

31 Exports of Fishery Products

31.1 Recent Exports of Fishery Products

Readily available information on the export of fishery products is presented in the country and territory chapters, and is summarised in Table 31-1 below.

Table 31-1: Exports of Fishery Products from Pacific Islands Countries and Territories in 2014 (2014, unless otherwise noted)

Country/Territory	Nominal Value (local currency)	Nominal Value (US\$)	% of All Exports	Additional Information
American Samoa	385,664,013	385,664,013	99.8	Data is for 2013; The fishery exports of American Samoa consist largely of canned tuna and by-products of the canneries
Cook Islands	560,000	437,500	2.6	Pearl production reached maximum production about 15 years ago when it accounted for more than 90% of exports
Fiji	114,362,000	57,758,586	9.3	From the Customs Department database
French Polynesia	10,259,000,000	104,544,991	80.0	Pearl products account for 86% of fishery exports
FSM	19,600,190	19,600,190	73.7	The Statistics Division policy is that fish should be included in exports if the company exporting is considered part of the FSM economy, so longline production is not included but purse seine production (if by a local company) is included
Guam	n/a		0	Only a small amount of fishery exports (shrimp broodstock, aquarium fish)
Kiribati	3,363,000	2,756,557	39.9	Export categories are fish, pet fish, sharkfins, seaweed, and beche-de-mer
Marshall Islands	14,600,000	14,600,000	84.4	The Marshall Islands chapter gives two other (much higher) estimates of fishery exports
Nauru	0	0	0	Informal exports of fish are made by passengers travelling on regular commercial flights, but no estimates have been made of the value
New Caledonia	2,173,000,000	22,144,095	1.5	66% of the fishery exports is cultured shrimp
Niue	115,854	90,511	0.6	The cited figure is the present study's estimate of informal fish exports as passenger baggage on flights to Auckland

Table 31-1: continuation

Country/Territory	Nominal Value (local currency)	Nominal Value (US\$)	% of All Exports	Additional Information
Northern Marianas	712,500	712,500	4.5	Market shrimp and shrimp broodstock are the only fishery exports
Palau	11,500,000	11,500,000	100	If tuna exports in 2014 were \$10.5 million, reef fish and giant clam exports were \$0.9 million, and total exports (according to the World Bank) were \$11.4 million, then fishery exports are 100% of exports
Pitcairn Islands	12,800	10,000	n/a	The only exports of fishery products are the catch that is sold to visiting vessels (cruise ships, merchant ships, yachts, and fishing vessels)
PNG	345,900,000	134,591,440	1.6	Information from the Customs Department. The national fisheries authority (NFA) maintains an independent database of the exports of fishery products, but information by commodity by year is not readily available, nor is summary information available in a recent NFA annual report
Samoa	5,562,000	2,327,197	4.7	From 1997 export bans on several types of fishery products (coral, aquarium fish, and beche-de-mer) have resulted in almost all commercial fishery exports in recent years being tuna products
Solomon Islands	418,000,000	54,783,748	11.9	Customs Department data
Tokelau	220,000	171,875	n/a	An analysis of goods shipped in 2014 from Tokelau to Samoa shows 62,867 kg of "frozen seafood"
Tonga	12,483,119	6,711,354	44.2	Exports of beche-de-mer (a very high value product) increased from 56 mt in 2013 to 143 mt in 2014
Tuvalu	36,143	29,625	100	This is an estimate by the present study as government export statistics are not detailed
Vanuatu	196,000,000	1,912,009	3.2	"Live fish" make up 72% of fishery exports
Wallis and Futuna	10,000,000	101,906	47	The only substantial fishery export in 2014 appears to be shell necklaces worn by departing tourists

Notes: Data are for 2014, unless otherwise noted. Prices are FOB. Official data are used when available. Some data irregularities are noted in the country and territory chapters.

The nominal values of fishery exports from Table 31-1, above, are shown graphically in Figure 31-1 (Nauru and Guam make no estimates for fishery exports). The data are for 2014, except for American Samoa where the data are for 2013.

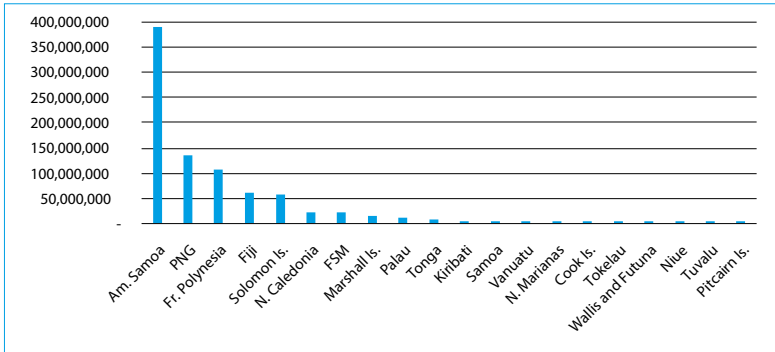


Figure 31-1: The Value of Fishery Exports from Pacific Island Countries and Territories in 2014 (2013 for American Samoa) (US\$)

The relative importance of fishery exports (i.e. the value of fishery exports as a percentage of the value of all exports) is given in Figure 31-2.

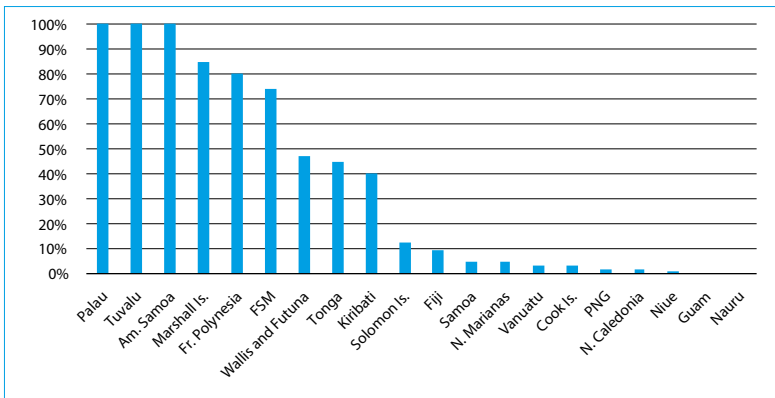


Figure 31-2: The Relative Importance of Fishery Exports from Pacific Island Countries and Territories in 2014 (2013 for American Samoa)

Perhaps the most important point to note from the above table and figures is that fishery exports are very important to some countries and territories in the region. In about half of the countries/territories fishery exports represent over 40% of the value of all exports. Where they represent less than 40% of all exports, several still remain quite large in nominal terms, namely PNG

(US\$136 million), Fiji (US\$58 million), Solomon Islands (US\$54 million), and New Caledonia (US\$22 million). Other notable points evident from the table and figures are as follows:

- The three countries/territories that have the largest values of fishery exports are American Samoa, PNG, and French Polynesia. Interestingly, two of them are non-independent territories. Of the total of about US\$820 million in fishery exports from the region in 2014, about 76% are from these three.
- American Samoa's fishery exports are about 47% of the fishery exports from all the other countries and territories combined.
- The value of PNG's fishery exports is about 41% of all the fishery exports from all the other independent countries combined.
- The fishery exports of several countries/territories are very small or non-existent.
- Some large exporters of fishery products are countries or territories that export substantial amounts of other commodities, e.g. PNG and New Caledonia. In other words, in these countries/territories fishery exports, although large, appear small in comparison to other exports.
- Some large exporters of fishery products are countries/territories that export only small amounts of other commodities, e.g. American Samoa, French Polynesia, FSM, and the Marshall Islands.

31.2 Changes in the Values of Exports from 2007 to 2014

The 2009 Benefish study (Gillett 2009) gave the values of fishery exports for 2007. These values are converted to 2014 prices¹ and compared to the value of fishery exports in 2014 in Table 31-2.

¹ The difficulties of converting values for many different commodity types across the 22 Pacific Island countries and territories with 10 different currencies are discussed in Chapter 29. A conversion factor of 1.173 is used in this publication for converting 2007 prices to 2014 prices.

Table 31-2: Comparison of the Values of 2007 and 2014 Fishery Exports from Pacific Island Countries and Territories

Country/Territory	2007 exports (US\$; 2014 prices)	2014 exports (US\$)	Change in Value of Exports 2007–2014
American Samoa	514,394,939	385,664,013	-33.4%
Cook Islands	4,833,731	437,500	-1004.9%
Fiji	74,154,659	57,758,586	-28.4%
French Polynesia	150,588,931	104,544,991	-44.0%
FSM	14,429,446	19,600,190	26.4%
Guam	-	-	-
Kiribati	2,220,929	2,756,557	19.4%
Marshall Islands	43,802,166	14,600,000	-200.0%
Nauru	-	-	-
New Caledonia	184,053,138	22,144,095	-731.2%
Niue	-	90,511	-
Northern Marianas	-	712,500	-
Palau	22,287,000	11,500,000	-93.8%
Pitcairn Islands	44,037	10,000	-340.4%
PNG	118,473,000	134,591,440	12.0%
Samoa	8,954,682	2,327,197	-284.8%
Solomon Islands	23,207,372	54,783,748	57.6%
Tokelau	-	171,875	-
Tonga	5,702,868	6,711,354	15.0%
Tuvalu	4,945	29,625	83.3%
Vanuatu	1,443,012	1,912,009	24.5%
Wallis and Futuna	91,683	101,906	10.0%
Total	1,168,686,538	820,448,097	-42.4%

The changes in the values of fishery exports from 2007 to 2014 are shown in the following two figures, where the countries/territories are separated into two groups – large exporters and small exporters.

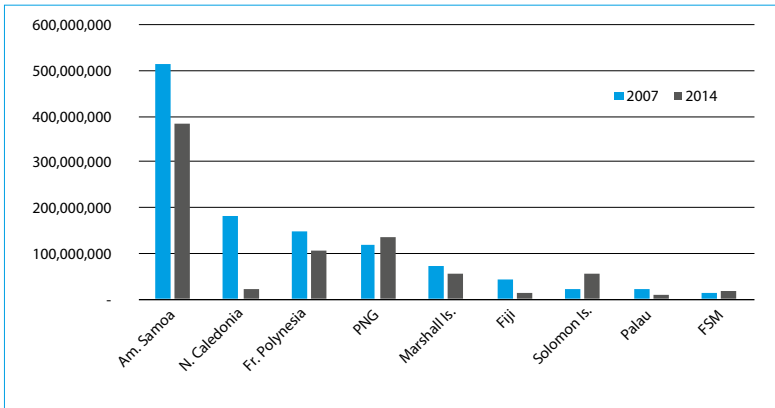


Figure 31-3: Changes in Value of Fishery Exports 2007–2014 for the Large Exporters (US\$, 2014 prices)

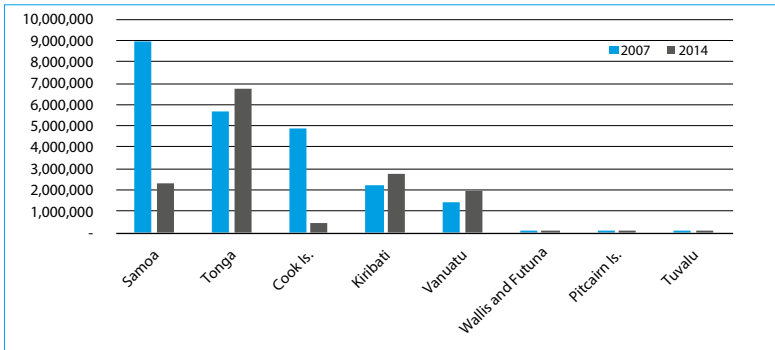


Figure 31-4: Changes in Value of Fishery Exports 2007–2014 for the Small Exporters (US\$, 2014 prices)

From the table and figures above several observations can be made on changes of the values of fishery exports over the period 2007–2014:

- The total amount of fishery exports from the entire region fell about 42% in real value over the period.
- The fall in the value of canned tuna exports from American Samoa was responsible for about 37% of the total regional decline.
- The fall in exports from American Samoa, French Polynesia, and New Caledonia combined was responsible for about 97% of the total regional decline.
- The total amount of fishery exports from the independent countries of the region fell about 4% in real value over the period.

- Of the large exporters, only PNG and Solomon Islands scored gains over the period.
- Some of the biggest falls (French Polynesia, Cook Islands) were due to declines in the pearl industry.

31.3 Issues in Measuring Fishery Exports

In the course of collecting and compiling information on fishery exports, some observations were made on the accuracy of the data. The most notable feature is the apparent underestimation of the value of fishery exports. This underestimation appears large and relatively worse than in other trade sectors. In most cases, when the official export values are compared to other sources of similar information (e.g. importing country information, Convention on the International Trade of Endangered Species (CITES) records, or audited exporting company accounts), the differences are remarkable. There are several possible reasons for the differences. Most government customs departments are oriented towards taxing imports and may give low priority to documenting exports. Some countries have no legal requirement for reporting exports (e.g. FSM and the Marshall Islands) and estimate fishery exports through indirect methods. Keeping track of fishery exports, compared to other major commodities exported by Pacific Island countries and territories, is more complex due to many exporters, a multitude of different products each with different values, large numbers of small shipments, and many different export points. Often there is no examination by customs departments of the exported commodities.

In about half of the Pacific Island countries and territories the government fisheries agency monitors fishery exports independently of the government customs agency. This is presumably to gain more detail on fishery exports, but could also be used as an enforcement tool (e.g. to prevent the export of banned species and sizes), as a quality control measure, and to supplement other fishery statistical systems, especially for coastal fisheries. All of these could be very useful in fishery management. However, in many countries these fisheries agency export data systems are not functional – they produce inaccurate information on exported fishery commodities, especially for coastal fisheries. Another issue is that the information is supposed to be made available to the public, but in most countries it is very difficult to actually obtain the data or data summaries from the staff of the fisheries

agencies², and the information is often not available through annual reports. The requirement for exporters to participate in the export monitoring system (i.e. have export shipments inspected and obtain an export permit) creates extra work for both exporters and fisheries staff. Conceptually, the idea of a fisheries agency doing independent monitoring of fishery exports is good, but in most countries/territories of the region that do it, either poor or non-available information is produced at considerable expense. It seems logical that such export monitoring systems should be improved or abandoned.

The Harmonised Commodity Description and Coding System (HS)³ used by most government customs agencies in the region to classify exports allows easy comparison of fishery trade across countries. It does however create problems for a detailed comparison of tuna products. For example, Fiji exports a large amount of tuna but it is not possible to state exactly how much because some of the HS fish codes in the Fiji Bureau of Statistics export trade data could contain tuna and/or coastal fishery products: the trade statistics show that in 2014 F\$251,476 of “Other fish excluding livers and roes” were exported – a category that could include products from off-shore and/or coastal fisheries.

Another problem in accurately quantifying fishery exports is that, in many countries, products which would normally be considered fishery products are not being captured in the official export statistics:

- For some countries and territories, fishery exports are confined to finfish.
- Coral exports are not considered to be a fishery product in at least two countries.
- Some countries list a few important fishery exports, and lump other fishery products together with miscellaneous non-fishery commodities.

There are some inconsistencies in the export treatment of tuna transshipments. Some agencies do not consider that transshipments in a country are exports of that country (e.g. Tuvalu’s Central Statistics Division). Some agencies consider that only those transshipments made by companies that

2 In two of the countries of the present study, after obtaining agreement in principle to obtain fisheries agency export information, multiple requests over a 3-month period did not produce reasonable export data.

3 Harmonised Commodity Description and Coding System (Harmonised System, or HS) is an international nomenclature system for the classification of products which allows participating countries to classify traded goods on a common basis for customs purposes. The HS comprises approximately 5,000 article/product descriptions that appear as headings and subheadings, arranged in 97 chapters, grouped in 21 sections.

are considered part of the domestic economy are exports of the country (e.g. FSM's Statistics Division). Within a single country different national or international agencies sometimes treat transshipments differently, and hence have very different estimates of total exports (e.g. the three estimates of the 2014 fishery exports of Marshall Islands are: \$14.6 million vs \$44.8 million vs \$121.2 million).

According to officials of the International Monetary Fund (G. Legoff, per. com. August 2015), changes in the System of National Accounts (SNA) may affect the classification of some of the fishery exports of the region. In the newest version of SNA (issued in 2008) fish sent to one country for processing and subsequent re-export are no longer considered an export of the processing country.