

## Foreword

Fisheries is a critical sector for food security and economic growth in the Pacific region. Maintaining up-to-date information about the impact of fisheries is critical for Pacific Island countries and territories (PICTs) and their communities to make informed decisions about management of the sector, and for a range of development organisations, institutions and donors to plan and implement effective development assistance in collaboration with PICTs.

However, finding accurate and up-to-date data on the value of fisheries and its numerous components to the economies of Pacific Island countries and territories is very difficult, and this makes the assessment of development and change very difficult to measure over time. To address this information deficit in the past, the Asian Development Bank (ADB), with the World Bank, the Australian Government, the Pacific Community (SPC) and the Pacific Islands Forum Fisheries Agency (FFA) undertook to embark on a series of studies of fisheries in the Pacific region: the 2001 report, *The Contribution of Fisheries to the Economies of Pacific Island countries*, and the 2009 report, *Fisheries in the Economies of the Pacific Island Countries and Territories*. These reports provided a snapshot on where each PICT was in their fisheries development, including an assessment of the contribution of fisheries to gross domestic product (GDP). The 2009 report stated: “The study was also intended to provide the basis for progressive refinement and development of a regular assessment of the region’s fisheries, which ideally would be done every 4–5 years.”

In early 2015, in response to a growing demand for up-to-date data on the contribution of fisheries to economies in the Pacific region, SPC’s Fisheries, Aquaculture and Marine Ecosystems (FAME) Division, with support from the FFA, approached the Australian Department of Foreign Affairs

and Trade (DFAT) for funding to undertake a complete update of the 2009 study. This would allow a new baseline to be set in assessing the value of fisheries to PICTs, both for measuring achievements and for assessing future improvements. It would also document changes in the management of the Pacific tuna fishery, food security concerns for coastal fisheries in the face of growing populations, and the effects these have on the economies of PICTs. DFAT, through Australian Aid, kindly agreed to fund the study. SPC contracted the consultant who wrote the 2001 and 2009 studies, Mr Robert Gillett, to undertake the work using the same processes, procedures and techniques that were used in the 2009 report, to ensure comparability of data between the editions.

It was agreed the PICT chapters of the study should cover the following:

- Volumes and value of fish harvested
- Contribution of fisheries to GDP
- Exports of fishery production
- Government revenue from fisheries
- Fisheries-related employment
- Levels of fishery resource consumption
- Exchange rates.

The same topic areas were to be covered in comparative chapters to provide a regional perspective of the value of fisheries to PICTs. These analyses would be based on 2014 data, to allow comparison with the 2009 study, which was based on 2007 data.

The consultant commenced work in August 2015, with several months of fieldwork collecting data, primarily from Fisheries Departments and National Statistics Offices, and from other in-country sources. The consultant visited 18 PICTs, and used local consultants in several locations. The final report – *Fisheries in the Economies of Pacific Island Countries and Territories 2016* (second edition) – was edited and produced by SPC, and was published in June 2016.

This new report provides a range of critical, original information in a range of fisheries fields that will be extremely useful for PICTs, regional organisations, research institutions, non-governmental organisations and donors.

In undertaking this work the consultant highlighted the difficulties in finding recent data on fisheries from within fisheries departments, as some PICTs are not producing annual reports or other published fisheries data. I would strongly urge PICTs to collect and publish fisheries data annually, to enable the region to maintain an accurate picture of the impact of fisheries for PICTs and the region.

The information in this report will remain relevant for several years. However, the study should be undertaken again in another four to five years to maintain the currency of fisheries data, which will ultimately help to maintain the sustainability of a sector that is fundamental in the lives of Pacific people.

A handwritten signature in black ink, appearing to read 'Colin', with a long horizontal stroke underneath.

***Dr Colin Tukuitonga***  
*Director-General*  
*Pacific Community*

## About the Author

Robert Gillett, a director of Gillett, Preston and Associates ([gillett@connect.com.fj](mailto:gillett@connect.com.fj)) has been involved in marine resources development in the Pacific region and beyond for four-and-a-half decades. He has undertaken work for several regional and international organisations active in the marine sector in the region, including the United Nations Development Programme, the Pacific Community, Forum Fisheries Agency, Food and Agriculture Organization of the United Nations, World Bank, Secretariat of the Pacific Regional Environment Programme, University of the South Pacific, Pacific Islands Forum Secretariat, Commonwealth Secretariat, and Asian Development Bank. Mr Gillett has authored more than 250 publications, books and technical reports on fisheries in the region.

## Acknowledgements

Many people contributed to this study (referred to as the Benefish study). Three individuals were particularly helpful. Lindsay Chapman of SPC performed a critical role in generating interest in this updated version of the previous Benefish study, liaising with the donor, making administrative arrangements for the work, providing the study consultant with logistics support, and responding to requests for information. Perry Head, formerly of the Australian Department of Foreign Affairs and Trade, was responsible for organising funding for the work and facilitating the SPC contracting. Gerald Haberkorn, of SPC's Statistics for Development Division, has been a long-time supporter of the Benefish studies. He provided a large amount of assistance dealing with liaison with the statistical agencies of the region, technical issues and encouragement.

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# Abbreviations

ACP	African, Caribbean and Pacific
ADB	Asian Development Bank
AusAID	Australian Agency for International Development
BEA	Bureau of Economic Analysis (of the U.S. Department of Commerce)
BMR	Bureau of Marine Resources (of Palau)
BPNG	Bank of Papua New Guinea
CBSI	Central Bank of Solomon Islands
CIF	cost insurance freight
CIPA	Cook Islands Pearl Authority
CITES	Convention on the International Trade of Endangered Species
CMI	College of the Marshall Islands
CNMI	Commonwealth of the Northern Mariana Islands
CoFish	Pacific Regional Coastal Fisheries Development Programme
Cospi	Commercialisation of Seaweed Production in the Solomon Islands
CPI	consumer price index
CPP	Central Pacific Producers (of Kiribati)
DAM	Direction des Affaires Maritimes (of New Caledonia)
DMWR	Department of Marine and Wildlife Resources (of American Samoa)
DevFish	Development of Tuna Fisheries in the Pacific ACP Countries
DFAT	Department of Foreign Affairs and Trade (of Australia)
DFMR	Department of Fisheries and Marine Resources
DRMM	Direction des Ressources Marines et Minières (of French Polynesia)
DWFN	distant water fishing nation
EEZ	exclusive economic zone
ENSO	El Niño Southern Oscillation
EPPSO	Economic Planning Policy and Statistics Office (of Marshall Islands)
ESCAP	Economic and Social Commission for Asia and the Pacific
FAD	fish aggregating device
FAO	Food and Agriculture Organization of the United Nations
FFA	Forum Fisheries Agency

FOB	free on board
FRP	fibre-reinforced plastic
FSM	Federated States of Micronesia
FTE	full-time equivalents
FY	fiscal year, financial year
GDP	gross domestic product
GNI	gross national income (formerly, GNP)
GNP	gross national product
GO	Gross output
GRT	Gross registered tonnage
HIES	household income and expenditure survey
Hp	Horsepower
HS	Harmonised System of Tariff Classification
IAS	Institute of Applied Science of the University of the South Pacific
IC	intermediate consumption
IMF	International Monetary Fund
ISIC	International Standard Industrial Classification of All Industrial Activities
ISPF	Institut de la Statistique de la Polynesie Francaise
ISEE	Instut de la Statistique et des Etudes Economique (of New Caledonia)
IUCN	International Union for Conservation of Nature
IUU	Illegal, unreported and unregulated (fishing)
JICA	Japan International Cooperation Agency
Kg	kilogram
km	kilometre
km <sup>2</sup>	square kilometres
Lb	pound
MACBIO	Marine and Coastal Biodiversity Management in Pacific Island Countries
MFA	Micronesian Fisheries Authority (formerly MMA)
MFMR	Ministry of Fisheries and Marine Resources (of Solomon Islands)
MIMRA	Marshall Islands Marine Resources Authority
MMDC	Micronesian Mariculture Demonstration Center
MMR	Ministry of Marine Resources (of Cook Islands)
MPA	marine protected area
mt	metric ton
NAFICOT	National Fishing Corporation of Tuvalu
NEPO	National Economic Planning Office
NFA	National Fisheries Authority (of PNG)



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NFC	National Fisheries College (of PNG)
NFMRA	Nauru Fisheries and Marine Resources Authority
NGO	non-governmental organisation
NMFS	National Marine Fisheries Service (of the United States)
NORMA	National Oceanic Resource Management Authority (of FSM)
NSO	National Statistics Office (of PNG)
OFCF	Overseas Fisheries Cooperation Foundation (of Japan)
OFD	Offshore Fisheries Division (of the Cook Islands Ministry of Marine Resources)
PAFCO	Pacific Fishing Company (of Fiji)
PCS	Palau Conservation Society
pcs	Pieces
PICTs	Pacific Island countries and territories
PIFTAC	Pacific Island Financial Technical Assistance Centre (of the IMF)
PMDC	Palau Mariculture Demonstration Center
PNA	Parties to the Nauru Agreement
PNG	Papua New Guinea
ProcFish	Pacific Regional Oceanic and Coastal Fisheries Development Programme (PROCFish/C/CoFish)
PRISM	Pacific Regional Information System (SPC)
RMI	Republic of Marshall Islands
SAM	Social Accounting Matrix (of Federated States of Micronesia)
SNA	System of National Accounts
SPC	Pacific Community (formerly Secretariat of the Pacific Community, South Pacific Commission)
TDS	Tonga Statistics Department
TML	Te Mautari Limited
UN	United Nations
UNDP	United Nations Development Programme
US	United States
VA	value added
VAR	value added ratio
VAT	value added tax
VDS	Vessel Day Scheme
VMS	vessel monitoring system
WCPFC	Western and Central Pacific Fisheries Commission
WCPO	western and central Pacific Ocean
WPacFIN	Western Pacific Fisheries Information Network

## Currency Equivalents

The average yearly exchange rates (relative to the US dollar – US\$) used in this report are as follows:

	Australia	New Zealand	Papua New Guinea	Solomon Islands	French Territories	Vanuatu	Fiji Islands	Tonga	Samoa
2000	1.74	2.19	2,76	5.09	130.00	137.80	2.13	1.64	3.27
2001	1.95	2.38	3,36	5.28	133.00	145.70	2.33	1.95	3.47
2002	1.83	2.15	3.89	6.75	127.00	139.10	2.15	2.18	3.37
2003	1.52	1.72	3.55	7.51	106.00	122.20	1.85	2.19	3.00
2004	1.36	1.51	3.22	7.48	96.00	111.90	1.73	2.04	2.78
2005	1.31	1.42	3.10	7.53	96.00	109.00	1.70	1.93	2.71
2006	1.32	1.54	3.06	7.61	95.00	110.00	1.73	2.01	2.78
2007	1.19	1.36	2.96	7.65	87.00	104.00	1.60	2.02	2.62
2008	1.10	1.32	2.77	7.67	80.00	96.77	1.51	1.85	2.52
2009	1.12	1.39	2.65	7.88	83.22	99.72	1.92	1.90	2.50
2010	1.10	1.30	2.63	7.85	90.27	95.24	1.81	1.81	2.35
2011	0.98	1.29	2.13	7.24	92.16	95.43	1.84	1.73	2.36
2012	0.96	1.21	2.07	7.07	89.88	93.51	1.79	1.74	2.28
2013	1.12	1.22	2.42	7.19	86.01	96.02	1.88	1.85	2.33
2014	1.22	1.28	2.57	7.63	98.13	102.51	1.98	1.86	2.39

Unless other specified, in this report “\$” refers to US dollars.