

# fish: an antiquated industry

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# 1. antiquated and lethal

In any competition for the title of "Britain's Most Antiquated Industry," only a very antiquated industry indeed would give the fish industry any serious competition. It's not merely that fishing is a hunting, trapping and gathering activity, but the way these activities are carried on by the British industry.

Take Billingsgate fish market in London. Walk towards the Monument beside London Bridge and you will smell Billingsgate some way before you get there—the warmer the morning the earlier you'll smell it. A perfect place not to have a major fish market is a site in the City of London between Tower Bridge and London Bridge. Yet Billingsgate is situated there. (Because 100 years ago fishing vessels used to sail up the Thames to land fish.) Indeed look at any fish market. Those in the leading ports, Hull, Grimsby, Lowestoft and Aberdeen are just as antiquated. Watch the vessels being unloaded, inspect the kits standing on the market, observe the fish auction, watch the filleters in action or go to your local fishmonger's shop—which again you will be able to smell well before you get there. Or why not try the local fish and chip shop? Where else can you still get food up to two weeks old, wrapped in newspaper? Or why not go to sea? On the deck of a typical British fishing vessel at the fishing grounds you can see men working totally unguarded machinery for 18 hours at a stretch.

Fishing is one of those fields in which Britain led the world before 1914. However, in contrast to other industries with which it might be compared—industries like coal, electricity and gas, or the railways or textiles—this industry has never undergone a major phase of rationalization, nationalization or re-organization. Since 1939, British agri-

culture has been transformed into a prosperous, strongly capitalized, and scientifically advanced industry with a key import-saving function. But the fish industry in contrast has languished.

Spread around between a bewildering army of Ministries, investigated by a series of totally unrelated and uncoordinated official investigations, Balkanized up between a series of remote and outlandish ports, the fishing industry is a perpetual source of amusement and delight to the outsider or the tourist. "The fishing-boat-bobbing-sea," wrote Dylan Thomas.

To one who spent two years studying some aspects of the industry from 1958 to 1960, there is a comforting familiarity about the scene today. Or it would be comforting were one not talking about an industry which continues to be probably the most inhumane employer of labour in Britain. An industry which despite repeated official investigations produces less than half of the fish and fish products consumed in Britain and has an adverse trade balance of about £100 million a year. An industry which might have been invented by Karl Marx to prove that capitalism was inherently self-destructive. An industry set on an island floating in seas rich in fish, but yet an industry which is failing to produce fish for a world where people are hungry and protein scarce. An industry whose management in general and marketing management in particular makes most British industry by comparison seem self-confident, far-sighted and successful.

## labour force

People are sometimes surprised to hear that there is a higher occupational death rate among fishermen than among coal-miners. This had been known for a



long time, among fishermen. It was established beyond possible doubt by Professor R. S. F. Schilling, head of the Department of Occupational Health at the London School of Hygiene. In a Presidential Address to the Occupational Medicine Section of the Royal Society of Medicine in 1966 (R. S. F. Schilling, "Trawler Fishing: an extreme occupation" *Proceedings of the Royal Society of Medicine*, May 1966 59). Professor Schilling sharply criticized the lack of adequate statistics for the industry.

This lack, he pointed out, went along with an almost total absence of safety legislation affecting fishing vessels. Schilling concluded that fishermen's death rates are twenty times as high as in manufacturing industry and twice as high as in coal-mining. In trawler fishing the death rate is probably four times as high as in coal-mining. Between 1960 and 1966, no less than 223 fishermen were killed on British fishing vessels—about 1 per cent of the work force.

Of the roughly 20,000 full-time fishermen in Britain, about 7,000 work on trawlers operating out of Hull, Grimsby, Fleetwood, Lowestoft and Aberdeen. This type of fishing has for a long time been big business. Trawler fishing has for just over 60 years been carried on by British vessels in the Arctic Circle at Iceland, Bear Island and off the Norwegian and Russian coasts. Conventional trawlers which fish these waters carry a crew of 20.

A quite different type of fishing is carried on from very small inshore ports especially in Scotland, but also in England. These inshore men work in small boats which they themselves own. The basic economic set-up is similar to that in a family-run small farm. It is a dangerous job under bad conditions

for very low pay per hour. But inshore men choose to do it, because they presumably do not want to leave the region to work for more money in factories in Glasgow. In this type of fishing there is a genuine family tradition.

But in trawler fishing, there is no such family tradition. When sailing trawler fishing was booming in Hull and Grimsby in the 1880s due to the arrival of the railway, the life was so hard that the recruits were mainly boys apprenticed direct from workhouses in Leeds and London. Two lurid murder cases in which Hull fishing apprentices were brutally beaten and murdered at sea, resulted in a Board of Trade Inquiry in 1882. This Inquiry took the lid off an apprenticeship system which contained strong elements of forced labour. Teenage boys when ashore lived with girl prostitutes; often they tried not to go back to sea and were sent to prison. From prison they were put right back on the sailing smacks. The boys were terrified of the staggeringly high death rate. (Jeremy Tunstall, *The Fishermen*, pp 20-28, 1962).

In 1967 as a result of press and TV publicity given to Professor Schilling's article and of pressure by TGWU officials and MPs, another Board of Trade Committee was set up. One wonders whether it will take the opportunity to produce as penetrating a report as that of 1882. The fishing industry and its employment practices have changed since 1882. Unfortunately, however, it has not caught up with other industries. Now, as in 1882, the fishing industry is at least fifty years behind the times. Then as now the very high death and accident rate is merely the outward and visible sign of a system of work and employment which is antiquated, vicious, corrupt, and lethal.



Boys who go to sea on Hull trawlers come from the lower streams of the secondary modern schools. They are attracted by the manly lure of the sea, the chance of saving up their pay while at sea and of acting like kings on their three days ashore after a three week trip to sea. Most of all, they are attracted by the lure of the successful trawler skipper's earnings of £5,000 or more a year.

Pay is largely by results of voyages. The job is casual. There is bribery to get on the best ships where more money can be earned. On a three week trip to sea the men spend the ten days of steaming performing ordinary merchant seaman type duties. For the other 10 days they are on duty 18 hours in 24. This means 180 hours work in 10 days.

The pay per hour is very low; but because they work so many hours of what elsewhere would be overtime, deckhands make (on Hull trawlers) about £1,200 a year. One of the many archaic aspects of trawler fishing is that when a labour dispute takes place the Trade Union side spends much of its time trying to establish the actual level of earnings. The difficulty arises partly from the fact that because of the unremitting intensity of work and the very brief three days ashore, most men take off several trips a year and stay ashore—unpaid. Thus establishing what a normal year's work consists of is not so easy. The difficulty also arises from the mediaeval complexity of the system of payment—consisting of:

1. A basic wage
2. A share of what the catch sells for on the market.
3. Something called "liver money."

A further complexity is that men must

buy their own work clothing—which is quite expensive.

The trawler owners have a vested interest in this system of payment because it confuses the Trade Union and makes comparison with any other system of earnings impossible.

But Hull and Grimsby fishermen, when the Industrial Court turned down their claim in 1966, appeared to be earning about £30 a week. For a 40-week year this would be about £1,200. But for a 90-hour week this is only 6s 8d an hour. If you include rising overtime rates for a 90-hour week, the basic pay is more like 4s 6d a week. Incidentally, although Hull and Grimsby fishermen today average a 90-hour week and a 126-hour week at the fishing grounds, the International Labour Organisation in 1920 recommended a 48-hour week for the fishing industry.

The skipper's job becomes a reality for about one in every fifty trawler fishermen. The other forty-nine are getting "old" by the time they're 45; this means declining earnings and no job ashore to go back to. The skippers themselves are chronically insecure. Competition for skippers' jobs is ferocious. To make sure of keeping his job a skipper must catch a lot of fish. And to do this many skippers drive their men relentlessly. I have myself seen a skipper continue to fish off Bear Island when waves were coming ~~ashore~~ <sup>aboard</sup>, sometimes knocking over the deckhands gutting fish on the open deck.

This work is carried on in winter at the Arctic fishing grounds, where the endless dark prevails, the deck is coated in ice, the men's hands numb with cold. When men working in these conditions on a swaying deck, after perhaps fifteen hours of unremitting labour, have to operate unguarded winches and other



machinery, one has to look no further to find the underlying conditions which make accidents so prevalent.

### difficulties of organisation

Fishermen have always been difficult to organize—even more so than other casual workers. The qualities which go to make a trawler fisherman and those which go to make a trade union activist are unlikely to appear in one man. Fishing union leaders have usually in fact been engineers. Fishermen are inclined to form break-away unions. As recently as 1961 most of the Grimsby fishermen formed a break-away United Fishermen's Union. But after years of rather little success, the Transport and General Workers' Union has regained the trawler fishermen's loyalty. The TGWU is working steadily toward such modest goals as complete decasualization, the provision of free work clothing and bedding, the acceptance of shipboard representatives (or shop-stewards), and a basic minimum wage of £20 plus a week.

The Board of Trade Inquiry—now known as the "Working Group for the safety of deep sea fishermen"—has split up into three sub-committees. But the Board of Trade officials who are chairing these sub-committees should remember that trying to explain trawler fishing in the Arctic to a man who has not been on a fishing vessel at sea is like trying to discuss farming with a town dweller who has never visited the countryside. This, however, is how the working conditions appeared to an expert in occupational health—Professor Schilling: "In a trawler crew which had fished continuously for five days and nights, I noticed signs of fatigue—an ashen grey pallor of the face, slower movements, irritability . . . It reminded me of what I saw among

soldiers during the retreat to Dunkirk in 1940."

The dangers of the occupation cannot be radically reduced until the whole system of employment, pay, and working conditions is altered. This means complete decasualization; minimum earnings per week; a reduction in the number of hours any man must work at a stretch from 18 to 14 (allowing eight hours sleep plus an hour at either end); no working to be allowed on the open deck when the wind reaches a certain speed, such as force 6. All skippers should be given a contract of, say, three years and paid a salary; all trawlers should carry one extra certificated officer—as recommended by the Fleck Committee. At present the skipper on the voyage home is so exhausted that he usually plays little part in watch-keeping. Disasters sometimes occur as a result. The present turn-round time of three days after a three week trip cannot be justified in terms of using capital equipment, since running costs predominate; consequently turn-round time should be two days for every five days spent at sea, that is 8 days instead of the present 3 after a three week trip. The Fleck Committee found that depreciation accounted for only 10 per cent of distant water trawler costs. (*Report of the Committee of Inquiry into the Fishing Industry*, 35 HMSO 1961). Finally the present training both of recruits and mates and skippers is virtually non-existent compared with what is required. Japan, for instance, has 15 Universities with a Faculty of Fisheries whereas we have none, 60 Fishery High Schools and over 30 training vessels.



## 2. imports and production

In 1938, Britain was a net exporter of fish. Today Britain is a major fish importer. We import about £100 million worth of fish, and fish products; these imports make up nearly three-fifths of all the fish consumed in Britain. The major reason for this change is a failure by the British industry to keep up with the more adventurous fish industries of other nations.

In 1938, Britain was a substantial exporter of herring mainly to Germany and Eastern Europe, and this enabled Britain to be a net exporter of fish. In 1938 Britain's catch of fish was fourth in the world after those of Japan, USA, and USSR. Between 1938 and 1965, Britain's catch fell (in weight) by about 15 per cent. But the world catch increased in the same period from 21 to 52 million tons. Peru has come from almost nothing to the top of the world table—Peru now lands seven times the weight of the British catch. Norway has doubled its catch, Iceland has increased its catch sixfold, Spain threefold. Canada also shows a major increase. Among those at the top of the table, the Soviet Union has trebled its catch since 1938, and Japan has nearly doubled its catch. It might be argued that fishing is not a suitable industry for a country at Britain's stage of development. Certainly the industries of France, Germany and USA are relatively stagnant and each of these countries is a major fish importer. But France is a country much richer in food resources. Moreover, West Germany has a less favourable location and coastline for fishing than does Britain; Germany also imports less fish than Britain, and has a more modern fishing industry, vessels and fish docks. West German fish marketing is also considerably more progressive.

Other rich countries like Denmark,

Norway and Canada have expanding industries and are fish exporters. Moreover, USA which has indeed allowed its own fishing industry to stagnate has recently adopted a new policy. America has extended its fishing limit to 12 miles, provided more federal government support for fishing and has launched a major scientific programme in oceanography.

### FISH EXPORTS AND IMPORTS

1965 in US dollars

	exports	imports	balance
Norway	203	13	+190
Canada	193	25	+168
Japan	254	88	+166
Iceland	120	0	+120
Denmark	157	44	+113
France	20	137	-117
W. Germany	35	192	-157
United Kingdom	31	293	-262
United States	59	507	-448

Source: FAO year books

Gloomy prognostications are made about overfishing. But arguments about the whale industry are not relevant to fish. In the North Atlantic area there are signs of diminishing returns setting in. But very little can be done about this. Pious demands for better international conservation measures are unlikely to get anywhere. Even the very limited agreements on mesh sizes in the North Atlantic are not fully observed. The only two really successful international conservation agreements both concern the Pacific coast of the American continent. Ingredients for success appear to be a common economic interest amongst members and a small number of participants.

But the doubling of the world catch between 1955 and 1964 hardly calls for gloom. The American programme of basic research, although connected with broader commercial and defence



interests, is also based on the realization that the world fish industry is only just beginning. Some experts believe that the world catch can be increased tenfold from the present level. *Fisheries of the United States 1966* (US Department of the Interior CFS, 4400, p VI). Certainly the catching of fish is one of the few forms of food production which can confidently be expected to continue increasing at a much faster rate than the world population.

Since 1945 much of the increase in the world catch has taken place in Tuna fishing—in which the Japanese are especially efficient. The other very major increase has been in the catching of fish for processing into fish meal. The development of the Peruvian fish meal industry is one of the most spectacular examples of economic development anywhere in the developing nations. But fish meal has also boomed off Angola and South West Africa. Moreover, Iceland, Norway and Denmark have successfully expanded their fish meal industries by catching herring for this purpose.

Britain's emergence as the second biggest fish importer in the world (and per head of population we even surpass the US as a fish importing nation) is to a great extent due to our failure to move with the world trend. Our present main categories of imports are canned salmon and tuna from Japan; fish meal and oil from South Africa, Norway, Denmark and Iceland; and frozen fish fillets from Norway and Denmark.

The latter category is connected with the appearance of EFTA. The EFTA countries have a big surplus of fish much of which now enters Britain. The Common Market countries are big net importers of fish and the British industry hopes to do well in Europe

eventually—especially since EFTA exports may be diverted into EEC. But this need not necessarily occur. What happens, for instance, if Spain also enters EEC? Spain has an expanding industry, already quick-freezes at sea more fish than does Britain, and is a net exporter of fish. Moreover, if some wider economic grouping comes into existence, powerful fish exporting nations like Japan and Canada may also do even better in Europe.

#### FISH IMPORTS 1965

	£ millions
fresh, chilled, frozen	23.0
semi-preserved	.7
preserved, canned	34.7
shellfish	8.9
fish meal and flours	22.6
fish oils	14.6
whale meat	2.7
total	107.2

Source: Sea fisheries—statistical tables 1965

In the EFTA agreements the British fish industry's interests were given low priority, whereas the politically more powerful fish industries of countries like Norway and Denmark benefited. But this is just part of a larger problem—there is no national fish policy in Britain.

It is very noticeable that the countries which are doing best on the world scene are all ones which have a vigorous national fish policy which embraces research, catching and marketing. Japan and the Soviet Union have also shown the importance of conceiving of fishing as a world-wide activity—not just something that you do a few hundred miles off your own coast.

I am not suggesting that Britain suddenly starts clapping on huge tariffs



and breaking all its international agreements. Some of the imports—for instance, fish meal which is used to produce meat—are probably highly desirable from a balance of payments point of view. One of the many failures in this area in Britain is that nobody has sat down to do the economic research necessary to discover how this drain on our balance of payments could be eased. But even with fish meal, we could certainly do better. And some of the Pacific and South Atlantic fish we now import we could easily catch ourselves.

What is needed is a national fish industry policy. The basis of this policy should be a determination to develop the British industry and change the present situation in which we import about three-fifths of all our fish and fish products. The present fish import bill of £100 million could surely be reduced by a half or something of that order.

**southern oceans**

One of the many disturbing aspects of the British fish industry is its North Atlantic provincialism. People in the British industry have been saying for years that something will have to be done about fishing elsewhere than the North Atlantic. But very little has been done. Japanese vessels range over the whole Pacific from Alaska to Australia and the Indian Ocean. The Soviet Union has built fleets of vessels designed to fish together in Southern oceans. These fleets of vessels catch fish and then transfer it to a central factory ship where it is processed and frozen or canned. Weather, and fishing, intelligence is pooled; helicopters fitted with echo-sounders rove ahead of the fleet in search of shoals of fish; and a high proportion of sailing time is used in

actual fishing operations. Nobody in Britain seems able to answer the question of whether this could be profitable for a British fleet. Meanwhile, in the pessimistic atmosphere that exists, the organizational problems, including initial financing, are regarded as prohibitive.

While Greek freezer ships fish in the Indian Ocean, and Italian, German and other foreign vessels fish off the South West African coast, a British voyage to those parts has recently been regarded as a proper field for a state-subsidized "exploratory" trip by the White Fish Authority. British lack of interest in the Southern oceans seems to include the local fishing industries of newly independent former colonial territories. Meanwhile, there are major opportunities for schemes varying from basing British ships on local ports and using cheap local labour right through to straight economic aid. Japan is involved in a variety of fishing activities in, for instance, Tanzania, Ghana and India. The best-known fish development project in India is receiving not British but Norwegian finance and technical aid.

Local needs vary greatly. In some countries outboard motors for small boats would transform catch levels. In other countries like Ghana a modern industry already exists. In the case of Ghana although some of the new vessels come from Britain, it is noticeable that the great majority of outside influence comes from the Soviet Union, Japan and Norway. This includes fisheries education. In addition, large quantities of fish are landed in Ghana mainly by Soviet vessels under contract. The importance of fish in the underdeveloped world can scarcely be exaggerated. Where available, fish is usually the cheapest form of animal protein. In several Asian countries fish constitutes



over half the intake of animal protein. Some steps are being taken in this direction. The Ross Group are involved in the Middle East and in Kenya. Moreover, recently Ross have sent some trawlers to be based on Newfoundland—thus eliminating wasteful steaming time to and from the grounds. Birds Eye, a subsidiary of the giant Unilever organization has also recently become involved in fishing activities based on Newfoundland. This British subsidiary has not previously been involved in fishing activities. Direct involvement in new fishing activities by such a research and profit-minded organization is in marked contrast to the pessimism and conservatism of the British industry generally.

The British trawler owners have become so tradition-bound that they find it hard to look beyond the North Atlantic. The declining returns there and the lack of any positive national policy also means that they regard ventures into more remote oceans as too risky and expensive. They lack the management expertise, the knowledge and the motivation required. The Ministry of Overseas Development gives little lead.

What is required is a sustained government backed programme to catch fish in the Southern oceans—in some cases using local cheap labour, and setting up processing plants ashore, but in other cases providing mainly advice, training and expertise. A successful programme would involve fisheries research, and education as well as the participation of the shipbuilding industry.

### **inshore and herring industry**

What is left of the British herring industry and most of the inshore fishing is to be found in Scotland. Moreover,

this type of fishing is mainly in the most remote parts of Scotland, and such inshore fishing as remains in England and Wales is also in fairly remote places. This is the part of the industry which delights tourists in the North East of Scotland. It is also one of the few sources of employment in these areas, and government policy is that "social" arguments here justify a slightly more generous subsidy.

Inshore and herring fishing vessels are mainly owned by individuals, and there is no distinction between owners and crews. So isolated are the communities and presumably so individual the individuals involved that the inshore men have no really representative organization. In addition to the hazards of long hours spent at sea on small boats close to a rocky coastline, the inshore men complain of being in a weak position for marketing their fish. Road and rail communication is poor and shore based middlemen relatively strong. The distribution system is such that good catches depress prices very sharply, and there are consequently local arrangements for quota restriction of catches when conditions are good.

The inshore men catch high quality fish—and when it reaches the shore it is fresher than the average for British caught fish. However, the official statistics appear to report that inshore caught fish fetch lower than average prices. (*White fish authority annual report 1966-67*, p 25, HMSO). Thus the inshore men do have a real grievance against the marketing system.

Having been introduced to the fishing industry in Hull, I must confess to having previously regarded inshore fishing as a somewhat amusing appendage to the tourist industry—the very stuff of which picture postcards are made. However, after examining the



evidence I now think there are strong arguments for a much more positive policy towards inshore fishing. *Firstly*, these vessels do produce high quality fresh fish. *Secondly*, there are real arguments in favour of retaining communities in these places; even the tourist industry aspect is an extra argument. Fishing industries add to tourism in various ways, but also such developments as improvement of roads can be justified on a combined fishing/tourist industry argument. *Thirdly*, the other traditional British fishing grounds in the North Sea and North Atlantic are producing declining catches, whereas *fourthly*, the recent expansion of territorial waters has provided bigger opportunities for inshore men.

The Herring Industry Board did try to improve the marketing position for herring; but because of failure to anticipate the Peruvian fish meal boom, much of this endeavour was unfortunately a failure.

What the inshore industry needs is an assured and reasonably high price for its product. The current system—which forces men to restrict their catches artificially at a time when we are importing more than half our total fish consumption—must be wrong. A satisfactory system of marketing inshore fish would involve:

1. A guaranteed minimum price regardless of quantity for high quality fish.
2. A co-ordinated transport scheme for moving the inshore catch quickly and efficiently to inland centres.

The inshore fishermen are at present sadly unorganized. They require funds to set up a genuine national organization. At the same time the archaic Sea Fisheries Committees—which place too

much power over local fisheries in the hands of rural County Councillors—should be abolished.

Had some real national organization of inshore fishermen existed, it is difficult to believe they would have been so badly neglected by the White Fish Authority, which despite its show-piece at Brixham, has done very little to encourage local fishing cooperatives. Once again, fishing is neglected relative to agriculture.

### capital and catching

The majority of the British fish catch is landed by trawlers based on Hull, Grimsby, Lowestoft, Fleetwood and Aberdeen. The grounds fished by these vessels have altered little in the last decade. The near-and middle-water vessels still trawl mainly in the North Sea and to the North of Scotland. The so-called “distant-water” trawlers—in which Hull is predominant—still fish mainly in the North East Atlantic area. Iceland, Barents Sea, Norwegian Coast and Bear Island continue to produce most of the distant-water fish. Ten years ago, there was an indication that fishing in the North-West Atlantic, at Greenland, Newfoundland and Labrador, would become more important; but it has happened to only a fairly minor extent.

The very term “distant” waters is archaic. By 1906 British vessels were fishing both Iceland and the Barents Sea. Now sixty years later it is absurd to call Iceland “distant.” The real “distant” waters of today lie in the Southern oceans—unfished by British vessels.

The British trawler owners have never fully recovered from the changes which occurred at the time of the first World



War. Fishing is an unpredictable business and the biggest ups and downs are experienced after a war when grounds which have been left fallow are fished again; the result is a glut, then a period of high catches and later a long period of slow decline in catch per effort.

**VALUE OF WHITE FISH LANDED BY BRITISH VESSELS IN 1966**

waters where caught	England and Wales	Scotland	total £m
distant	23.7	.6	24.3
near, middle	10.2	5.8	16.0
inshore	4.8	10.0	*14.9
total	38.7	16.4	55.3

\*includes £100,000 landings in Northern Ireland

Source: White Fish Authority

In 1920, the British industry which had before the War been the West European leader, now found itself using old vessels to compete with new foreign owned trawlers. The 1920s were bad times for British trawler owners. But worse was to follow. Encouraged by improved catches in the late 1920s the British owners ordered new vessels and

thus entered the 1930s depression with an expensive excess of capacity. A somewhat similar thing happened after 1945. The immediate post-War years saw very high fish prices, furious ordering of new vessels and in the 1950s another decline.

The British trawler owners were extremely slow to adopt the diesel engine. By the mid-1950s the vogue was beginning for vessels which could freeze their catch at sea. Japan had experimented with this type of ship in the 1930s. In 1953-54 the Soviet Union negotiated the construction of twenty such trawlers by the Lowestoft firm, Brooke Marine. While other communist and other West European countries switched to freezer trawlers, the only British firm to buy this kind of vessel was a whaling company; the British trawler owners kept aloof. But finally, after ten years of waiting and watching, the British owners made the big switch to freezer trawlers. In 1966, thirteen British freezer trawlers came into service—costing up to £500,000 each.

Once again the British trawler owners have shown their infallible ability to order wrong vessels at the wrong time.

**UNITED KINGDOM FISHING FLEET—distribution of trawlers of 80 feet and over. 31 December 1966**

	near water 80 ft-109 ft	middle water 110 ft-139 ft	distant water 140 ft and over	total
North Shields	1	5	3	9
Hull	—	1	116	117
Grimsby	23	59	62	144
Lowestoft	99	13	1	113
Milford Haven	23	3	—	26
Fleetwood	11	36	13	60
Granton	11	8	—	19
Aberdeen	48	57	3	108
other	8	—	1	9
total	224	182	199	605

Source: White Fish Authority



These particular freezer ships are designed to fish the North Atlantic but it is becoming increasingly evident that freezer trawlers based on British ports are too expensively built, too expensive to operate, and catch too little fish to be a really economic proposition. ("Factory trawler fleet being laid up" *Financial Times* 26 October 1967).

The British distant water fleet now consists partly of a small number of these apparently ill-conceived freezer trawlers—which have a crew of 25-30 men and fish for from six to twelve weeks usually in the Greenland area; but the bulk of the distant water fleet is of conventional trawlers—with crews of 20 and making three week voyages—which are predominantly vessels built around 1950, and now nearing the end of their working lives. Both sorts are designed for individual (not fleet) trips to Arctic waters—where the prospects for future profitable fishing are somewhat doubtful.

Only an industry whose leaders were excessively slow to follow others' leads and completely uninterested in learning from their own mistakes could have made these decisions. But the British industry has an extreme reverence for the past—especially the period before 1914 when Britain really did lead the world.

British trawler owners are production oriented—in the narrowest possible way. They rather seldom go to sea; if they had gone to sea more frequently with their skippers the owners would have seen modern fishing in action. Ships fish very close together when fish are plentiful and it's often possible to exchange greetings with, for instance, Russian fishermen. Perhaps a more accurate term is port-oriented. British owners insist on basing vessels on their home ports instead of nearer to where

fish can be caught. Consequently, a conventional trawler on a 21 day fishing trip in the North East Atlantic, wastes about ten days steaming to and from the grounds.

Another aspect of this port orientation is that the trawler owners have no control over the fish docks, most of which belong to British Transport Docks. Nor do the trawler owners have any understanding of their local labour force. Mutual suspicion, and bitterness, between fishermen and trawler owners are both fierce and wasteful. One result is that the trawler owners always assume that the fishermen will be vicious and unreasonable; this may be an additional reason why the trawler owners have been reluctant to abandon outdated ways of fishing.

The term "fishing" industry itself is outdated. This term defines the industry as a catching industry. It inevitably de-emphasizes marketing. Government organizations like the White Fish Authority and the Herring Industry Board by emphasizing differences between species of fish and the equipment used to catch them do the same; there is much support for merging these bodies—and undoubtedly they make marketing nonsense. Subsidies also are concentrated on vessels—on the doubtful assumption that it is more important to modernize the vessels which catch the fish, rather than the marketing system through which it is sold. Official inquiries are mainly concerned with how public money is spent—so these also largely ignore the marketing of fish.



### 3. marketing

Marketing costs make up almost half of the retail price of fish. On this basis alone, then, marketing is as important as catching. But if one looks at the food business generally it is difficult to escape the conclusion that marketing is more important than production. In this connection it is interesting to note the behaviour of Unilever in Britain. For some years in Britain, Unilever was only involved in the retailing of fish through its MacFisheries subsidiary. Then with the advent of freezing, packaging and brand names, another Unilever subsidiary, Birds Eye, became prominent in that field. Only recently has a British subsidiary of Unilever moved into catching.

Much the most successful of the companies involved in all stages of the fish industry—including port wholesaling—is Ross. Perhaps because it was a fish merchanting company before it moved into the catching side, Ross maintains a marketing orientation and has diversified into other foods; chickens and frozen food generally are now its leading interests, with fish only third. Yet even Ross has only 8 per cent of the fish distribution business. The next firm, Associated Fisheries, has 6 per cent. (Monopolies Commission, *Ross Group Limited and Associated Fisheries Limited a report on the proposed merger*, p 3, HMSO 1966). Even had the Monopolies Commission allowed the proposed merger of these two companies, the resulting organization on the marketing side would have been too small for *real* efficiency.

#### marketing systems

Broadly speaking there are four quite separate systems by which fish is marketed to housewives in Britain.

Firstly, the traditional "distant" waters

Arctic fish which is brought back on trawlers, not frozen but cooled with ice. This fish is a week to two weeks old when it reaches the public—much of it through fried fish shops as cheap low quality food.

Secondly, somewhat higher quality fresh fish which is sold from the slab of the high street fishmonger—much of this is inshore, or North Sea fish and some is imported fresh from Scandinavia.

Thirdly, a growing but still minority market of frozen fish—some frozen at sea, some ashore—which is packaged and sold under brand names mainly in grocers' shops. Some of this is imported.

Fourthly, imported canned fish such as salmon and tuna which is sold in the grocery shops.

In addition there is the important fish meal industry and shellfish, the great majority of which goes to restaurants and hotels.

Systems three and four are the growth ones and they both feature imports strongly. Systems one and two are relatively unchanging except for being in decline. Fish and chip shops are in decline because the demand for cheap rather tasteless, fried fish is declining. The fresh fishmonger is also in decline, while frozen fish is gaining slowly but steadily. Fishmongers do not want to introduce frozen food cabinets because the housewife then has no need for a fishmonger at all—she can buy frozen fish at the grocery.

The marketing system which supplies fish and chip shops and fishmongers is one of the most antiquated parts of the whole antiquated industry. The fish is brought out of the vessel onto the dockside by a rope and basket method



of true mediaeval vintage. The fish then stands on the quayside for a number of hours before the fish auction, a procedure with a certain picturesque charm and a certain commonsense in crude supply-and-demand terms, but one which cannot be accused of adding much to the quality of the fish.

Accurate information about many aspects of marketing does not exist. The official Family Expenditure Survey, not the most satisfactory piece of social research at the best of times, is particularly weak in the case of fish because it does not include the very important institutional markets. For instance, most shellfish and about half of all frozen fish is not consumed in the home but in restaurants, schools, hospitals and other institutions.

Even the type of transport used in the distribution of fish is not accurately known. The Fleck Committee, which spent three years between 1957 and 1960 producing a report said: "between a quarter and a half of total fish distributed from the ports is said to go by road." (*Report of the Committee of Inquiry into the Fishing Industry*, 1266 p 22, HMSO 1961). In contrast figures about the catching side of the industry appearing in the same report are immensely precise.

The marketing side of the fish industry is split up into a jumble of totally unco-ordinated segments of varying degrees of inefficiency. Even the most efficient integrated marketing organization—Ross Group's—is small and inefficient by general food marketing standards. The fish docks, the auctions, the inland markets like Billingsgate, and the fish and chip shops are all relics of another age using outdated and not very sanitary methods with the aid of a variety of restrictive practices. The fishmongers demand more advertising

of fish as the answer to all their troubles, while remaining themselves the worst conceivable advertisement for fish. (Butchers may seem just as bad. But unlike fresh meat, "fresh" fish may have been caught a week or more earlier and have been ever since slowly deteriorating in chopped ice—but not actually frozen.)

### consumption

In the chaotic and very slowly changing world of fish marketing one stable point stands out. This is the level of domestic consumption which has remained remarkably stable ever since the end of meat rationing at around 18-19 lbs of fresh and frozen fish consumed per person per year. If anything there is a slight indication of increased consumption which, with rising population, means a slowly but steadily increasing total demand.

The fish marketing system's characteristic inertia and conservatism is found even among the frozen fish marketers, who stick mainly to the safe species like cod, haddock and plaice. Other species such as redfish are readily available in the traditional grounds where British vessels fish, but it is generally agreed that the British public will not eat this kind of fish although millions of British holiday-makers on their summer holidays eat and enjoy many kinds of Mediterranean fish soups, fish stews and other un-British fish dishes.

Here again one comes up against the remarkable weakness of market research on fish. A number of very basic questions remain to be answered such as:

1. What is the long-term demand likely to be for frozen fish?



2. What is the elasticity of demand? Or how much extra will people pay for good quality fish?
3. Who eats fish in restaurants and why? (The evidence suggests that some people eat fish in expensive restaurants but not at home.)

Eventually, we must have a marketing system which streamlines the port procedures, replaces the traditional fishmonger and his slab with something like a MacFisheries supermarket, provides a really rapid and efficient inland transport system which includes small inshore ports, and some fish restaurants which provide slightly more edible fish than is available in most fish and chip shops. There are some signs that MacFisheries supermarkets are not proving as profitable as Unilever had hoped. This, however, is not an argument against the MacFisheries concept, but another argument for improving the image of fish and the profitability of fish marketing in general.

If the marketing system is left to itself such a modern national marketing system may take until the end of the century to emerge, while the imported proportion of fish will continue to increase. One indication of the slow rate of change is that Ross, who have their own freezer vessels, cold stores, their own direct port-to-retailer road distribution system and their established brand name still let much of their fish pass through the dockside auction.

### promotion

In the past there has occasionally been a feeling that the answer to the fish industry's problems was a massive advertising campaign. In the mid-1950s the British Trawlers' Federation spent £300,000 a year on advertising. One

theme was that "Tuesday is fish day" and the other was even less likely to persuade: "Restrictive practices in fish—nonsense." By now with brand names there is at last something to advertise. Names of "new" species would be another obvious theme.

Meanwhile, the major publicity event in fishing is still the Silver Cod Dinner. The British Trawlers' Federation were advised by their public relations firm to organize this Dinner. (Fishing News, 12 February 1955). The Duke of Edinburgh and various other celebrities have presented the trophy to the skipper who lands the most fish in the previous year. So much do the trawler owners enjoy themselves on these occasions that they do not stop to consider whether it really is good publicity. A smiling Hull skipper steps forward to receive a trophy for landing a couple of thousand tons of cod. Surely this is just the wrong image to be presenting. Huge heaps of tasteless cod, destined for frying. It's about as relevant as a competition for the car factory with the tallest chimney. Such factory talk is marketing madness.

A more sensible national publicity event would be a contest for the best fish chef in Britain, judged by a panel of Fleet Street women's editors. But the trawler owners would not think that appropriate to their he-man self-image (even though they keep well clear of the he-man work themselves).

In my opinion, the present system of subsidizing the catching side of the industry is a mistake because it retards change and ignores the industry's most crucial problems which are not on the vessels but in the quality of management and in the marketing system ashore. I would like to see:

1. Stimulus given to the emergence



of good quality and reasonably priced restaurants specializing in fish. The present fish and chip shops provide an obvious starting point.

2. "Test marketing" of unfamiliar species of fresh fish.

3. A genuine national internal distribution system, using modern rail and road freight facilities.

4. Radical improvement of fish docks and markets.

5. A promotion campaign aimed not at expensive advertising of inane formulae, but a sustained attempt to improve the cooking of fish and to present it as a sophisticated, varied, and wholesome food.

6. All of this means that we must have one or several distribution organizations on a scale considerably bigger than the present size of Ross.

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## 4. governmental action

When the usual diminishing returns set in after 1945, as the traditional grounds were again fished, the then Labour Government decided to set up a new statutory body. The White Fish Authority came into existence in 1950. The legislation received fairly widespread support, although a few Conservative MPs thought it looked like nationalization by the backdoor.

Indeed, the new White Fish Authority appeared to have very wide powers. The powers included carrying out research and experiment; to encourage co-operatives and to assist them financially; to improve the selling of fish including direct intervention; to promote exports; to operate fishing vessels in its own right; to operate its own processing plant; to assist training; to encourage consumption of fish by publicity and promotion.

### the White Fish Authority today

Despite these apparently blanket powers the White Fish Authority today is a feeble and ineffectual organization. Most of its powers have never been used. The Estimates Committee recently commented: "A remarkable feature of the Authority's statutory powers is that though they are wide and far-reaching ("to re-organize, develop and regulate" the industry) they have not so far been used." (Estimates Committee, *Assistance to the fishing industry* p XXXIII, HMSO 1966).

There seem to be several reasons why an organization which seemed to be equipped with some teeth has behaved like a frightened minnow. Immediately after the White Fish Authority (WFA) was set up in 1950, the Conservative Government came to power and much of the political support necessary for the WFA to pursue an activist policy

suddenly disappeared. Secondly, during the 1950s the issues which seemed most urgent to the industry and which got the most publicity were the price of fish, the question of imports, the "over-fishing" and conservation problem, and the extension of fishing limits by Iceland and other countries. All of these matters were outside the powers of the WFA. But a most important cause of the WFA's weakness was that it was attached to the apron strings of a large and powerful Ministry. The Ministry of Agriculture, in fact, retained all the key powers over the WFA; the Ministry was responsible for appointing the top personnel and also in practice for its finance. The WFA has become a kind of buffer organization between the Ministry of Agriculture and the fish industry. its major function is to funnel and administer grants and loans. These grants on catching activities and loans for new vessels reflect the general approach to life of the Ministry of Agriculture and Fisheries. The Ministry likes *ad hoc* grants, because in this way the Ministry retains all the power.

Apart from this antiquated production obsession the influence of the WFA in its administration of subsidies is in other ways undesirable. One example is that the WFA has encouraged the industry to build the freezer trawlers which now look unsuitable for the 1970s. The WFA despite believing that a few large firms must dominate the industry in the future, in fact is excessively generous to small fishing companies which get into trouble with repaying loans. Such policies must slow down the very changes the WFA knows to be urgently necessary.

Another serious fault is the minute amount of assistance given by the WFA for the encouragement of cooperative marketing arrangements, despite this being one of the stated aims of the



original legislation. This point alone lends substance to the suspicion of the inshore men that the WFA favours the big trawler owners.

The WFA's training expenditure is quite inadequate. Only £57,000 in 1966-67 on the training of 458 raw recruits and upgrading training for 542 engineers, mates and skippers. An expenditure of £57 per trainee in an industry with such an appallingly high record of death, drownings and disaster. The WFA also spends about £75,000 a year on publicity which in view of the size of the industry and the severity of its marketing problems is only a token amount, and as such probably a waste.

In the 1950s the WFA seemed unclear of what its major function should be. In the mid-1950s the WFA tried to introduce a detailed investigation of the finances of the industry; however, in the face of vigorous opposition from the trawler owners the whole scheme was meekly dropped. After a great deal of anxious searching around for something which it could do which would be acceptable to both the Ministry of Agriculture and the trawler owners, the WFA finally arrived at research and development work, this is now its major activity. This is mainly rather obvious work which the vessel owners, had they not been so excessively tradition bound, would have done for themselves long ago. The programme seems to be acceptable to the trawler owners because even these short-sighted men can see the benefit of having a government body provide them with simple and tested ways of cutting costs.

## Research

And what about research in general? In keeping with the fish industry's usual chaotic ways, fish research is split up

under no less than four different controlling organizations:

1. The Ministry of Technology has control of the Torry Research Station at Aberdeen which deals with fish processing.
2. The Ministry of Agriculture (together with the Scottish office) has control of marine biology research—mainly concerned with fish stocks and conservation.
3. The White Fish Authority deals with research and development and the practical application of other research.
4. The Department of Education and Science has control of the Natural Environment Research Council which in turn has an Oceanographic and Fisheries Committee which is supposed to co-ordinate all research on fishing and oceanography.

The WFA plays only a fairly minor role in all this. Over half of all the British expenditure on fish research is spent on monitoring fish stocks mainly in the North Atlantic. It is difficult to escape the conclusion that much of this expenditure is wasted because of two false assumptions. One assumption is that this kind of research can lead to major international agreements to conserve fish stocks. The hard fact is, however, that the existing international agreements in the North Atlantic are very modest indeed, they are far from being universally observed and further agreements are unlikely to be achieved because they are not equally in the interests of all the nations involved.

A second and even more serious objection to the concentration of research on fish stocks in the North Atlantic is that this is yet one more harmfully restraining force on the British indus-



try. Many areas of the North Atlantic are becoming increasingly uneconomic. The research follows the British trawlers, which in turn follow the information the research provides. It's one more vicious circle, which can only be broken by a radical policy of innovation, including a major switching of research efforts to other ocean areas.

Much public interest exists in "fish farming." A good deal of research is being done in this field in Britain, by the WFA, the Ministry of Agriculture and by Unilever. Britain is behind Japan in such research, as well as the Soviet Union and perhaps Poland. While popular expectations about commercially viable fish farming are unlikely to be realized for some, perhaps many, years, marine biological research is probably the only aspect of commercial fishing in which Britain is firmly among the leading half-dozen nations in the world. British marine biologists are much in demand in many countries abroad, and they are probably the most cosmopolitan element in the British industry. In any attempt to initiate a more dynamic national fishing policy they would have to play a leading role. It is all the more regrettable, therefore, that so much of their time is wasted on doing research in the wrong ocean areas and in activities of a coordinating and communicating nature, made necessary by the segmentation of research activity—in particular the divorce of basic and applied research.

Meanwhile, very major developments are taking place in this field. The United States will spend \$462 million on oceanographic "hydrospace" research in 1968. There are some signs that this type of research may eventually become as important as space research. A group of major British companies which recently commissioned a report on oceanographic research included not

only Uniliver, ICI, and BP but also Hawker Siddeley, Rio Tinto Zinc and Costain's.

Much of the interest in this type of research is in exploiting resources other than fish. But nevertheless the very deep diving submarines being developed in the USA may well help to produce methods of fishing in what is at present impossibly deep water.

The WFA is simply not suited to the determined and adventurous policy of innovation which these kinds of developments make necessary. The WFA is merely a buffer between a government department and an industry. Moreover, this type of WFA even if it did have the will to follow the stated intentions of the original legislation, which it does not, would probably still come unstuck. The example of the Herring Industry Board is instructive. It is even smaller and weaker than the WFA but perhaps because it does not have to contend with a concerted organization comparable to the British Trawlers' Federation, the Herring Industry Board has been more adventurous. In particular, it set up plants to process meal; but it failed to anticipate the spectacular rise of the Peruvian fish meal industry. Its intelligence system was inadequate.

The Fleck Committee wanted to see the Herring Industry Board merged into the WFA to make a new Sea Fisheries Authority. This, it seems to me, would do little good. Such a new body would merely be the WFA in a slightly enlarged form. Its familiar drawbacks would still be there. I would rather see both bodies abolished. Their impact has been extremely small. And even part of that small impact has not been beneficial. At present the WFA provides too easy a scapegoat for the industry. For the Ministry of Agricul-



ure, the WFA provides too simple a front organization to mask the fact that there is no national policy for the fish industry.

The few functions the present WFA performs could be as well, and one would hope better, performed by the Ministry of Agriculture. If some new body is to be set up what is wanted first of all is a policy. If the Ministry of Agriculture can bear to hand over the pursuit of that policy to another organization then a new organization should be set up equipped with the powers, the finance, and the personnel that would be needed.

### government policy

The policy of the present Government, like that of the previous Conservative one, is largely based on the Report of the Fleck Committee of 1957-60. The major recommendation of Fleck was that the subsidy should be extended to include the "distant water" vessels for the first time; that the industry should be kept at about the same catching capacity and that the trawler subsidy should be phased out over a ten year period. This trawler subsidy is now due to end altogether in the year 1972.

At present subsidies to the British fish industry are running at about £5 million a year, of which the great majority is an *operating* subsidy based on the time vessels spend at sea.

The Fleck Committee produced a very unimpressive report. It met only once every three weeks in its three year life. There is no evidence of any of the members having been to sea; to anyone who has been to sea on fishing vessels the Fleck Committee exhibits a startling ignorance of quite simple facts of fish-

ing life. Committee members visited only West Germany and Belgium, and seem to have failed to realize just how far the British industry lags behind, for instance, Japan and the Soviet Union.

The Fleck Committee Report has all the familiar weaknesses of official inquiries whose members start off as ignorant amateurs putting naive questions to the industry, and fail either to establish an effective staff or to commission new research.

### divided responsibility

This is all the more serious in the fish industry which is parcelled up between so many Ministries. There seem to be thirteen Ministries involved:

1. Ministry of Agriculture, Fisheries and Food.
2. Scottish Office — fisheries in Scotland.
3. Home Office — responsible for Northern Ireland fisheries.
4. Foreign Office. Territorial limits of other countries.
5. Ministry of Defence. Fisheries protection.
6. Board of Trade. Vessel regulation and regional development.
7. Department of Economic Affairs.
8. The Treasury. Subsidies.
9. Ministry of Labour. Conditions of employment in fishing are a monument to the indifference of this Ministry.
10. Department of Education and Science. Fisheries research.



11. Ministry of Technology. Fisheries research.

12. Ministry of Overseas Development. Fisheries aid projects.

13. Ministry of Transport. Certificates for skippers and mates.

In addition, of course, there are:

14. White Fish Authority.

15. Herring Industry Board.

In most of these bodies, the fish industry carries very low status. This is so even in the Ministry of Agriculture. It is also the case in the Transport and General Workers' Union—in which fishermen make up under 1 per cent of the total membership.

In consequence, there is a lack of reliable information, even about quite simple points. Moreover, the information that does exist is highly fragmented and difficult to compare. Because so many different organizations collect figures these tend to involve different bases. Some figures are the weight of the whole fresh fish, others are the landed weight of gutted fish; figures for imports are the actual weight of the imported fish. And so on.

### international comparisons

International comparisons are even more difficult. A report on subsidies to fish industries of OECD countries reveals a baffling array of subsidies and gives the reader little real opportunity to make meaningful comparisons. (OECD *Financial support to the fishing industry*, Paris: Organization for Economic Co-operation and Development, 1965). The blanket recommendation that all subsidies should be quickly reduced

and preferably abolished seems unrealistic in view of the policies OECD countries are in fact pursuing.

### inquiries and investigations

Meanwhile, in Britain a whole new list of enquiries and investigations have been produced in the last two years. The Restrictive Practices Court in November 1966 after the longest hearing in its history ruled in favour of a voluntary minimum price scheme—the Distant Water Vessels Development Scheme, which operates at Hull, Grimsby and Fleetwood.

But in May 1966 the Monopolies Commission reported against the proposed merger between the two largest fish companies, Ross Group and Associated Fisheries. The finding, which seems to have acquired a wider significance in other industries, makes rather doubtful sense in the fish industry. On the marketing side even the merged company would have been too *small*. The merger was rejected on the ground that a new Ross-Associated Company would have an unduly dominant position in Hull and Grimsby distant water trawlers and the supply of cod varying from 48 per cent to about 60 per cent according to which aspect you look at. The argument turned on evidence about the elasticity of consumer demand—the degree to which an artificial price for cod would induce consumers to switch to other types of fish. This evidence was simply not available. In the absence of such evidence the Monopolies Commission cited the movement of *wholesale* prices. (Monopolies Commission, *Ross Group Limited and Associated Fisheries Limited* p 35, HMSO 1966). Such an argument is based on the rather unrealistic basis of merely projecting current trends in fish marketing. How-



ver, this assumption that the current highly conservative structure will continue becomes to some extent a self-fulfilling prophecy. By retarding change, the Monopolies Commission makes it more likely that its conservative projections will be accurate.

Also in 1966 a TGWU pay claim was rejected by the Industrial Court. Again reading the document one gets a sense of just how difficult it is to envisage the life that goes on at sea when sitting in a room in London. This goes for the members of the Court as much as for the Trade Union leaders.

The Select Committee on Agriculture has had some comments to make about fishing. And the Estimates Committee made a determined attempt to understand how the subsidy system works. As with the Fleck Report, however, there is a strange sense of well-intentioned outsiders ending a long inquiry, reeling somewhat from the shock of exposure to this bewildering backward industry—and producing a rather modest, well-intentioned and inadequate report.

Yet other bodies have been cogitating. One of these was the Board of Trade Committee set up in February 1967 to investigate the high accident and death rate on trawlers. The appearance of this Committee was in itself an implied criticism of previous investigations which had scarcely even mentioned the spectacularly high death rate, which is, of course, part of the conventional wisdom of all fishermen.

There has also been an interdepartmental reviewing committee set up. To this committee, one assumes, will have one representative from the thirteen Ministries and two government boards concerned. Only an incurable optimist would place much faith in such a body.

Perhaps my tone here seems to be getting repetitively pessimistic and cynical. There is, however, something slightly laughable about all this. The White Fish Authority eagerly pushing forward with its best idea in years—the merger of Ross and Associated—only to have it vetoed by the Monopolies Commission. Or the Commons Estimates Committee coming up with one major proposal—a statutory minimum prices scheme—which was quickly vetoed by the Treasury. The breezy optimism of the Estimates Committee in 1966 was quickly followed by a return to much less favourable conditions in 1967—making the whole report seem rather unrealistic.

If I seem pessimistic and cynical, however, it is not about the various enquiries. These make little progress and produce highly conflicting reports because they have no starting line of a realistic national fish policy.

The problem is a political one. Either the Ministry of Agriculture, Fisheries and Food must run this industry or it must let someone else run it. The present system by which the White Fish Authority is supposed to run the fish industry and is then prevented from doing so constitutes a political problem.

One might argue that all the fish industry really needs is to have the Sea Fisheries Act of 1950 passed once more. Because, although the Act has never been repealed, it is a dead letter. Obviously a big powerful Ministry is going to be reluctant to lose even a small part of itself. A junior member of the Government and some seniorish civil servants are also involved. But one way or another a political decision must be taken. One body—either the Ministry of Agriculture or some other body—must be given over-riding responsibility for this industry.



## 5. a policy for fish

Something must be done to alter a situation in which Britain imports about £100 million worth of fish and fish products, about three-fifths of the UK consumption. A national fishing policy must try to recover at least half of the loss since 1938, when Britain was a net exporter.

Since this situation has partly come about because of the lack of any industry-wide body the argument for a Little Neddy for the fish industry is strong, especially since NEDC seems to regard the import saving argument in favour of a new Little Neddy as crucial. Such a body would enable leaders of the various sections of the industry to come together to discuss long term plans for the industry.

A Little Neddy would, however, in itself not be enough. The Government must first of all make a political decision to adopt a vigorous policy. In the short run the main part of this policy would be saving lives (of fishermen); in the somewhat longer run saving imports of fish and fish products.

The first step should be the production of a White Paper by the Ministers at the DEA, the Board of Trade, the Ministry of Agriculture and the Scottish Office. This should specify the kind of additional support the government would undertake. My preference is that the present phasing out of the catching subsidies in 1972 should be accompanied by a phasing-in of price guarantee subsidies. My suggestion would be that the present subsidy level of about £5 million should be increased by about one million a year to about £10 million in 1972. This decision would remove the present uncertainty and pessimism (which increases as the subsidy is steadily phased out). The more secure position would give the Little Neddy a basis on which to discuss the future.

In addition the Government should also announce its intention to remove the White Fish Authority and Herring Industry Board. An integrated and much more vigorous Fish Industry Board (FIB) should be introduced. This name, unlike the existing bodies and also the body suggested by Fleck, no longer stresses catching over marketing.

The new Fish Industry Board deliberately reflects the title of the Herring Industry Board more than that of the WFA. This is in recognition of the more vigorous policy, including the marketing policy, pursued by the Herring Industry Board. Incidentally one of the major criticisms of the Herring Industry Board is that the talents of Mr. George Middleton have been confined to the tiny Herring Industry rather than to the whole fish industry. Mr. George Middleton, CBE, was first appointed Chairman of the Herring Industry Board in 1965 and re-appointed in January 1968. He was formerly general secretary of the Scottish TUC, and a member of the Fleck Committee. He is Vice-chairman of the Scottish Economic Planning Council.

The Fish Industry Board should take over nearly all the functions of the Ministry of Agriculture in the fish industry. This should be recognised by dropping the word *Fisheries* from "Ministry of Agriculture, Fisheries and Food." In view of its current rather low level of interest in fish the Ministry should not be very reluctant to lose its lowly department which is concerned with fish. This pattern should be followed with the other dozen Ministries concerned in fish. The Scottish Office is not such an easy case. But it's hard to see why the Home Office should miss its responsibilities for Northern Ireland fisheries.

The Ministry of Defence would



obviously continue its fisheries protection activities. But what about the Royal Navy's hydrography activities? Some of these now seem more relevant to an expanded fish industry than to contracting naval commitment.

The future Fish Industry Board would need a strong Labour department to do some of the work which the Ministry of Labour has conspicuously failed to do in the fish industry. In the short term such objective should be complete casualization of fishermen. In the longer term the new department should endeavour to negotiate a completely new pay structure for fishermen—which could reduce the present very high payment-by-results element that adds to the men's willingness to take risks at work.

In view of the decision not to set up an Industrial Training Board in the fish industry and the paltry current effort at training of the WFA, training would have to be a major activity of the new body. The level of training given to trawler skippers should be radically altered from the present skimpy effort to a real professional level qualification in the relevant subjects including marine biology, navigation and the use of electronic aids. The present system by which the Ministry of Transport award officers certificates might be reconsidered, along with the Board of Trade's activities (or non-activity) in the field of vessel regulation.

The new Fish Industry Board should take over the Ministry of Agriculture's scientific programme and integrate it with the present WFA research and development effort. The new body should also take over the Ministry of Technology and the Department of Education and Science responsibilities for fish research. The new body should have a dominant control of scientific

research, but not a monopoly. One way of ensuring that research independent of the new body was conducted would be a much more substantial financing of fish research in Universities. Small programmes already existing in several Universities could be radically expanded.

The new body should also take over much of the present Ministry of Overseas Development activity in fisheries aid projects. In this as in most of the other cases, however, it is not so much a matter of taking over activities that the Ministries are performing—it is much more a matter of initiating activities which Ministries are failing to perform.

The new Fish Industry Board should, in my opinion, have an annual budget by 1972 of about £15 million. Over half of this would go on subsidies—in the form of a minimum price scheme, which would include an element of flexibility and some discrimination in favour of inshore fish. This body would obviously need to come into the orbit of a Ministry. I suggest that it should report to the Board of Trade (and not to the Ministry of Agriculture) on the basis of its import-saving, regional development, vessel regulation, and subsidy roles.

The chairman of this body should be full-time (unlike the chairman of the WFA). Its headquarters, I think, should be outside London. North Shields, which lies between the Humber and the Scottish ports would be a logical choice. North Shields also has its own fish industry and the North East offers almost the complete range of British fish catching from freezer trawlers to small inshore vessels. Daily proximity to such a port would be an advantage missing in London. Location in North Shields should also be welcome in



the North East. Moreover, paradoxical although it may seem, the new body might well get better publicity in the North East. In London the present WFA is one of a vast number of national headquarters offices and not of much interest to journalists. But in Newcastle there are journalists working for all the main national media—some of whom might become semi-specialists on the problems of the fish industry.

From a marketing point of view the North East provides an excellent area for test-marketing "new" species of fish. Another obvious starting point would be an effort to develop some good quality medium price fish restaurants in places like Sunderland and Durham.

The new Fish Industry Board would need to develop a staff of a size and calibre quite different from the present WFA. It would need experts in marketing, publicity, and numerous kinds of research including marine biology, economic and social. It would need to develop the kind of reliable and integrated set of statistics (based on one set of definitions) which does not at present exist and without which serious planning cannot begin. Such an organization might be able to tempt back from the various United Nations Agencies to which they have departed a number of men who represent a level of fish expertise which is in general lacking in the British industry. Such men might well be attracted by a body with vigorous programmes in economic research and aid to fish industries in developing countries.

The Fish Industry Board should be a far more vigorous body than the present WFA. But its role should be to lead and cajole—by use of its finance, expertise and prestige—not to dictate. Hence it would need to, and

presumably want to, work closely with the Little Neddy for the fish industry.

How could such a body be set up? Legislation would be required. But merely transferring the powers which the WFA already has, but does not use would fulfil many of the requirements. The integration of the Herring Industry Board was recommended by Fleck in 1961.

The only major loser would be the Ministry of Agriculture. But it, like the other Ministries concerned, would only lose a department to which it gives very low status and rather little interest. Moreover, the new body would obviously still need to carry on active liaison with the various different Ministries.

The fish industry itself should welcome such a proposal. Encouragement of mergers in the trawling companies, but more importantly in the marketing side, could lead to greatly increased prosperity. The inshore men and Scotland would receive special benefits. The fish and chip shops might be helped to develop into good quality fish restaurants. The fishermen would benefit from better earnings, more security, and most of all from safer working conditions. The trawler officers would benefit from securer earnings and—with an extra officer—much more work.

All this would depend on a radical improvement of fish marketing of both "old" and "new" species and a successful attempt to switch our catching effort into more distant oceans. But there is no reason why we should not be able to do this and by learning especially from Japanese experience, with the help of very modest sums of government money produce vastly greater returns in terms of saving lives and saving imports.



# fabian society the author

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