

TUNA FISHERY REPORT CARD 2019



Photo: Donna Heerder (FFA)

Introduction

This Tuna Fishery Report Card provides high-level advice on the current status of Pacific tuna fisheries in relation to the goals, indicators and strategies adopted by Forum Leaders in 2015 in the **Regional Roadmap for Sustainable Pacific Fisheries**. The report card takes account of the work of the **Taskforce on Increasing Economic Returns from Fisheries**, which was established by the Forum Leaders to develop a programme that will deliver real results within 5 years. Economic indicators reflect Taskforce-agreed targets.

The information provided below indicates there has been continuing progress towards the achievement of these goals and targets.

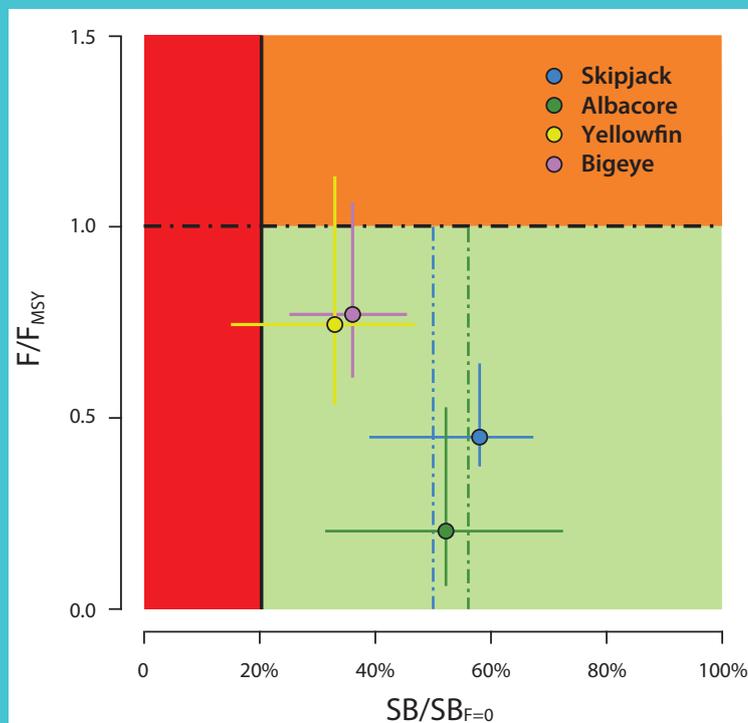
Goal 1 – Sustainability

The Roadmap provides a 3-year timeframe for the agreement of Target Reference Points (TRPs) for key tuna stocks and a 10-year timeframe for the implementation of management measures to achieve these TRPs in order to support economically viable fisheries. Three years into implementation interim TRPs have been agreed by the Western and Central Pacific Fisheries Commission (WCPFC) for skipjack and albacore.

The 'Majuro' plot below shows the relative status of each of the main stocks against biological reference points (black lines). The traffic light colouring provides a rapid indication of the biological 'health' of each stock, with the overall intention to stay in the green and avoid the red. Following more positive scientific advice on the status of the bigeye stock in 2017/2018, all four major tuna stocks are now in the green "healthy" area. However, there is no room for complacency with the biomass of most stocks continuing to decline and a need to address weaknesses and gaps in the management measures currently in place.

Target species

"Majuro" Plot



Skipjack tuna, according to the latest (2016) stock assessment, **is not overfished and overfishing is not occurring** and the stock is above the Target Reference Point. A new assessment will be considered at the 15th meeting of the WCPFC Scientific Committee (SC15) in August 2019.

South Pacific albacore tuna is not overfished and overfishing is not occurring. A Target Reference Point for this stock was agreed in December 2018. While economic conditions improved in recent years, the longevity of these improvements is unlikely without the implementation of measures to reduce overall effort/catch in the fishery.

Yellowfin tuna, according to the 2017 assessment, is not overfished and overfishing is not occurring. Work on a Target Reference Point for this stock will be considered at SC15.

Bigeye tuna, according to the latest assessment undertaken in 2017/2018, **is not overfished and overfishing is not occurring.** The change in stock status is a result of the incorporation of new biological information into the scientific model, fisheries management measures and favourable biological recruitment of new fish into the stock. Work on a Target Reference Point for this stock will also be considered at SC15.

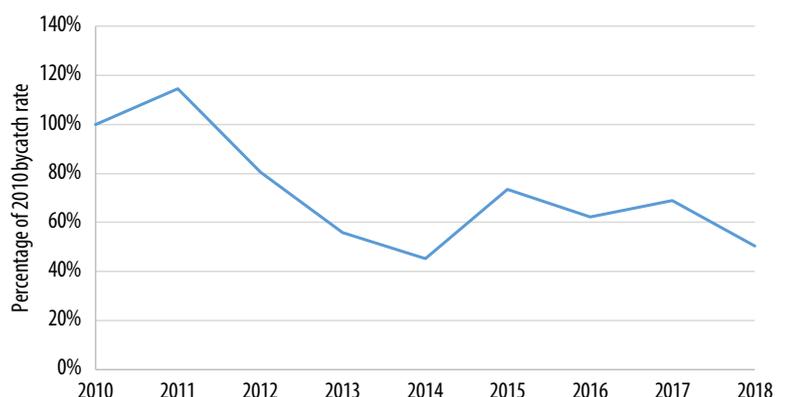
Other commercial species

Other commercially important stocks that have been assessed and that require further management include southwest Pacific striped marlin and western and central North Pacific striped marlin.

This Report Card does not cover Pacific bluefin tuna as that stock is rarely caught by FFA fleets or in FFA EEZs. As such FFA members have no real control over its exploitation and limited influence on the design of management measures.

Bycatch

Nominal longline (excluding shark-targeting longline fisheries) bycatch rates of sharks in FFA members' EEZs were relatively stable from 2012 to 2018 (see graph). It is not clear to what extent the apparent decrease in bycatch rates from 2011 to 2012 is driven by available observer coverage. Observed captures of marine mammals, seabirds and sea turtles are insufficient to explore temporal trends.

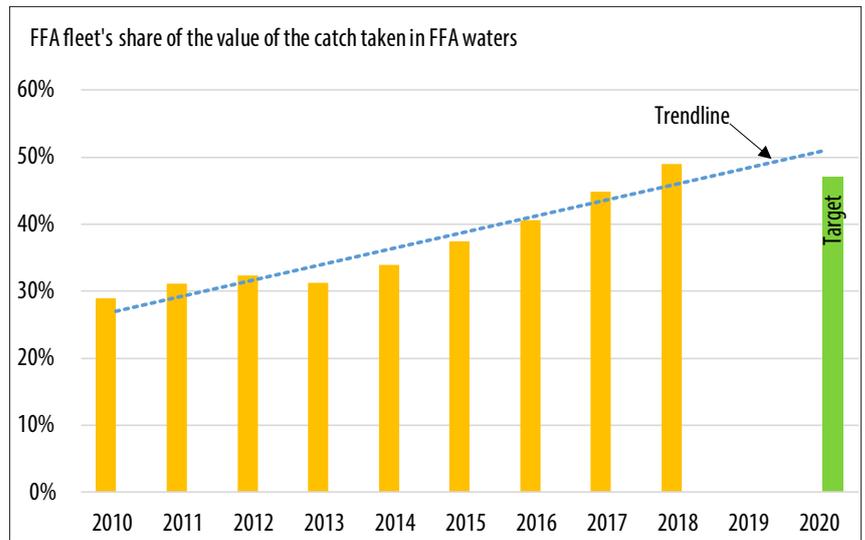




Goal 2 – Value

Increasing the share of the catch value taken by FFA fleets by 25% over 5 years is the agreed Taskforce objective, both to increase economic returns and to strengthen coastal State control of the fishery.

The share taken by FFA fleets (includes flagged and chartered vessels) has increased significantly in recent years, with the value share rising from 31% in 2013 to 49% in 2018 to exceed the 2020 target. In 2018 the proportions of the value of the catch taken by FFA longline and purse seine fleets were 56% and 47% respectively. If the recent trend continues the value of the catch taken by FFA fleets will exceed that of foreign fleets for the first time in 2019.

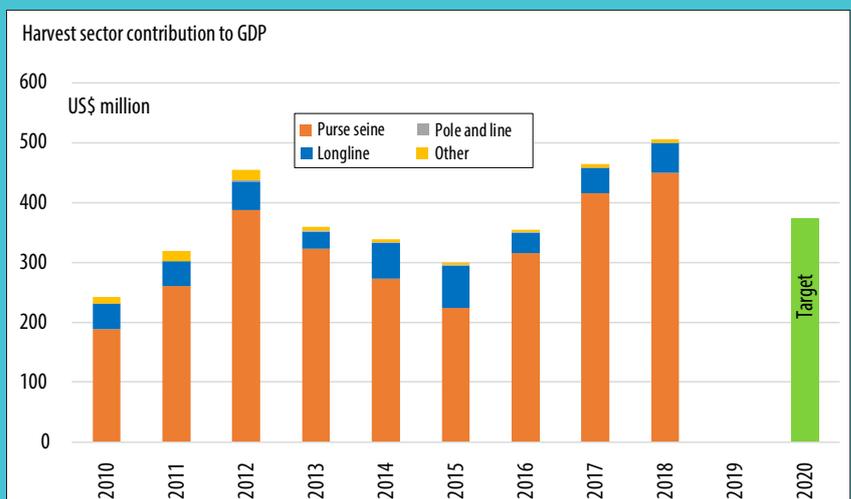
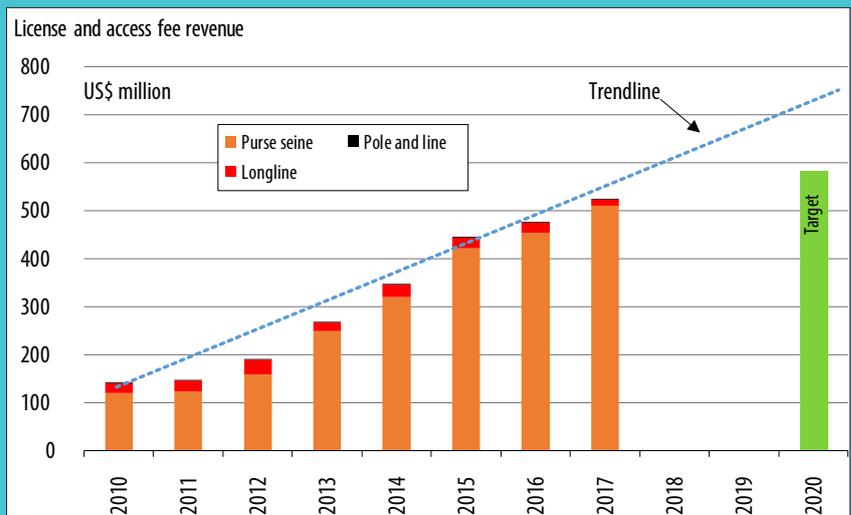


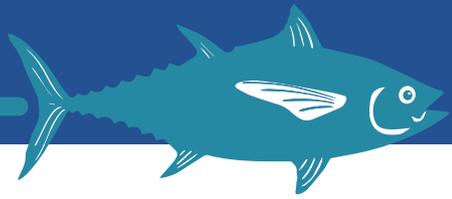
Economic returns

Economic returns to FFA member countries are measured through two components: government revenues from license and access fees and the contribution of the harvest sector to GDP. The 5-year goal is to increase each factor by 25% from 2015 levels.

License and access fee revenue: The figure at right shows very large growth in the overall value of license and access fee revenue. Under the current trend the 25% increase is likely to be achieved before 2020. However, this growth has been achieved from purse seine vessels operating under the Vessel Day Scheme and this has slowed in recent years. The stagnant and low level of returns from the longline fishery indicates the challenges faced in achieving the economic potential of this sector.

Contribution to GDP (value added): The contribution to GDP of the tuna fishery harvest sector (that is, fishing by domestic and locally-based fleets in all waters), after falling between 2012 and 2015 due to declines in fish prices, has since rebounded. Preliminary estimates indicate that in 2018 the contribution of the harvest sector to GDP of FFA members reached record highs with the year on year increase reflecting an increase in the value of the catch taken by FFA fleets in both the longline and purse seine fisheries.





Goal 3 – Employment

Total direct employment in the fishing industry (FFA Pacific Island members' public and private sectors) continues to grow, **providing around 22,500 jobs in 2017 – an increase of around 7,000 since 2013**. The Roadmap anticipated an increase of 18,000 jobs from the 2013 total, with 9,000 new jobs created in the first 5 years, and the current trends indicate that these targets remain achievable. Importantly, the Roadmap also focuses on ways to increase the spread of employment across FFA members, noting that it is very concentrated at present around the processing industry in Melanesia.

There has been some growth in crew employment and new initiatives will seek to build on this trend.

Trade and investment

The **Taskforce** proposed new initiatives to stimulate trade in tuna products and investment. It suggested that growth in export values could be used to measure progress. Estimates of export values from FFA member countries are based on import data from the major export destinations for tuna from the region and exports to other areas provided in the UN Comtrade database.

Following substantial growth from 2010 to 2012, values fell each year up to 2014 as prices fell. In 2016 and 2017 export values rose as fish prices recovered and volumes rose. In 2018 values continued to increase driven by higher volumes. The target for 2020 for an increase of 25% from 2015 levels was exceeded in 2017. Further diversification of export markets is proposed.

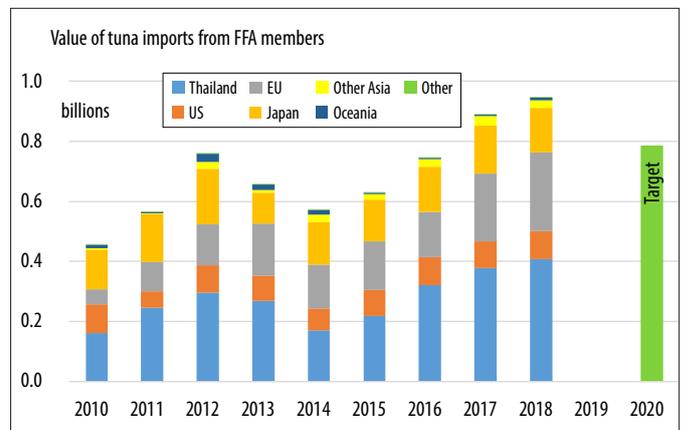
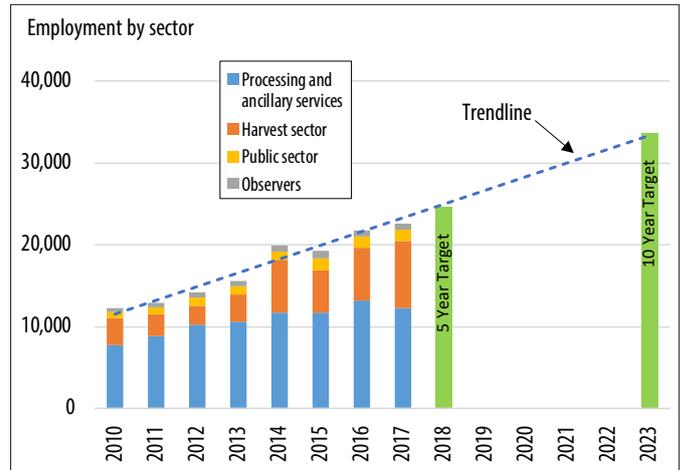


Photo: Francisco Blaha

Goal 4 – Food security

The Roadmap lays out a challenge to ensure an additional 40,000 tonnes of tuna will be available for regional consumption in 10 years. There have been a number of initiatives to increase supplies of tuna to local markets. These include increasing landings from commercial tuna fleets, with several countries requiring licensed vessels to land to onshore bases with by-catch going to the local market. A recent study estimated that in 2016 around 29,000 tonnes of the catch of locally based fleets in the region entered local markets which is equivalent to only 0.8% of the total catch taken by these vessels. However, for some FFA members a significant proportion of the catch of locally based commercial fleets is supplied to local markets. For example, in 2016, this proportion was estimated at 95% for the Cook Islands, 33% for Samoa, 25% for Tonga, and 8% for Palau. In addition, many countries have programmes to increase tuna catches by artisanal fleets (mainly by provision of anchored Fish Aggregating Devices (FADs)). Catch of tuna and tuna-like species by artisanal fleets was estimated in 2016 to be around 17,500 tonnes. Another recent study has shown the importance of canned tuna to local markets, with annual consumption in the region's three largest countries ranging from 2,600 tonnes (Fiji), through to 3,000 tonnes (Solomon Islands) to 3,300 tonnes (PNG) – equivalent to 22,000 tonnes of whole tuna in total.

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