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ANNEX TO THE
**WORLDWIDE FISHERIES
MARKETING STUDY:**
PROSPECTS TO 1985

URUGUAY



Government
of Canada

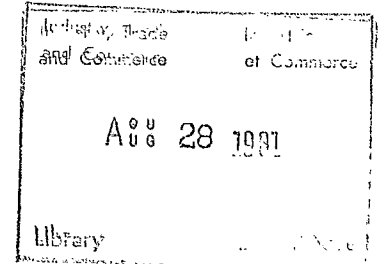
Gouvernement
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et Océans

Canada. Dept. of Fisheries and Oceans. Fisheries Economic Development & Marketing.
Marketing Services Branch.

This Report is one of a series of country and species annexes to the main study
which is entitled the Overview.



D R A F T

Annex to the
Worldwide Fisheries Marketing Study:
Prospects to 1985

URUGUAY

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July 1980

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The views expressed in this Study, however, are ours alone and reflect the Canadian perception of worldwide markets.

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E. Wong
November, 1980

FOREWORD

As a consequence of global extension of fisheries jurisdictions, a radical shift has taken place in the pattern of worldwide fish supply and demand. This change is still going on and will continue for many years before a new dynamic equilibrium situation is reached. However, in the midst of this re-adjustment, a new trade pattern is emerging -- some net exporting countries are now importing and vice versa. In the longer term, some countries will experience shortages of supply and others will have a surplus. Fortunately, Canada is amongst the latter group.

The implications for the marketing of Canadian fisheries products arising from the worldwide introduction of the 200-mile limit are extensive. With our vastly improved supply position relative to world demand, government and industry are understandably concerned about ensuring that the bright promise of increased market opportunities are real and can be fulfilled. One of the steps in this process is the publication of the Worldwide Fisheries Marketing Study which assesses the global potential on a country and species basis.

Specifically, the purpose of the Study is to identify the longer term market opportunities for selected traditional and non-traditional species in existing and prospective markets and to identify factors which may hinder or help Canadian fisheries trade in world markets. To date, over 40 country markets and 8 species groups have been analyzed. It should be noted that while the information contained in the Reports was up-to-date when collected, some information may now be dated given the speed with which changes are occurring in the marketplace. In this same vein, the market projections should be viewed with caution given the present and still evolving re-alignment in the pattern of international fisheries trade, keeping in mind the variability of key factors such as foreign exchange rates, energy costs, bilateral fisheries arrangements and GATT agreements which have a direct effect on trade flows.

Notwithstanding, the findings contained in these Reports represent an important consolidation of knowledge regarding market potential and implications for improvements in our existing marketing and production practices. The results of the Study should, therefore, usefully serve as a basis for planning fisheries development and marketing activities by both government and industry in order to capitalize on the identified market opportunities.

This draft report is published for discussion purposes and as such we invite your critical comments.

Ed Wong

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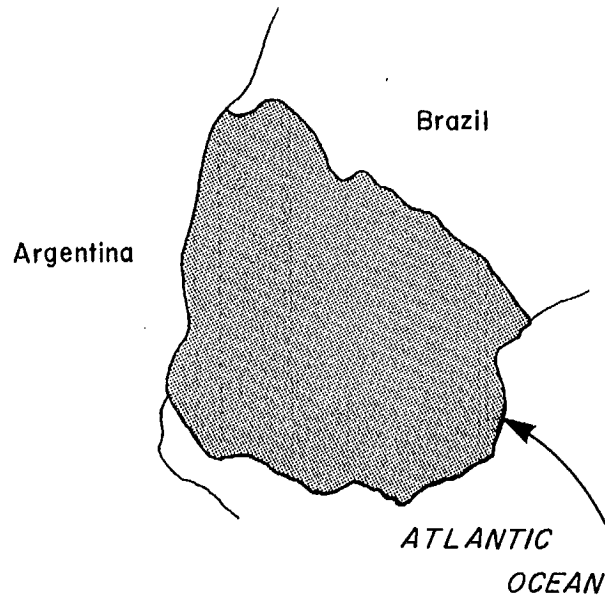
WORLDWIDE FISHERIES MARKETING STUDY

URUGUAY

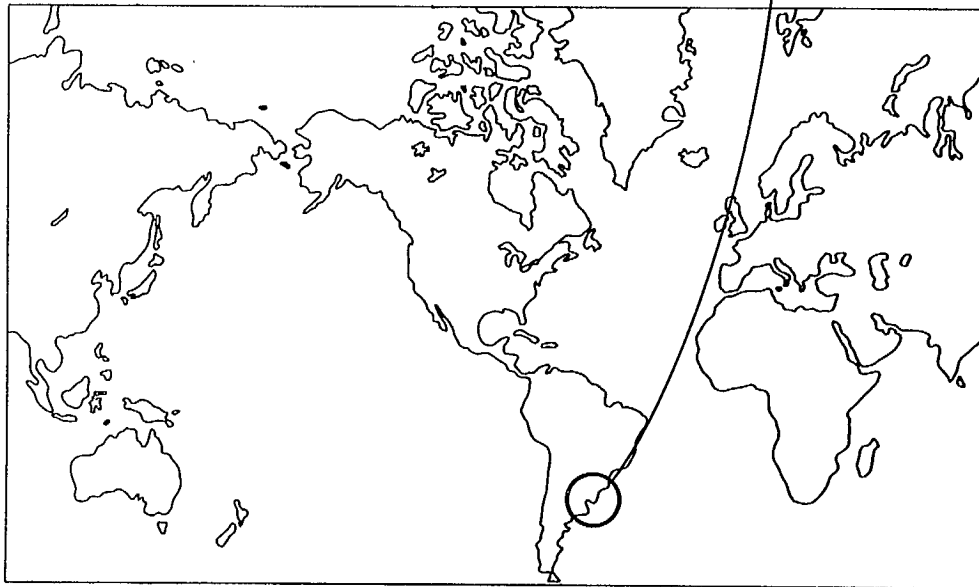
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URUGUAY



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A. INTRODUCTION

Uruguay has a population of 3 million and covers an area of 176 215 square kilometres. The country had been beset by extremely high inflation (135% in 1967) and slow economic growth at 1% per year. In the mid-1970s, however, the situation began to improve and by 1979 real economic growth was near 9%. Inflation is still high, but the country's balance of payments position is healthy, and so are its foreign currency holdings.

Historically, the fishing industry has not played a significant role in Uruguayan life or the country's economy, but that situation is changing, largely as a result of government policies designed to develop the fishery.

As recently as 1974, the Uruguayan fishery output accounted for less than 1% of the nation's gross national product (GNP) but since then there has been significant growth, most of it intended for the export trade.

Government policy encourages the export of fish in processed form, as a means of maximizing the industry's potential as a valuable source of foreign exchange.

Fish consumption in Uruguay is very low at less than five kilograms per capita per year and the expanding domestic fishery can easily meet demand. Uruguay, therefore, should not be seen as a potentially significant market for Canadian products, but rather as a competitor in the world fish trade. Uruguay's exports are examined in more detail in a later section, with special emphasis on sales to the United States.

B. SUPPLY

1. Current Domestic Supplies

Since 1973, Uruguay's total fish landings have increased from 17 500 tonnes to 74 299 tonnes in 1978, an increase of 400%. The principal species landed are merluza (hake or whiting - merluccius hubbsii) which accounted for 55% or 41 323 tonnes of the total catch in 1978. Atlantic croaker (micropogonias undulatus) came next at 13 980 tonnes (19%), followed by striped weakfish (cynoscion striatus) at 6 488 tonnes (9%) and short-finned squid (illex illecebrosus) at 2182 tonnes (3%). Detailed figures on landings are shown in Table 1.

As the figures show, landings of these major species have continued to rise, with hake as the dominant species. Industry spokesmen pointed out that although squid landings have increased significantly, they do not consider it one of the key species, and only small quantities are processed and exported.

2. Fisheries Development Plan

Responsibility for the overall development of the fishery sector rests with the Institute Nacional de Pesca (INAPE). Based in Montevideo, this is under the Ministry of Agriculture and is charged with orientation, assistance, development and control in all aspects of fishing and ancillary industries.

Table 1

Uruguay: Fisheries Landings

1973 - 1978

(tonnes)

| Uruguay | <u>1973</u> | <u>1974</u> | <u>1975</u> | <u>1976</u> | <u>1977</u> | <u>1978</u> |
|------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Characins | 0 | 300 | 163 | 152 | 153 | 293 |
| Freshwater Siluroids, etc. | - | - | 70 | 23 | 122 | 85 |
| Freshwater Fishes NEI | - | - | 12 | 4 | 46 | 94 |
| River "Anchoita" | 0 | 0 | 0 | 0 | 0 | 0 |
| Flatfishes NEI | 100 | 100 | 45 | 66 | 69 | 133 |
| Argentine Hake | 4 500 | 1 500 | 9 847 | 11 675 | 22 511 | 41 323 |
| Gadiformes NEI | ... | 100 | 60 | 91 | 155 | 109 |
| Demersal Percomorphs NEI | 0 | 0 | 105 | 47 | 249 | 381 |
| Striped Weakfish | 6 100 | 4 400 | 3 394 | 3 891 | 5 077 | 6 488 |
| Atlantic Croaker | 2 800 | 4 000 | 5 594 | 9 434 | 11 920 | 13 980 |
| Argentine Croaker | - | 100 | 86 | 138 | 251 | 252 |
| King Weakfish | 600 | 1 100 | 953 | 2 193 | 1 603 | 1 409 |
| Red Porgy (Common Seabream) | - | 200 | 371 | 81 | 394 | 474 |
| Castanfia | - | - | 0 | 0 | 180 | 245 |
| Blackbelly Rosefish | - | - | 3 | 8 | 378 | 464 |
| Pelagic Percomorphs NEI | - | - | 10 | 32 | 29 | 35 |
| Carangids NEI | 0 | 100 | 162 | 295 | 304 | 1 103 |
| Southwest Atlantic Menhadens | - | - | 386 | 171 | 500 | 1 289 |
| Anchoita (Argentine Anchovy) | 0 | 0 | 7 | 10 | 47 | 70 |
| Clupeoids NEI | 0 | 0 | 0 | 0 | 0 | 0 |
| Tuna-like Fishes NEI | 0 | 0 | 4 | 3 | 0 | 0 |
| Sharks, Rays, Skates, Etc. | 1 700 | 2 400 | 3 070 | 3 003 | 2 144 | 1 707 |
| Marine Fishes NEI | 1 200 | 1 300 | 936 | 1 057 | 1 030 | 1 674 |
| Southern King Crab | - | - | 3 | 2 | 10 | 4 |
| Natantian Decapods NEI | 0 | 0 | - | 37 | 2 | 47 |
| Marine Crustaceans NEI | 0 | 0 | 0 | 0 | 0 | 0 |
| Sea Mussels NEI | 300 | 300 | 206 | 327 | 601 | 298 |
| Clams NEI | 0 | 0 | 241 | 90 | 136 | 59 |
| Short-Finned Squid | 200 | 100 | 520 | 773 | 362 | 2 182 |
| Marine Molluscs NEI | 0 | 0 | 0 | 1 | 1 | 25 |
| Red Seaweeds | - | - | 85 | 200 | 100 | 76 |
| Total | 17 500 | 16 000 | 26 333 | 33 804 | 48 374 | 74 299 |

Source. FAO, Yearbook of Fishery Statistics Vol. 46, 1978.

Development plans began with scientific analysis of fish stocks in 1974. Although the research is not yet completed, the government believes that by 1980 its waters could sustain a catch of 200 000 tonnes per year. Preliminary figures provided by INAPE indicate that the 1979 catch was 103 000 tonnes, surpassing the target of 95 000 tonnes. As in previous years, the main species were hake (57 100 tonnes), Atlantic croaker (23 000 tonnes), and striped weakfish (11 400 tonnes) which in 1979 represented 88% of total landings.

The Uruguayan fishing industry is based at Montevideo, where several companies are involved in processing and producing fish meal. There are 24 distant-water fishing vessels and 39 mid-water vessels operating out of Montevideo. The development plans call for the addition of 30 new distant-water vessels. Table 2 shows a breakdown of development of the fleet from 1974 to 1978. As can be seen, the fleet is still numerically dominated by small artisanal craft. However, the large vessels now produce the greater proportion of landings.

The major development in the fishing industry is to take place in La Paloma, northeast of Montevideo, with the establishment of four processing plants. One has just begun operation in 1979; another is under construction and is scheduled to be operating by February 1981; the remaining two have not yet been started. Each plant will be able to process 20 000 tonnes of raw material and also have a capacity to produce 30 000 tonnes of fish meal per year. Each plant is to be supplied by nine vessels; three for the

Table 2

URUGUAY: Development of the Traditional, Coastal and Deep-Sea Fishing Fleets Between 1974 and 1978

| | Number of vessels | | | Gross registered | | length(m) | crew |
|------------------------|-------------------|-------------|------------|------------------|---------------|-----------------|--------------|
| | powered | non-powered | total | tonnage(GRT) | horsepower | | |
| <u>Total for 1974:</u> | <u>207</u> | <u>99</u> | <u>306</u> | <u>2 448.1</u> | <u>10 983</u> | <u>2 204.00</u> | <u>1 067</u> |
| Traditional fishery | 167 | 99 | 266 | 473.6 | 3 595 | 1 524.00 | 746 |
| Coastal fishery | 35 | | 35 | 1 036.9 | 5 221 | 534.10 | 255 |
| Deep-sea fishery | 5 | | 5 | 937.6 | 2 167 | 145.90 | 66 |
| <u>Total for 1975:</u> | <u>213</u> | <u>102</u> | <u>315</u> | <u>6 257.6</u> | <u>15 965</u> | <u>2 467.95</u> | <u>1 192</u> |
| Traditional fishery | 167 | 102 | 269 | 474.5 | 3 595 | 1 524.00 | 746 |
| Coastal fishery | 35 | | 35 | 1 036.9 | 5 221 | 534.10 | 255 |
| Deep-sea fishery | 11 | | 11 | 4 746.2 | 7 149 | 409.85 | 191 |
| <u>Total for 1976:</u> | <u>249</u> | <u>110</u> | <u>359</u> | <u>7 601.6</u> | <u>21 464</u> | <u>2 918.59</u> | <u>1 448</u> |
| Traditional fishery | 190 | 110 | 300 | 528.0 | 4 096 | 1 701.60 | 821 |
| Coastal fishery | 43 | | 43 | 1 415.0 | 7 364 | 675.79 | 345 |
| Deep-sea fishery | 16 | | 16 | 5 658.6 | 10 004 | 541.20 | 282 |
| <u>Total for 1977:</u> | <u>268</u> | <u>130</u> | <u>398</u> | <u>8 193.9</u> | <u>23 962</u> | <u>3 195.70</u> | <u>1 571</u> |
| Traditional fishery | 211 | 130 | 341 | 590.6 | 4 615 | 1 934.65 | 926 |
| Coastal fishery | 38 | | 38 | 1 435.6 | 7 458 | 629.74 | 324 |
| Deep-sea fishery | 19 | | 19 | 6 167.7 | 11 889 | 631.31 | 321 |
| <u>Total for 1978:</u> | <u>286</u> | <u>155</u> | <u>441</u> | <u>9 547.6</u> | <u>29 675</u> | <u>3 596.09</u> | <u>1 763</u> |
| Traditional fishery | 223 | 155 | 378 | 645.6 | 4 880 | 2 143.38 | 1 030 |
| Coastal fishery | 39 | | 39 | 1 486.3 | 8 233 | 646.24 | 331 |
| Deep-sea fishery | 24 | | 24 | 7 415.7 | 16 562 | 806.47 | 402 |

Note: Traditional fishery = 0 - 9.9 GRT
 Coastal fishery = 10 - 99.9 GRT
 Deep-sea fishery = 100 - 1 999.9 GRT

Source Boletín Estadístico Pesquero, No. 4. Instituto Nacional de Pesca, 1978, Montevideo.

anchovy stocks for fish meal and six for other species, principally hake. The maximum vessel length permitted is 32.6 metres; freezer trawlers and side trawlers are not permitted. The new vessels are stern trawlers using drums for hauling the gear. Eleven vessels have been ordered from Denmark, of which three have been delivered. It is expected that the vessels will average 25 tonnes of hake per day, with a maximum of 40 tonnes. Ex-vessel prices for hake are currently (1980) US\$225 to US\$250 per tonne.

Fish is iced on board vessels in 25 kilogram plastic boxes and, while some officials in the industry are in favour of placing gutting machines on board in order to increase vessel capacity by 20%, no final decision has been made.

The fishing plants are likely to remain labour intensive in order to maintain a competitive price position. A major exception in the new plant will be the installation of skinning machines.

3. Joint Fishing Zone with Argentina

Argentina and Uruguay share a common fishing zone from the Uruguay-Brazil border in the north, to the 38°S in the south. Most of the Uruguayan fishing is done in this area, largely within 20 miles off shore.

There is a potential for problems with Argentina over access to the resource. At present, Argentina is concerned about the possible depletion of the stocks which is a view not shared by Uruguay. Argentina also believes it should receive 75% of the quota in this area; Uruguay sees no basis for this, but has made no counter offer.

Another potential problem stems from the fact that Argentina permits freezer and factory-freezer trawlers in its waters. Although these vessels are restricted to operating south of 40°S, pressure is mounting on the Argentina officials to remove this restriction. If this was done and they were to operate in Uruguayan waters, the potential for conflict would be great as Uruguay does not permit freezer or factory-freezer trawlers.

C. DEMAND-SUPPLY BALANCE

1. Exports

a) By Species and Product Form

In many developing fisheries, the quantity and value of exports tend to increase rapidly and this is the case with Uruguay. In 1976, total exports were just under 11 000 tonnes, valued at US\$5.1 million; for 1979 preliminary data suggests they will approach 48 000 tonnes by product weight, for a value of over US\$36 million. Table 3 outlines Uruguay fish exports for the period 1976-1979. Hake is the most important single species which is exported, but other fish such as croaker and striped mullet, and molluscs such as squid are also significant.

Table 3

Uruguay: Fish Exports, 1976-1979

| | 1976 | | 1977 | | 1978 | | 1979 | |
|---------------------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|
| | <u>tonnes</u> | <u>US\$000</u> | <u>tonnes</u> | <u>US\$000</u> | <u>tonnes</u> | <u>US\$000</u> | <u>tonnes</u> | <u>US\$000</u> |
| Frozen | 9 062 | 4 273 | 16 621 | 9 247 | 29 894 | 20 525 | 42 255 | 32 786 |
| Molluscs, fresh/frozen | 688 | 294 | 41 | 32 | 1 715 | 1 465 | 2 727 | 2 412 |
| Fish meal | 32 | 7 | 8 | 2 | 793 | 252 | 1 747 | 612 |
| Others | 1 176 | 605 | 999 | 1 045 | 329 | 251 | 1 071 | 412 |
| Total | 10 958 | 5 179 | 17 669 | 10 326 | 32 731 | 22 493 | 47 800 | 36 222 |

Source: INAPE Boletin Commercial, 1979.
FAO confirms INAPE

Frozen fish, primarily merluza, continues to be the main export form representing 88% of exports by volume and 90% by value. The growing importance of frozen fish is illustrated in Table 4.

Table 4
Uruguay: Distribution of Fish Production by Form

| | <u>1976</u> | <u>1977</u> | <u>1978</u> |
|--------|-------------|-------------|-------------|
| Fresh | 28.4 | 15.2 | 3.2 |
| Frozen | 59.0 | 67.9 | 83.6 |
| Meal | 11.5 | 12.1 | 12.4 |
| Other | 1.1 | 4.8 | .8 |
| | <u>100%</u> | <u>100%</u> | <u>100%</u> |

Fresh fish has diminished in importance from 28.4% of production in 1976 to 3.2% in 1978. Fish meal is relatively stable as a percentage of total production although increasing in absolute terms. From 1976 to 1979 there has been a 55% increase in exports of meal. Between 1978 and 1979 alone, exports increased by over 100%. Appendix I gives a complete analysis of the 1978 production by product form and species.

b) By Country

Brazil is the largest market for Uruguayan fish in terms of both volume and value (see Table 5). In 1979, 18 450 tonnes worth US\$12.9 million were exported to Brazil. Exports to the United States ranked third in volume at 8 306 tonnes and second in value (US\$10.8 million), largely because the products had a significant value added component i.e. frozen blocks and fillets. Nigeria was second in volume (10 863 tonnes) but a distant third in value (US\$4.98 million), largely because the products were frozen whole. Table 5 shows the principal markets for 1979.

Table 5
Principal Markets for Uruguay Fish Products, 1979

| | <u>Volume</u> <u>tonnes</u> | | <u>Value</u> <u>\$US'000 fob Montevideo</u> | |
|---------------|--------------------------------|--------------|--|--------------|
| Brazil | 18 450 | (38.5) | 12 898 | (35.6) |
| United States | 8 306 | (17.5) | 10 773 | (24.7) |
| Nigeria | 10 863 | (22.7) | 4 911 | (13.5) |
| Japan | 2 429 | (5.0) | 2 180 | (6.0) |
| Spain | 1 413 | (2.9) | 973 | (2.6) |
| West Germany | 1 385 | (2.9) | 632 | (1.7) |
| Italy | 1 184 | (2.5) | 834 | (2.3) |
| Kuwait | 1 053 | (2.2) | 827 | (2.2) |
| Other | 2 717 | (5.8) | 2 194 | (11.4) |
| | <u>47 800</u> | <u>100 %</u> | <u>36 222</u> | <u>100 %</u> |

Source: INAPE, Ibid.

Apart from those listed in Table 5, none of the other markets exceeded 700 tonnes or US\$350 000 in 1979. Appendix III contains a breakdown of the exports to all markets.

It should be noted that 87% of exports to the United States market are frozen hake fillets and blocks. Quantities and values in 1979 to the United States market were: 1 632 tonnes of frozen fillets (US\$2.1 million f.o.b. Montevideo) and 4 422 tonnes of blocks (US\$6.6 million f.o.b. Montevideo). U.S. imports of fish from Uruguay have increased dramatically, from a mere 457 tonnes in 1974 to 7 190 tonnes in 1978 and 8 306 tonnes in 1979.

In the case of Brazil, frozen hake fillets represented the largest single export item. In 1979, 3 411 tonnes valued at US\$3 483 000 was exported. This was an average of US\$1 021 per tonne f.o.b. Montevideo. Other significant exports to Brazil include frozen headed and gutted Atlantic croaker (2 649 tonnes); frozen headed and gutted hake (1 654 tonnes); frozen whole Atlantic croaker (2 400 tonnes); and minced hake blocks (1 646 tonnes).

Hake dominates the Uruguay fishery to the extent that hake exports to the United States, Nigeria, Brazil, and Spain accounted for 35% of all fish exports to all locations in 1979. The importance of hake exports to the United States market is shown by the fact that they represent almost 25% of the value of all Uruguay's fish exports in that year. In fact, hake exports to Brazil and the United States accounted for 42% of the value of all fish exports in 1979.

Other significant exports included frozen whole Atlantic croaker (7 171 tonnes) and frozen headed and gutted Atlantic croaker (3 415 tonnes), and frozen whole squid (2 188 tonnes) to Japan.

Table 6 provides a complete breakdown of fish exports for the period 1976 to 1978.

Table 6

Uruguay: Exports of Fish and Fish Products by
Product Group and Country, 1976-1978

| Product Group Country | 1976 | | 1977 | | 1978 | |
|--------------------------|---------------|--------------|---------------|---------------|---------------|---------------|
| | tonnes | US\$000 | tonnes | US\$000 | tonnes | US\$000 |
| <u>TOTAL</u> | <u>10 958</u> | <u>5 179</u> | <u>17 669</u> | <u>10 326</u> | <u>32 732</u> | <u>22 495</u> |
| <u>Fresh</u> | <u>1 136</u> | <u>489</u> | <u>82</u> | <u>49</u> | <u>172</u> | <u>90</u> |
| Brazil | 1 086 | 453 | 52 | 15 | 150 | 60 |
| Greece | | | 4 | 3 | | |
| Israel | 20 | 9 | | | | |
| Italy | 30 | 27 | 26 | 31 | 22 | 30 |
| <u>Frozen</u> | <u>9 062</u> | <u>4 273</u> | <u>16 621</u> | <u>9 247</u> | <u>29 896</u> | <u>20 527</u> |
| West Germany | 81 | 34 | 15 | 17 | 46 | 41 |
| Saudi Arabia | | | | | 324 | 282 |
| Belgium | | | | | 24 | 26 |
| Brazil | 4 399 | 2 113 | 6 877 | 3 572 | 8 958 | 5 442 |
| Canada | | | | | 155 | 186 |
| Czechoslovakia | | | | | 180 | 146 |
| Congo | | | | | 522 | 201 |
| Egypt | | | | | 200 | 91 |
| Spain | 1 586 | 504 | 2 904 | 1 689 | 2 089 | 1 337 |
| United States | 1 215 | 764 | 1 750 | 1 408 | 7 173 | 7 021 |
| France | | | 873 | 503 | 754 | 708 |
| Greece | 120 | 84 | 42 | 30 | | |
| Holland | | | 33 | 18 | 211 | 167 |
| Hong Kong | | | 1 | 1 | | |
| Israel | 153 | 87 | 44 | 26 | 90 | 74 |
| Italy | 1 089 | 517 | 1 996 | 996 | 1 784 | 1 233 |
| Japan | | | 60 | 41 | 51 | 32 |
| Kuwait | | | 220 | 119 | 846 | 757 |
| Nigeria | | | | | 4 142 | 1 737 |
| Portugal | 414 | 167 | | | | |
| Puerto Rico | | | | | 113 | 65 |
| United Kingdom | 5 | 3 | 455 | 322 | 241 | 168 |
| Benin | | | | | 1 500 | 640 |
| South Africa | | | 10 | 8 | | |
| Zaire | | | 1 341 | 497 | 493 | 173 |

Table 6 (cont'd)

| Product Group Country | 1976 | | 1977 | | 1978 | |
|----------------------------------|------------|------------|------------|------------|--------------|--------------|
| | tonnes | US\$000 | tonnes | US\$000 | tonnes | US\$000 |
| <u>Dry, salted</u> | <u>24</u> | <u>88</u> | <u>888</u> | <u>923</u> | <u>150</u> | <u>139</u> |
| Belgium | | | 35 | 16 | 140 | 86 |
| Brazil | 7 | 8 | 21 | 36 | 6 | 4 |
| Hong Kong | 10 | 55 | 6 | 57 | 4 | 49 |
| Japan | 2 | 11 | 1 | 6 | | |
| Singapore | 5 | 14 | 1 | 12 | | |
| Zaire | | | 824 | 796 | | |
| <u>Frozen molluscs</u> | <u>688</u> | <u>294</u> | <u>41</u> | <u>32</u> | <u>1 715</u> | <u>1 466</u> |
| Argentina | | | 11 | 7 | 25 | 172 |
| Brazil | | | | | 31 | 21 |
| South Korea | | | | | 354 | 261 |
| Spain | 277 | 119 | 22 | 20 | 346 | 279 |
| United States | | | | | 17 | 12 |
| France | | | | | 13 | 30 |
| Hong Kong | | | | | 10 | 7 |
| Italy | 3 | 3 | 8 | 5 | 39 | 26 |
| Japan | 408 | 172 | | | 880 | 658 |
| <u>Canned fish</u> | <u>14</u> | <u>21</u> | <u>4</u> | <u>9</u> | <u>1</u> | <u>5</u> |
| Federal Republic of Germany | 14 | 21 | | | | |
| Brazil | | | 4 | 9 | 1 | 5 |
| <u>Canned shellfish</u> | <u>2</u> | <u>7</u> | <u>25</u> | <u>64</u> | <u>5</u> | <u>15</u> |
| Argentina | 1 | 3 | 6 | 17 | | |
| Brazil | | | 19 | 47 | 5 | 15 |
| Spain | 1 | 4 | | | | |
| <u>Not for human consumption</u> | <u>32</u> | <u>7</u> | <u>8</u> | <u>2</u> | <u>793</u> | <u>253</u> |
| Federal Republic of Germany | | | 8 | 2 | 403 | 133 |
| Brazil | 32 | 7 | | | 90 | 29 |
| Italy | | | | | 199 | 60 |
| Nigeria | | | | | 2 | 1 |
| South Africa | | | | | 99 | 30 |

Source: Boletín Estadístico Pesquero, No. 4. Instituto Nacional de Pesca, 1978, Montevideo.

2. Imports

Because of the low level of fish consumption in Uruguay and the growing domestic fishery, imports are minimal, as can be seen from the figures in Table 7.

Table 7

Uruguay: Imports of Fish and Fish Products

(tonnes)

| | <u>1973</u> | <u>1974</u> | <u>1975</u> | <u>1976</u> | <u>1977</u> | <u>1978</u> |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| - Fish, fresh, chilled or frozen | - | - | 118 | 41 | 28 | 28E |
| - Fish, dried, or salted or smoked | - | - | - | 2 | 4 | 4E |
| - Crustaceans and molluscs | - | - | - | 8 | 15 | 15E |
| - Fish products and preparations, whether or not in airtight containers | 0 | 0 | 21 | 147 | 325 | 325E |
| - Crustacean and mollusc products and preparations, whether or not in airtight containers | - | 0 | 1 | 3 | 7 | 7E |
| - Oils and fats, crude or refined of aquatic animal origin | - | 200 | 232 | 437 | 309 | 309E |
| - Meals, solubles and similar animal feeding material | - | - | - | - | - | - |

E=Estimate

Source: FAO, Yearbook of Fishery Statistics, Vol 47, 1978.

D. OPPORTUNITIES FOR CANADIAN EXPORTS TO URUGUAY

As noted previously, Uruguay offers very little in the way of market potential for Canadian fishery products and, in fact, the country should be seen as a competitor rather than as a customer. There may be some potential for sales of small quantities of Canadian salmon, but this would be limited to the restaurant trade.

The main obstacle to increased fish consumption in Uruguay is a strong preference for other protein foods, mainly beef and chicken, which continue to be available at favourable prices. Even if per capita consumption of fish should increase, the market could probably be satisfied by Uruguay's growing domestic landings.

E. COMPETITION BETWEEN URUGUAY AND CANADA FOR THE UNITED STATES MARKET

The Uruguayan government is clearly committed to developing its fishing industry, as can be seen from plans to acquire new vessels, build new processing plants and renovate existing plants. These plans were discussed in more detail in Section B.

The government policy is to encourage maximum processing on shore before exporting, and a prohibition of factory-freezer vessels reflects the commitment to develop a land-based industry.

Based on the data available, the study team considers that competition from Uruguayan exports could have an impact on Canadian sales, principally in the important United States market.

In 1979, there were 1 632 tonnes of Uruguayan frozen hake fillets valued at US\$2.086 million f.o.b. Montevideo (US\$1 278 per tonne) exported to the United States. The wholesale price for Canadian cod fillets was US\$2 310 per tonne in Boston in 1979, while the wholesale price for hake fillet was US\$1 763 per tonne.

Imports of hake blocks are the source of greatest potential concern for Canada. The United States is increasing its import of frozen hake blocks from South America. As already indicated, the Americans imported 4 422 tonnes of frozen hake blocks from Uruguay in 1979 for a total value of US\$6 595 000 (US\$1 491 per tonne f.o.b. Montevideo). Canadian data indicate that the United States' total imports of frozen hake blocks in 1979 amounted to 24 637 tonnes, up 36.5% over 1978. On the basis of these figures, Uruguay supplied 18% of all

hake block imports into the United States in 1979, up from 8.7% in 1978.

Imports of frozen groundfish blocks into the United States in 1979 increased by only some 774 tonnes to 185 208 tonnes. Cod blocks actually dropped from 92 876 to 87 568 tonnes, a decrease of 6%. Equally significant is that, as a percentage of total U.S. frozen groundfish imports, cod blocks from all sources dropped from 50 to 47 percent, while hake blocks increased from 9% to 13.3%. The cheaper South American hake is a strong competitor for Canadian cod blocks and potentially threatens our future share of the U.S. import market.

Table 8
United States Imports of Whiting Blocks, 1975 to 1979

| | (tonnes) | | | | |
|----------------------|----------------|----------------|-----------------|-----------------|-----------------|
| | <u>1975</u> | <u>1976</u> | <u>1977</u> | <u>1978</u> | <u>1979</u> |
| Canada | 0 | 0 | 45.4 | 0 | 45.4 |
| Iceland | 0 | 90.7 | 0 | 0 | 90.7 |
| Denmark | 45.4 | 136.1 | 181.5 | 544.5 | 317.6 |
| Fed. Rep. of Germany | 0 | 725.9 | 45.4 | 0 | 0 |
| Rep. of South Africa | 1 179.7 | 1 497.2 | 771.3 | 680.6 | 998.2 |
| Japan | 45.4 | 181.5 | 363.0 | 862.1 | 363.0 |
| Poland | 226.9 | 408.3 | 771.3 | 90.7 | 1 769.5 |
| Netherlands | 0 | 90.7 | 0 | 0 | 0 |
| United Kingdom | 408.3 | 816.7 | 1 179.7 | 408.3 | 499.1 |
| Rep. of Korea | 0 | 0 | 0 | 2 041.7 | 2 540.8 |
| Argentina | 1 406.5 | 4 854.8 | 6 715.0 | 11 297.6 | 11 932.8 |
| China - Taiwan | 0 | 0 | 0 | 45.4 | 45.4 |
| Peru | 635.2 | 408.3 | 0 | 226.9 | 317.6 |
| Chile | 0 | 0 | 0 | 181.5 | 226.9 |
| Brazil | 0 | 0 | 0 | 45.4 | 40.7 |
| Uruguay | 0 | 90.7 | 90.7 | 1 588.0 | 5 399.2 |
| Total | <u>3 947.4</u> | <u>9 300.9</u> | <u>10 163.3</u> | <u>18 012.7</u> | <u>24 586.9</u> |

Source: MARKET BULLETIN, GROUND FISH, March 1980,
Marketing Services Branch, FISHERIES & OCEANS.

Given their fisheries development plans, it is fair to assume that Uruguay's landings have reached approximately one-half of their potential. Furthermore, hake will continue to represent 50% or more of the landings, and exports of hake are likely to increase even further. Thus competitive pressure in their present major export markets, including Brazil and the U.S., is unlikely to abate.

Like other suppliers, Uruguay is aware that the U.S. demand for frozen blocks is price elastic and that, given the limits of its resource base, it will never dominate that market. However, lower costs and respectable quality give Uruguayan products some competitive advantage. This is partially offset by high transportation costs in getting their products to the U.S. market.

Uruguay's exports to the United States are, of course, only a fraction of total U.S. imports of frozen groundfish and, even if this were to double or triple (which is possible), the percentage of the total would remain minor. However, given the predicted increase in Canadian groundfish landings and the importance of the U.S. market to Canadian processors, any increase in the market share by a competitor is cause for concern. Brazil which currently is an important market for Uruguayan fish intends to replace these imports with its own supplies. As this occurs, it will further increase Uruguay's dependence on the United States as a market and intensify the focus of their export marketing effort in North America.

F. CONCLUSIONS

- 1) Historically, the fishing industry has not been a significant factor in the Uruguayan economy, but this is changing largely as a result of government policies that encourage development and expansion. Between 1973 and 1978, domestic fish landings increased by 325%, from 17 500 tonnes to 74 299 tonnes. Preliminary data indicate that 1979 catch was 103 000 tonnes and, although scientific analysis of the stock has yet to be completed, the government believes Uruguayan waters could sustain a catch of 200 000 tonnes annually. Principal species landed, in order of quantity, are hake or whiting, Atlantic croaker, striped weakfish and short-finned squid.
- 2) Uruguay cannot be considered a potential market of any significance for Canadian fisheries products. If a market does exist, it may be for small quantities of salmon for the restaurant trade. Uruguay should, in fact, be considered a competitor to Canada in the fish export markets of the world, particularly the U.S..
- 3) As Uruguayan fish landings have increased dramatically, so have the country's fish exports - from just under 11 000 tonnes valued at US\$5.2 million in 1976 to an estimated 48 000 tonnes worth more than US\$36 million in 1979. Frozen fish, primarily hake, accounts for 88% of exports by volume and 90% by value.

- 4) Of the greatest potential concern to Canadian exporters is the success Uruguay is experiencing in selling frozen hake blocks on the expanding United States market. In 1979, the United States imported 4 422 tonnes of hake blocks from Uruguay with a value of US\$6.595 million. In addition, the United States imported 1 632 tonnes of Uruguayan frozen hake fillets, valued at US\$2.086 million, in 1979. Uruguayan products account for only a fraction of total U.S. groundfish imports. And even if there should be a threefold increase in Uruguay's sales to the United States (which is possible), the percentage of the total would still be minor. However, given a predicted increase in Canadian landing and the importance of the United States market to Canadian processors, any increased competition is cause for concern.

- 5) Another factor to watch is the possible loss to Uruguay of some of its major market in Brazil. The Brazilian government intends to replace imports with domestic supplies, and this will increase Uruguay's dependance on the United States as a market.

- 6) While Uruguayan stocks are limited and American demand for frozen blocks is elastic, lower costs and respectable quality give Uruguay some competitive advantage (offset in part by high transportation costs). A factor in Uruguay's favour is the fact that the value of its currency is decreasing, while the Canadian dollar is generally increasing.

- 7) Traditionally, Uruguayans are not heavy consumers of fish, with per capita consumption running at less than five kilograms annually. The people much prefer beef and chicken, which are available at favourable prices. Should there be any increase in demand, it could easily be met by the expanding domestic industry.

- 8) The fishing industry is based in Montevideo, which is home port for 24 distant-water fishing vessels and 39 mid-water vessels. The government's development plan calls for the acquisition of 30 additional distant-water vessels. Several companies are engaged in processing and fish meal production at Montevideo.

- 9) Major new developments are taking place at La Paloma, northeast of Montevideo, with the establishment of four processing plants, one of them already in production. Each plant will be able to process 20 000 tonnes of raw material and be able to produce 30 000 tonnes of fish meal.

APPENDIX I

URUGUAY FISH PRODUCTION BY

PRODUCT FORM AND SPECIES

1978

Table A-1

URUGUAY

1978 Production by Product Form and Species

| <u>PRODUCTS</u> <u>Species</u> | <u>No. of Plants</u> <u>Reporting</u> | <u>Weight (kg)</u> | | <u>%</u> |
|-----------------------------------|--|--------------------|-------------------|---------------|
| | | <u>Partial</u> | <u>Total</u> | |
| <u>TOTAL</u> | <u>24</u> | | <u>40 289 829</u> | <u>100.00</u> |
| FRESH FISH | 4 | | 1 281 618 | 3.18 |
| <u>Whole:</u> | <u>2</u> | | <u>1 049 816</u> | <u>2.61</u> |
| Catfish | 1 | 2 | | |
| Dogfish and Shark | 1 | 32 298 | | |
| Croaker | 1 | 214 882 | | |
| Anchovies | 1 | 135 | | |
| Striped Mullet | 1 | 2 | | |
| Hake | 1 | 515 419 | | |
| Red Snapper | 2 | 1 055 | | |
| River Atherine | 1 | 2 | | |
| Weakfish | 1 | 236 408 | | |
| Sargo | 1 | 20 720 | | |
| Other | 1 | 28 893 | | |
| <u>Gutted:</u> | <u>2</u> | | <u>138 650</u> | <u>0.34</u> |
| Catfish | 1 | 27 110 | | |
| Forkbeard | 1 | 72 | | |
| Croaker | 1 | 30 | | |
| Striped Mullet | 1 | 90 | | |
| River Atherine | 1 | 18 | | |
| Weakfish | 1 | 36 | | |
| Shad | 2 | 40 311 | | |
| Hoplias Malaborious | 1 | 70 311 | | |
| Other Freshwater Fish | 1 | 672 | | |
| <u>Fillets:</u> | <u>1</u> | | <u>65 130</u> | <u>0.16</u> |
| Various | 1 | 65 130 | | |
| <u>Headed and Gutted:</u> | <u>1</u> | | <u>28 027</u> | <u>0.07</u> |
| Various | 1 | 28 027 | | |

Table A-1 (cont'd)

| <u>PRODUCTS</u> <u>Species</u> | <u>No. of Plants</u> <u>Reporting</u> | <u>Weight (kg)</u> | | <u>%</u> |
|-----------------------------------|--|--------------------|-------------------|--------------|
| | | <u>Partial</u> | <u>Total</u> | |
| FROZEN FISH | 13 | | 31 788 981 | 78.91 |
| <u>Whole:</u> | <u>13</u> | | <u>10 197 449</u> | <u>25.31</u> |
| Cod | 1 | | 60 | |
| Sea Bream | 6 | 168 | 670 | |
| Castagnole | 5 | 192 | 129 | |
| Dogfish, Shark | 2 | 7 | 650 | |
| Croaker | 9 | 3 569 | 958 | |
| Black Croaker | 1 | | 350 | |
| Anchovies | 4 | 936 | 645 | |
| Sole | 2 | 1 | 960 | |
| Striped Mullet | 2 | 15 | 707 | |
| Hake | 6 | 1 359 | 771 | |
| Pompano | 8 | 571 | 210 | |
| Red Snapper | 8 | 176 | 420 | |
| River Atherine | 1 | 2 | 120 | |
| Weakfish | 10 | 1 720 | 121 | |
| Netted Weakfish | 7 | 511 | 015 | |
| Pouget | 1 | 1 | 146 | |
| Shad | 3 | 13 | 081 | |
| Sargo | 3 | 25 | 063 | |
| Other | 5 | 924 | 373 | |
| <u>Gutted:</u> | <u>5</u> | | <u>452 461</u> | <u>1.12</u> |
| Sea Bream | 1 | 104 | 788 | |
| Dogfish, Shark | 1 | 9 | 988 | |
| Croaker | 5 | | | |
| Black Croaker | 1 | | | |
| Anchovies | 1 | | | |
| Sole | 1 | 6 | 680 | |
| Hake | 2 | 172 | 000 | |
| Pompano | 2 | 10 | 000 | |
| Red Snapper | 1 | 1 | 559 | |
| Weakfish | 2 | 64 | 320 | |
| Netted Weakfish | 1 | 48 | 585 | |
| Shad | 1 | 148 | 825 | |
| Sargo | 1 | | 492 | |
| Other | 1 | | | |
| <u>Trimmed:</u> | <u>5</u> | | <u>1 153 695</u> | <u>2.86</u> |
| Dogfish, Shark | 1 | 5 | 510 | |
| Croaker | 2 | 28 | 260 | |
| Anchovies | 2 | 91 | 960 | |
| Hake | 5 | 875 | 375 | |
| Pompano | 4 | 147 | 840 | |
| Weakfish | 1 | 4 | 000 | |
| Other | 1 | | 750 | |

Table A-1 (cont'd)

| <u>PRODUCTS</u> <u>Species</u> | <u>No. of Plants</u> <u>Reporting</u> | <u>Weight (kg)</u> | | <u>%</u> |
|-----------------------------------|--|--------------------|-------------------|--------------|
| | | <u>Partial</u> | <u>Total</u> | |
| <u>Headed and Guttled:</u> | <u>13</u> | | <u>10 825 269</u> | <u>26.87</u> |
| Cod | 2 | 2 108 | | |
| Sea Bream | 1 | 7 350 | | |
| Forkbeard | 1 | 1 000 | | |
| Dogfish, Shark | 5 | 205 539 | | |
| Croaker | 10 | 3 018 199 | | |
| Anchovies | 2 | 44 375 | | |
| Hake | 9 | 6 829 976 | | |
| Pompano | 2 | 51 533 | | |
| Weakfish | 6 | 435 604 | | |
| Netted Weakfish | 4 | 134 365 | | |
| Other | 3 | 95 220 | | |
| <u>Filletts:</u> | <u>11</u> | | <u>7 870 269</u> | <u>19.53</u> |
| Cod | 3 | 3 059 | | |
| Forkbeard | 1 | 44 | | |
| Dogfish, Shark | 5 | 78 974 | | |
| Croaker | 5 | 335 408 | | |
| Black Croaker | 1 | 1 825 | | |
| Sole | 1 | 1 959 | | |
| Hake | 8 | 6 349 739 | | |
| Pompano | 3 | 113 818 | | |
| Weakfish | 9 | 840 884 | | |
| Netted Weakfish | 6 | 77 087 | | |
| Other | 3 | 67 472 | | |
| <u>Pieces and Slices:</u> | <u>1</u> | | <u>225 800</u> | <u>0.56</u> |
| Croaker | 1 | 225 800 | | |
| <u>Fish Roe:</u> | <u>4</u> | | <u>19 287</u> | <u>0.05</u> |
| Croaker | 2 | 10 322 | | |
| Hake | 2 | 8 965 | | |
| <u>Minced:</u> | <u>2</u> | | <u>345 516</u> | <u>0.86</u> |
| Hake | 2 | 345 516 | | |
| <u>Other:</u> | <u>1</u> | | <u>18 000</u> | <u>0.04</u> |
| Various (heads) | 1 | 18 000 | | |

Table A-1 (cont'd)

| <u>PRODUCTS</u> <u>Species</u> | <u>No. of Plants</u> <u>Reporting</u> | <u>Weight (kg)</u> | | <u>%</u> |
|-----------------------------------|--|--------------------|------------------|-------------|
| | | <u>Partial</u> | <u>Total</u> | |
| DRIED, SALTED OR SMOKED FISH | 6 | | 251 025 | 0.62 |
| <u>Salted (dry or wet):</u> | <u>6</u> | | <u>242 787</u> | <u>0.60</u> |
| Dogfish, Shark | 5 | 72 198 | | |
| Croaker | 2 | 43 190 | | |
| Anchovies | 1 | 975 | | |
| Hake | 3 | 116 024 | | |
| Other | 1 | 10 400 | | |
| <u>Dried Fins:</u> | <u>2</u> | | <u>7 564</u> | <u>0.02</u> |
| Dogfish, Shark | 2 | 7 564 | | |
| <u>Smoked:</u> | <u>1</u> | | <u>674</u> | <u>0.00</u> |
| Anchovies | 1 | 121 | | |
| Shad | 1 | 553 | | |
| FROZEN SHELLFISH | 2 | | 52 908 | 0.13 |
| <u>Whole:</u> | <u>2</u> | | <u>52 207</u> | <u>0.13</u> |
| Crabs | 2 | 1 522 | | |
| Prawns | 1 | 50 685 | | |
| <u>Other:</u> | <u>1</u> | | <u>701</u> | <u>0.00</u> |
| Prawns (meat) | 1 | 701 | | |
| FROZEN MOLLUSCS | 10 | | 1 825 879 | 4.53 |
| <u>Whole:</u> | <u>9</u> | | <u>1 780 808</u> | <u>4.42</u> |
| Squid | 9 | 1 766 415 | | |
| Mussels | 1 | 13 946 | | |
| Octopus | 1 | 446 | | |
| <u>Other:</u> | <u>3</u> | | <u>45 071</u> | <u>0.11</u> |
| Clams (shelled) | 1 | 611 | | |
| Cockles | 1 | 196 | | |
| Squid (tails, tentacles, body) | 2 | 43 991 | | |
| Mussels (shelled) | 1 | 273 | | |

Table A-1 (cont'd)

| PRODUCTS Species | No. of Plants Reporting | Weight (kg) | | % |
|--------------------------|----------------------------|-------------|---------------|-------------|
| | | Partial | Total | |
| CANNED PRODUCTS | <u>4</u> | | 143 974 | 0.36 |
| <u>Fish:</u> | <u>4</u> | | <u>44 384</u> | <u>0.11</u> |
| In oil: | <u>4</u> | | <u>22 671</u> | <u>0.06</u> |
| Anchovy | 1 | 3 400 | | |
| Tuna | 2 | 13 583 | | |
| Croaker | 1 | 255 | | |
| Hake | 1 | 1 773 | | |
| Shad | 1 | 59 | | |
| River Atherine | 1 | 477 | | |
| Horse Mackerel | 1 | 3 124 | | |
| In water: | <u>1</u> | | <u>12 163</u> | <u>0.03</u> |
| Anchovy | 1 | 12 126 | | |
| Menhaden | 1 | 37 | | |
| Pickled and other: | <u>2</u> | | <u>9 550</u> | <u>0.02</u> |
| Corbina | 1 | 160 | | |
| Fish Roe | 1 | 598 | | |
| Anchovy | 1 | 4 400 | | |
| Striped Mullet | 1 | 175 | | |
| Hake | 1 | 262 | | |
| Fish Paste | 1 | 555 | | |
| Simulated Salmon Product | 1 | 3 400 | | |
| <u>Molluscs:</u> | <u>4</u> | | <u>27 603</u> | <u>0.07</u> |
| In oil: | <u>2</u> | | <u>4 610</u> | <u>0.01</u> |
| Clams | 1 | 232 | | |
| Squid | 1 | 2 746 | | |
| Mussels | 1 | 1 632 | | |
| In water: | <u>4</u> | | <u>15 367</u> | <u>0.04</u> |
| Clams | 2 | 3 549 | | |
| Cockles | 3 | 6 127 | | |
| Mussels | 3 | 5 691 | | |
| Pickled and other: | <u>2</u> | | <u>7 626</u> | <u>0.02</u> |
| Squid | 1 | 3 592 | | |
| Mussels | 2 | 4 034 | | |

Table A-1 (cont'd)

| <u>PRODUCTS</u> <u>Species</u> | <u>No. of Plants</u> <u>Reporting</u> | <u>Weight (kg)</u> | | <u>%</u> |
|-----------------------------------|--|--------------------|------------------|--------------|
| | | <u>Partial</u> | <u>Total</u> | |
| PROTEIN CONCENTRATES | 1 | | 19 000 | 0.05 |
| <u>Fish Products:</u> | <u>1</u> | 19 000 | <u>19 000</u> | <u>0.05</u> |
| FISH MEAL, FEEDS, ETC. | 7 | | 4 920 775 | 12.21 |
| <u>Fish Meal:</u> | <u>6</u> | 4 636 899 | <u>4 636 899</u> | <u>11.51</u> |
| <u>Feeds:</u> | <u>1</u> | 283 876 | <u>283 876</u> | <u>0.70</u> |
| OIL | 4 | | 76 986 | 0.19 |
| <u>Fish Oil:</u> | <u>3</u> | 73 042 | <u>73 042</u> | <u>0.18</u> |
| <u>Dogfish Liver Oil:</u> | <u>1</u> | 3 854 | <u>3 854</u> | <u>0.01</u> |
| OTHER FISHERIES PRODUCTS | 1 | | 760 | 0.00 |
| <u>Agar:</u> | <u>1</u> | 760 | <u>760</u> | <u>0.00</u> |

APPENDIX II

URUGUAY: FISH LANDINGS

Table A-2

URUGUAY

National Fisheries Institute

Landings

Nominal Captures by Principal Species 1973-1979 (tonnes)

| Principal species | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979* |
|-------------------|--------|--------|--------|--------|--------|--------|--------|
| TOTAL | 17 500 | 16 000 | 26 200 | 33 600 | 48 300 | 74 200 | 93 000 |
| Hake | 4 500 | 1 500 | 9 800 | 11 700 | 22 500 | 41 300 | 57 100 |
| Croaker | 2 800 | 4 000 | 5 600 | 9 400 | 11 900 | 14 000 | 23 000 |
| Striped Weakfish | 6 100 | 4 400 | 3 400 | 3 300 | 5 100 | 6 500 | 11 400 |
| Other | 4 100 | 6 100 | 7 400 | 9 200 | 8 800 | 12 400 | 1 500 |

APPENDIX III

URUGUAY: FISH EXPORTS

Table A-3

URUGUAY

Exports of Fisheries and Fish Products: 1976-1979

| Product Group | 1976 | | 1977 | | 1978 | | 1979 | |
|------------------------------------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|
| | tonnes | US\$ '000 | tonnes | US\$ '000 | tonnes | US\$ '000 | tonnes | US\$ '000 |
| TOTAL | 10 958 | 5 179 | 17 669 | 10 326 | 32 731 | 22 493 | 47 800 | 36 222 |
| Frozen Fish | 9 062 | 4 273 | 16 621 | 9 247 | 29 894 | 20 525 | 42 255 | 32 786 |
| Frozen fresh molluscs | 688 | 294 | 41 | 32 | 1 715 | 1 465 | 2 727 | 2 412 |
| Fish meal and similar animal feeds | 32 | 7 | 8 | 2 | 793 | 252 | 1 747 | 612 |
| Other | 1 176 | 605 | 999 | 1 045 | 329 | 251 | 1 071 | 412 |

* Provisional data, subject to change.

Table A-4

URUGUAY

Export Orders Filled Between Jan.-Dec., 1979

| COUNTRY | Tonnes | | | US\$'000 fob Montevideo | | |
|---------------|---------------|---------------|---------------|-------------------------|--------------|---------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>36 194</u> | <u>11 606</u> | <u>47 800</u> | <u>26 681</u> | <u>9 541</u> | <u>36 222</u> |
| BRAZIL | 12 826 | 5 624 | 18 450 | 8 703 | 4 195 | 12 898 |
| UNITED STATES | 6 530 | 1 776 | 8 306 | 8 128 | 2 645 | 10 773 |
| NIGERIA | 8 867 | 1 996 | 10 863 | 3 962 | 949 | 4 911 |
| JAPAN | 2 423 | 6 | 2 429 | 2 177 | 3 | 2 180 |
| SPAIN | 1 280 | 133 | 1 413 | 881 | 92 | 973 |
| ITALY | 730 | 454 | 1 184 | 523 | 311 | 834 |
| KUWAIT | 932 | 121 | 1 053 | 706 | 121 | 827 |
| GERMANY | 910 | 475 | 1 385 | 366 | 266 | 632 |
| FRANCE | 368 | 108 | 476 | 368 | 108 | 476 |
| ENGLAND | 483 | 180 | 663 | 271 | 180 | 451 |
| SAUDI ARABIA | 41 | 333 | 374 | 32 | 314 | 346 |
| ISRAEL | 232 | 57 | 289 | 207 | 55 | 262 |
| HOLLAND | 25 | 236 | 261 | 26 | 135 | 161 |
| HUNGARY | 44 | 44 | 88 | 81 | 63 | 144 |
| BELGIUM | 297 | | 297 | 98 | | 98 |
| ARGENTINA | 72 | 19 | 91 | 37 | 25 | 62 |
| GREECE | 45 | | 45 | 45 | | 45 |
| HONG KONG | 3 | 1 | 4 | 33 | 12 | 45 |
| SWITZERLAND | | 30 | 30 | | 40 | 40 |
| DENMARK | | 13 | 13 | | 22 | 22 |
| SOUTH KOREA | 36 | | 36 | 19 | | 19 |
| MAURITIUS | 50 | | 50 | 18 | | 18 |
| PARAGUAY | | 0 | 0 | | 5 | 5 |

(1) Data provided by export firms.

(2) Amount differentials are due to figures rounded off.

(3) Quantity greater than zero, but lower than the unit of final digit.

Table A-5

URUGUAY

Exports to Brazil, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|-----------------------|---------------|--------------|---------------|-------------------------|--------------|---------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>12 826</u> | <u>5 621</u> | <u>18 447</u> | <u>8 703</u> | <u>4 195</u> | <u>12 898</u> |
| Fresh fish total | 173 | 21 | 194 | 63 | 8 | 71 |
| <u>Whole</u> | <u>173</u> | <u>18</u> | <u>191</u> | <u>63</u> | <u>7</u> | <u>70</u> |
| Striped weakfish, red | 123 | | 123 | 43 | | 43 |
| Tararira | 49 | 18 | 67 | 20 | 7 | 27 |
| Bagre | 1 | | 1 | 0 | | 0 |
| <u>Eviscerated</u> | | <u>3</u> | <u>3</u> | | <u>1</u> | <u>1</u> |
| Tararira | | 3 | 3 | | 1 | 1 |
| Frozen fish total | 11 803 | 5 270 | 17 073 | 8 351 | 4 058 | 12 409 |
| <u>Whole</u> | <u>2 567</u> | <u>1 286</u> | <u>3 853</u> | <u>1 181</u> | <u>634</u> | <u>1 815</u> |
| Sea bream | 93 | 12 | 105 | 72 | 8 | 80 |
| Sole | 1 | | 1 | 1 | | 1 |
| Black croaker | 11 | | 11 | 5 | | 5 |
| Croaker | 1 635 | 765 | 2 400 | 763 | 395 | 1 158 |
| Striped weakfish, red | 300 | 189 | 489 | 189 | 85 | 219 |
| Striped weakfish | 168 | 60 | 228 | 75 | 30 | 189 |
| Pomfrets | 18 | 18 | 36 | 6 | 6 | 12 |
| Porgy | 86 | | 86 | 40 | | 40 |
| Mulletts | 1 | | 1 | 0 | | 0 |
| Common pompano | 38 | 134 | 172 | 10 | 76 | 96 |
| Mackerel | 6 | | 6 | 3 | | 3 |
| Anchovy | 193 | 108 | 301 | 57 | 32 | 89 |
| Shad | 14 | | 14 | 6 | | 6 |
| Bagre | 3 | | 3 | 1 | | 1 |
| <u>Eviscerated</u> | <u>3 860</u> | <u>1 412</u> | <u>5 272</u> | <u>2 507</u> | <u>906</u> | <u>3 413</u> |
| Dogfish | 24 | | 24 | 15 | | 15 |
| Croaker | 2 019 | 630 | 2 649 | 1 479 | 516 | 1 995 |
| Sea bream | 2 | | 2 | 2 | | 2 |
| Hake | 1 097 | 562 | 1 659 | 558 | 289 | 847 |
| Sole | 10 | | 10 | 11 | | 11 |
| Forked hake | 2 | | 2 | 2 | | 2 |
| Striped weakfish | 346 | 38 | 384 | 240 | 27 | 267 |

Table A-5 (cont'd)

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|--------------------------------------|--------------|--------------|--------------|--------------------------|--------------|--------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| Striped weakfish, red | 94 | 28 | 122 | 65 | 19 | 84 |
| Angel shark | 8 | | 8 | 3 | | 3 |
| Black corv. | 7 | | 7 | 3 | | 3 |
| Common pompano | 4 | | 4 | 2 | | 2 |
| Anchovy | 18 | 154 | 172 | 6 | 55 | 61 |
| Shad | 229 | | 229 | 121 | | 121 |
| <u>Fillets</u> | <u>2 856</u> | <u>1 586</u> | <u>4 442</u> | <u>2 853</u> | <u>1 819</u> | <u>4 672</u> |
| Croaker | 123 | 42 | 165 | 136 | 74 | 210 |
| Sole | | 8 | 8 | | 20 | 20 |
| Hake | 2 175 | 1 236 | 3 411 | 2 129 | 1 354 | 3 483 |
| Porgy | 18 | | 18 | 7 | | 7 |
| Striped weakfish | 461 | 261 | 722 | 478 | 306 | 784 |
| Striped weakfish, red | 72 | 24 | 96 | 92 | 33 | 125 |
| Dogfish | 4 | | 4 | 3 | | 3 |
| Codfish | 3 | 10 | 13 | 8 | 28 | 36 |
| Black corv. | | 5 | 5 | | 4 | 4 |
| <u>Espalmado</u> | <u>1 184</u> | <u>740</u> | <u>1 924</u> | <u>602</u> | <u>437</u> | <u>1 039</u> |
| Hake | 1 115 | 581 | 1 696 | 577 | 337 | 914 |
| Croaker | | 129 | 129 | | 88 | 88 |
| Black croaker | 5 | | 5 | 3 | | 3 |
| Anchovy | 63 | 18 | 81 | 21 | 6 | 27 |
| Common pompano | 1 | | 1 | 1 | | 1 |
| Striped weakfish | | 12 | 12 | | 6 | 6 |
| <u>Postas</u> | <u>630</u> | <u>148</u> | <u>778</u> | <u>524</u> | <u>131</u> | <u>655</u> |
| Hake | 18 | | 18 | 12 | | 12 |
| Croaker | 523 | 80 | 603 | 451 | 76 | 527 |
| Striped weakfish | 89 | 68 | 157 | 61 | 55 | 116 |
| <u>Blocks</u> | <u>706</u> | <u>98</u> | <u>804</u> | <u>684</u> | <u>131</u> | <u>815</u> |
| Hake | 485 | 76 | 561 | 468 | 102 | 564 |
| Striped weakfish | 221 | 22 | 243 | 222 | 29 | 251 |
| <u>Fish meal</u> | | <u>189</u> | <u>189</u> | | <u>80</u> | <u>80</u> |
| Not for human consumption, from fish | | 189 | 189 | | 80 | 80 |

Table A-5 (cont'd)

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|--------------------------|------------|-----------|------------|-------------------------|-----------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| Frozen shellfish total | 163 | 54 | 217 | 172 | 36 | 208 |
| <u>Whole</u> | <u>163</u> | <u>54</u> | <u>217</u> | <u>172</u> | <u>36</u> | <u>208</u> |
| Squid | 145 | 54 | 199 | 100 | 36 | 136 |
| Octopus | 18 | | 18 | 72 | | 72 |
| <u>Other frozen toal</u> | 687 | 90 | 777 | 117 | 13 | 130 |
| <u>Waste</u> | <u>687</u> | <u>90</u> | <u>777</u> | <u>117</u> | <u>13</u> | <u>130</u> |
| Fundry | 687 | 90 | 777 | 117 | 13 | 130 |

Table A-6

URUGUAY

Exports to the United States, 1979

| PRODUCTS | Tonnes | | | US\$'000 | | fob Montevideo |
|--------------------|--------------|--------------|--------------|--------------|--------------|----------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>6 530</u> | <u>1 776</u> | <u>8 306</u> | <u>8 128</u> | <u>2 645</u> | <u>10 773</u> |
| Frozen fish total | 6 530 | 1 776 | 8 306 | 8 128 | 2 645 | 10 773 |
| <u>Whole</u> | | <u>12</u> | <u>12</u> | <u>10</u> | | <u>10</u> |
| Croaker | | 9 | 9 | 8 | | 8 |
| Common pompano | | 3 | 3 | 2 | | 2 |
| <u>Eviscerated</u> | <u>934</u> | <u>97</u> | <u>1 031</u> | <u>741</u> | <u>86</u> | <u>827</u> |
| Croaker | 669 | 97 | 766 | 531 | 86 | 617 |
| Hake | 218 | | 218 | 170 | | 170 |
| Striped weakfish | 41 | | 41 | 29 | | 29 |
| Common pompano | 6 | | 6 | 11 | | 11 |
| <u>Fillets</u> | <u>1 766</u> | <u>220</u> | <u>1 986</u> | <u>2 285</u> | <u>275</u> | <u>2 620</u> |
| Croaker | 3 | 1 | 4 | 6 | 3 | 69 |
| Sole | 3 | | 3 | 6 | | 6 |
| Hake | 1 457 | 175 | 1 632 | 1 878 | 208 | 2 086 |
| Striped weakfish | 283 | 44 | 327 | 362 | 64 | 426 |
| Common pompano | 6 | | 6 | 11 | | 11 |
| Surnards | 14 | | 14 | 22 | | 22 |
| <u>Blocks</u> | <u>3 316</u> | <u>1 260</u> | <u>4 576</u> | <u>4 732</u> | <u>2 150</u> | <u>6 882</u> |
| Croaker | 108 | | 108 | 233 | | 233 |
| Hake | 3 163 | 1 259 | 4 422 | 4 467 | 2 128 | 6 595 |
| Striped weakfish | 45 | 1 | 46 | 52 | 2 | 54 |
| <u>Minced</u> | <u>514</u> | <u>187</u> | <u>701</u> | <u>350</u> | <u>144</u> | <u>494</u> |
| Hake | 514 | 187 | 701 | 350 | 144 | 494 |

Table A-7

URUGUAY

Exports to Nigeria, 1979

| PRODUCTS | Tonnes | | | US\$'000 | | fob Montevideo |
|-----------------------|--------------|--------------|---------------|--------------|------------|----------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| TOTAL | 5 867 | 1 996 | 10 863 | 3 962 | 949 | 4 911 |
| Frozen fish total | 5 867 | 1 996 | 10 863 | 3 962 | 949 | 4 911 |
| <u>Whole</u> | <u>5 862</u> | <u>1 996</u> | <u>10 858</u> | <u>3 959</u> | <u>949</u> | <u>4 908</u> |
| Sea bream | 40 | 25 | 65 | 35 | 11 | 46 |
| Croaker | 1 130 | 632 | 4 762 | 1 881 | 303 | 2 184 |
| Rouget | 3 | | 3 | 1 | | 1 |
| Striped weakfish, red | 66 | 12 | 78 | 32 | 5 | 37 |
| Striped weakfish | 2 742 | 662 | 3 404 | 1 192 | 323 | 1 515 |
| Pomfret | 166 | 233 | 399 | 76 | 105 | 181 |
| Hake | 1 033 | 191 | 1 224 | 445 | 90 | 535 |
| Sheepshead | 115 | 16 | 131 | 55 | 8 | 63 |
| Porgy | 307 | 27 | 334 | 133 | 13 | 146 |
| Palometa | 72 | 69 | 141 | 33 | 32 | 65 |
| Anchovy | 179 | 129 | 308 | 73 | 59 | 132 |
| Shad | 9 | | 9 | 3 | | 3 |
| <u>Eviscerated</u> | <u>5</u> | | <u>5</u> | <u>3</u> | | <u>3</u> |
| Shad | 5 | | 5 | 3 | | 3 |

Table A-8

URUGUAY

Exports to Japan, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|------------------------|--------------|----------|--------------|-------------------------|----------|--------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>2 423</u> | <u>6</u> | <u>2 429</u> | <u>2 177</u> | <u>3</u> | <u>2 180</u> |
| Frozen fish total | 79 | 6 | 85 | 74 | 3 | 77 |
| <u>Whole</u> | <u>36</u> | <u>6</u> | <u>42</u> | <u>28</u> | <u>3</u> | <u>31</u> |
| Sea bream | 31 | | 31 | 25 | | 25 |
| Striped weakfish, red | | 6 | 6 | | 3 | 3 |
| Palometa | 5 | | 5 | 3 | | 3 |
| <u>Eviscerated</u> | <u>4</u> | | <u>4</u> | <u>3</u> | | <u>3</u> |
| Croaker | 4 | | 4 | 3 | | 3 |
| <u>Blocks</u> | <u>6</u> | | <u>6</u> | <u>4</u> | | <u>4</u> |
| Croaker | 6 | | 6 | 4 | | 4 |
| <u>Roe</u> | <u>33</u> | | <u>33</u> | <u>39</u> | | <u>39</u> |
| Hake | 33 | | 33 | 39 | | 39 |
| Frozen shellfish total | 2 344 | | 2 344 | 2 103 | | 2 103 |
| <u>Whole</u> | <u>2 188</u> | | <u>2 188</u> | <u>1 918</u> | | <u>1 918</u> |
| Squid | 2 188 | | 2 188 | 1 918 | | 1 918 |
| <u>Espalmado</u> | <u>156</u> | | <u>156</u> | <u>185</u> | | <u>185</u> |
| Squid | 156 | | 156 | 185 | | 185 |

Table A-9

URUGUAY

Exports to Spain, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|--------------------|--------------|------------|--------------|-------------------------|-----------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>1 280</u> | <u>133</u> | <u>1 413</u> | <u>881</u> | <u>92</u> | <u>973</u> |
| Fresh fish total | 8 | | 8 | 4 | | 4 |
| <u>Whole</u> | <u>8</u> | | <u>8</u> | <u>4</u> | | <u>4</u> |
| Hake | 8 | | 8 | 4 | | 4 |
| Frozen fish total | 1 212 | 92 | 1 304 | 849 | 66 | 915 |
| <u>Whole</u> | <u>2</u> | | <u>2</u> | <u>1</u> | | <u>1</u> |
| Sea bream | 1 | | 1 | 1 | | 1 |
| Sole | 0 | | 0 | 0 | | 0 |
| Surnard | 1 | | 1 | 0 | | 0 |
| Pomfret | 0 | | 0 | 0 | | 0 |
| Forked hake | 0 | | 0 | 0 | | 0 |
| <u>Eviscerated</u> | <u>1 146</u> | <u>92</u> | <u>1 238</u> | <u>775</u> | <u>66</u> | <u>841</u> |
| Dogfish | 6 | | 6 | 5 | | 5 |
| Croaker | 4 | | 4 | 3 | | 3 |
| Hake | 1 136 | 92 | 1 228 | 767 | 66 | 833 |
| <u>Fillets</u> | <u>58</u> | | <u>58</u> | <u>65</u> | | <u>65</u> |
| Hake | 58 | | 58 | 65 | | 65 |
| <u>Other</u> | <u>2</u> | | <u>2</u> | <u>1</u> | | <u>1</u> |
| Ray fin | 2 | | 2 | 1 | | 1 |
| <u>Blocks</u> | <u>2</u> | | <u>2</u> | <u>3</u> | | <u>3</u> |
| Hake | 2 | | 2 | 3 | | 3 |
| <u>Roe</u> | <u>2</u> | | <u>2</u> | <u>4</u> | | <u>4</u> |
| Hake | 2 | | 2 | 4 | | 4 |

Table A-9 (cont'd)

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|------------------------|-----------|-----------|-----------|--------------------------|-----------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| Frozen shellfish total | 60 | 41 | 101 | 28 | 26 | 54 |
| <u>Whole</u> | | <u>41</u> | <u>41</u> | | <u>26</u> | <u>26</u> |
| Squid | | 41 | 41 | | 26 | 26 |
| <u>Eviscerated</u> | <u>0</u> | | <u>0</u> | <u>0</u> | | <u>0</u> |
| Squid | 0 | | 0 | 0 | | 0 |
| <u>Squid Parts</u> | <u>60</u> | | <u>60</u> | <u>28</u> | | <u>28</u> |
| Fins | 20 | | 20 | 8 | | 8 |
| Tentacles | 30 | | 40 | 20 | | 20 |
| Squid tube CP | 0 | | 0 | 0 | | 0 |
| Squid tube SP | 0 | | 0 | 0 | | 0 |

Table A-10

URUGUAY

Exports to Italy, 1979

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|--------------------|------------|------------|--------------|--------------------------|------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>730</u> | <u>454</u> | <u>1 184</u> | <u>523</u> | <u>311</u> | <u>834</u> |
| Fresh fish total | 25 | 5 | 30 | 35 | 7 | 42 |
| <u>Whole</u> | <u>25</u> | <u>5</u> | <u>30</u> | <u>35</u> | <u>7</u> | <u>42</u> |
| Sea bream | 15 | 2 | 17 | 21 | 3 | 24 |
| Sheepshead | 10 | 3 | 13 | 14 | 4 | 18 |
| Frozen fish total | 705 | 449 | 1 154 | 488 | 304 | 792 |
| <u>Whole</u> | <u>10</u> | | <u>10</u> | <u>10</u> | | <u>10</u> |
| Rabbit fish | 9 | | 9 | 9 | | 9 |
| Majuga | 1 | | 1 | 1 | | 1 |
| <u>Eviscerated</u> | <u>539</u> | <u>355</u> | <u>894</u> | <u>335</u> | <u>211</u> | <u>546</u> |
| Dogfish | 57 | 11 | 68 | 74 | 16 | 90 |
| Hake | 464 | 344 | 808 | 242 | 195 | 437 |
| Rabbit fish | 18 | | 18 | 19 | | 19 |
| <u>Fillets</u> | <u>156</u> | <u>78</u> | <u>234</u> | <u>143</u> | <u>78</u> | <u>221</u> |
| Hake | 156 | 69 | 225 | 143 | 67 | 210 |
| Rabbit fish | | 9 | 9 | | 11 | 11 |
| <u>Blocks</u> | | <u>16</u> | <u>16</u> | | <u>15</u> | <u>15</u> |
| Hake | | 16 | 16 | | 15 | 15 |

Table A-11

URUGUAY

Exports to Kuwait, 1979

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|--------------------|------------|------------|--------------|--------------------------|------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>932</u> | <u>121</u> | <u>1 053</u> | <u>706</u> | <u>121</u> | <u>827</u> |
| Frozen fish total | 932 | 121 | 1 053 | 706 | 121 | 827 |
| <u>Whole</u> | <u>54</u> | <u>6</u> | <u>60</u> | <u>35</u> | <u>4</u> | <u>39</u> |
| Sea bream | 1 | | 1 | 1 | | 1 |
| Striped weakfish | 30 | 6 | 36 | 17 | 4 | 21 |
| Hake | 3 | | 3 | 1 | | 1 |
| Porgy | 20 | | 20 | 16 | | 16 |
| <u>Eviscerated</u> | <u>794</u> | <u>85</u> | <u>879</u> | <u>590</u> | <u>82</u> | <u>672</u> |
| Croaker | 633 | 85 | 718 | 480 | 82 | 562 |
| Hake | 42 | | 42 | 31 | | 31 |
| Striped weakfish | 91 | | 91 | 66 | | 66 |
| Pomfret | 28 | | 28 | 13 | | 13 |
| <u>Fillet</u> | <u>84</u> | <u>15</u> | <u>99</u> | <u>81</u> | <u>16</u> | <u>97</u> |
| Hake | | 15 | 15 | | 16 | 16 |
| Striped weakfish | | | 84 | | | 81 |
| <u>Blocks</u> | | <u>15</u> | <u>15</u> | | <u>19</u> | <u>19</u> |
| Hake | | 15 | 15 | | 19 | 19 |

Table A-12

URUGUAY

Exports to West Germany (FRG), 1979

| PRODUCTS | Tonnes | | | US\$'000 | fob Montevideo | |
|----------------------------------|------------|------------|--------------|------------|----------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>910</u> | <u>475</u> | <u>1 385</u> | <u>366</u> | <u>266</u> | <u>632</u> |
| Frozen fish total | 77 | 124 | 201 | 75 | 137 | 212 |
| <u>Whole</u> | <u>8</u> | | <u>8</u> | <u>5</u> | | <u>5</u> |
| Sea bream | 5 | | 5 | 4 | | 4 |
| Striped weakfish | 3 | | 3 | 1 | | 1 |
| <u>Fillets</u> | <u>69</u> | <u>96</u> | <u>165</u> | <u>70</u> | <u>101</u> | <u>171</u> |
| Hake | 69 | 96 | 165 | 70 | 101 | 171 |
| <u>Blocks</u> | | <u>28</u> | <u>28</u> | | <u>36</u> | <u>36</u> |
| Hake | | 28 | 28 | | 36 | 36 |
| Fish meal | 794 | 348 | 1 142 | 262 | 126 | 388 |
| <u>Not for human consumption</u> | <u>794</u> | <u>348</u> | <u>1 142</u> | <u>262</u> | <u>126</u> | <u>388</u> |
| From fish | 794 | 348 | 1 142 | 262 | 126 | 388 |
| Frozen shellfish total | 39 | 3 | 42 | 29 | 3 | 32 |
| <u>Whole</u> | <u>39</u> | <u>3</u> | <u>42</u> | <u>29</u> | <u>3</u> | <u>32</u> |
| Squid | 39 | 3 | 42 | 29 | 3 | 32 |

Table A-13

URUGUAY

Exports to France, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|------------------------------|------------|------------|------------|-------------------------|------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>368</u> | <u>108</u> | <u>476</u> | <u>368</u> | <u>108</u> | <u>476</u> |
| Frozen fish total | 368 | 108 | 476 | 368 | 107 | 475 |
| <u>Whole</u> | | <u>26</u> | <u>26</u> | | <u>18</u> | <u>18</u> |
| Croaker | | 3 | 3 | | 2 | 2 |
| Palometa | | 23 | 23 | | 16 | 16 |
| <u>Eviscerated</u> | <u>334</u> | <u>79</u> | <u>413</u> | <u>336</u> | <u>80</u> | <u>416</u> |
| Dogfish | 5 | | 5 | 5 | | 5 |
| Croaker | | 15 | 15 | | 15 | 15 |
| Hake | 329 | 64 | 393 | 331 | 66 | 397 |
| <u>Fillets</u> | <u>24</u> | | <u>24</u> | <u>26</u> | | <u>26</u> |
| Hake | 24 | | 24 | 26 | | 26 |
| <u>Blocks</u> | <u>10</u> | <u>3</u> | <u>13</u> | <u>6</u> | <u>9</u> | <u>15</u> |
| Hake | 10 | 3 | 13 | 6 | 9 | 15 |
| Protein | | 0 | 0 | | 1 | 1 |
| <u>Protein, concentrated</u> | | <u>0</u> | <u>0</u> | | <u>1</u> | <u>1</u> |
| B.P.C. | | 0 | 0 | | 1 | 1 |

Table A-14

URUGUAY

Exports to the United Kingdom, 1979

| PRODUCTS | Tonnes | | | US\$ '000 | | fob Montevideo | |
|------------------------|------------|------------|------------|------------|------------|----------------|--|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec | |
| <u>TOTAL</u> | <u>483</u> | <u>180</u> | <u>663</u> | <u>271</u> | <u>180</u> | <u>451</u> | |
| Frozen fish total | 483 | 178 | 661 | 271 | 178 | 449 | |
| <u>Whole</u> | | <u>25</u> | <u>25</u> | | <u>20</u> | <u>20</u> | |
| Sea bream | | 25 | 25 | | 20 | 20 | |
| <u>Eviscerated</u> | <u>389</u> | <u>21</u> | <u>410</u> | <u>182</u> | <u>19</u> | <u>201</u> | |
| Hake | 389 | 21 | 410 | 182 | 19 | 201 | |
| <u>Fillets</u> | <u>2</u> | | <u>2</u> | <u>2</u> | | <u>2</u> | |
| Hake | 2 | | 2 | 2 | | 2 | |
| <u>Others</u> | <u>0</u> | | <u>0</u> | <u>0</u> | | <u>0</u> | |
| Ray fin | 0 | | 0 | 0 | | 0 | |
| <u>Blocks</u> | <u>92</u> | <u>49</u> | <u>141</u> | <u>87</u> | <u>82</u> | <u>169</u> | |
| Hake | 92 | 49 | 141 | 87 | 82 | 169 | |
| <u>Ground</u> | | <u>83</u> | <u>83</u> | | <u>57</u> | <u>57</u> | |
| Hake | | 83 | 83 | | 57 | 57 | |
| Frozen shellfish total | | 2 | 2 | | 2 | 2 | |
| <u>Whole</u> | | <u>2</u> | <u>2</u> | | <u>2</u> | <u>2</u> | |
| Squid | | 2 | 2 | | 2 | 2 | |

Table A-15

URUGUAY

Exports to Saudi Arabia, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|------------------------|-----------|------------|------------|-------------------------|------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>41</u> | <u>333</u> | <u>374</u> | <u>32</u> | <u>299</u> | <u>331</u> |
| Frozen fish total | 41 | 313 | 354 | 32 | 299 | 331 |
| <u>Whole</u> | <u>21</u> | | <u>21</u> | <u>18</u> | | <u>18</u> |
| Sea bream | 20 | | 20 | 17 | | 17 |
| Common pompano | 1 | | 1 | 1 | | 1 |
| <u>Eviscerated</u> | <u>20</u> | <u>313</u> | <u>333</u> | <u>14</u> | <u>299</u> | <u>313</u> |
| Corvina | 7 | 313 | 320 | 5 | 299 | 304 |
| Sea bream | 3 | | 3 | 2 | | 2 |
| Striped weakfish | 10 | | 10 | 7 | | 7 |
| Frozen shellfish total | | 20 | 20 | | 15 | 15 |
| <u>Whole</u> | | <u>20</u> | <u>20</u> | | <u>15</u> | <u>15</u> |
| Squid | | 20 | 20 | | 15 | 15 |

Table A-16

URUGUAY

Exports to Holland, 1979

| PRODUCTS | Tonnes | | | US\$'000 | fob Montevideo | |
|--------------------|-----------|------------|------------|-----------|----------------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| TOTAL | 25 | 236 | 261 | 26 | 135 | 161 |
| ===== | ===== | ===== | ===== | ===== | ===== | ===== |
| Frozen fish total | 25 | 236 | 261 | 26 | 135 | 161 |
| <u>Eviscerated</u> | <u>25</u> | <u>236</u> | <u>261</u> | <u>26</u> | <u>135</u> | <u>161</u> |
| Hake | 25 | 236 | 261 | 26 | 135 | 161 |

Table A-17

URUGUAY

Exports to Hungary, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|-------------------|-----------|-----------|-----------|-------------------------|-----------|------------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>44</u> | <u>44</u> | <u>88</u> | <u>81</u> | <u>63</u> | <u>144</u> |
| Frozen fish total | | 34 | 34 | | 46 | 46 |
| <u>Blocks</u> | | <u>34</u> | <u>34</u> | | <u>46</u> | <u>46</u> |
| Hake | | 34 | 34 | | 46 | 46 |
| Canned | 44 | 10 | 54 | 81 | 17 | 98 |
| <u>In oil</u> | <u>44</u> | <u>10</u> | <u>54</u> | <u>81</u> | <u>17</u> | <u>98</u> |
| Hake | 44 | 10 | 54 | 81 | 17 | 98 |

Table A-18

URUGUAY

Exports to Belgium, 1979

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|--------------------------------------|------------|---------------|------------|--------------------------|---------------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>297</u> | <u> </u> | <u>297</u> | <u>98</u> | <u> </u> | <u>98</u> |
| Fish meal | 297 | | 297 | 98 | | 98 |
| <u>Not for human consumption</u> | <u>297</u> | | <u>297</u> | <u>98</u> | | <u>98</u> |
| From fish | 297 | | 297 | 98 | | 98 |

Table A-19

URUGUAY

Exports to Argentina, 1979

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|----------------------------------|-----------|-----------|-----------|--------------------------|-----------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>72</u> | <u>19</u> | <u>91</u> | <u>37</u> | <u>25</u> | <u>62</u> |
| Frozen fish total | | 18 | 18 | | 19 | 19 |
| <u>Eviscerated</u> | | <u>18</u> | <u>18</u> | | <u>19</u> | <u>19</u> |
| Croaker | | 18 | 18 | | 19 | 19 |
| Fish meal | 70 | | 70 | 28 | | 28 |
| <u>Not for human consumption</u> | <u>70</u> | | <u>70</u> | <u>28</u> | | <u>28</u> |
| From fish | 70 | | 70 | 28 | | 28 |
| Canned | 2 | | 2 | 9 | | 9 |
| <u>Shellfish in oil</u> | <u>2</u> | | <u>2</u> | <u>9</u> | | <u>9</u> |
| Squid | 2 | | 2 | 9 | | 9 |
| Protein | | 1 | 1 | | 6 | 6 |
| <u>Protein Concentrate</u> | | <u>1</u> | <u>1</u> | | <u>6</u> | <u>6</u> |
| Hydroprot | | 1 | 1 | | 6 | 6 |
| B.P.C. | | 0 | 0 | | 0 | 0 |

Table A-20

URUGUAY

Exports to Greece, 1979

| PRODUCTS | Tonnes | | | US\$ '000 fob Montevideo | | |
|--------------------|-----------|-------------------|-----------|--------------------------|-------------------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>45</u> | <u> </u> | <u>45</u> | <u>45</u> | <u> </u> | <u>45</u> |
| Frozen fish total | | | | | | |
| <u>Whole</u> | <u>30</u> | | <u>30</u> | <u>21</u> | | <u>21</u> |
| Sheepshead | 24 | | 24 | 16 | | 16 |
| Porgy | 6 | | 6 | 5 | | 5 |
| <u>Eviscerated</u> | <u>15</u> | | <u>15</u> | <u>24</u> | | <u>24</u> |
| Dogfish | 15 | | 15 | 24 | | 24 |

Table A-21

URUGUAY

Exports to Hong Kong, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|------------------------------------|----------|----------|----------|-------------------------|-----------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>3</u> | <u>1</u> | <u>4</u> | <u>33</u> | <u>12</u> | <u>45</u> |
| Dried/smoked/ salted fish total | 3 | 1 | 4 | 33 | 12 | 45 |
| <u>Dried/Salted</u> | <u>3</u> | <u>1</u> | <u>4</u> | <u>33</u> | <u>12</u> | <u>45</u> |
| Shark fins | 3 | 1 | 4 | 33 | 12 | 45 |

Table A-22

URUGUAY

Exports to Switzerland, 1979

| PRODUCTS | Tonnes | | | US\$'000 fob Montevideo | | |
|-------------------|-----------|-----------|-----------------|-------------------------|-----------|-----------|
| | Jan/Sept | Oct/Dec | Jan/Dec | Jan/Sept | Oct/Dec | Jan/Dec |
| <u>TOTAL</u> | <u>30</u> | <u>30</u> | <u> </u> | <u> </u> | <u>40</u> | <u>40</u> |
| Frozen fish total | 30 | 30 | | | 40 | 40 |
| <u>Fillets</u> | <u>0</u> | <u>0</u> | | | <u>1</u> | <u>1</u> |
| Hake | 0 | 0 | | | 1 | 1 |
| <u>Blocks</u> | <u>30</u> | <u>30</u> | | | <u>39</u> | <u>39</u> |
| Hake | 30 | 30 | | | 39 | 39 |

