000	6,500-164,124	40	28
Oregon-----	79	^{1/}	33,065	275,000-113,123	30	38
Washington-----	75	^{1/}	80,000	12,000-320,000	25	33
Total-----	280	-	-	-	95	34

^{1/} Not available.

Source: 1976-1977 data from Draft Pacific Coast Groundfish Plan, prepared by Pacific Fishery Management Council, October 1979. Data for 1979 compiled from a survey of boatyards which was commissioned by the National Marine Fisheries Service.

Note.--Some of the vessels have the capacity to harvest species other than groundfish.

^{1/} This section is largely based on a report by the Pacific Fishery Management Council, Draft Pacific Coast Groundfish Plan, October 1979.

Pacific whiting and other underutilized species. 1/--The implementation of the FMP for Pacific groundfish has a potential national economic impact on the productivity, marketing, and pricing of whiting. Of those groundfish species regulated under the FMP, only Pacific whiting (with the possible inclusion of several other underutilized species) is available in stocks of sufficient size that their development could impact on national markets. In the draft FMP for Pacific groundfish, it is projected that Pacific whiting could displace up to 15 percent of the expected 1987 level of imports of frozen groundfish blocks of various species. However, it is noted that such expansion of the domestic whiting catch is unlikely to take place owing to present market price conditions and quality problems with the U.S. product.

The establishment of joint ventures in which U.S. fishermen deliver underutilized species to foreign processing vessels provides U.S. fishermen with an additional outlet for processing and marketing Pacific whiting. Processing at sea often results in a higher quality product and is currently less expensive than icing, brining, or refrigerating the fish for delivery to shore based processors. Eastern Europe and the Soviet Union are the primary markets for headed and gutted and filleted whiting.

In 1977, a U.S.-U.S.S.R. joint venture was instituted to harvest, process, and market Pacific whiting. Operations have continued through 1979. The present level of domestic harvesting through joint ventures requires fishing efforts by only 10 U.S. vessels. By 1983, it is anticipated that 30 vessels will be employed in harvesting groundfish in joint ventures.

Processing plants. 2/--In 1976, approximately 75 plants processed groundfish on the Pacific coast; 15 of these handled industrial, nonfood production or were engaged in the processing of food items purchased from sources other than fishermen. Currently, the processing of groundfish is handled by 90 plants on the west coast. The majority of these plants also process other species; space that is used to process one species may be easily converted to process another type of fish. Most plants are currently operating using only one work shift. Experiments have indicated, however, that capacity could be easily increased by adding a second work shift.

Impact of the FCMA.--According to industry sources, until 1977, increases in the production of groundfish expanded in conjunction with the ability of processors and brokers to market the product. In anticipation of the establishment of the 200-mile zone in 1976, the U.S. groundfish fleet on the Pacific coast began to increase both the number and capacity of vessels to harvest groundfish. Although Government assistance to fishermen, as described on pages A-23 and A-24 encouraged the development of harvesting capacity,

1/ This section is largely based on a report by the Pacific Fishery Management Council, Draft Pacific Coast Groundfish Plan, October 1979.

2/ This section is largely based on a report by the Pacific Fishery Management Council, Draft Pacific Coast Groundfish Plan, October 1979.

processors 1/ have indicated that because comparable assistance has not been available to them, they have been unable to utilize more efficient processing techniques or (for the smaller firms) to develop better merchandising methods. One of the major goals of the FCMA is to encourage the development of such underutilized species as whiting. However, given the current market situation for most groundfish species, domestic processors are reluctant to accept deliveries of whiting and resist investing in factory ships or chilled-water technology, which would permit more efficient processing and lead to a better quality product. It is of great concern to fishermen that if the U.S. groundfish industry cannot demonstrate the capacity to market domestic harvests, increasing portions of the optimum yield will be allocated to foreign fishermen under the terms of the FCMA of 1976.

Groundfish of the Gulf of Alaska 2/

It is difficult to determine the capacity of domestic fishermen to harvest groundfish in the Gulf of Alaska region. Foreign trawlers have traditionally harvested the largest share of groundfish from the Gulf of Alaska; most domestic groundfish landings are either incidental to the harvesting of other species or are taken by fishermen after the seasons for more profitable species close. Sablefish, which in 1978 accounted for over one-half of the value and over 30 percent of the quantity of groundfish landed, is primarily harvested by halibut fishermen using long-lines (rather than trawls) after the close of the halibut season in the early fall. The harvesting of pollock, Pacific cod, and various flounder for use as bait in the crab industry is pursued mainly by shrimp fishermen in the Kodiak region when prices for bait are high. Few Alaskan vessels target exclusively on groundfish. A fishery for flounder and pollock in the Southeastern Alaskan region did not begin until 1976 when three boats began trawling for pollock in the winter and for flounder during the spring.

The North Pacific Council estimated that with the creation of the fishery management zone, an increasing percent of the landings will be harvested by domestic rather than foreign vessels if the catches can be successfully marketed. The following tabulation lists the number of commercial vessels which harvest sablefish in the southeast region of the Gulf of Alaska, an area which accounts for over 90 percent of the annual harvest of sablefish in Alaska:

1/ The processors interviewed by the Commission are small independent processors whose views, as represented here, may differ significantly from larger processors who import significant quantities of frozen fish.

2/ This section is largely based on a report by the North Pacific Fishery Management Council, Groundfish of the Gulf of Alaska, April 1978.

Vessels harvesting sablefish
in the Southeastern region
of the Gulf of Alaska

1976-----	43
1977-----	46
1978-----	53
1979-----	78

Industry officials estimate that another five or six vessels fished exclusively for other species of groundfish in the southeastern region in both 1978 and 1979. In the western fishing grounds (including the Kodiak and Dutch Harbor waters), 64 vessels landed groundfish in 1978; in 1979 the number of vessels decreased to 41. However, in both 1978 and 1979, only 10 or 15 of these vessels are believed to have been targeted primarily on groundfish species.

As indicated in table 2, U.S. vessels do not presently have the capacity to harvest and market more than a small percentage of what is defined as the optimum yield for each groundfish species in the Gulf of Alaska fishery. In an effort to determine the domestic annual capacity of U.S. fishermen and processors to harvest groundfish in the Gulf of Alaska, representatives of 16 processing plants were interviewed in conjunction with the preparation of the fishery management plan for the Gulf of Alaska. Since it is estimated that most of the additional capacity to harvest groundfish could come from existing crab and shrimp fleets, the measures developed for the FMP were based on an analysis of vessels presently utilized in the Alaskan shellfish industry. Also, declining quotas in the halibut industry could stimulate increases in groundfishing by halibut fishermen if market conditions warrant. It is stated in the Gulf of Alaska FMP that:

Estimates of the domestic capacity to physically take and process Gulf of Alaska groundfish indicate that a capacity exists to account for a substantial portion of the total Gulf OY. However, due to market conditions, among other things, the relationship between the total domestic capacity to catch, process and hold groundfish has little relationship to the expected harvest and processing by the domestic industry of a number of groundfish species in the Gulf of Alaska during 1978. 1/

1/ North Pacific Fishery Management, Groundfish of the Gulf of Alaska, (43 F.R. 17312, Apr. 21, 1978).

Furthermore, while most of the processors indicated that they would support the development of a domestic fishery for groundfish in the Gulf of Alaska, it was felt that such development was not economically feasible because of market conditions. Eight companies did indicate that plans to expand capacity and processing techniques in 1978 were being considered.

Financial experience for U.S. fishermen

In the past two countervailing duty investigations (303-TA-3 and 303-TA-9) the Commission mailed numerous questionnaires to fishermen, but received few responses from them, and received no responses to the profit-and-loss sections of the questionnaires for them. In order to alleviate past problems in securing financial information, the Commission's staff, with the help of the domestic industry, devised a financial questionnaire format that was compatible with current accounting practices of domestic fishermen. Approximately 700 questionnaires were sent out to U.S. fishermen on both the Atlantic and Pacific coasts. At the public hearing, 1/ the petitioners (U.S. fishermen) were reminded of the Commission's need for adequate financial information in making the determination in this investigation. 1/ In addition, the Commission's staff made concerted efforts by telephone and field visits to obtain adequate questionnaire responses. However, as of January 3, 1980, the Commission had received only 13 completed questionnaires. The majority of these questionnaires are from the Coast Draggers Association, Westport, Wash., the copetitioner, in this investigation. The 13 questionnaires represent a majority of the boats in the Coast Draggers fleet, but only 22 percent of the quantity of domestic landings in the State of Washington, 7.2 percent of total west coast landings, and 2.3 percent of the quantity of domestic landings in the United States as a whole.

The aggregate net operating profit for the six groundfishing vessels that reported profit-and-loss data for the entire January 1975-September 1979 period increased each year from \$86,000 in 1975 to \$377,000 in 1978. However, in January-September 1979, net aggregate profit was sharply down to \$169,000 from \$298,000 in the corresponding period of 1978. Among the chief reasons for the sharp decline in aggregate net operating profit has been the limits the west coast processors have put on their supplying fishing vessels. In January-September 1979, the six reporting vessels landed 342,000 pounds less than in the corresponding period of 1978 (table 8). Other reasons for the decline in profitability in 1979 were a 41-percent increase in fuel costs, a 16-percent increase in ice costs, and a 50-percent increase in food costs. As could be expected, crew shares are down 63 percent from the corresponding period of 1978.

The ratio of net operating profit to sales for the six reporting vessels increased from 14 percent in 1975 to 22.1 percent in 1978, as shown in the following tabulation. However, the ratio declined during January-September 1979 to 20.6 percent from 22.7 percent during January-September 1978.

1/ Transcript of the hearing, p. 74-75.

Table 8.—Aggregate profit-and-loss experience of six fishermen from Westport, Washington on all their groundfish operations, 1975-78, January-September 1978-79

Line no.	Item	Groundfish operations					
		1975	1976	1977	1978	January-September--	
						1978	1979
	Gross stock (gross sales):						
1	Pounds------(1,000 pounds)---1/	2,761	3,035	3,537	3,578	2,529	2,187
2	Dollars------(1,000 dollars)---	610	822	1,157	1,704	1,311	818
	Trip expense:						
3	Fuel-----do-----	19	67	80	72	56	79
4	Ice-----do-----	4	7	7	8	6	7
5	Groceries-----do-----	8	16	18	17	14	21
6	Association assessment and weighers-----do-----	-	1	1	1	1	3
7	Total trip expense (lines 3-6)-----do-----	31	91	106	98	77	110
8	Adjusted gross stock (line 2 less line 7)-----do-----	579	731	1,051	1,606	1,234	708
	Operating expenses:						
9	Crew shares-----do-----	211	283	480	608	464	170
10	Captains share-----do-----	-	-	-	-	-	36
11	Gear, nets, and supplies-----do-----	35	34	46	57	45	33
12	Insurance-----do-----	38	41	53	57	41	27
13	Vessel repair and maintenance-----do-----	14	74	134	164	124	57
14	Taxes and lincenses (other than Federal income tax)-----do-----	13	14	9	23	19	13
15	Depreciation-----do-----	102	97	94	98	75	76
16	Professional services-----do-----	4	3	5	6	5	10
17	Other-----do-----	76	63	61	216	163	117
18	Total operating expenses (lines 9-17)-----do-----	493	609	882	1,229	936	539
19	Net operating profit (line 8 less line 18)-----do-----	86	122	169	377	298	169

1/ Includes the estimated gross stock for one of six reporting companies.

Source: Compiled from data received in response to questionnaires of the U.S. International Trade Commission.

Ratio of net operating profit to sales

<u>Year</u>	<u>Percent</u>
1975-----	14.0
1976-----	14.8
1977-----	14.6
1978-----	22.1
January-September--	
1978-----	22.7
1979-----	20.6

The average net operating profit for each vessel owner (who is also the vessel's captain) has increased substantially during the 5-year period, as shown by the following tabulation.

Average vessel owner's (captain's) net profit

<u>Year</u>	
1975-----	\$14,333
1976-----	20,333
1977-----	28,166
1978-----	62,833
January-September--	
1978-----	49,666
1979-----	28,166

However, 1979 again appears to be a downward year for the vessel owners.

There are a few generalizations that can be made from the aggregate totals of the six reporting vessels. Sales of groundfish had increased 280 percent from 1975 (\$610,000) to 1978 (\$1,704,000); however, by all indications, 1979 sales of groundfish will not reach the 1978 levels. This has been especially hard on the vessel owners because their costs have increased, and their ability to land groundfish has been artificially limited by the processors. Total aggregate profit-and-loss data received by the Commission are presented in table 9. The Commission has not received any financial data from fishermen on the east coast.

Employment

Accurate data on the number of persons employed in the harvesting and processing sectors of the U.S. groundfish industry is not available. Many fishermen and employees of processing plants are either part time, seasonally employed, or work in more than one fishery. However, as new vessels enter or leave the fishery, there will be a corresponding increase or decrease in employment. It was estimated in a 1979 report by the Comptroller General of

Table 9.—Aggregate profit-and-loss experience of all reporting fishermen from Washington, on all their groundfish operations, 1974-78, January-September 1978, and January- September 1979

Line no.	Item	Groundfish operations						
		1974	1975	1976	1977	1978	January- September--	
							1978	1979
	Number of vessels reporting data							
	number-----	3	8	11	12	14	12	12
	Gross stock (gross sales):							
1	Pounds <u>1</u> /------(1,000 pounds)---	3,351	4,179	7,963	7,269	13,383	9,814	7,704
2	Dollars------(1,000 dollars)---	533	732	1,319	1,882	3,542	1,820	2,376
	Trip expense:							
3	Fuel-----do-----	34	30	113	134	195	106	189
4	Ice-----do-----	3	6	12	21	32	26	25
5	Groceries-----do-----	7	12	26	28	43	21	44
6	Association assessment, and							
	weighers-----do-----	2	1	2	2	9	8	28
7	Total trip expense (lines							
	3-6)-----do-----	42	49	153	185	279	161	286
8	Adjusted gross stock (line 2							
	less line 7)-----do-----	487	683	1,166	1,697	3,263	1,659	2,090
	Operating expenses:							
9	Crew shares-----do-----	198	231	429	673	1,278	699	775
10	Captain's share-----do-----	-	-	17	24	85	73	150
11	Gear, nets, and supplies-----do-----	19	40	71	101	161	109	113
12	Insurance-----do-----	34	44	71	101	182	86	162
13	Vessel repair and							
	maintenance-----do-----	17	25	104	211	260	111	40
14	Taxes and licenses (other than							
	Federal income tax)-----do-----	12	16	23	22	53	21	293
15	Depreciation <u>2</u> /-----do-----	85	123	152	173	323	130	27
16	Professional services-----do-----	4	5	5	8	20	6	271
17	Other <u>2</u> /-----do-----	62	89	90	108	419	104	1,963
18	Total operating expenses							
	(lines 9-17)-----do-----	431	573	962	1,421	2,781	1,339	1,963
19	Net operating profit (line 8							
	less line 18)-----do-----	56	110	204	276	382	320	127

1/ In 1,000 lbs.

2/ In 1,000 dollars.

Source: Compiled from data received in response to questionnaires of the U.S. International Trade Commission.

the United States that there has been an increase in employment in the New England commercial groundfish industry since the passage of the FCMA. In Massachusetts, employment in the groundfish and shellfish industries increased by 11 percent from 1974 to 1977. According to union officials of the Atlantic Fishermen's Union in Gloucester, Mass., the number of Gloucester fishermen increased from approximately 650 in 1976 to 1,000 in 1978. The majority of these fishermen are believed to harvest some groundfish. 1/

Employment in a specific fishery, however, fluctuates widely, depending upon such factors as weather and market conditions. Sources contacted by the Commission have indicated that there has been a decrease in recent months in the number of fishermen on both the Atlantic and Pacific coasts and in Alaska who are primarily dependent on groundfish.

Pricing

In general, prices of domestic and imported groundfish and groundfish products have risen significantly in recent years. A major increase in demand for groundfish and groundfish products, as evidenced by a 41-percent increase in consumption between 1974 and 1978, accounts for much of the price rise. In addition, sharply escalating costs for U.S. fishermen and U.S. processors (assumed to be the same for foreign fishermen and processors) have intensified the upward price pressures on groundfish and related groundfish products. During 1979, U.S. fishermen suffered a doubling of the price for diesel fuel; the cost of ice has increased 25 percent, and food provision costs (for fishing trips) have also escalated.

Despite the aforementioned generalizations, price increases have varied greatly, depending upon the products and markets being considered. This is particularly true of the prices received by U.S. fishermen. On the west coast, where fishermen's associations negotiate prices with processors, prices of most groundfish have climbed sharply in recent years. However, on the east coast, where prices are determined at auctions, and, thus, are subject to the uncertainties of short-term market forces, performances have been mixed.

Price increases for most varieties of fresh fish in west coast markets significantly outpaced increases in the U.S. Labor Department's wholesale price index for meat, fish, and poultry between January 1976 and January 1979. Fresh fish prices generally rose by 50 to 100 percent or more during this period, while the Labor Department index registered an increase of only 26 percent. The largest increase was recorded for dressed black cod (sable fish). During the 3-year period, the price tripled, rising from \$0.24 per pound to \$0.75 per pound (table 10). Of the items surveyed, only Alaskan pollock and English sole recorded price increases of less than 26 percent (see table 11a). However, no additional major upward adjustments in West coast prices have occurred within the past year. The increase in prices on the West

1/ Comptroller General of the United States, The Fishery Conservation and Management Act's Impact and Selected Fisheries, April 1979.

Table 10.--Selected Pacific coast fish: Winchester Bay, Oreg., to Monterey, Calif., inclusive, prices negotiated between processors and the Fishermen's Marketing Association of Eureka, Calif., Inc., by types of fish and by dates of negotiation, Aug. 21, 1975-May 1, 1979.

(Per pound)										
Pacific coast fish	: Aug. 21, 1975	: Apr. 4, 1975	: Oct. 15, 1975	: May 1, 1976	: Oct. 15, 1976	: May 1, 1977	: Oct. 25, 1977	: May 14, 1978	: Oct. 25, 1978	: May 1, 1979
Black cod (sable fish):	:	:	:	:	:	:	:	:	:	:
Whole-----	\$0.16	\$0.16	\$0.16	\$0.185	\$0.215	\$0.24	\$0.35	\$0.45	\$0.48	\$0.48
Dressed-----	.24	.24	.24	.27	.32	.40	.55	.70	.75	.75
Petrale sole-----	.24	.24	.27	.28	.31	.33	.36	.38	.42	.46
Dover sole-----	.1225	.1175	.1375	.145	.175	.175	.2025	.2125	.21	.2175
English sole-----	.22	.22	.25	.25	.28	.32	.36	.38	.30	.30
Rockfish and ocean perch-----	.115	.115	.13	.14	.155	.155	.1725	.185	.20	.20

Source: Fishermen's Marketing Association, Inc., Eureka, Calif.

Table 11a.--Selected Pacific coast fish: Washington prices negotiated between processors and the Fishermen's Marketing Association of Washington, Inc., by types of fish and by dates of negotiation, Jan. 1, 1974-May 8, 1979

(Per pound)										
Pacific coast fish	: Jan. 1, 1974	: Jan. 1, 1976	: Nov. 11, 1976	: Jan. 1, 1977	: May 21, 1977	: Oct. 16, 1977	: May 5, 1978	: Nov. 1, 1978	: May 8, 1979	
Cod:	:	:	:	:	:	:	:	:	:	:
Whole-----	\$0.115	\$0.125	\$0.138	\$0.15	\$0.16	\$0.18	\$0.1925	\$0.20	\$0.2150	
Dressed-----	.21	.23	.253	.27	.27	.35	.40	.45	.43	
Petrale sole-----	.21	.24	.264	.28	.29	.32	.36	.40	.44	
Dover sole-----	.12	.13	.143	.15	.16	.175	.185	.20	.21	
Rock cod (red)-----	.105	.115	.127	.135	.1425	.1625	.18	.20	.2150	
Alaska pollock-----	.08	.08	.08	.08	.08	.10	.10	.10	.10	

Source: Fishermen's Marketing Association of Washington, Inc., Seattle, Wash.

coast is currently of very little value to the fishermen because of strict "trip limits" on the amount of fish a processor will buy (see app. D).

Price trends for east coast groundfish are difficult to analyze because of seasonal factors and the impact of storms. It is apparent from tables 10 through 13 that prices are typically lower during the summer, when landings are at peak levels, in contrast to landings during the less productive winter months. However, these patterns are often disrupted by sharp, temporary upsurges in prices, caused by storm-related curtailments in landings. Between January 1976 and January 1979, the price of ocean perch rose by 70 percent, from 12.1 to 20.6 cents per pound. During this period, the price of yellowtail flounder increased by 31 percent, while the price of cod remained unchanged, and the price of haddock declined by 25 percent. Between October 1978 and October 1979, east coast prices of cod, ocean perch, and haddock all increased significantly, while the price of yellowtail flounder dropped sharply from \$0.76 to \$0.48 per pound (table 13). However, flounder prices during September and October of 1978 were well above the levels prevailing in the months immediately preceding and immediately following this period. This is probably a result of storms. Thus, a direct comparison of October prices for yellowtail flounder in 1978 and 1979 tends to overstate the extent of the decline.

In the market place, imported fresh groundfish fillets meet head-on with domestically processed (from domestic landings) groundfish fillets. Interesting comparisons can be made between trends in quarterly prices for imported fresh cod fillets (table 15) and trends in monthly exvessel and wholesale prices of domestically produced fresh fillets. Import prices for fresh cod fillets, which rose by * * * percent, from * * * to * * * per pound, between the January-March 1976 and January-March 1979, increased at about the same rate as the east coast wholesale price for fresh fillets (table 16), but much more rapidly than the east coast exvessel price for cod and much less rapidly than west coast exvessel prices. Prices paid by importers for fresh fillets of flatfish and ocean perch are presented on a quarterly basis in table 15.

Table 11b.--Cod: Exvessel average weighted price paid for cod fish at major New England ports, by months, January 1974-October 1979

(In cents per pound)							
Month	1974	1975	1976	1977	1978	1979	
January-----	23.8	26.2	39.2	32.8	30.1	39.5	
February-----	24.8	25.5	38.9	31.5	32.2	55.4	
March-----	28.0	33.6	38.8	29.3	35.6	33.5	
April-----	25.7	26.8	32.2	22.3	21.0	27.8	
May-----	16.8	17.3	20.6	16.0	17.8	21.4	
June-----	15.7	22.2	19.8	15.1	17.4	21.5	
July-----	14.9	22.5	22.5	18.3	27.6	26.9	
August-----	20.2	23.4	24.2	22.4	28.0	28.3	
September-----	21.3	26.3	26.5	31.7	24.9	30.5	
October-----	18.3	24.7	33.0	32.8	24.0	35.2	
November-----	24.1	26.5	32.0	26.1	28.3	NA	
December-----	24.9	30.7	28.5	28.2	44.3	NA	

Source: Food Fish Market Review, September 1978, U.S. Department of Commerce, National Marine Fisheries Service.

Table 12.--Flounder: Exvessel average weighted price paid for yellowtail flounder at major New England ports, by months, January 1974-October 1979

(In Cents per pound)							
Month	1974	1975	1976	1977	1978	1979	
January-----	28.2	39.6	49.2	53.7	68.4	65.5	
February-----	33.8	42.4	61.0	55.0	60.2	91.0	
March-----	38.9	47.8	59.1	51.9	74.4	51.7	
April-----	38.2	40.0	41.1	43.8	50.7	42.1	
May-----	22.1	28.0	37.7	40.0	49.0	33.7	
June-----	18.4	31.1	42.3	43.0	48.7	43.2	
July-----	18.1	27.7	35.7	44.0	63.2	49.7	
August-----	18.0	24.4	36.0	42.5	54.0	56.6	
September-----	21.3	37.6	24.0	45.4	78.2	53.8	
October-----	24.0	38.6	48.8	50.3	76.2	48.0	
November-----	33.1	39.3	42.0	52.3	52.6	NA	
December-----	21.3	49.4	47.9	49.2	61.5	NA	

Source: Food Fish Market Review, September, 1978, U.S. Department of Commerce, National Marine Fisheries Service.

Table 13.--Ocean perch: Exvessel average weighted price paid for ocean perch at major New England ports, by months, January 1974-October 1979

(In Cents per pound)							
Month	1974	1975	1976	1977	1978	1979	
January-----	9.9	8.7	12.1	15.3	16.6	20.6	
February-----	9.4	9.2	12.2	15.5	17.1	24.4	
March-----	9.5	10.5	13.6	15.3	18.0	22.3	
April-----	8.7	10.4	13.6	16.2	16.7	21.5	
May-----	7.9	9.9	13.8	15.0	16.8	19.3	
June-----	7.8	10.3	13.0	15.3	15.8	16.4	
July-----	7.2	10.1	13.8	14.0	16.6	20.4	
August-----	7.2	10.6	14.2	15.2	17.0	20.7	
September-----	7.4	11.0	14.1	15.2	17.0	21.2	
October-----	7.8	11.6	14.2	15.6	18.0	21.4	
November-----	8.1	11.8	15.2	15.5	18.6	1/	
December-----	8.0	11.9	28.5	15.9	19.4	1/	

1/ Not available.

Source: Food Fish Market Review, September 1978, U.S. Department of Commerce, National Marine Fisheries Service.

Table 14.--Haddock: Exvessel average weighted price paid for haddock at major New England ports, by months, January 1974-October 1979

(In Cents per pound)							
Month	1974	1975	1976	1977	1978	1979	
January-----	35.2	30.3	56.6	42.5	38.4	45.0	
February-----	44.0	38.9	44.0	36.0	27.5	10.2	
March-----	35.7	43.6	42.9	43.6	41.8	42.3	
April-----	51.0	39.8	48.4	38.6	32.0	36.1	
May-----	36.8	21.4	40.0	28.9	27.1	34.0	
June-----	33.4	29.3	42.7	27.9	23.1	31.5	
July-----	28.9	43.9	46.4	25.4	31.8	41.8	
August-----	39.7	30.5	44.1	31.0	32.4	38.7	
September-----	41.1	35.2	41.3	33.5	36.4	43.1	
October-----	41.9	38.0	44.4	31.6	34.6	49.7	
November-----	42.7	34.2	45.0	29.6	33.8	1/	
December-----	37.6	47.4	49.1	34.7	60.8	1/	

1/ Not available.

Source: Food Fish Market Review, September 1978, U.S. Department of Commerce, National Marine Fisheries Service.

Table 15.--Fresh groundfish fillets: Weighted average prices paid by importers ^{1/} for selected types of fresh groundfish fillets, quarterly, 1976 through September 1979

(Per pound)					
Period		Price			
		Cod	Ocean perch	Flounder	
1976:					
January-March-----		***	<u>2/</u>	***	<u>2/</u> ***
April-June-----		***	<u>2/</u>	***	<u>2/</u> ***
July-September-----		***	<u>2/</u>	***	<u>2/</u> ***
October-December-----		***	<u>2/</u>	***	<u>2/</u> ***
1977:					
January-March-----		***	<u>2/</u>	***	<u>2/</u> ***
April-June-----		***	<u>2/</u>	***	<u>2/</u> ***
July-September-----		***	<u>2/</u>	***	<u>2/</u> ***
October-December-----		***	<u>2/</u>	***	<u>2/</u> ***
1978:					
January-March-----		***	<u>2/</u>	***	<u>2/</u> ***
April-June-----		***	<u>2/</u>	***	<u>2/</u> ***
July-September-----		***	<u>2/</u>	***	<u>2/</u> ***
October-December-----		***	<u>2/</u>	***	<u>2/</u> ***
1979:					
January-March-----		***	<u>2/</u>	***	<u>2/</u> ***
April-June-----		***	<u>2/</u>	***	<u>2/</u> ***
July-September-----		***	<u>2/</u>	***	<u>2/</u> ***

^{1/} This table was derived from two importers of groundfish fillets, * * *. The prices are believed to be representative of the various products.

2/ Denotes one price reported.

Source: Compiled from U.S. International Trade Commission questionnaires.

Table 16.--Cod: Average monthly wholesale prices for fresh domestic fillets in New York City's Fulton Fish Market, January 1974-July 1978

(In cents per pound)						
Months	1974	1975	1976	1977	1978	
January	102.5	105.7	150.0	170.0	180.0	
February	102.5	107.1	150.0	170.0	180.0	
March	103.0	108.3	150.0	170.0	182.5	
April	105.0	115.0	150.0	170.0	187.5	
May	99.8	115.0	150.0	170.6	190.0	
June	95.8	120.0	165.0	173.5	175.0	
July	98.3	120.0	165.0	173.5	223.1	
August	98.3	127.0	170.0	175.0	1/	
September	105.0	145.5	173.0	175.0	1/	
October	105.0	149.0	173.0	180.0	1/	
November	105.0	150.0	170.0	180.0	1/	
December	105.0	150.0	170.0	180.0	1/	
Average	102.1	126.0	161.4	173.9	1/	

1/ Not available.

Source: Food Fish Market Review, September 1978, U.S. Department of Commerce, National Marine Fisheries Service.

Most of the import data developed from questionnaires and from other sources is for frozen fillets. The United States does not have a substantial frozen fillet industry. Instead, frozen fillets are produced as a byproduct by processors when fresh fish prices are at depressed levels. However, it is believed that imported frozen fillets do compete to some extent with U.S.-produced fresh and frozen fillets. Thus, an interesting comparison can be made between price trends for imported frozen fillets of cod and price trends for U.S.-produced fresh cod fillets. As shown in tables 16 and 17, prices of imported frozen cod fillets increased less rapidly than wholesale prices of U.S. cod fillets between January 1976 and January 1979. During this period, the average price of a 5-pound package of the Canadian product rose by only 17 percent, from 75 to 87 cents per pound, while the wholesale price of fresh U.S. cod and fillets increased by 23 percent from \$1.76 to \$2.18 per pound.

Table 17.--Cod: Average wholesale prices for packages of frozen Canadian fillets, by months, January 1974-September 1979

(In cents per pound)												
Month	:	1974	:	1975	:	1976	:	1977	:	1978	:	1979
	:		:		:		:		:		:	
January-----	:	79.0	:	64.9	:	74.6	:	80.8	:	95.0	:	87.4
February-----	:	79.0	:	62.9	:	75.0	:	89.0	:	95.0	:	93.5
March-----	:	79.9	:	61.0	:	72.0	:	90.4	:	95.0	:	87.5
April-----	:	79.1	:	60.5	:	70.0	:	92.8	:	91.8	:	100.4
May-----	:	76.8	:	60.5	:	70.0	:	95.6	:	90.0	:	96.0
June-----	:	72.0	:	58.0	:	70.9	:	93.6	:	90.0	:	89.5
July-----	:	66.0	:	58.0	:	71.1	:	92.1	:	89.5	:	83.0
August-----	:	65.0	:	60.5	:	70.0	:	90.9	:	88.4	:	80.2
September-----	:	65.0	:	61.5	:	70.0	:	89.5	:	88.0	:	80.2
October-----	:	65.0	:	64.0	:	70.5	:	90.0	:	88.0	:	1/
November-----	:	65.0	:	67.2	:	71.3	:	93.4	:	88.3	:	1/
December-----	:	65.0	:	70.8	:	75.4	:	94.9	:	87.5	:	1/
Average-----	:	71.4	:	62.5	:	71.7	:	91.1	:	90.5	:	1/
	:		:		:		:		:		:	

1/ Not available.

Source: Food Fish Market Review, September 1978, U.S. Department of Commerce, National Marine Fisheries Service; brought to date by author.

It should be noted that the average wholesale prices for Canadian frozen fillets have been declining throughout 1979.

Import price data for frozen fillets of cod, haddock, pollock, ocean perch, flatfish, rockfish, and whiting are presented in table 18 for January-March 1976 through July-September 1979. Although rates of increase vary, depending upon the species being considered, prices of all classes of imported frozen fillets have risen during this period. The largest increase was recorded for Atlantic pollock, which rose by 79 percent, from \$0.48 per pound to \$0.86 per pound during the span of 3.5 years. In general, the data indicate that imported frozen fillet prices have risen more rapidly than fresh fish prices on the east coast, but less rapidly than fresh fish prices on the west coast.

Table 18.—Frozen groundfish fillets: Weighted average of prices paid by importers for selected varieties of frozen groundfish fillets, by quarters, January 1976-September 1979

(Per pound)									
Period	Cod	Haddock	Pollock	Ocean perch	Whiting	Flatfish	Rockfish		
1976:									
January-March-----	\$0.954	\$0.973	\$0.480	\$0.850	1/ ***	\$1.101	1/	***	
April-June-----	.939	.963	.554	.843	-	1.101	1/	***	
July-September-----	.951	.964	.560	.876	1/ ***	1.114	1/	***	
October-December-----	.929	1.045	.562	.861	1/ ***	1.108	1/	***	
1977:									
January-March-----	1.064	1.099	.600	.824	1/ ***	1.146		-	
April-June-----	1.076	1.097	.600	.873	1/ ***	1.154	1/	***	
July-September-----	1.148	1.143	.730	.876	1/ ***	1.195		-	
October-December-----	1.128	1.210	.730	.914	1/ ***	1.193		-	
1978:									
January-March-----	1.149	1.210	.759	.915	-	1.248	1/	***	
April-June-----	1.139	1.200	.794	.982	-	1.297	1/	***	
July-September-----	1.145	1.23	.810	.972	1/ ***	1.350	1/	***	
October-December-----	1.155	1.19	.810	.915	1/ ***	1.392	1/	***	
1979:									
January-March-----	1.221	1.31	.791	.996	1/ ***	1.345		-	
April-June-----	1.282	1.350	.831	1.038	-	1.385		-	
July-September-----	1.288	1.40	.860	1.088	-	1.536		-	

1/ Denotes one price reported.

Source: Compiled from U.S. International Trade Commission questionnaires.

Import prices of cod, whiting, and pollock groundfish blocks are presented in table 19 for January-March 1976 through July-September 1979. Prices of groundfish blocks made of all three types of fish have almost doubled during this period. However, price increases from July-September 1977 to July-September 1979 have been small. Although two U.S. firms are presently producing groundfish blocks, their output is believed to amount to less than 1 percent of total U.S. consumption. Domestic price data for groundfish blocks are unavailable. However, U.S. fish block producers have informed the Commission that the current stagnation of fish block prices have made it almost impossible for them to sell their product at a profit. The reason for this problem is the price that the U.S. block manufacturer must pay for his groundfish. Thus, if prices of U.S. groundfish rise, the block producer will cease production of blocks and shift into fillet production.

Table 19.--Groundfish blocks: Weighted average of prices charged by importers to principal customers for selected types of groundfish blocks, by quarters, January 1976-September 1979

(In cents per pound)			
Period	Cod	Whiting	Pollock
1976:			
January-March-----	\$0.664	\$0.425	\$0.414
April-June-----	.770	.420	.868
July-September-----	.811	.484	.516
October-December-----	.876	.454	.514
1977:			
January-March-----	.932	.752	.550
April-June-----	.998	.783	.607
July-September-----	1.037	.827	.659
October-December-----	1.028	.804	.666
1978:			
January-March-----	1.036		.682
April-June-----	1.034	.818	.720
July-September-----	1.060	.830	.739
October-December-----	1.034	.831	.715
1979:			
January-March-----	1.047	.851	.706
April-June-----	1.052	.834	.723
July-September-----	1.077	.875	.749

Source: Compiled from U.S. International Trade Commission questionnaires.

Allegations of lost sales

At the public hearing, ^{1/} a panel of processors from the State of Washington alleged that an undetermined number of their former customers (for domestically landed groundfish and groundfish products) have been lost to imports. Although the processors agreed to submit the list of lost sales to the Commission, such a list had not been received by the Commission as of January 3, 1980.

The Question of Whether Increased Imports Are a Substantial Cause of Serious Injury

The Trade Act of 1974 states that, in order for an affirmative determination to be made in investigations conducted under section 201, the Commission must find:

. . . with respect to substantial cause, an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers.

Table twenty (20) shows actual imports, the ratios of imports to domestic production, and the proportion of the domestic market supplied by domestic producers for whole groundfish and for groundfish in fillet and block form. Such imports are discussed in detail in the following sections of this report.

The question of increased imports

Whole fish.—U.S. imports of whole groundfish (fresh, chilled, or frozen) increased from 27 million pounds in 1974 to 30 million pounds in 1976, but then declined by 17 percent to 25 million pounds in 1977. In 1978, imports of whole groundfish rebounded back to 30 million pounds (table 21). In January-September 1979, import statistics in whole groundfish show a 32-percent increase over imports during the corresponding period of 1978. As shown in table 22, Canada is, by far, the largest exporter of whole groundfish to the United States, and in January-September 1979, Canadian exports of whole groundfish increased by 60 percent over exports during the corresponding period of 1978.

U.S. imports of whole cod (fresh, chilled, or frozen) increased from 3.2 million pounds in 1974 to 5 million pounds in 1975, but thereafter declined sharply, to 2.6 million pounds in 1978, representing a decrease of 48 percent. However, imports of whole cod for January-September 1979 totaled 3.8 million pounds, more than twice the amount imported during the corresponding period of 1978 and more than the total imports of whole cod for the entire year of 1978. As shown in tables 24 and 25, imports of both fresh and chilled and of frozen whole cod are increasing in 1979.

^{1/} Transcript of the hearing, p. 167.

Table 20.--Groundfish and groundfish products: U.S. imports for consumption, ratio of imports to domestic production, and proportion of domestic market supplied by domestic producers, 1974-78, January-September 1978, and January-September 1979

Item and period	Actual U.S. imports	Ratio of imports to domestic production	Proportion of domestic market supplied by domestic producers
	1,000 pounds	Percent	Percent
Whole <u>1/</u> groundfish:			
1974-----	26,700	6.8	93.7
1975-----	29,514	7.0	93.5
1976-----	30,161	6.8	93.6
1977-----	24,564	4.9	95.3
1978-----	29,847	5.2	95.1
January-September--			
1978-----	21,134	4.9	95.3
1979-----	27,862	6.3	93.7
Groundfish fillet:			
1974-----	268,996	270.7	27.0
1975-----	320,206	343.2	22.6
1976-----	360,386	339.3	26.2
1977-----	344,116	287.2	26.1
1978-----	365,496	315.3	24.0
January-September--			
1978-----	285,462	<u>2/</u>	<u>2/</u>
1979-----	282,544	<u>2/</u>	<u>2/</u>
Groundfish blocks:			
1974-----	266,072	6,023.8	1.6
1975-----	303,591	12,880.4	.8
1976-----	364,237	21,463.6	.5
1977-----	366,522	17,143.2	.6
1978-----	386,925	18,122.9	.5
January-September--			
1978-----	311,290	<u>2/</u>	<u>2/</u>
1979-----	301,587	<u>2/</u>	<u>2/</u>

1/ Whether or not processed by removal of heads, viscera, fins, scales, or any combination thereof.

2/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 21.--Fish, fresh, chilled or frozen, whole, or processed by removal of heads, viscera, fins, or any combination thereof, but not otherwise processed (TSUSA items 110.1585, 110.1589, 110.1593, 110.1597, and 110.3552-110.3575): U.S. imports for consumption, by species, 1974-78, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January- September-- 1978	1979
Quantity (1,000 pounds, product weight)							
Cod-----	3,166	5,088	4,093	3,903	2,605	1,850	3,812
Cusk, haddock, hake, and pollock----	8,851	7,684	8,909	6,195	6,705	5,423	5,857
Atlantic ocean perch-----	1,362	451	1,644	249	416	365	132
Flounder and other flatfish (except halibut)-----	3,043	5,642	5,459	5,897	5,182	3,401	5,374
Other 1/-----	10,278	10,649	10,056	8,320	14,939	10,095	12,688
Total 1/-----	26,700	29,514	30,161	24,564	29,847	21,134	27,863
Value (1,000 dollars)							
Cod-----	829	974	1,089	1,352	882	621	1,707
Cusk, haddock, hake, and pollock----	3,484	3,049	3,776	2,696	2,773	2,256	2,317
Atlantic ocean perch-----	620	204	715	171	433	399	31
Flounder and other flatfish (except halibut)-----	2,208	4,656	6,283	5,879	5,865	4,822	7,965
Other 1/-----	4,144	4,135	3,429	3,637	6,398	4,535	6,245
Total 1/-----	11,285	13,018	15,292	13,735	16,351	12,633	18,265
Unit value (per pound)							
Cod-----	\$0.26	\$0.19	\$0.27	\$0.35	\$0.34	\$0.34	\$0.45
Cusk, haddock, hake, and pollock----	.39	.40	.42	.44	.41	.42	.40
Atlantic ocean perch-----	.46	.45	.44	.69	1.04	1.42	.24
Flounder and other flatfish (except halibut)-----	.73	.83	1.15	1.00	1.13	1.42	1.48
Other 1/-----	.40	.39	.34	.44	.43	.45	.49
Average 1/-----	.42	.44	.51	.56	.55	.60	.66

1/ Includes whiting, wolf fish, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 22.—Fish, fresh, chilled or frozen, whole or processed by removal of head, viscera, fins or any combination thereof, but not otherwise processed (TSUSA items 110.1585-110.1597 and 110.3552-110.3575): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January- September-- 1978	1979
Quantity (1,000 pounds, product weight)						
Canada-----	15,613	15,365	13,082	12,833	8,717	13,948
South Africa-----	3,623	2,096	3,535	6,242	3,915	5,153
Argentina-----	2,775	4,018	2,296	3,299	2,296	2,256
Netherlands-----	2,302	2,216	2,023	2,129	1,694	2,279
Uruguay-----	57	552	116	2,106	1,630	202
All other-----	5,144	5,914	3,512	3,238	2,882	4,024
Total-----	29,514	30,161	24,564	29,847	21,134	27,863
Value (1,000 dollars)						
Canada-----	4,812	5,270	4,974	4,673	3,288	4,706
South Africa-----	913	532	1,151	2,346	1,416	2,425
Argentina-----	580	666	421	856	575	534
Netherlands-----	3,571	4,875	4,167	4,790	4,187	7,159
Uruguay-----	31	106	37	601	466	116
All other-----	3,111	3,843	2,985	3,085	2,701	3,325
Total-----	13,018	15,292	13,735	16,351	12,633	18,265
Unit value (per pound)						
Canada-----	\$0.30	\$0.34	\$0.38	\$0.36	\$0.38	\$0.34
South Africa-----	.35	.25	.33	.38	.36	.47
Argentina-----	.21	.17	.18	.26	.25	.24
Netherlands-----	1.55	2.20	2.06	2.25	2.47	3.14
Uruguay-----	.54	.19	.32	.29	.29	.57
All other-----	.60	.65	.85	.95	.94	.83
Average-----	.44	.51	.56	.55	.60	.66

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Includes whiting, wolf fish, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Table 23.--Fish, fresh or chilled only, whole or processed by removal of heads, viscera, fins or any combination thereof, but not otherwise processed (TSUSA items 110.1585, 110.1593, 110.3560 and 110.3570): U.S. imports for consumption, by species, 1974-78, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Cod-----	2,502	4,224	3,443	3,177	2,118	1,526	2,425
Cusk, haddock, hake, and pollock----	7,982	6,817	7,910	5,650	5,865	4,645	4,388
Flounder and other flatfish (except halibut)-----	1,158	1,856	2,292	2,349	2,137	1,139	2,144
Other 1/-----	729	1,212	903	1,090	2,061	1,026	3,758
Total 1/ 2/-----	12,371	14,109	14,547	12,266	12,181	8,336	12,715
Value (1,000 dollars)							
Cod-----	528	671	847	918	634	441	892
Cusk, haddock, hake, and pollock----	3,280	2,834	3,371	2,481	2,366	1,893	1,647
Flounder and other flatfish (except halibut)-----	354	511	562	795	842	515	791
Other 1/-----	218	363	245	422	475	277	771
Total 1/ 2/-----	4,380	4,379	5,025	4,616	4,317	3,126	4,101
Unit value (Per pound)							
Cod-----	\$0.21	\$0.16	\$0.25	\$0.29	\$0.30	\$0.29	\$0.37
Cusk, haddock, hake, and pollock----	.41	.42	.43	.44	.40	.41	.38
Flounder and other flatfish (except halibut)-----	.31	.28	.25	.34	.39	.45	.37
Other 1/-----	.30	.30	.27	.39	.23	.27	.21
Average 1/ 2/-----	.35	.31	.35	.38	.35	.38	.32

1/ Includes whiting wolf fish, Pacific rockfish, black cod and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

2/ Excludes insignificant amount of fresh or chilled, whole Atlantic ocean perch.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 24.--Fish, frozen only, whole or processed by removal of heads, viscera, fins, or any combination thereof, but not otherwise processed (TSUSA items 110.1589, 110.1597, 110.3552, 110.3565, and 110.3575): U.S. imports for consumption, by species, 1974-78, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Cod-----	665	864	650	726	487	324	1,387
Cusk, haddock, hake, and pollock----	869	867	999	546	840	778	1,470
Atlantic ocean perch 1/-----	1,362	451	1,644	249	416	365	132
Flounder and other flatfish (except halibut)-----	1,885	3,786	3,167	3,547	3,045	2,262	3,230
Other 2/-----	9,549	9,437	9,153	7,230	12,878	9,069	8,930
Total 1/ 2/-----	14,329	15,405	15,613	12,298	17,666	12,798	15,149
Value (1,000 dollars)							
Cod-----	301	303	241	434	248	181	814
Cusk, haddock, hake, and pollock----	205	215	405	216	407	363	670
Atlantic ocean perch 1/-----	620	204	715	171	433	399	31
Flounder and other flatfish (except halibut)-----	1,854	4,145	5,722	5,084	5,023	4,308	7,174
Other 2/-----	3,926	3,772	3,184	3,215	5,923	4,258	5,474
Total 1/ 2/-----	6,906	8,639	10,267	9,120	12,034	9,509	14,163
Unit value (per pound)							
Cod-----	\$0.45	\$0.35	\$0.37	\$0.60	\$0.51	\$0.56	\$0.59
Cusk, haddock, hake, and pollock----	.24	.25	.41	.40	.48	.47	.46
Atlantic ocean perch 1/-----	.46	.45	.44	.67	1.04	1.09	.24
Flounder and other flatfish (except halibut)-----	.98	1.09	1.81	1.43	1.65	1.90	2.22
Other-----	.41	.40	.35	.44	.46	.47	.61
Average 1/ 2/-----	.48	.56	.66	.74	.68	.74	.93

1/ Includes insignificant amount of fresh or chilled whole Atlantic ocean perch.

2/ Includes whiting, wolf fish, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 25.--Fish, fresh, chilled or frozen, processed into fillets (TSUSA items 110.5520, 110.5720, 110.7033-110.7039 and 110.7080): U.S. imports for consumption, by species, 1974-78, January- September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Atlantic ocean perch-----	59,477	67,417	60,269	45,239	47,561	34,389	35,133
Cod-----	71,421	90,969	118,378	122,092	135,000	112,830	120,330
Cusk, haddock, hake, and pollock-----	33,510	41,737	49,451	49,908	50,539	40,195	42,579
Wolf fish-----	6,753	7,633	7,810	7,467	5,689	4,465	4,990
Flatfish (except halibut)-----	77,531	98,344	100,718	95,876	94,270	70,331	57,559
Other 1/-----	2/ 20,304	2/ 14,186	2/ 23,760	2/ 23,534	32,437	23,252	21,953
Total 1/-----	2/ 268,996	2/ 320,286	2/ 360,386	2/ 344,116	365,496	285,462	282,544
Value (1,000 dollars)							
Atlantic ocean perch-----	27,982	37,616	46,523	38,964	44,406	31,845	34,649
Cod-----	56,829	70,740	102,369	126,182	145,933	122,242	143,143
Cusk, haddock, hake, and pollock-----	23,866	28,137	38,453	45,167	49,729	39,341	44,330
Wolf fish-----	4,502	5,381	6,600	7,268	6,403	5,033	6,423
Flatfish (except halibut)-----	50,293	61,425	79,485	87,703	94,571	70,052	64,115
Other 1/-----	2/ 10,058	2/ 7,425	2/ 13,531	2/ 13,839	20,043	14,356	15,186
Total 1/-----	2/ 17,530	2/ 210,724	2/ 286,961	2/ 319,123	361,085	282,869	307,846
Unit value (per pound)							
Atlantic ocean perch-----	\$0.47	\$0.56	\$0.77	\$0.86	\$0.93	\$0.93	\$0.99
Cod-----	.80	.78	.86	1.03	1.08	1.19	1.19
Cusk, haddock, hake, and pollock-----	.71	.67	.78	.90	.98	1.04	1.04
Wolf fish-----	.67	.70	.85	.97	1.13	1.29	1.29
Flatfish (except halibut)-----	.65	.62	.79	.91	1.00	1.11	1.11
Other 1/-----	2/ .50	2/ .52	2/ .57	2/ .84	.62	.62	.69
Average 1/-----	2/ .65	2/ .66	2/ .80	2/ .93	.99	.99	1.09

1/ Includes whiting, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

2/ Includes small amount of salmon, a species which is not under investigation.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Imports of whole flounders and other flatfish (fresh, chilled, or frozen) increased from 3 million pounds in 1974 to 5.6 million pounds in 1975, but remained generally constant from 1975 to 1978. As in the case of whole cod, imports of whole flounder and other flatfish increased sharply in January-September 1979. For January-September 1979, imports of whole flounder and other flatfish totaled 5.4 million pounds compared with 3.4 million pounds for January-September 1978, representing an increase of 2 million pounds, or 58 percent. Again, imports of both fresh and chilled and of frozen whole flounder and other flatfish increased sharply in 1979 (tables 24 and 25).

Imports of whole cusk, haddock, hake, and pollock (fresh, chilled, or frozen) declined from 8.9 million pounds in 1974 to 7.7 million pounds in 1975, but then rebounded back to 8.9 million pounds in 1976. Thereafter, imports of whole cusk, haddock, hake, and pollock declined to 6.7 million pounds in 1978, but then increased by 8 percent in January-September 1979 over imports during the corresponding period of 1978.

The "basket" provision for whole groundfish (fresh and frozen) includes whiting, lingcod, black cod, and Pacific ocean rockfish and perch. Imports of the aforementioned whole groundfish remained in the 10-million-pound range during 1974-76. Thereafter, imports declined to 8.3 million pounds in 1977, but then increased to 15 million pounds in 1978, or by 79 percent. Imports under this category grew again by 26 percent between January-July 1978 and the corresponding period of 1979. The increase in January-September 1979 is only in the fresh or chilled category; imports of the frozen whole fish in this category declined slightly during the period. Imports of whole groundfish, by geographical areas, is set forth in table B-1, appendix B.

Groundfish fillets.--Imports of groundfish fillets (fresh, chilled, or frozen) 1/ jumped from 269 million pounds in 1974 to 360 million pounds in 1976 (table 25). Thereafter, imports of groundfish fillets declined slightly, to 337 million pounds in 1977, and then increased again to 365 million pounds in 1978. From 1974 to 1978, imports of groundfish fillets increased by 96 million pounds, or 36 percent. Imports of groundfish fillets fell by 1 percent in January-September 1979 when compared with imports during January-September 1978. 2/

Cod fillets (fresh, chilled, or frozen) increased each year, from 71 million pounds in 1974 to 135 million pounds in 1978, or by 90 percent. In January-September 1979, imports of cod fillets increased by over 17 million pounds, compared with imports during the corresponding period of 1978. Cod fillets currently account for 43 percent of all groundfish fillet imports. It should be noted that 98 percent of all cod fillet imports are of the frozen variety, as shown by comparing data in tables 26 and 27. Flounder and flatfish fillets (fresh, chilled, or frozen) increased from 78 million pounds

1/ Fresh or chilled groundfish fillets account for approximately 2 percent of all groundfish fillet imports; frozen groundfish fillets account for approximately 98 percent.

2/ U.S. imports of groundfish fillets, by countries, are presented in app. B.

Table 26.--Fish, fresh or chilled only, processed into fillets (TSUSA items 110.5545, 110.5565, 110.5710, and 110.7033): U.S. imports for consumption, by species, 1974-78, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Cod-----	2,989	4,091	5,100	3,662	3,959	2,981	6,134
Cusk, haddock, hake, and pollock-----	1,814	2,524	2,935	3,009	3,301	2,647	2,938
Wolf fish-----	170	145	42	34	8	4	97
Flatfish, except halibut-----	1,193	817	702	475	774	581	836
Total 1/ 2/-----	6,166	7,577	8,779	7,180	8,042	6,213	10,004
Value (1,000 dollars)							
Cod-----	2,366	2,966	4,660	3,794	4,258	3,203	6,751
Cusk, haddock, hake, and pollock-----	1,487	2,052	2,784	2,866	3,490	2,783	3,147
Wolf fish-----	104	133	39	32	6	3	122
Flatfish, except halibut-----	1,174	842	764	662	1,050	788	1,110
Total 1/ 2/-----	5,181	5,993	8,247	7,354	8,804	6,777	11,130
Unit value (per pound)							
Cod-----	\$0.79	\$0.73	\$0.91	\$1.04	\$1.08	\$1.07	\$1.10
Cusk, haddock, hake, and pollock-----	.82	.81	.95	.95	1.06	1.05	1.07
Wolf fish-----	.61	.92	.93	.94	.75	.75	1.26
Flatfish, except halibut-----	.98	1.03	1.09	1.39	1.36	1.36	1.33
Average 1/-----	.83	.79	.94	1.02	1.09	1.09	1.11

1/ Whiting, wolf fish, Pacific rockfish, black cod, lingcod, and any other types of fresh or chilled fillets classified under TSUSA item Nos. 110.5000 and 110.7080.

2/ Excludes insignificant amount of fresh or chilled filleted Atlantic ocean perch.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 27.--Fish, frozen only, processed into fillets (TSUSA items 110.5550, 110.5570, 110.5720, 110.7038 and 110.7039): U.S. imports for consumption, by species, 1974-78, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Atlantic ocean perch 1/---	59,477	67,417	60,269	45,239	47,561	34,389	35,133
Cod-----	68,432	86,878	113,278	118,429	131,040	109,849	114,196
Cusk, haddock, hake, and pollock-----	31,696	39,213	46,516	46,900	47,238	37,547	39,640
Wolf fish-----	6,583	7,488	7,768	7,433	5,681	4,462	4,894
Flatfish (except halibut and turbot)-----	3/ 39,696	45,135	53,442	52,980	48,389	35,424	29,564
Turbot-----	3/ 36,643	52,391	46,574	42,277	45,106	34,326	27,159
Total 1/ 2/-----	242,227	298,522	327,847	313,258	325,015	255,998	250,587
Value (1,000 dollars)							
Atlantic ocean perch 1/---	27,982	37,616	46,523	38,964	44,406	31,845	34,649
Cod-----	54,463	67,774	97,709	122,388	141,675	119,039	136,393
Cusk, haddock, hake, and pollock-----	22,380	26,085	35,669	42,301	46,239	36,558	41,183
Wolf fish-----	4,398	5,248	6,562	7,235	6,397	5,030	6,302
Flatfish (except halibut and turbot)-----	3/ 30,945	35,726	50,500	54,493	55,637	40,254	39,547
Turbot-----	3/ 18,174	24,857	28,221	32,548	37,884	29,010	23,459
Total 1/ 2/-----	158,342	197,306	265,184	297,929	332,238	261,736	281,531
Unit value (per pound)							
Atlantic ocean perch 1/---	\$0.47	\$0.56	\$0.77	\$0.86	\$0.93	\$0.93	\$0.99
Cod-----	.80	.78	.86	1.03	1.08	1.08	1.19
Cusk, haddock, hake, and pollock-----	.71	.67	.77	.90	.98	.97	1.04
Wolf fish-----	.67	.70	.84	.97	1.13	1.13	1.29
Flatfish (except halibut and turbot)-----	3/ .76	.79	.94	1.03	1.15	1.14	1.34
Turbot-----	3/ .67	.47	.61	.77	.84	.85	.86
Average 1/ 2/-----	.65	.66	.81	.95	1.02	1.02	1.12

1/ Includes insignificant amount of fresh or chilled, filleted Atlantic ocean perch.

2/ Whiting, wolf fish, Pacific rockfish, blackcod, lingcod, and any other types of frozen fillets classified under TSUSA item numbers 110.5000 and 110.7080 are omitted.

3/ Estimated on the basis of official statistics of the U.S. Department of Commerce.

Source: Compiled from official statistics of the U.S. Department of Commerce.

in 1974 to 101 million pounds in 1976, but thereafter declined slightly to 94 million pounds in 1978. More importantly, imports of flounder and flatfish fillets declined by 18 percent in January-September 1979 when compared with imports during the corresponding period of 1978.

Atlantic ocean perch fillets (all of which are frozen, according to industry sources) increased from 59 million pounds in 1974 to 67 million pounds in 1975, but then declined over the next 2-year period to 45 million pounds in 1977. In 1978, imports increased to 48 million pounds, and during January-September 1979, imports were slightly higher than those of the corresponding period of 1978.

The "basket" category of groundfish fillets (fresh, chilled, or frozen), TSUSA item 110.7080, includes fillets of whiting, ling cod, black cod, and Pacific ocean rockfish and perch. Imports of the aforementioned groundfish fillets increased irregularly, from 20.3 million pounds in 1974 to 32.4 million pounds in 1978. Whiting fillets, according to industry sources, account for a large percentage of the imports under this tariff provision. Cusk, haddock, hake, and pollock fillets (fresh, chilled, or frozen) have increased continuously, from 34 million pounds in 1974 to 51 million pounds in 1978, representing an increase of 50 percent.

As shown in table 29, Canada accounts for nearly all of the fresh fillets imported into the United States. In January-September 1979, imports of Canadian fillets increased by 7.8 million pounds, or 57 percent compared with imports during the corresponding period of 1978. Canada is also the leading exporter of frozen fillets to the United States, followed by Iceland, Japan, Norway, and Denmark (table 29). Imports of groundfish fillets, by geographical areas, is set forth in table B-2, appendix B.

Groundfish blocks.—Imports of groundfish blocks increased from 266 million pounds in 1974 to 387 million pounds in 1978, or by 45 percent. However, imports of groundfish blocks in January-September 1979 declined slightly when compared with imports during the corresponding period of 1978 (table 30).

Cod fish blocks currently account for 53 percent of all imports of groundfish blocks. Imports of cod blocks increased from 113 million pounds in 1974 to 205 million pounds in both 1977 and 1978, representing an increase of 81 percent. There was a significant decline in imports of cod fish blocks (approximately 14 million pounds) in January-September 1979 compared with such imports in the corresponding period of 1978.

Table 28.—Fresh fish, under investigation, whole or processed into fillets:
U.S. imports for consumption, by principal sources, 1975-78, January-
September 1978, and January-September 1979 ^{1/}

Source	:	:	:	:	:	January-	
	1975	1976	1977	1978		September--	
						1978	1979
	:	:	:	:	:	:	:
	Quantity (1,000 pounds, product weight)						
	:	:	:	:	:	:	:
Canada-----	20,383	21,974	18,334	19,092	13,787	21,667	
Mexico-----	32	132	150	285	207	356	
Iceland-----	226	605	466	277	241	190	
Uruguay-----	-	-	-	141	116	56	
Netherlands-----	172	-	150	108	81	46	
All other-----	873	615	346	320	117	404	
Total-----	21,686	23,326	19,446	20,223	14,549	22,719	
	:	:	:	:	:	:	:
	Value (1,000 dollars)						
	:	:	:	:	:	:	:
Canada-----	9,524	12,368	10,662	12,178	9,208	14,294	
Mexico-----	11	38	72	167	118	186	
Iceland-----	204	504	422	304	265	234	
Uruguay-----	-	-	-	37	31	17	
Netherlands-----	174	-	241	227	177	150	
All other-----	459	362	573	208	98	350	
Total-----	10,372	13,272	11,970	13,121	9,897	15,231	
	:	:	:	:	:	:	:
	Unit value (per pound)						
	:	:	:	:	:	:	:
Canada-----	\$0.47	\$0.56	\$0.58	\$0.64	\$0.67	\$0.66	
Mexico-----	.34	.29	.48	.59	.57	.52	
Iceland-----	.90	.83	.91	1.10	1.10	1.23	
Uruguay-----	-	-	-	.26	.27	.30	
Netherlands-----	1.01	-	1.61	2.10	2.19	3.26	
All other-----	.53	.59	1.66	.65	.84	.87	
Average-----	.48	.57	.62	.65	.68	.67	
	:	:	:	:	:	:	:

^{1/} Includes fresh or chilled, whole, headed or gutted whiting, wolf fish, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Whiting, Pacific rockfish, black cod, lingcod, and any other types of fresh or chilled fillets classified under TSUSA item numbers 110.5000 and 110.7080 are omitted.

Excludes insignificant amount of fresh or chilled, whole or filleted Atlantic ocean perch.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 29.—Fish, fresh, chilled or frozen, processed into fillets (TSUSA items 110.5520-110.5720, 110.7033-110.7039 and 110.7080): 1/ U.S. imports for consumption, by principal sources, 1975-78, January- September 1978, and January-September 1979

Source	1975 <u>2/</u>	1976 <u>2/</u>	1977 <u>2/</u>	1978	January- September--	
					1978	1979
Quantity (1,000 pounds, product weight)						
Canada-----	142,453	141,962	135,618	161,003	120,705	123,267
Iceland-----	59,533	72,400	85,237	91,918	74,832	90,554
Japan-----	58,837	62,790	44,714	44,621	34,373	24,357
Norway-----	21,521	22,458	23,102	20,337	18,311	9,904
Denmark-----	17,692	27,709	24,645	18,752	16,238	11,519
All other-----	20,250	33,067	30,800	28,865	21,003	22,943
Total-----	320,286	360,386	344,116	365,496	285,462	282,544
Value (1,000 dollars)						
Canada-----	94,785	121,477	129,578	164,672	122,685	133,474
Iceland-----	46,859	63,646	86,016	98,769	80,426	110,173
Japan-----	27,043	37,171	31,254	33,443	25,459	20,070
Norway-----	15,948	18,575	23,912	22,988	20,725	11,941
Denmark-----	14,148	23,924	26,404	21,150	18,774	14,706
All other-----	11,941	22,158	21,959	20,063	15,300	17,482
Total-----	210,724	286,961	319,123	361,085	282,869	307,846
Unit value (per pound)						
Canada-----	\$0.65	\$0.86	\$0.96	\$1.02	\$1.02	\$1.08
Iceland-----	.79	.88	1.01	1.07	1.07	1.22
Japan-----	.46	.59	.70	.75	.74	.82
Norway-----	.74	.83	1.04	1.13	1.13	1.21
Denmark-----	.80	.86	1.07	1.13	1.13	1.28
All other-----	.59	.67	.92	.70	.73	.76
Average-----	.66	.80	.95	.99	.99	1.09

1/ Includes whiting, Pacific rockfish, black cod and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

2/ Includes small amounts of salmon, a species which is not under investigation.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 30.--Fish blocks (TSUSA items 110.4710-110.4765): U.S. imports for consumption, by species, 1974-1978, January-September 1978, and January-September 1979

Species	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds, product weight)							
Cod-----	113,162	160,857	180,126	204,872	204,696	173,337	158,726
Flatfish (except turbot)---	1/ 15,390	10,025	13,164	10,496	12,425	9,509	8,398
Turbot-----	1/ 5,692	2,776	8,514	4,594	4,352	3,321	4,140
Haddock-----	21,052	36,649	28,547	30,815	27,026	20,811	15,016
Pollock-----	80,052	74,831	95,699	82,960	81,294	59,070	62,411
Whiting-----	1/ 14,440	8,727	20,570	22,402	39,817	31,258	39,737
Atlantic ocean perch-----	1/ 3,687	2,173	7,981	2,291	3,084	1,896	4,364
Other-----	1/ 12,597	7,553	9,636	8,092	14,231	12,088	8,795
Total-----	266,072	303,591	364,237	366,522	386,925	311,290	301,587
Value (1,000 dollars)							
Cod-----	69,714	83,963	117,027	183,371	190,971	163,016	153,166
Flatfish (except turbot)---	1/ 9,723	6,837	11,365	11,274	12,347	8,996	10,420
Turbot-----	1/ 2,134	1,214	5,210	2,944	2,684	1,997	2,886
Haddock-----	13,953	19,730	18,712	27,023	26,101	19,926	14,857
Pollock-----	32,040	20,907	35,315	41,680	50,560	36,477	38,600
Whiting-----	1/ 5,184	2,696	8,288	11,137	22,885	18,193	24,620
Atlantic ocean perch-----	1/ 1,910	1,007	5,046	1,516	2,404	1,398	3,672
Other-----	1/ 6,549	3,331	6,038	6,064	9,730	8,167	6,493
Total-----	141,207	139,685	207,001	285,008	317,682	258,170	254,714
Unit value (per pound)							
Cod-----	\$0.62	\$0.52	\$0.65	\$0.90	\$0.93	\$0.94	\$0.96
Flatfish (except turbot)---	1/ .63	.68	.86	1.07	.99	.95	1.24
Turbot-----	1/ .38	.44	.61	.64	.62	.60	.70
Haddock-----	.66	.54	.66	.88	.97	.96	.99
Pollock-----	.40	.28	.37	.50	.62	.62	.62
Whiting-----	1/ .36	.31	.40	.50	.57	.58	.62
Atlantic ocean perch-----	1/ .52	.46	.63	.66	.78	.74	.84
Other-----	1/ .52	.44	.64	.75	.68	.68	.74
Average-----	.53	.46	.57	.78	.82	.83	.84

1/ Estimated on the basis of official statistics of the U.S. Department of Commerce.

Source: Compiled from official statistics of the U.S. Department of Commerce.

After increasing irregularly from 80 million pounds 1974 to 96 million pounds in 1976, imports of pollock blocks declined to 81 million pounds in 1978, but appear to be increasing again in 1979. In comparison, imports of whiting blocks have mushroomed from 9 million pounds in 1975 to 40 million pounds in 1978, representing an increase of over 344 percent. Furthermore, imports of whiting blocks increased by an additional 27 percent in January-September 1979, compared with such imports during the corresponding period of 1978. Cod, pollock, and whiting blocks account for 87 percent of total U.S. imports of groundfish blocks in January-September 1979. They are the primary groundfish ingredient used in the United States in frozen fish sticks and breaded fish portions.

Not until 1977 did Canada become the leading exporter of groundfish blocks to the United States. Prior to 1977, Iceland, Denmark, and Norway dominated the U.S. fish block market, but all of these countries have now taken an important, but secondary, role to Canada in this market (table 31). Imports of groundfish blocks, by geographical areas, are set forth in table B-3, appendix B.

Scaled groundfish.—U.S. imports of scaled groundfish (TSUS items 110.40 and 110.45) declined from 9.1 million pounds in 1974 to 2.9 million pounds in 1977 and then rebounded to 6.5 million pounds in 1978. However, in January-September 1979, imports are down compared with imports during the corresponding period of 1978.

Apparent consumption and market penetration by imports

U.S. apparent consumption of groundfish and groundfish products has increased irregularly, from 662 million pounds in 1974 to 934 million pounds in 1978, or by 41 percent. However, in January-September 1979, apparent U.S. consumption declined slightly, compared with apparent U.S. consumption during the corresponding period of 1978 (table 32). During the 1974-78 period, total imports of groundfish and groundfish products (by product weight) increased each year, from 543 million pounds in 1974 to 761 million pounds in 1978, or by 40 percent. However, total imports (by product weight) declined by approximately 11 million pounds in January-September 1979 compared with imports during the corresponding period of 1978. More importantly, U.S. landings, by product weight, ^{1/} during the 1974-79 period increased each year, from 119 million pounds in 1974 to 173 million pounds in 1978, or by 45 percent.

U.S. imports of groundfish and groundfish products have maintained over an 81-percent share of the U.S. market throughout the 5-year period from 1974-78. It should be noted that U.S. imports have actually suffered a slight decline in market share, from 82.1 percent in 1974 and 1975 to 81.5 percent in 1978.

^{1/} The staff used 30 percent of the whole weight of the landings as a conversion factor.

Table 31.—Fish blocks (TSUSA items 110.4710-110.4765): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September--	
					1978	1979
Quantity (1,000 pounds, product weight)						
Canada-----	39,127	49,112	74,312	90,811	74,816	86,426
Iceland-----	57,124	65,129	60,778	63,621	46,751	57,391
Denmark-----	37,788	51,637	64,760	59,904	51,149	25,533
Republic of Korea---	37,115	59,741	43,743	52,469	40,702	49,193
Norway-----	66,127	50,020	45,695	44,893	36,839	16,665
All other-----	66,309	88,599	77,233	75,225	61,031	66,379
Total-----	303,591	364,238	366,521	386,923	311,288	301,586
Value (1,000 dollars)						
Canada-----	20,820	34,626	65,808	80,543	67,236	84,713
Iceland-----	26,682	41,101	50,888	57,758	42,346	51,652
Denmark-----	19,275	33,476	56,371	53,834	46,483	23,435
Republic of Korea---	9,374	20,235	20,684	30,897	23,771	29,959
Norway-----	35,538	28,280	37,523	39,877	33,529	15,198
All other-----	27,997	49,283	53,735	54,774	44,805	49,757
Total-----	139,686	207,001	285,008	317,683	258,171	254,714
Unit value (per pound)						
Canada-----	\$0.53	\$0.71	\$0.89	\$0.89	\$0.90	\$0.98
Iceland-----	.47	.63	.84	.91	.91	.90
Denmark-----	.51	.65	.87	.90	.91	.92
Republic of Korea---	.25	.34	.47	.59	.58	.61
Norway-----	.54	.57	.82	.89	.91	.91
All other-----	.42	.56	.70	.73	.73	.75
Average-----	.46	.57	.78	.82	.83	.84

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 32.--Groundfish and groundfish products: U.S. landings, imports for consumption, and apparent consumption, 1974-78, January-September 1978, and January-September 1979

Item	1974	1975	1976	1977	1978	January-September--	
						1978	1979
	Quantity (1,000 pounds, product weight)						
U.S. landings 1/-----	118,617	127,230	132,182	149,567	172,704	128,823	132,487
Imports:							
Fresh and frozen:							
Whole fish 1/-----	8,010	8,854	9,048	7,369	8,954	6,340	8,359
Fillets 2/-----	268,996	320,286	360,386	344,116	365,496	285,462	282,544
Blocks-----	266,072	303,591	364,237	366,522	386,925	311,290	301,587
Total imports-----	543,078	632,731	733,671	718,007	761,375	603,092	592,490
Apparent consumption-----	661,695	759,961	865,853	867,574	934,079	731,915	725,077
	Percent of total						
Ratio to total apparent U.S.							
consumption of groundfish							
and groundfish products							
of imports of--							
Fresh and frozen--							
Whole fish-----	1.2	1.2	1.0	0.8	1.0	0.9	1.2
Fillets-----	40.6	42.1	41.6	39.7	39.1	39.0	39.0
Blocks-----	40.2	39.9	42.1	42.2	41.4	42.5	41.6
Total-----	82.1	83.3	84.7	82.8	81.5	82.4	81.7

1/ The product weight is based on a conversion factor of 30 percent of the landed and imported whole weight.

2/ Includes all groundfish fillets, including TSUS item 110.7080.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Whole fish

As shown in table 33, U.S. imports of whole groundfish (fresh, chilled, or frozen) since 1976 have lost market share, while U.S. landings increased each year in the 1974-78 period. In 1978, imports accounted for approximately 4.9 percent of apparent U.S. consumption of whole groundfish, or a decrease of

Table 33.—Groundfish: U.S. landings, imports for consumption, and apparent consumption, 1974-78, January-September 1978, and January-September 1979

Period	U.S. landings	Imports of whole fish (fresh and frozen)	Apparent consumption	Ratio of imports to apparent consumption
	<u>1,000</u> <u>pounds</u>	<u>1,000 pounds</u>	<u>1,000</u> <u>pounds</u>	<u>Percent</u>
1974-----	395,389	26,700	422,089	6.3
1975-----	424,102	29,514	453,616	6.5
1976-----	440,608	30,161	470,769	6.4
1977-----	498,555	24,564	523,119	4.7
1978-----	575,679	29,847	605,526	4.9
January-September--				
1978-----	429,409	21,134	450,543	4.7
1979-----	441,955	27,862	469,817	5.9

Source: Compiled from official statistics of the U.S. Department of Commerce.

25 percent from the 6.5 percent experienced in 1975. However, in January-September 1979, imports of whole groundfish rebounded, accounting for 5.9 percent of U.S. consumption during the period.

Groundfish blocks.—As set forth in table 35, U.S. imports of groundfish blocks increased each year from 1974 through 1978, and for the last 3 years imports have accounted for approximately 99.5 of apparent U.S. consumption of groundfish blocks. It should be noted that a new U.S. groundfish block industry has recently started production of fish blocks for commercial sale. The production of U.S. groundfish blocks prior to 1979 was not considered to be a separate industry, inasmuch as the blocks are merely an intermediate product between the fillets and fish portions. Thus the reporting of U.S. production figures for groundfish blocks is probably significantly understated.

Table 34.--Groundfish blocks: U.S. production, imports for consumption, and apparent consumption, 1974-78

Year	: U.S. production of groundfish blocks:	: Imports of groundfish blocks:	: Apparent consumption:	: Ratio of imports to apparent consumption
	: 1,000 pounds	: 1,000 pounds	: 1,000 pounds	: Percent
1974-----	4,417	266,072	270,489	98.4
1975-----	2,357	303,591	305,948	99.2
1976-----	1,697	364,237	365,934	99.5
1977-----	2,138	366,522	368,660	99.4
1978-----	2,135	386,925	389,060	99.5

Source: Compiled from official statistics of the U.S. Department of Commerce.

Groundfish fillets.--While U.S. production of groundfish fillets has irregularly increased by small margins since 1974, U.S. imports of groundfish fillets have increased by 96.5 million pounds, from 269 million pounds in 1974 to 365 million pounds in 1978 (table 35). Imports of groundfish fillets in 1978 accounted for 76 percent of apparent U.S. consumption, representing a slight increase over the 1977 level. It should be noted that the vast majority of groundfish fillet imports are frozen, while U.S. fillets are primarily sold in the fresh market.

Table 35.--Groundfish fillets: U.S. production, imports for consumption, and apparent consumption, 1974-78

Year	: U.S. production of fresh, chilled, or frozen fillets 1/	: U.S. imports of fresh, chilled, or frozen fillets	: Apparent consumption:	: Ratio of imports to apparent consumption
	: 1,000 pounds, fillet weight			: Percent
1974-----	99,371	268,996	368,367	73.0
1975-----	93,330	320,286	413,616	77.4
1976-----	106,199	360,386	466,585	77.2
1977-----	119,796	344,116	456,937	75.3
1978-----	115,722	365,496	481,218	76.0

1/ Includes U.S. fillet production of cod, cusk, flounders, haddock, hake, lingcod, Atlantic and Pacific perch, pollock, rockfish, sablefish, and whiting.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Increased imports relative to other possible causes of serious injury of the domestic industry

In their petition to the International Trade Commission, the Fishermen's Marketing Association of Washington and the Coast Draggers Association alleged that increasing imports of groundfish and groundfish products were causing serious injury to the U.S. fishing industry. In attempting to prove their case before the Commission, the petitioners have emphasized the following points:

1. On the west coast domestic fishermen were put on severe "trip limits" by domestic processors in 1979. In mid-November 1979 the situation had deteriorated to the point where three main fish processors 1/ have ceased buying any domestically landed groundfish. 2/ As a consequence of not being able to sell the fish which their vessels have the capacity to harvest the owners of the vessels are allegedly losing money and their crewmen are receiving lower wages. The situation is further aggravated by large increases in the costs of production (e.g., fuel, ice and groceries).
2. It is further alleged that increased imports of whole fish (fresh and frozen) and fresh fillets (see import section) in 1979 are adversely affecting that area in which the domestic industries have been the most competitive with imports—the fresh fish market. The petitioners have argued that lower cost imports (while small in number) have depressed the price of fresh groundfish fillets and in some cases have taken away traditional markets.
3. East coast domestic fishermen have alleged that the auction prices of their landings are being depressed by increasing low cost imports. Thus they are facing lower prices for their fish and rapidly increasing costs of vessel necessities, such as fuel and ice.
4. The petitioners also allege that the vast increases in imports of low priced frozen fillets have prevented U.S. processors from even entering the frozen fillet market. Every time a U.S. processor has to freeze unsold inventories of fresh fillets, they allegedly lose money, since the product is then reportedly sold at the lower frozen fillet prices.
5. The same argument has been advanced pertaining to fish blocks. Imports have increased and prices have been stagnant for almost 2 years. Thus, imports have allegedly discouraged any U.S. competition and have maintained a 99 percent control of the market.

1/ Lazio Fish Co., Eureka, Calif.; Washington Crab Producers, Westport, Wash.; and Ilwaco Fish Co., Ilwaco, Wash.

2/ Brief of Haugen and Thoreen, p. 4.

In response to the above allegations, the opposing parties in this investigation have advanced the following arguments:

1. U.S. landings of groundfish on both the Atlantic and Pacific coasts have increased dramatically from 395 million pounds in 1974 to 575 million pounds in 1978, and continued to increase in 1979. Furthermore the prices received by the domestic fishermen have increased significantly during the 1974-79 period. ^{1/} They contend that increasing landings and increasing prices for the fish landed are not likely to occur in a seriously injured industry.
2. The opposing parties contend that the processors on the west coast have limited landings because of overproduction. They state that the 34 percent increase in the Pacific groundfishing fleet in 1979 alone (95 vessels) has flooded the processors with groundfish in unmarketable quantities, since consumption has not expanded to consume the increase in landings. Furthermore, the negotiated prices on the west coast do not allow for price fluctuations which would take into account rising or falling supply or demand. Thus, the processor, faced with a rigid pricing system, a vast increase in landings, and a "soft" fresh fish market, has simply decided to limit the amount of fish he will buy to coincide with the amount of fish he can market.
3. Opponents to the petition further allege that, on the east coast, the fishermen's main problem are the conservation quotas on cod, haddock and flounder. These quotas have not allowed the domestic fishermen to increase their catch to off-set the increasing costs of fuel and ice.
4. Furthermore, the opponents of the petition allege that fish sales at the retail level are sensitive to the price of other food commodities. Thus, the opposing parties allege that any increase in the cost of frozen fillets or fish blocks will cause consumer shifts to other products such as poultry, pork, or beef.
5. Finally, the opposing parties argue that there is no viable U.S. frozen fish industry since the fishermen and U.S. processors primarily supply the fresh fish market, which commands substantially higher prices than the frozen fish market. Groundfish for the frozen market must be bought in volume so as to lower the unit cost of the fish. Yet, U.S. fishermen demand to sell their entire catch at one price and make no differentiation between fish that will be sold as fresh from that to be sold as frozen. Opponents to the petition also contend that domestic processors do not have the capacity to supply the product needs of the fish block converters industry. The United States consumed 389 million pounds of fish blocks in 1978, and current capacity of U.S. producers is estimated to be approximately 45 million pounds.

^{1/} Brief of Arter, Hadden and Hemmindinger, pp. 13-17.

APPENDIX A

U.S. INTERNATIONAL TRADE COMMISSION NOTICES
OF INVESTIGATION AND HEARING

UNITED STATES INTERNATIONAL TRADE COMMISSION
Washington, D.C.

CERTAIN FISH

[TA-201-41]

Notice of Investigation and Hearing

Investigation instituted. Following receipt of an amended properly filed "petition for relief from injury caused by imports of ground fish" on August 20, 1979, filed on behalf of the Fishermen's Marketing Association of Washington, Inc., Seattle, Washington and the Coast Draggers Association, Westport, Washington, ^{1/} the United States International Trade Commission on September 5, 1979, instituted an investigation under section 201(b) of the Trade Act of 1974 (19 U.S.C. 2251(b)) to determine whether cod, cusk, haddock, hake, pollock, whiting, wolf fish, Atlantic Ocean perch, Pacific rockfish (including Pacific Ocean perch), flounder, turbot, and all other flatfish, except halibut, provided for in items 110.15, 110.35, 110.40, 110.45, 110.47, 110.50, 110.57, and 110.70 of the Tariff Schedules of the United States, are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

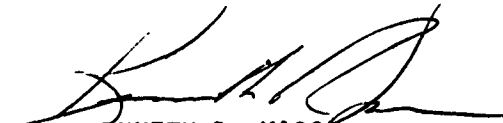
1/ Supporting this petition to date are the following organizations:

- (a) Fishermen's Marketing Association, Inc., Eureka, Calif.
- (b) National Federation of Fishermen/Western Region
- (c) Pacific Coast Federation of Fishermen's Associations, Sausalito, Calif.
- (d) Western Fishboat Owners Association, San Diego, Calif.
- (e) Otter Trawl Commission of Oregon, Astoria, Ore.
- (f) Marine Construction and Design Co., Seattle, Wash.
- (g) Point Judith Fishermen's Cooperative Association, Inc., Narraganset, R.I.

Public hearing ordered. A public hearing in connection with this investigation will be held in Seattle, Washington, on Wednesday, November 14, 1979, at a time and place to be announced. Requests for appearances at the hearing should be received in writing by the Secretary to the Commission, U.S. International Trade Commission Building, 701 E Street, NW., Washington, D.C. 20436, not later than the close of business, Thursday, November 8, 1979.

Inspection of petition. The submission filed in this case is available for public inspection at the Office of the Secretary to the Commission in Washington and at the Commission's New York City office, located at 6 World Trade Center.

By order of the Commission.



KENNETH R. MASON
Secretary

Issued: September 7, 1979

UNITED STATES INTERNATIONAL TRADE COMMISSION
Washington, D.C.

CERTAIN FISH

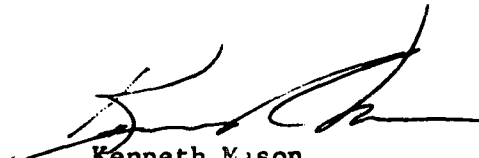
(TA-201-41)

CORRECTION OF NOTICE OF INVESTIGATION

Notice is hereby given that the notice of investigation and hearing in the above investigation inadvertently excluded item 110.55 of the Tariff Schedules of the United States from the product description of the fish covered by the investigation. The notice of investigation is hereby corrected to include item 110.55 of the Tariff Schedules of the United States in the product scope of the investigation.

The notice of investigation and hearing was published in the Federal Register of September 12, 1979 (44 F.R. 53112).

By order of the Commission.



Kenneth Mason
Secretary

Issued: September 20, 1979

APPENDIX B

STATISTICAL TABLES OF IMPORTS OF GROUND FISH
AND GROUND FISH PRODUCTS BY
GEOGRAPHICAL AREA

Table B-1.--Fish, whole, or processed by removal of heads, viscera, fins, or any combination thereof, but not otherwise processed (TSUSA items 110.1585, 110.1597, and 110.3553, 110.3575): U.S. imports for consumption, by market area types, 1978

Market	Quantity		Value	
	1,000 pounds	Percent	1,000 dollars	Percent
	product weight	of total		of total
Fresh: 1/ 2/				
New England-----	9,020	74	3,461	80
New York-----	121	1	60	1
Other east and gulf coast				
States-----	276	2	118	3
Washington, Oregon, and				
northern California-----	2,430	20	418	10
Southern California-----	239	2	205	5
All other (including Alaska)---	95	1	57	1
Total, fresh-----	12,181	100	4,317	100
Frozen: 1/ 3/				
New England-----	3,957	22	2,939	24
New York-----	2,053	11	2,584	22
Other east and gulf coast				
States-----	2,788	16	1,419	12
Washington, Oregon, and				
northern California-----	660	4	388	3
Southern California-----	822	5	777	6
All other (including Alaska)---	7,386	42	3,927	33
Total, frozen-----	17,666	100	1,034	100
Grand total-----	29,847	-	16,351	-

1/ Includes whiting, wolf fish, Pacific rockfish, black cod, and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

2/ Excludes insignificant amount of fresh or chilled, whole Atlantic ocean perch.

3/ Includes insignificant amount of fresh or chilled, whole Atlantic ocean perch.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table B-2.--Fish blocks (TSUSA items 110.4710-110.4763): U.S. imports
for consumption, by markets, 1978

Market	Quantity		Value	
	1,000 pounds product weight	Percent of total	1,000 dollars	Percent of total
New England-----	301,591	78	251,844	79
New York-----	5,400	1	3,506	1
Other east and gulf coast States-----	63,621	16	48,526	15
Washington, Oregon, and northern California-----	2,950	1	2,270	1
Southern California-----	7,512	2	6,739	2
All other (including Alaska)----	5,951	20	4,795	2
Total-----	386,925	100	317,682	100

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table B-3.--Fish, under investigation, processed into fillets (TSUSA items 110.5520-110.5720 and 110.7033-110.7080): U.S. imports for consumption, by markets and by type, 1978

Market	Quantity		Value	
	1,000 pounds	Percent of total product weight	1,000 dollars	Percent of total
Cod, cusk, haddock, hake, Atlantic ocean perch, wolf fish, flatfish (except halibut)				
Fresh: <u>1/</u>				
New England-----	5,843	73	6,362	72
New York-----	528	6	599	7
Other east gulf coast States--	74	1	86	1
Washington, Oregon, and northern California-----	368	5	351	4
Southern California-----	144	2	188	2
All other (including Alaska)---	1,085	13	1,218	14
Total fresh-----	8,042	100	8,804	100
Frozen: <u>2/</u>				
New England-----	251,291	77	242,108	73
New York-----	1,474	1	1,450	1
Other east and gulf coast States-----	10,869	3	11,187	3
Washington, Oregon, and northern California-----	4,138	1	3,723	1
Southern California-----	7,649	3	6,534	2
All other (including Alaska)---	49,594	15	67,236	20
Total frozen-----	325,015	100	332,238	100
Whiting, Pacific rockfish, black cod, and lingcod <u>3/</u>				
New England-----	13,374	41	7,591	38
New York-----	4,006	12	1,608	8
Other east and gulf coast States-----	6,465	20	3,492	17
Washington, Oregon, and northern California-----	3,978	12	3,588	18
Southern California-----	2,413	8	1,781	9
All others (including Alaska)---	2,201	7	1,983	10
Total-----	32,437	100	20,043	100
Grand total-----	365,496	-	361,085	-

1/ Excludes insignificant amount of fresh or chilled, filleted Atlantic ocean perch.

2/ Includes insignificant amount of fresh or chilled, filleted Atlantic ocean perch.

3/ Includes all other types of filleted groundfish classified under TSUSA item no. 110.7080; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Source: Compiled from official statistics of the U.S. Department of Commerce.

APPENDIX C
STATISTICAL TABLES

Table C-1.--Cod, fresh or chilled, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.1585): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	2,464	4,196	3,366	3,154	2,103	1,521	2,349
Mexico.....	0	0	58	0	15	5	75
Norway.....	0	0	0	20	0	0	<u>1/</u>
Nethlds.....	0	0	0	3	0	0	0
Japan.....	0	0	20	0	0	0	0
All other....	38	28	0	0	0	0	0
Total.....	2,502	4,224	3,443	3,177	2,118	1,526	2,425
Value (1,000 dollars)							
Canada.....	505	668	830	888	627	438	864
Mexico.....	-	-	3	-	6	2	28
Norway.....	-	-	-	27	-	-	<u>1/</u>
Nethlds.....	-	-	-	4	-	-	-
Japan.....	-	-	14	-	-	-	-
All other....	23	3	-	-	-	-	-
Total.....	528	671	847	918	634	441	892
Unit value (cents per pound)							
Canada.....	\$0.21	\$0.16	\$0.25	\$0.28	\$0.30	\$0.29	\$0.37
Mexico.....	-	-	0.05	-	0.43	0.49	0.37
Norway.....	-	-	-	1.31	-	-	1.09
Nethlds.....	-	-	-	1.28	-	-	-
Japan.....	-	-	0.69	-	-	-	-
All other....	0.60	0.10	-	-	-	-	-
Average....	0.21	0.16	0.25	0.29	0.30	0.29	0.37

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-2.--Cod, frozen, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.1589): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	351	564	264	525	426	283	862
Japan.....	151	28	46	95	41	41	0
Mexico.....	3	25	77	4	20	0	59
Denmark.....	58	128	5	47	0	0	0
FR Germ.....	0	0	0	43	0	0	0
All other....	102	119	259	12	0	0	467
Total.....	665	864	650	726	487	324	1,387
Value (1,000 dollars)							
Canada.....	128	196	110	251	201	142	509
Japan.....	90	17	36	88	39	38	-
Mexico.....	1	5	15	1	8	-	23
Denmark.....	42	59	2	47	-	-	-
FR Germ.....	-	-	-	41	-	-	-
All other....	40	27	77	4	-	-	282
Total.....	301	303	241	434	248	181	814
Unit value (cents per pound)							
Canada.....	\$0.37	\$0.35	\$0.42	\$0.48	\$0.47	\$0.50	\$0.59
Japan.....	0.60	0.62	0.80	0.92	0.95	0.94	-
Mexico.....	0.30	0.18	0.20	0.38	0.38	-	0.40
Denmark.....	0.73	0.46	0.50	1.01	-	-	-
FR Germ.....	-	-	-	0.96	-	-	-
All other....	0.39	0.22	0.30	0.36	-	-	0.60
Average....	0.45	0.35	0.37	0.60	0.51	0.56	0.59

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-3.--Cusk, haddock, hake and pollock, fresh or chilled, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.1593): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	7,944	6,814	7,909	5,649	5,862	4,645	4,385
Norway.....	0	0	0	0	1	0	0
Portugl.....	0	0	1/	0	1	0	1
Kor Rep.....	0	0	0	1	0	0	0
Iceland.....	0	4	1/	0	0	0	0
All other....	39	0	0	0	0	0	2
Total.....	7,982	6,818	7,910	5,650	5,865	4,645	4,388
Value (1,000 dollars)							
Canada.....	3,263	2,833	3,370	2,479	2,363	1,893	1,643
Norway.....	-	-	-	-	2	-	-
Portugl.....	-	-	1/	-	1	-	1
Kor Rep.....	-	-	-	1	-	-	-
Iceland.....	-	1	1/	-	-	-	-
All other....	16	-	-	-	-	-	3
Total.....	3,280	2,834	3,371	2,481	2,366	1,893	1,647
Unit value (cents per pound)							
Canada.....	\$0.41	\$0.42	\$0.43	\$0.44	\$0.40	\$0.41	\$0.37
Norway.....	-	-	-	-	1.25	-	-
Portugl.....	-	-	0.75	-	1.06	-	1.02
Kor Rep.....	-	-	-	1.29	-	-	-
Iceland.....	-	0.20	1.12	-	-	-	-
All other....	0.42	-	-	-	-	-	1.90
Average....	0.41	0.42	0.43	0.44	0.40	0.41	0.38

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-4.--Cusk, haddock, hake and pollock, frozen, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.1597): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Kor Rep.....	34	96	500	226	472	435	157
Chile.....	0	0	0	0	221	221	79
Canada.....	100	258	60	80	52	41	333
Rep Saf.....	55	68	0	19	46	46	170
U King.....	0	26	191	0	32	32	0
All other....	680	418	248	221	18	3	731
Total.....	869	867	999	546	840	778	1,470
Value (1,000 dollars)							
Kor Rep.....	5	16	127	46	280	257	91
Chile.....	-	-	-	-	44	44	18
Canada.....	30	64	41	50	17	14	122
Rep Saf.....	22	28	-	12	13	13	84
U King.....	-	12	146	-	32	32	-
All other....	148	95	91	108	21	3	355
Total.....	205	215	405	216	407	363	670
Unit value (cents per pound)							
Kor Rep.....	\$0.15	\$0.17	\$0.25	\$0.20	\$0.59	\$0.59	\$0.58
Chile.....	-	-	-	-	0.20	0.20	0.22
Canada.....	0.30	0.25	0.68	0.62	0.34	0.34	0.37
Rep Saf.....	0.40	0.41	-	0.62	0.27	0.27	0.50
U King.....	-	0.47	0.77	-	1.01	1.01	-
All other....	0.22	0.23	0.37	0.49	1.17	1.14	0.49
Average....	0.24	0.25	0.41	0.40	0.48	0.47	0.46

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-5.--Atlantic ocean perch, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.3552): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Norway.....	0	0	0	0	301	301	0
Canada.....	265	52	527	71	84	46	33
Mexico.....	10	45	8	1	15	15	0
Rep Saf.....	71	124	20	89	13	0	0
U King.....	1	29	0	0	3	3	0
All other....	1,014	201	1,088	89	1/	1/	100
Total.....	1,362	451	1,644	249	416	365	132
Value (1,000 dollars)							
Norway.....	-	-	-	-	355	355	-
Canada.....	156	27	95	67	62	37	6
Mexico.....	5	24	4	1/	4	4	-
Rep Saf.....	12	35	9	33	9	-	-
U King.....	1	16	-	-	3	3	-
All other....	446	104	607	71	1/	1/	25
Total.....	620	205	716	171	433	399	31
Unit value (cents per pound)							
Norway.....	-	-	-	-	\$1.18	\$1.18	-
Canada.....	0.59	0.52	0.18	0.95	0.74	0.80	0.19
Mexico.....	0.46	0.54	0.45	0.40	0.28	0.28	-
Rep Saf.....	0.16	0.28	0.47	0.37	0.67	-	-
U King.....	1.01	0.55	-	-	1.23	1.23	-
All other....	0.44	0.51	0.56	0.79	1.30	1.30	0.25
Average....	0.46	0.45	0.44	0.67	1.04	1.09	0.24

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-6.--Flounders and other flatfish, except halibut, fresh or chilled, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.3560): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	1,054	1,784	2,214	2,085	1,750	864	1,776
Mexico.....	29	32	70	150	270	202	281
Nethlds.....	44	21	0	91	87	65	33
Japan.....	0	0	0	0	20	0	0
N Zeal.....	0	0	0	2	4	4	32
All other....	31	18	7	21	5	3	22
Total.....	1,158	1,856	2,292	2,349	2,137	1,139	2,144
Value (1,000 dollars)							
Canada.....	236	428	517	528	495	255	466
Mexico.....	8	11	33	72	160	115	158
Nethlds.....	61	35	-	166	159	130	101
Japan.....	-	-	-	-	10	-	-
N Zeal.....	-	-	-	1	3	3	24
All other....	49	38	12	28	15	12	41
Total.....	354	511	562	795	842	515	791
Unit value (cents per pound)							
Canada.....	\$0.22	\$0.24	\$0.23	\$0.25	\$0.28	\$0.29	\$0.26
Mexico.....	0.26	0.33	0.47	0.48	0.59	0.57	0.56
Nethlds.....	1.39	1.62	-	1.83	1.82	1.98	3.05
Japan.....	-	-	-	-	0.48	-	-
N Zeal.....	-	-	-	0.66	0.77	0.77	0.76
All other....	1.59	2.13	1.57	1.31	2.80	3.46	1.84
Average....	0.31	0.28	0.25	0.34	0.39	0.45	0.37

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-7.--Flounders and other flatfish, except halibut, frozen, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.3565): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)							
Nethlds.....	786	1,541	1,935	1,535	1,430	1,097	1,743
Canada.....	224	440	122	208	382	131	301
Belgium.....	262	468	442	466	364	331	268
Iceland.....	45	736	341	872	306	267	522
Japan.....	287	291	189	36	249	189	88
All other....	281	310	139	429	315	248	307
Total.....	1,885	3,786	3,168	3,547	3,045	2,262	3,230
Value (1,000 dollars)							
Nethlds.....	994	2,447	4,195	3,185	3,202	2,837	5,385
Canada.....	111	203	63	134	350	119	252
Belgium.....	328	658	928	995	841	816	746
Iceland.....	20	372	187	479	210	181	392
Japan.....	132	105	82	25	109	74	59
All other....	269	359	267	265	312	281	340
Total.....	1,854	4,145	5,722	5,084	5,023	4,308	7,174
Unit value (cents per pound)							
Nethlds.....	\$1.27	\$1.59	\$2.17	\$2.07	\$2.24	\$2.59	\$3.09
Canada.....	0.50	0.46	0.52	0.65	0.92	0.91	0.84
Belgium.....	1.25	1.41	2.10	2.13	2.31	2.47	2.78
Iceland.....	0.44	0.51	0.55	0.55	0.69	0.68	0.75
Japan.....	0.46	0.36	0.43	0.70	0.44	0.39	0.67
All other....	0.96	1.16	1.92	0.62	0.99	1.14	1.11
Average....	0.98	1.09	1.81	1.43	1.65	1.90	2.22

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-8.--Other fish under investigation, fresh or chilled, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.3570): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September--	
						1978	1979
Quantity (1,000 pounds product-weight)							
Canada-----	649	1,043	584	902	1,729	869	3,499
Argentina-----	0	56	100	86	173	28	133
Uruguay-----	0	0	0	0	141	116	56
Netherland-----	36	36	0	56	17	12	12
Japan-----	44	77	178	46	1	1	15
All other-----	0	0	41	1/	0	0	43
Total-----	729	1,212	903	1,090	2,061	1,026	3,758
Value (1,000 dollars)							
Canada-----	178	253	116	292	319	200	630
Argentina-----	-	8	18	20	60	7	37
Uruguay-----	-	-	-	-	37	31	17
Netherland-----	28	64	-	70	57	37	46
Japan-----	12	38	90	39	2	2	21
All other-----	-	-	21	1	-	-	20
Total-----	218	363	245	422	475	277	771
Unit value (cents per pound)							
Canada-----	.27	.24	.20	.32	.18	.23	.18
Argentina-----	-	.14	.18	.23	.35	.25	.28
Uruguay-----	-	-	-	-	.26	.27	.30
Netherland-----	.78	1.78	-	1.25	3.35	3.08	3.83
Japan-----	.27	.49	.51	.85	2.00	2.00	1.40
All other-----	-	-	.51	-	-	-	.47
Total-----	.30	.30	.27	.39	.23	.27	.21

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Includes whiting, wolf fish, pacific rockfish, black cod and lingcod; amounts estimated on the basis of official statistics of the U.S. Department of Commerce.

Table C-9.--Other fish under investigation, frozen, whole or processed by removal of heads, viscera, or fins, or any combination thereof, but not otherwise processed (TSUSA item 110.3575): U.S. imports for consumption by principal sources, 1974-78, January-September 1978, and January-September 1979.

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product-weight)							
South Africa-----	3,101	3,623	2,056	3,535	6,242	3,915	5,110
Argentina-----	1,937	2,719	3,918	2,210	3,126	2,268	2,123
Uruguay-----	343	57	552	116	2,106	1,630	202
Netherland-----	1,047	661	265	326	595	520	491
Canada-----	693	462	318	413	445	317	411
All other-----	2,428	1,915	2,044	630	364	419	593
Total-----	9,549	9,437	9,153	7,230	12,878	9,069	8,930
Value (1,000 dollars)							
South Africa-----	689	913	515	1,151	2,346	1,416	2,405
Argentina-----	312	572	648	401	796	568	497
Uruguay-----	75	31	106	37	564	435	99
Netherland-----	1,498	1,019	640	724	1,372	1,184	1,627
Canada-----	292	140	127	285	239	189	213
All other-----	1,060	1,097	1,148	617	606	466	633
Total-----	3,926	3,772	3,184	3,215	5,925	4,258	5,474
Unit value (cents per pound)							
South Africa-----	.22	.25	.25	.33	.38	.36	.47
Argentina-----	.16	.21	.17	.18	.25	.25	.23
Uruguay-----	.22	.54	.19	.32	.27	.27	.49
Netherland-----	1.43	1.54	2.42	2.22	2.31	2.28	3.31
Canada-----	.42	.30	.40	.69	.54	.60	.52
All other-----	.44	.57	.56	.98	1.66	1.11	1.07
Total-----	.41	.40	.35	.44	.46	.47	.61

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Includes whiting, wolf fish, pacific rockfish, block cod and lingcod, amount estimated on the basis of official statistics of the U.S. Department of Commerce.

Table C-10.--Scaled fish, whether or not heads, viscera, fins, or any combination thereof have been removed, but not otherwise processed, in bulk or in immediate containers weighing with their contents over 15 pounds each (TSUSA item 110.4000): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Uruguay.....	400	1,521	818	1,101	2,021	1,837	930
Argent.....	1,206	813	752	624	1,590	1,371	1,289
Rep Saf.....	931	1,399	569	125	1,501	1,013	329
Canada.....	270	284	123	499	250	206	232
Cyprus.....	0	0	0	0	122	0	0
All other....	6,074	1,036	967	437	281	249	718
Total.....	8,880	5,054	3,229	2,786	5,765	4,676	3,498
Value (1,000 dollars)							
Uruguay.....	107	433	227	304	575	507	356
Argent.....	271	145	133	141	404	334	262
Rep Saf.....	329	226	108	26	326	246	116
Canada.....	223	248	88	206	202	166	190
Cyprus.....	-	-	-	-	31	-	-
All other....	1,303	374	453	269	139	120	310
Total.....	2,234	1,425	1,009	946	1,676	1,373	1,235
Unit value (cents per pound)							
Uruguay.....	\$0.27	\$0.28	\$0.28	\$0.28	\$0.28	\$0.28	\$0.38
Argent.....	0.23	0.18	0.18	0.23	0.25	0.24	0.20
Rep Saf.....	0.35	0.16	0.19	0.21	0.22	0.24	0.35
Canada.....	0.83	0.87	0.71	0.41	0.81	0.81	0.82
Cyprus.....	-	-	-	-	0.25	-	-
All other....	0.21	0.36	0.47	0.62	0.50	0.48	0.43
Average....	0.25	0.28	0.31	0.34	0.29	0.29	0.35

Source: Compiled from official statistics of the Department of Commerce.

Table C-11.--Scaled fish, whether or not heads, viscera, fins, or any combination thereof have been removed, but not otherwise processed, other than in bulk or in immediate containers weighing with their contents over 15 pounds each (TSUSA item 110.4500): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)							
Argent.....	35	201	39	72	489	230	127
Uruguay.....	55	0	0	16	130	130	11
Peru.....	0	0	0	0	123	89	663
Mexico.....	0	0	7	0	20	20	149
Trinid.....	0	0	0	0	16	16	0
All other....	127	3	23	33	11	10	27
Total.....	218	204	69	121	789	495	977
Value (1,000 dollars)							
Argent.....	6	30	6	12	129	64	37
Uruguay.....	13	-	-	4	34	34	2
Peru.....	-	-	-	-	42	32	133
Mexico.....	-	-	5	-	18	18	30
Trinid.....	-	-	-	-	20	20	-
All other....	97	4	44	67	18	11	65
Total.....	116	34	56	82	260	180	266
Unit value (cents per pound)							
Argent.....	\$0.16	\$0.15	\$0.16	\$0.16	\$0.26	\$0.28	\$0.29
Uruguay.....	0.24	-	-	0.28	0.26	0.26	0.18
Peru.....	-	-	-	-	0.34	0.37	0.20
Mexico.....	-	-	0.72	-	0.89	0.89	0.20
Trinid.....	-	-	-	-	1.23	1.23	-
All other....	0.76	1.26	1.94	1.99	1.59	1.11	2.43
Average....	0.53	0.17	0.80	0.68	0.33	0.36	0.27

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-12.--Cod, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4710): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	21,184	22,538	33,655	57,532	65,556	54,434	69,633
Denmark.....	29,146	29,550	43,090	42,517	39,269	35,548	17,517
Iceland.....	29,993	30,755	36,733	38,990	38,920	27,889	35,413
Norway.....	9,103	45,674	32,146	35,587	33,163	31,054	10,587
Greenld.....	4,358	8,298	4,719	12,420	18,312	15,849	13,521
All other....	19,379	24,041	29,783	17,825	9,476	8,562	12,055
Total.....	113,162	160,857	180,126	204,872	204,696	173,337	158,726
Value (1,000 dollars)							
Canada.....	13,224	12,598	23,750	52,507	61,496	52,273	69,537
Denmark.....	18,414	15,713	28,611	39,143	37,102	33,604	16,787
Iceland.....	18,926	15,146	24,392	35,529	37,391	26,973	33,987
Norway.....	4,997	25,018	18,809	30,309	30,362	28,596	9,798
Greenld.....	2,366	3,801	2,961	10,922	16,403	14,148	12,437
All other....	11,788	11,687	18,505	14,961	8,217	7,422	10,621
Total.....	69,714	83,963	117,027	183,371	190,971	163,016	153,166
Unit value (cents per pound)							
Canada.....	\$0.62	\$0.56	\$0.71	\$0.91	\$0.94	\$0.96	\$1.00
Denmark.....	0.63	0.53	0.66	0.92	0.94	0.95	0.96
Iceland.....	0.63	0.49	0.66	0.91	0.96	0.97	0.96
Norway.....	0.55	0.55	0.59	0.85	0.92	0.92	0.93
Greenld.....	0.54	0.46	0.63	0.88	0.90	0.89	0.92
All other....	0.61	0.49	0.62	0.84	0.87	0.87	0.88
Average....	0.62	0.52	0.65	0.90	0.93	0.94	0.96

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-13.--Turbot, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4724): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September 1978	January-September 1979
Quantity (1,000 pounds product weight)						
Canada.....	1,691	2,979	2,703	4,108	3,179	3,201
Japan.....	919	4,885	1,550	184	106	315
Denmark.....	7	17	9	44	21	12
Norway.....	30	13	13	13	13	12
Nethlds.....	0	3	0	2	2	0
All other....	129	618	320	0	0	600
Total.....	2,776	8,514	4,594	4,352	3,321	4,140
Value (1,000 dollars)						
Canada.....	786	2,054	1,803	2,475	1,870	2,228
Japan.....	375	2,770	937	170	101	248
Denmark.....	3	9	5	26	12	8
Norway.....	13	7	8	8	8	8
Nethlds.....	-	6	-	6	6	-
All other....	37	364	190	-	-	395
Total.....	1,214	5,210	2,944	2,684	1,997	2,886
Unit value (cents per pound)						
Canada.....	\$0.46	\$0.69	\$0.67	\$0.60	\$0.59	\$0.70
Japan.....	0.41	0.57	0.60	0.92	0.95	0.79
Denmark.....	0.37	0.57	0.62	0.58	0.59	0.63
Norway.....	0.45	0.55	0.63	0.61	0.61	0.64
Nethlds.....	-	1.87	-	2.57	2.57	-
All other....	0.29	0.59	0.59	-	-	0.66
Average....	0.44	0.61	0.64	0.62	0.60	0.70

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-14.--Flatfish, except turbot, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4726): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)						
Canada.....	7,833	7,940	8,678	10,364	7,958	7,514
Japan.....	1,527	4,231	1,257	1,561	1,145	588
Iceland.....	430	761	387	451	366	213
SP Mqel.....	54	69	43	24	14	33
U King.....	74	9	20	12	12	3
All other....	106	153	110	14	13	47
Total.....	10,025	13,164	10,496	12,425	9,509	8,398
Value (1,000 dollars)						
Canada.....	4,679	6,425	7,799	9,352	7,119	8,215
Japan.....	1,806	4,336	2,831	2,499	1,466	1,898
Iceland.....	237	456	379	459	383	223
SP Mqel.....	30	51	39	19	10	33
U King.....	36	6	17	10	10	3
All other....	50	90	209	8	7	50
Total.....	6,837	11,365	11,274	12,347	8,996	10,420
Unit value (cents per pound)						
Canada.....	\$0.60	\$0.81	\$0.90	\$0.90	\$0.89	\$1.09
Japan.....	1.18	1.02	2.25	1.60	1.28	3.23
Iceland.....	0.55	0.60	0.98	1.02	1.05	1.05
SP Mqel.....	0.57	0.74	0.90	0.78	0.71	0.97
U King.....	0.48	0.69	0.84	0.82	0.82	0.88
All other....	0.47	0.59	1.90	0.60	0.56	1.06
Average....	0.68	0.86	1.07	0.99	0.95	1.24

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-15.--Haddock, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4730): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Iceland.....	4,942	12,738	10,107	5,950	9,619	7,042	6,454
Denmark.....	3,070	4,438	2,530	10,948	8,469	6,801	2,955
Norway.....	10,153	15,967	12,190	7,407	5,188	3,994	3,797
Canada.....	195	455	267	838	2,119	1,425	1,639
Kor Rep.....	0	0	0	103	847	847	0
All other....	2,692	3,051	3,455	5,570	785	702	171
Total.....	21,052	36,649	28,547	30,815	27,026	20,811	15,016
Value (1,000 dollars)							
Iceland.....	3,149	6,751	6,923	5,604	9,525	6,972	6,183
Denmark.....	2,038	2,283	1,941	10,483	8,186	6,566	2,982
Norway.....	6,986	8,879	7,031	5,728	5,045	3,811	3,916
Canada.....	135	250	176	814	2,082	1,394	1,702
Kor Rep.....	-	-	-	57	525	525	-
All other....	1,645	1,567	2,641	4,336	738	658	75
Total.....	13,953	19,730	18,712	27,023	26,101	19,926	14,857
Unit value (cents per pound)							
Iceland.....	\$0.64	\$0.53	\$0.68	\$0.94	\$0.99	\$0.99	\$0.96
Denmark.....	0.66	0.51	0.77	0.96	0.97	0.97	1.01
Norway.....	0.69	0.56	0.58	0.77	0.97	0.95	1.03
Canada.....	0.69	0.55	0.66	0.97	0.98	0.98	1.04
Kor Rep.....	-	-	-	0.56	0.62	0.62	-
All other....	0.61	0.51	0.76	0.78	0.94	0.94	0.44
Average....	0.66	0.54	0.66	0.88	0.97	0.96	0.99

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-16.--Pollock, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4740): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978, and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Kor Rep.....	14,793	36,700	58,654	43,171	43,929	34,160	43,037
Denmark.....	5,253	3,115	4,955	10,444	10,723	7,547	3,512
Iceland.....	6,938	10,856	10,176	11,105	9,597	7,866	9,593
Japan.....	47,038	15,470	10,513	10,476	6,482	4,616	3,545
Norway.....	1,622	3,767	5,098	2,512	6,308	1,613	1,722
All other...	4,409	4,923	6,304	5,251	4,255	3,267	1,002
Total.....	80,052	74,831	95,699	82,960	81,294	59,070	62,411
Value (1,000 dollars)							
Kor Rep.....	5,413	9,260	19,804	20,329	25,599	19,711	25,766
Denmark.....	2,159	1,011	2,350	6,062	7,394	5,300	2,387
Iceland.....	2,927	3,580	4,697	6,122	6,342	5,179	6,450
Japan.....	18,844	4,170	3,812	5,250	4,477	3,332	2,124
Norway.....	803	1,256	2,137	1,349	4,269	976	1,152
All other...	1,893	1,630	2,515	2,568	2,479	1,980	720
Total.....	32,040	20,907	35,315	41,680	50,560	36,477	38,600
Unit value (cents per pound)							
Kor Rep.....	\$0.37	\$0.25	\$0.34	\$0.47	\$0.58	\$0.58	\$0.60
Denmark.....	0.41	0.32	0.47	0.58	0.69	0.70	0.68
Iceland.....	0.42	0.33	0.46	0.55	0.66	0.66	0.67
Japan.....	0.40	0.27	0.36	0.50	0.69	0.72	0.60
Norway.....	0.50	0.33	0.42	0.54	0.68	0.60	0.67
All other...	0.43	0.33	0.40	0.49	0.58	0.61	0.72
Average...	0.40	0.28	0.37	0.50	0.62	0.62	0.62

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-17.--Whiting, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4755): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September 1978	January-September 1979
Quantity (1,000 pounds product weight)						
Argent.....	3,101	10,666	14,633	24,915	19,830	20,089
Kor Rep.....	0	0	19	4,518	3,112	4,426
Uruguay.....	0	164	249	3,538	2,649	9,052
Japan.....	100	360	764	1,865	1,449	606
Rep Saf.....	2,610	1,976	1,746	1,453	1,210	1,654
All other....	2,915	7,404	4,991	3,529	3,008	3,909
Total.....	8,727	20,570	22,402	39,817	31,258	39,737
Value (1,000 dollars)						
Argent.....	894	3,329	6,740	13,530	11,010	11,908
Kor Rep.....	-	-	13	2,848	1,979	2,983
Uruguay.....	-	23	120	2,008	1,527	5,533
Japan.....	30	144	488	1,094	810	428
Rep Saf.....	957	1,379	1,097	976	806	1,285
All other....	816	3,413	2,679	2,428	2,061	2,482
Total.....	2,696	8,288	11,137	22,885	18,193	24,620
Unit value (cents per pound)						
Argent.....	\$0.29	\$0.31	\$0.46	\$0.54	\$0.56	\$0.59
Kor Rep.....	-	-	0.69	0.63	0.64	0.67
Uruguay.....	-	0.14	0.48	0.57	0.58	0.61
Japan.....	0.30	0.40	0.64	0.59	0.56	0.71
Rep Saf.....	0.37	0.70	0.63	0.67	0.67	0.78
All other....	0.28	0.46	0.54	0.69	0.69	0.64
Average....	0.31	0.40	0.50	0.57	0.58	0.62

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-18.--Atlantic ocean perch (rosefish), skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4760): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September	
					1978	1979
Quantity (1,000 pounds product weight)						
Iceland.....	1,069	4,189	1,588	2,085	1,199	3,084
Canada.....	380	377	194	532	497	240
Greenld.....	397	1,192	360	194	113	220
Denmark.....	65	193	76	164	82	751
FR Germ.....	43	981	0	90	0	43
All other....	219	1,048	73	18	4	27
Total.....	2,173	7,981	2,291	3,084	1,896	4,364
Value (1,000 dollars)						
Iceland.....	469	2,778	1,071	1,666	900	2,597
Canada.....	212	276	128	397	361	228
Greenld.....	151	703	215	128	74	168
Denmark.....	34	109	52	121	60	624
FR Germ.....	24	568	-	77	-	34
All other....	118	611	49	16	3	21
Total.....	1,007	5,046	1,516	2,404	1,398	3,672
Unit value (cents per pound)						
Iceland.....	\$0.44	\$0.66	\$0.67	\$0.80	\$0.75	\$0.84
Canada.....	0.56	0.73	0.66	0.75	0.73	0.95
Greenld.....	0.38	0.59	0.60	0.66	0.65	0.76
Denmark.....	0.51	0.56	0.68	0.74	0.74	0.83
FR Germ.....	0.56	0.58	-	0.86	-	0.78
All other....	0.54	0.58	0.67	0.85	0.71	0.79
Average....	0.46	0.63	0.66	0.78	0.74	0.84

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-19.--Other fish, skinned and boned, whether or not divided into pieces, and frozen into blocks each weighing over 10 pounds, imported to be minced, ground, or cut into pieces of uniform weights and dimensions (TSUSA item 110.4765): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978, and January-September 1979

Source	1975	1976	1977	1978	January-September 1978	1979
Quantity (1,000 pounds product weight)						
Canada.....	3,370	2,662	3,495	6,489	5,791	3,407
Iceland.....	1,246	2,825	2,745	2,945	2,384	2,167
Kor Rep.....	75	0	54	2,516	1,925	1,145
FR Germ.....	0	298	175	649	520	558
Uruguay.....	0	109	37	442	442	105
All other....	2,862	3,743	1,585	1,191	1,027	1,413
Total.....	7,553	9,636	8,092	14,231	12,088	8,795
Value (1,000 dollars)						
Canada.....	1,288	1,460	2,250	3,660	3,214	2,206
Iceland.....	485	1,650	2,172	2,371	1,936	1,852
Kor Rep.....	23	-	38	1,532	1,163	737
FR Germ.....	-	103	84	425	316	394
Uruguay.....	-	27	18	289	289	91
All other....	1,535	2,799	1,501	1,454	1,250	1,213
Total.....	3,331	6,038	6,064	9,730	8,167	6,493
Unit value (cents per pound)						
Canada.....	\$0.38	\$0.55	\$0.64	\$0.56	\$0.56	\$0.65
Iceland.....	0.39	0.58	0.79	0.81	0.81	0.85
Kor Rep.....	0.31	-	0.70	0.61	0.60	0.64
FR Germ.....	-	0.35	0.48	0.66	0.61	0.71
Uruguay.....	-	0.25	0.49	0.65	0.65	0.86
All other....	0.54	0.75	0.95	1.22	1.22	0.86
Average....	0.44	0.63	0.75	0.68	0.68	0.74

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-20.--Atlantic ocean perch (rosefish), otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5520): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	55,933	63,727	53,887	37,217	42,329	30,458	25,952
Iceland.....	1,221	1,525	4,647	5,753	3,925	2,908	8,072
U King.....	109	203	375	932	561	471	411
SP Mqel.....	416	484	487	590	158	158	107
Norway.....	687	279	151	200	151	82	267
All other....	1,111	1,201	723	546	436	312	325
Total.....	59,477	67,417	60,269	45,239	47,561	34,389	35,133
Value (1,000 dollars)							
Canada.....	26,268	35,578	41,832	32,664	39,830	28,411	26,587
Iceland.....	637	853	3,425	4,547	3,478	2,573	7,096
U King.....	64	111	273	702	459	388	347
SP Mqel.....	181	270	395	523	151	151	101
Norway.....	310	133	96	148	134	70	233
All other....	522	671	503	380	353	252	285
Total.....	27,982	37,616	46,523	38,964	44,406	31,845	34,649
Unit value (cents per pound)							
Canada.....	\$0.47	\$0.56	\$0.78	\$0.88	\$0.94	\$0.93	\$1.02
Iceland.....	0.52	0.56	0.74	0.79	0.89	0.88	0.88
U King.....	0.59	0.55	0.73	0.75	0.82	0.82	0.84
SP Mqel.....	0.43	0.56	0.81	0.89	0.95	0.95	0.95
Norway.....	0.45	0.48	0.63	0.74	0.89	0.86	0.87
All other....	0.47	0.56	0.70	0.70	0.81	0.81	0.88
Average....	0.47	0.56	0.77	0.86	0.93	0.93	0.99

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table G-21.--Cod, fresh or chilled, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5545): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September 1978	January-September 1979
Quantity (1,000 pounds product weight)							
Canada.....	2,769	3,422	4,999	3,623	3,896	2,940	6,099
Norway.....	1	105	1	0	47	42	30
N Zeal.....	0	0	0	0	16	0	0
Iceland.....	8	28	12	3	1/	0	4
Spain.....	0	0	0	31	0	0	0
All other....	211	537	88	4	0	0	0
Total.....	2,989	4,091	5,100	3,662	3,959	2,981	6,134
Value (1,000 dollars)							
Canada.....	2,218	2,613	4,573	3,763	4,199	3,165	6,693
Norway.....	1	82	1	-	47	37	50
N Zeal.....	-	-	-	-	11	-	-
Iceland.....	8	24	11	4	1	-	7
Spain.....	-	-	-	23	-	-	-
All other....	140	246	74	4	-	-	-
Total.....	2,366	2,966	4,660	3,794	4,258	3,203	6,751
Unit value (cents per pound)							
Canada.....	\$0.80	\$0.76	\$0.91	\$1.04	\$1.08	\$1.08	\$1.10
Norway.....	0.95	0.79	1.00	-	0.99	0.90	1.67
N. Zeal.....	-	-	-	-	0.69	-	-
Iceland.....	0.95	0.88	0.94	1.05	1.67	-	1.71
Spain.....	-	-	-	0.73	-	-	-
All other....	0.66	0.46	0.85	0.99	-	-	-
Average....	0.79	0.73	0.91	1.04	1.08	1.07	1.10

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-22.--Cod, frozen, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5550): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Iceland.....	29,932	40,834	50,174	58,871	67,328	55,313	60,592
Canada.....	16,056	20,692	23,166	26,086	35,450	28,763	35,486
Norway.....	5,806	10,094	11,623	16,017	15,131	14,005	6,734
Denmark.....	12,477	12,170	17,957	13,185	9,121	8,428	6,847
Japan.....	1,210	1,680	3,170	2,177	2,050	1,818	3,144
All other....	2,952	1,408	7,188	2,093	1,960	1,522	1,394
Total.....	68,432	86,878	113,278	118,429	131,040	109,849	114,196
Value (1,000 dollars)							
Iceland.....	25,272	34,211	46,189	62,599	73,923	60,712	78,428
Canada.....	12,001	13,936	18,253	24,915	36,144	29,473	36,395
Norway.....	4,376	7,874	10,004	16,628	17,264	15,955	8,385
Denmark.....	9,983	9,887	15,395	14,335	10,198	9,438	8,743
Japan.....	753	940	2,082	1,905	2,115	1,881	2,994
All other....	2,078	927	5,787	2,006	2,031	1,579	1,448
Total.....	54,463	67,774	97,709	122,388	141,675	119,039	136,393
Unit value (cents per pound)							
Iceland.....	\$0.84	\$0.84	\$0.92	\$1.06	\$1.10	\$1.10	\$1.29
Canada.....	0.75	0.67	0.79	0.96	1.02	1.02	1.03
Norway.....	0.75	0.78	0.86	1.04	1.14	1.14	1.25
Denmark.....	0.80	0.81	0.86	1.09	1.12	1.12	1.28
Japan.....	0.62	0.56	0.66	0.87	1.03	1.03	0.95
All other....	0.70	0.66	0.81	0.96	1.04	1.04	1.04
Average....	0.80	0.78	0.86	1.03	1.08	1.08	1.19

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-23.--Cusk, haddock, hake, and pollock, fresh or chilled, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5565): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	1,659	2,333	2,268	2,450	2,994	2,387	2,725
Iceland.....	84	77	558	463	276	241	149
Norway.....	0	1	0	0	25	19	21
Dom Rep.....	0	0	0	0	6	0	0
Romania.....	0	0	1	2	1	1	1
All other....	71	113	108	94	0	0	43
Total.....	1,814	2,524	2,935	3,009	3,301	2,647	2,938
Value (1,000 dollars)							
Canada.....	1,367	1,905	2,242	2,374	3,145	2,492	2,909
Iceland.....	81	66	460	419	303	265	173
Norway.....	-	1	-	-	35	25	35
Dom Rep.....	-	-	-	-	5	-	-
Romania.....	-	-	1	2	1	1	1
All other....	39	80	81	71	-	-	30
Total.....	1,487	2,052	2,784	2,866	3,490	2,783	3,147
Unit value (cents per pound)							
Canada.....	\$0.82	\$0.82	\$0.99	\$0.97	\$1.05	\$1.04	\$1.07
Iceland.....	0.96	0.86	0.82	0.90	1.10	1.10	1.16
Norway.....	-	1.10	-	-	1.45	1.36	1.66
Dom Rep.....	-	-	-	-	0.90	-	-
Romania.....	-	-	1.25	1.25	1.25	1.25	1.25
All other....	0.56	0.71	0.75	0.75	-	-	0.69
Average....	0.82	0.81	0.95	0.95	1.06	1.05	1.07

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C- 24.--Cusk, haddock, hake, and pollock, frozen, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5570): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Iceland.....	6,568	13,301	13,371	16,522	17,367	13,804	18,664
Canada.....	4,482	6,576	6,936	9,857	16,283	12,533	13,707
Denmark.....	4,943	4,558	7,780	8,644	7,123	5,703	3,398
Norway.....	9,679	9,922	10,031	6,011	3,961	3,358	1,980
U King.....	4,606	3,478	6,249	4,363	1,713	1,633	80
All other....	1,419	1,379	2,149	1,502	791	517	1,810
Total.....	31,696	39,213	46,516	46,900	47,238	37,547	39,640
Value (1,000 dollars)							
Iceland.....	5,210	8,629	10,035	14,581	17,381	13,762	20,370
Canada.....	2,562	3,791	4,609	7,475	14,310	10,808	12,921
Denmark.....	3,779	3,568	6,646	8,970	7,877	6,260	4,170
Norway.....	7,000	7,190	8,040	6,401	4,576	3,900	2,395
U King.....	3,211	2,364	4,956	4,031	1,604	1,530	106
All other....	619	544	1,382	843	490	297	1,220
Total.....	22,380	26,085	35,669	42,301	46,239	36,558	41,183
Unit value (cents per pound)							
Iceland.....	\$0.79	\$0.65	\$0.75	\$0.88	\$1.00	\$1.00	\$1.09
Canada.....	0.57	0.58	0.66	0.76	0.88	0.86	0.94
Denmark.....	0.76	0.78	0.85	1.04	1.11	1.10	1.23
Norway.....	0.72	0.72	0.80	1.06	1.16	1.16	1.21
U King.....	0.70	0.68	0.79	0.92	0.94	0.94	1.33
All other....	0.44	0.39	0.64	0.56	0.62	0.57	0.67
Average....	0.71	0.67	0.77	0.90	0.98	0.97	1.04

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-25. --Wolf fish (sea catfish), fresh or chilled, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5710): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	106	27	10	24	8	4	39
Denmark.....	36	0	0	10	0	0	0
Iceland.....	0	118	32	0	0	0	37
SP Mqel.....	6	0	0	0	0	0	0
U King.....	21	0	0	0	0	0	0
All other....	0	0	0	0	0	0	21
Total.....	170	145	42	34	8	4	97
Value (1,000 dollars)							
Canada.....	67	20	8	23	6	3	38
Denmark.....	22	-	-	9	-	-	-
Iceland.....	-	113	31	-	-	-	54
SP Mqel.....	4	-	-	-	-	-	-
U King.....	11	-	-	-	-	-	-
All other....	-	-	-	-	-	-	29
Total.....	104	133	39	32	6	3	122
Unit value (cents per pound)							
Canada.....	\$0.63	\$0.72	\$0.78	\$0.98	\$0.82	\$0.87	\$0.97
Denmark.....	0.60	-	-	0.93	-	-	-
Iceland.....	-	0.96	0.96	-	-	-	1.48
SP Mqel.....	0.65	-	-	-	-	-	-
U King.....	0.50	-	-	-	-	-	-
All other....	-	-	-	-	-	-	1.42
Average....	0.61	0.91	0.91	0.97	0.82	0.87	1.26

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-26.--Wolf fish (sea catfish), frozen, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.5720): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Iceland.....	3,300	3,308	3,195	3,399	2,592	2,241	2,094
Canada.....	2,157	2,212	2,184	2,004	1,724	1,291	1,719
Norway.....	355	676	549	739	744	594	625
U King.....	132	442	636	407	307	234	81
Greenld.....	411	520	812	762	237	70	198
All other....	227	330	392	123	77	33	176
Total.....	6,583	7,488	7,768	7,433	5,681	4,462	4,894
Value (1,000 dollars)							
Iceland.....	2,345	2,704	3,150	3,625	3,267	2,802	3,228
Canada.....	1,412	1,453	1,724	1,852	1,813	1,331	1,975
Norway.....	206	436	370	631	734	578	675
U King.....	83	252	486	387	309	230	93
Greenld.....	201	230	529	600	223	64	189
All other....	151	173	304	141	50	26	141
Total.....	4,398	5,248	6,562	7,235	6,397	5,030	6,302
Unit value (cents per pound)							
Iceland.....	\$0.71	\$0.82	\$0.99	\$1.07	\$1.26	\$1.25	\$1.54
Canada.....	0.65	0.66	0.79	0.92	1.05	1.03	1.15
Norway.....	0.58	0.65	0.67	0.85	0.99	0.97	1.08
U King.....	0.63	0.57	0.76	0.95	1.01	0.98	1.15
Greenld.....	0.49	0.44	0.65	0.79	0.94	0.92	0.96
All other....	0.66	0.52	0.77	1.15	0.65	0.78	0.80
Average....	0.67	0.70	0.84	0.97	1.13	1.13	1.29

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C- 27.--Flatfish, except halibut, fresh or chilled, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.7033): U.S. imports for consumption, by principal sources, 1974-78, January-September 1978 and January-September 1979

Source	1974	1975	1976	1977	1978	January-September	
						1978	1979
Quantity (1,000 pounds product weight)							
Canada.....	1,169	764	623	448	751	557	795
Japan.....	0	1	20	11	20	20	0
Nethlds.....	0	2	1/	1	4	3	1
U King.....	16	45	38	9	0	0	0
Romania.....	0	0	0	5	0	0	0
All other....	8	5	21	2	0	0	40
Total.....	1,193	817	702	475	774	581	836
Value (1,000 dollars)							
Canada.....	1,155	805	711	615	1,023	761	1,051
Japan.....	-	1/	13	17	16	16	-
Nethlds.....	-	4	1/	2	11	10	3
U King.....	10	28	28	9	-	-	-
Romania.....	-	-	-	12	-	-	-
All other....	9	5	12	8	-	-	56
Total.....	1,174	842	764	662	1,050	788	1,110
Unit value (cents per pound)							
Canada.....	\$0.99	\$1.05	\$1.14	\$1.37	\$1.36	\$1.37	\$1.32
Japan.....	-	0.53	0.66	1.51	0.82	0.82	-
Nethlds.....	-	1.85	3.00	2.07	2.94	3.01	2.51
U King.....	0.60	0.63	0.74	1.10	-	-	-
Romania.....	-	-	-	2.40	-	-	-
All other....	1.25	1.00	0.58	4.01	-	-	1.41
Average....	0.98	1.03	1.09	1.39	1.36	1.36	1.33

1/ Less than 500 units.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-28.--Turbot, frozen, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.7038): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978 and January-September 1979

Source	1975	1976	1977	1978	January-September	
					1978	1979
Quantity (1,000 pounds product weight)						
Japan.....	46,829	41,186	27,128	28,071	20,952	13,851
Canada.....	4,975	4,058	11,362	13,902	11,012	9,796
Poland.....	214	1,077	3,768	1,570	1,437	1,893
Greenld.....	28	0	35	527	232	169
Kor Rep.....	0	0	0	264	75	451
All other....	346	252	296	772	618	998
Total.....	52,391	46,574	42,590	45,106	34,326	27,159
Value (1,000 dollars)						
Japan.....	21,762	24,573	20,487	22,692	17,052	11,292
Canada.....	2,733	2,861	8,851	12,462	9,854	9,233
Poland.....	118	628	2,922	1,423	1,315	1,548
Greenld.....	9	-	25	390	171	125
Kor Rep.....	-	-	-	221	63	390
All other....	235	160	263	696	555	871
Total.....	24,857	28,221	32,548	37,884	29,010	23,459
Unit value (cents per pound)						
Japan.....	\$0.46	\$0.60	\$0.76	\$0.81	\$0.81	\$0.82
Canada.....	0.55	0.70	0.78	0.90	0.89	0.94
Poland.....	0.55	0.58	0.78	0.91	0.92	0.82
Greenld.....	0.31	-	0.70	0.74	0.74	0.74
Kor Rep.....	-	-	-	0.84	0.84	0.86
All other....	0.68	0.63	0.89	0.90	0.90	0.87
Average....	0.47	0.61	0.76	0.84	0.85	0.86

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table C-29.--Other flatfish, except halibut and turbot, frozen, otherwise processed, whether or not heads, viscera, fins, scales, or any combination thereof have been removed (TSUSA item 110.7039): U.S. imports for consumption, by principal sources, 1975-78, January-September 1978 and January-September 1979

Source	1975	1976	1977	1978	January-September 1978	January-September 1979
Quantity (1,000 pounds product weight)						
Canada.....	34,842	41,371	37,627	36,218	25,375	23,403
Japan.....	4,725	6,859	7,143	4,465	3,608	1,680
Nethlds.....	436	394	1,619	3,359	2,812	1,244
Denmark.....	580	1,547	2,508	2,139	1,836	1,058
U King.....	1,823	860	1,312	636	512	456
All other....	2,729	2,411	2,603	1,572	1,280	1,723
Total.....	45,135	53,442	52,811	48,389	35,424	29,564
Value (1,000 dollars)						
Canada.....	30,042	42,204	42,125	44,291	31,001	32,126
Japan.....	1,474	3,444	3,713	1,985	1,545	1,140
Nethlds.....	284	477	1,838	4,295	3,510	1,938
Denmark.....	493	1,562	2,809	2,761	2,348	1,576
U King.....	1,253	756	1,336	708	567	603
All other....	2,179	2,057	2,671	1,597	1,283	2,164
Total.....	35,726	50,500	54,493	55,637	40,254	39,547
Unit value (cents per pound)						
Canada.....	\$0.86	\$1.02	\$1.12	\$1.22	\$1.22	\$1.37
Japan.....	0.31	0.50	0.52	0.44	0.43	0.68
Nethlds.....	0.65	1.21	1.14	1.28	1.25	1.56
Denmark.....	0.85	1.01	1.12	1.29	1.28	1.49
U King.....	0.69	0.88	1.02	1.11	1.11	1.32
All other....	0.80	0.85	1.03	1.02	1.00	1.26
Average....	0.79	0.94	1.03	1.15	1.14	1.34

Source: Compiled from official statistics of the U.S. Department of Commerce.

APPENDIX D

Pacific Coast Processors'
Official "Trip Limit" Letters



NOTICE TO ALL DALGETY SEAFOODS FISHERMEN

In compliance with paragraph 8 of the Fishermens Marketing Association of Washington Agreement, Dalgety Seafoods hereby issues written notice of limits on the species listed below effective November 8, 1979.

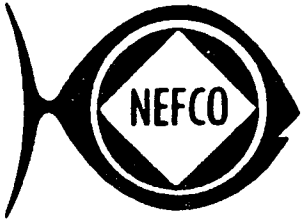
<u>Species</u>	<u>Limit/Delivery</u>
Dover Sole	20,000 lbs.
English Sole	10,000
Rex Sole	500
Bellingham Sole	0
Sand Dabs	500
Rockfish	40,000 lbs.
Brown Rockfish	0
Pacific Ocean Perch	10,000 lbs.
True Cod	40,000
Ling Cod	40,000
Round Sable 3 lbs under	1,000
Dressed Sable 3 lbs under	2,000
Turbot - Last day fish	5,000
Skate Wings	0

As noted before, please call in when you have 25,000 lbs, and do not bring in a load over 40,000 pounds total unless you have received our authorization to continue fishing due to market conditions. If you failed to contact us, we will have the right to refuse that amount over 40,000 lbs.

Sincerely,

* * *

Superintendent



NEW ENGLAND FISH COMPANY

PIER 65, SEATTLE, WASH. 98121 • AREA CODE 206 • 284 2750
SINCE 1868

November 20, 1979

* * *

Dear *** ;

Following are the limits and delivery dates for the
* * *. These limits will be strictly enforced and will
be effective until changed or suspended in writing. You
will also communicate daily on fishing conditions.

DELIVERY DATE IN SEATTLE

December 5
January 4

PRODUCT LIMITS

50,000# Rockfish
20,000# Sole
20,000# Cod
10,000# Perch

Any deliveries made to Warrenton shall be at one-half
($\frac{1}{2}$) the limits of Seattle deliveries. Such deliveries
will be co-ordinated through Seattle.

Thank you,

NEW ENGLAND FISH COMPANY

* * *

Library Cataloging Data

U.S. International Trade Commission.

Certain fish. Report to the President
on investigation no. TA-201-41 under
section 201 of the Trade act of 1974.
Washington, 1980.

11, A 111 p. illus. 28 cm. (USITC
Publication 1028)

1. Fish trade--U.S. 2. Fishery products.
3. Fishes. 4. Fish, Frozen. I. Title.

UNITED STATES
INTERNATIONAL TRADE COMMISSION
WASHINGTON, D.C. 20436

OFFICIAL BUSINESS

ADDRESS CORRECTION REQUESTED

Postage And Fees Paid
U.S. International Trade Commission



ADDRESS CHANGE

- ☐ Remove from List
 - ☐ Change as Shown
- Please detach address
label and mail to address
shown above.