

It can be expected that the average per unit catch will now be significantly higher than in the years immediately before the war because of enforced conservation during the war in such areas as the North Sea and the Western Pacific. In fact, boats now operating in the North Sea have already found this to be true. Facilities of such devastated countries as Poland, Greece, Yugoslavia, and Italy still need to be rehabilitated, but it should be borne in mind that these countries have always depended on imports to a great extent to augment their own catch.

Some 180,000 metric tons, or 400,000,000 lb., of pickled herring may be available for export in 1946-47 from such countries as Norway, Iceland, the United Kingdom, Holland, Newfoundland, and Canada, and almost double this quantity could be supplied, provided the necessary financing and procurement arrangements were carried through. Supplies of salted cod and related species available for export from the 1946 catch are now estimated at about 140,000 metric tons, or something over 300,000,000 lb., dry-salt basis, which is about double the supply available from the 1945 catch. Supplies of canned fish available for export are estimated at about 220,000 metric tons, or slightly under 500,000,000 lb., for 1946-47, which is not greatly different from 1945-46.

Prior to the war, Japan was the largest fish-catching country in the world as well as the largest exporter of canned fish, but her fishing-fleets have been greatly depleted. The scope of Japanese fishing operations is rigidly controlled by the occupation authorities, and efforts are being made to make the Japanese at least self-sufficient. It is not expected, however, that Japan will have any supplies available for export in 1946-47.

(4) FERTILIZER

Preliminary estimates of the amounts of chemical fertilizers which may be available for crops to be harvested in 1947 indicate that there may be fairly substantial increases for all three plant nutrients as compared with the amounts applied to crops to be harvested in 1946; but there will still be a deficiency of some 30 per cent. in the supplies of nitrogen and soluble phosphates and some 5 per cent. in the supplies of potash, judging from the requests of countries now before the Committee on Fertilizers of the Combined Food Board.

Fertilizer allocations (of the Combined Food Board) for 1945-46 and estimates for 1946-47, together with the pre-war data, are summarized in the following table:—

	Pre-war Production.	Allocations. 1945-46.	Estimates for 1946-47.	
			Production.	Demand.
Million Metric Tons.				
Nitrogen (N)	2.2	1.6	2.4	3.3
Phosphoric Acid (P ₂ O ₅)	3.4	3.1	4.1	5.5
Potash (K ₂ O)	2.4	2.1	3.2	3.3

The 1945-46 and 1946-47 figures are subject to revision, especially in the case of phosphate, for which the 1946-47 figures are based largely on the demand for and estimated production of phosphate rock.

To reach the estimated production levels for 1946-47, favourable conditions will have to be prevalent throughout the world. For instance, it has been assumed that Germany will produce 200,000 tons and Japan 260,000 tons of nitrogen. It is doubtful if these figures will be realized. Similary, for