

partially filled by exports from the Canadian surplus. Under present tariffs, the United States market does not present a market which can be relied upon to absorb any appreciable part of our annual production of canned salmon.

#### *Fresh and Frozen Fish*

British Columbia's principal exports of fresh and frozen fish are mainly salmon and halibut and the United States is the principal export buyer. This trade with the United States is of long standing, and apart from market fluctuations from time to time, exhibits a dependable pattern.

In pre-war years, the United Kingdom was an important buyer of frozen salmon and halibut but the continuing dollar problem has erased this outlet completely.

British Columbia's frozen salmon producers have been encouraged by the resumption of purchases by Belgium in recent years and even more recently by token purchases of this commodity by France.

#### *Fish Oil and Fish Meal*

Fish oil and fish meal contribute importantly to British Columbia's export trade in fishery products. The flow of trade in fish oil is influenced directly by the world market for fats and oils. Such Northern European countries as Western Germany and Belgium and Holland are traditional buyers of British Columbia herring oil and whale oil.

The United States had also bought substantial quantities of herring oil from British Columbia. Fish oil is freely exportable to the United States on payment of the prevailing import duties.

The United States is a large importer of fish meal which is used as an important ingredient of livestock and poultry feed stuffs. There is a firmly established pattern of trade with the United States on this commodity which enters the United States on a duty free basis.

Normal United States demand invariably disposes of British Columbia's surplus of this product and overseas sales of fish meal are rare and are for small quantities only.

### IN THE ATLANTIC AREA

#### *Salt Codfish*

The NATO countries which are, or at least were, large buyers of salt codfish from Canada are the United States, Greece, Italy and Portugal. The United States is an important buyer of salt codfish, although the volume has decreased somewhat in recent years.

This situation seems to follow a general pattern during prosperous cycles in countries with a high standard of living. People of European birth who have emigrated to the United States have long been heavy consumers of dried salt codfish. Second and third generations of Europeans, as their standards of living increase, are less inclined to continue using salt fish as a source of protein food, largely because of the extra work involved in preparation as compared to meats and fish in other forms. Salt codfish is not competing with production in the United States. United States import tariffs on this item are not high enough to materially retard sales.

Greece still remains a large importer and consumer of fish, but because of trading arrangements with European countries, some of which involve a barter basis as well as exchange restrictions, it has been impossible to effect any sales of Canadian fish. Italy remains the largest customer in the Mediterranean area for Canadian salt cod fish and every possible step should be taken to ensure the continuity of that trade and its possible enlargement.