

TUNA FISHERY REPORT CARD 2016



Photo: Lisa Williams-Lahari, © FFAmedia

Introduction

The annual Tuna Fishery Report Card provides a high-level overview of the current status of Pacific tuna fisheries in relation to key goals, indicators and strategies adopted by the Forum Leaders in the **Regional Roadmap for Sustainable Pacific Fisheries**. Launched in 2015, the report cards take account of the work of the **Taskforce on Increasing Economic Returns from Fisheries**, established by the Forum Leaders when

they endorsed the Future of Fisheries Roadmap to develop a programme supporting real, measurable results within five years. The Tuna Fishery Report Card is presented alongside the Coastal Fishery Report Card within the Future of Fisheries Roadmap, reflecting both the unique and unifying aspects of the two sectors, and aspiring towards synergy and effective partnerships at the regional and national levels.

Goal 1 – Sustainability

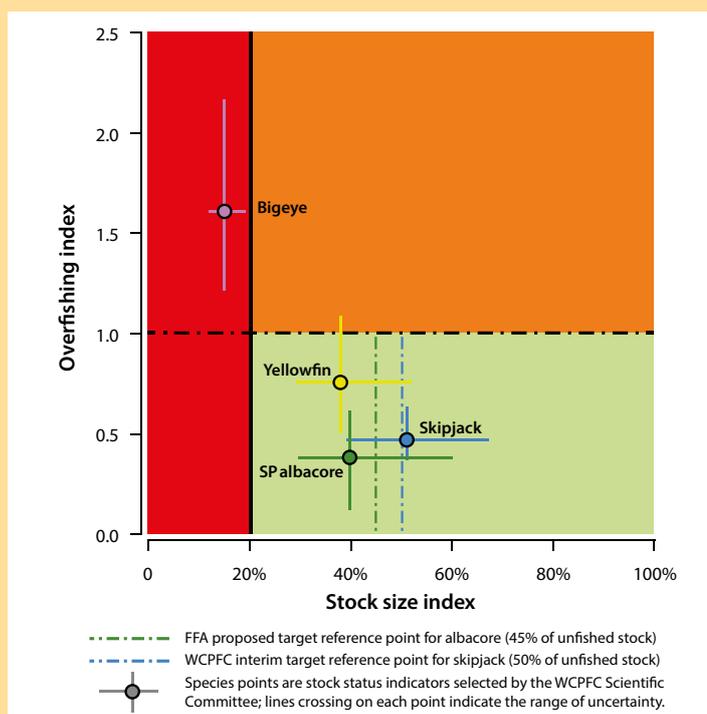
The Roadmap provides a 3-year timeframe for the agreement of target reference points and a 10-year timeframe for the implementation of management measures to achieve them in order to support economically viable fisheries.

The “Majuro” plot below shows the relative status of each of the main stocks against biological reference points (black lines). The traffic light colouring is useful to provide a rapid indication of the “health” of each, with the overall intention to stay in the green and avoid the red. There are management arrangements in place for all four stocks, but these have varying success at the moment and all need to be strengthened or supplemented.



Photo: Francisco Blaha

Relative status of the four main tuna stocks against biological reference points



Skipjack tuna is not overfished and overfishing is not occurring. Encouragingly, its current state is reflective of the economic target reference point that the Parties to the Nauru Agreement (PNA) have adopted and that was accepted by the Western and Central Pacific Fisheries Commission (WCPFC) in 2015 (dotted blue line). Management challenges for this fishery therefore lie around preventing uncontrolled expansion, with a particular risk posed by fishing in the high seas and non-FFA EEZs.

South Pacific albacore tuna is not overfished and overfishing is not occurring. However a new assessment in 2015 showed that the stock is much less than had previously been thought. **Catch and effort reductions are required to address the current low catch rates that are driving unprofitability.** Parties to the Tokelau Arrangement have approved a target reference point that aims to rebuild this important resource, but this has not yet been agreed to by WCPFC (dotted green line).

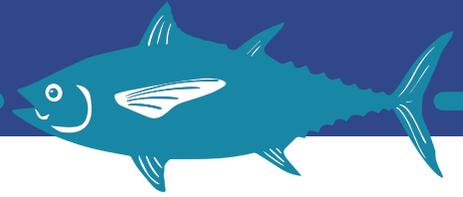
Bigeye tuna is overfished and overfishing is occurring. This means that **the number of adult fish in the water is below the agreed limit, and those fish are still being removed too rapidly.** Management measures for the purse seine FAD fishery introduced by PNA in 2008, and subsequently adopted by WCPFC with the addition of flag longline catch limits, have curtailed growth in overfishing, but are yet to be effective in rebuilding the stock. Further reductions are required from both purse seine and longline fisheries.

Yellowfin tuna is not overfished and overfishing is not occurring.

The stock is however **approaching the “cross hairs”**, particularly when the uncertainty of the assessment is taken into account. This plot only shows status against the biological limit reference point. No work has been undertaken yet as to where a target reference point indicative of an economically viable fishery would be placed.

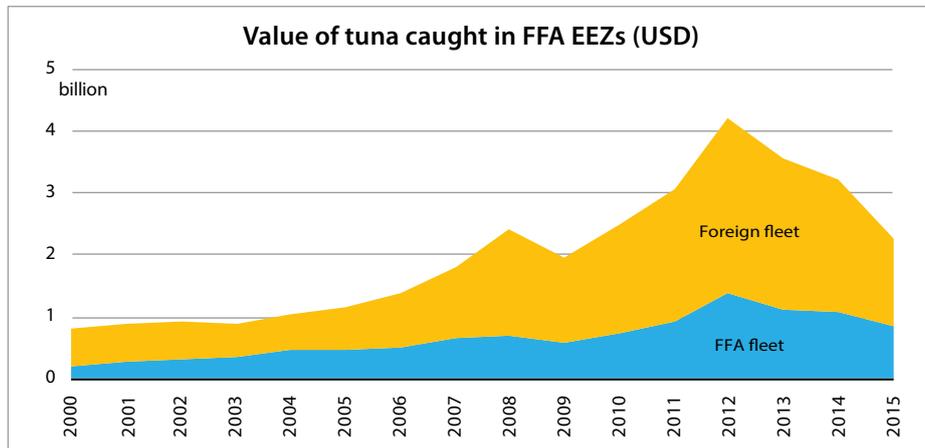
This Report Card does not cover Pacific bluefin tuna as that stock is not caught by FFA fleets or in FFA EEZs. As such FFA members have no control over its exploitation and limited influence on the design of management measures.

There are management measures for other target species such as swordfish and striped marlin. WCPFC has also adopted measures to reduce impacts on sharks, turtles, cetaceans and seabirds, all of which can be placed at risk by tuna fisheries. The impact of these measures needs to be assessed over time, but as a general comment, such issues are becoming more important to the global community and need to be embraced to ensure continued operation of tuna fisheries.



Goal 2 – Value

The Roadmap originally set a goal of doubling the value of the region's tuna catch by 2024. While some increase in value can be expected as prices recover and increase, this target is probably not realistic and does not reflect the returns to Pacific Island countries.



The figure shows the trends since 1997, by foreign and domestic (including locally based foreign) fleets. The peak in 2012 reflects prices of purse seine tuna that were unusually high. Prices fell sharply in 2014/15 but are now recovering.

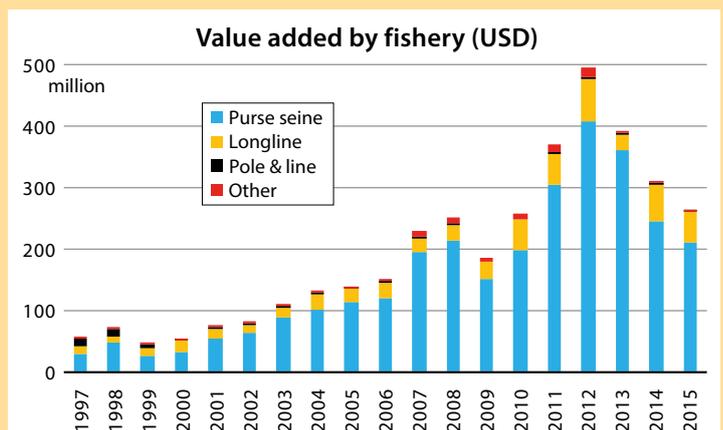
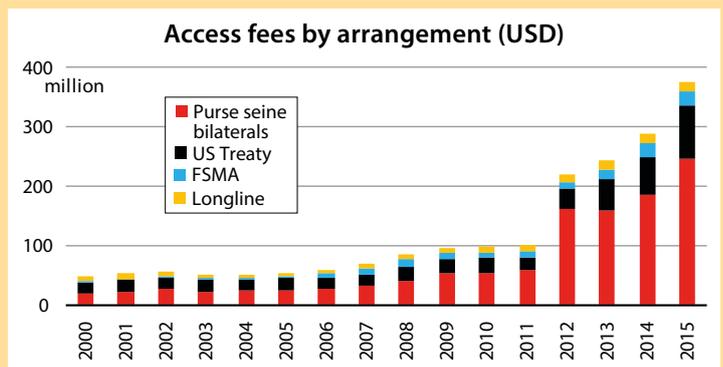
Increasing the share of the catch by the FFA fleets by 25% over five years has been proposed as an objective by the Taskforce, both to increase returns and to strengthen coastal state control of the fishery. It will, however, require FFA members to discharge their flag state responsibilities under international law, and regional conservation and management measures. These obligations come at a cost and most members will need to invest in human and technical capacity to ensure compliance by their vessels with these rules.

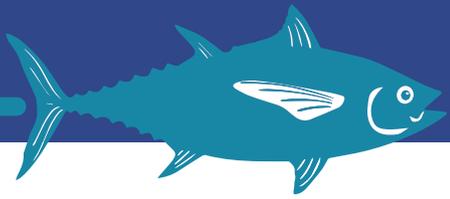
Economic returns

The real economic returns to FFA member countries are measured through two components: access fees show government revenue provided by foreign fleets, while value added to GDP captures the benefits from domestic fleets. The 5-year goal is to increase each by 25%.

Access fees: The figure at right shows very large growth in the overall value of access. However, almost all of this growth has been achieved from foreign flagged purse seine vessels operating under the Vessel Day Scheme. These two figures demonstrate that there are clear challenges and opportunities to increase returns from the longline fishery. Returns from the FSM arrangement (FSMA) show only payments to another party.

GDP contribution (value added): The contribution to GDP of the harvest sector of the tuna fishery (that is, fishing by domestic and locally based fleets in all waters) has increased markedly since the early 2000s reflecting increases in output and prices, especially for the purse seine fishery. After peaking with very high prices in 2012, however, the value added from fishing trended down due to the reductions in the value of the purse seine catch. This trend needs to be reversed.





Goal 3 – Employment

Total direct employment in the fishing industry (FFA Pacific Island members public and private sector) continues to grow, providing 22,000 jobs in 2014. The Roadmap anticipated an increase of 18,000 jobs from the 2013 total, with 9,000 new jobs created in the first five years. 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 (primarily Papua New Guinea).

Future reports will provide finer scale detail on where employment growth has been achieved.

Trade and investment

The Taskforce proposed new initiatives to stimulate trade in tuna products and investment. It suggested that a growth in export value could be used to measure progress. Estimates of exports from FFA member countries are based on import data from the major export destinations for tuna from the region, obtained from the COMTRADE database.

The annual trends between 2000 and 2015 show steady growth in export values between 2005 and 2011, followed by substantial growth in 2012 and then successive declines through to 2015 due to falling prices. The 2015 values show incomplete data. When all export data is available they should be higher than before prices peaked in 2012/13. The target for the next five years is an increase of 25% in the value of exports. Diversification of export markets is also proposed.

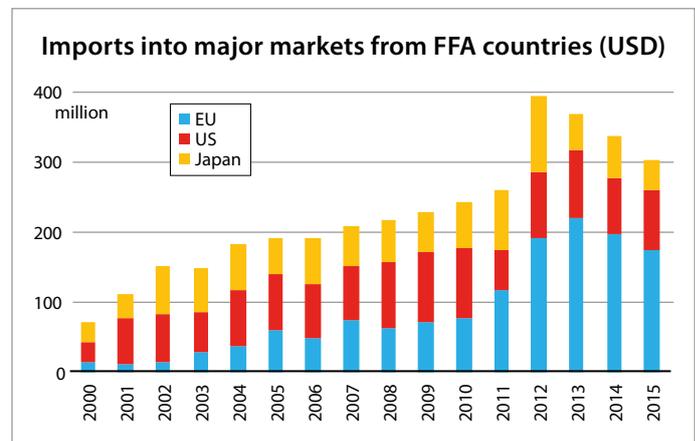
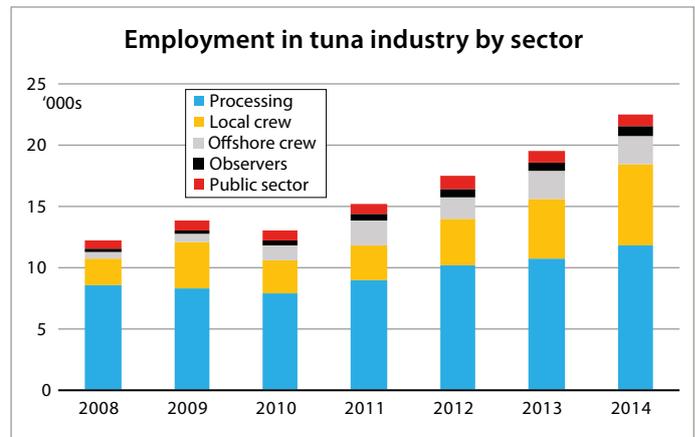


Photo: Lisa Williams-Lahari, ©FFAmedia

Goal 4 – Food security

At present there is still little formal data collection about the contribution of tuna to local 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. Data on artisanal tuna catches is being collected in a few countries but will need to be enhanced substantially. Some work has recently been carried out on assessing domestic consumption of canned tuna in the region. In the three largest countries in the region, per capita consumption of canned tuna was estimated at 2 kg/person/year in PNG; 7 kg/person/yr in Solomons; and 9 kg/person/yr in Fiji. This represents a significant contribution to the diet.

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