

TUNA FISHERY REPORT CARD 2015



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 Pacific Islands Forum Leaders in *the Regional Roadmap for Sustainable Pacific Fisheries*. Of course, not every fishery issue is covered here, but the Report Card provides a snapshot that fisheries stakeholders and political leaders can use as a benchmark to gauge future progress on implementing the Roadmap.

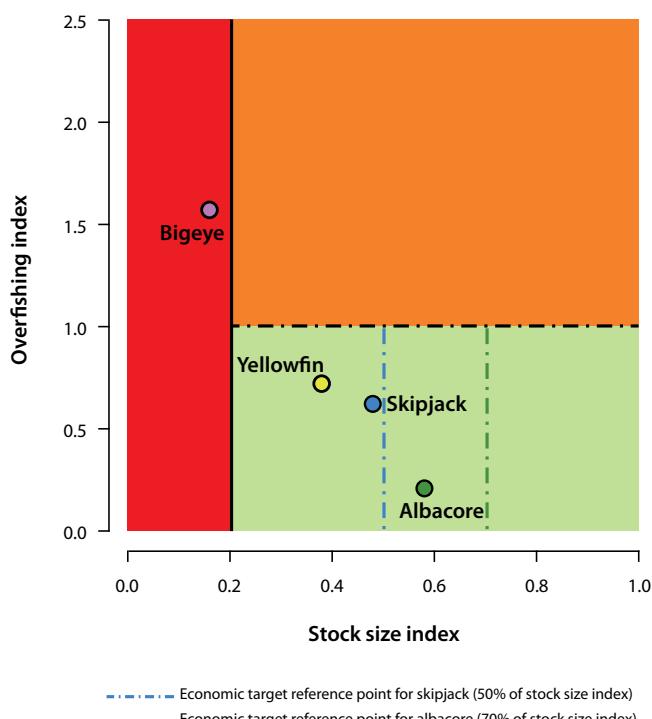
The Roadmap provides a 3-year timeframe for the agreement of Target Reference Points and a 10-year timeframe for the implementation of management measures to achieve them in order to support economically viable fisheries.

Goal 1 – Sustainability

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.



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



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 introduced by the Parties to the Nauru Agreement (PNA) in 2008 and subsequently adopted and enhanced by the Western and Central Pacific Fisheries Commission (WCPFC) have curtailed growth in overfishing, but are yet to be effective in actually eliminating this overfishing. Further reductions are required from both purse seine and longline fisheries.

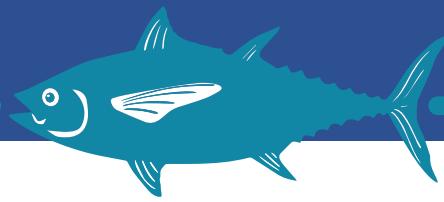
SOUTH PACIFIC ALBACORE TUNA is not overfished and overfishing is not occurring. However, that assessment is based on the agreed biological Limit Reference Point. The stock sits below the economic Target Reference Point provisionally adopted by the Participants to the Tokelau Arrangement (green dotted line). **Catch and effort reductions are required to address the current low catch rates that are driving unprofitability.**

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.

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 have provisionally adopted (blue dotted 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.

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.

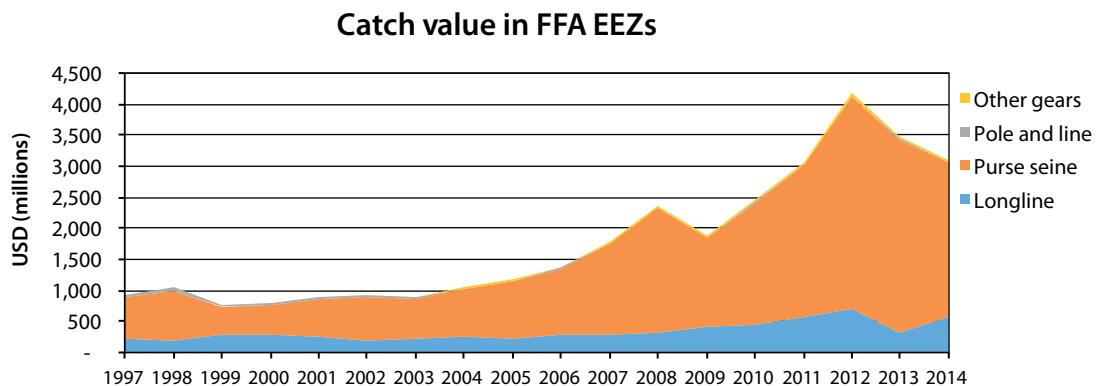
There are management measures for other target species such as swordfish and striped marlin. The Western and Central Pacific Fisheries Commission (WCPFC) has also adopted measures to reduce impacts on sharks, turtles, cetaceans and seabirds, all of which can be placed at risk by tuna fisheries. The impact 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.



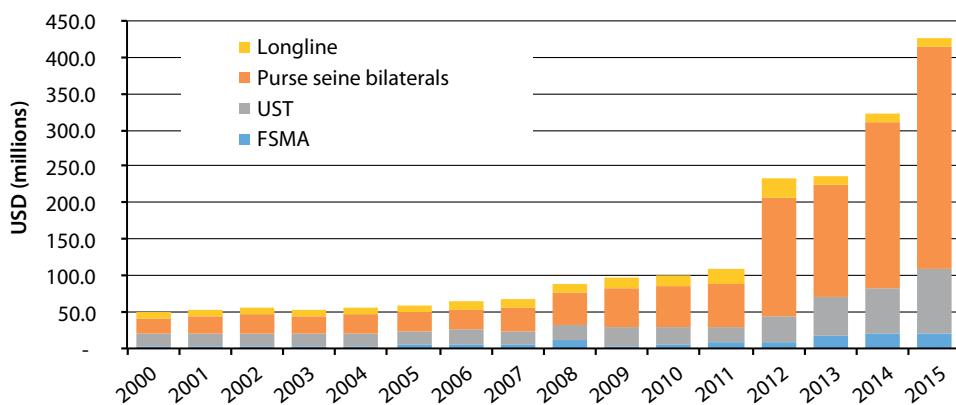
Goal 2 – Value

The Roadmap anticipates a doubling in the value of the region's tuna catch by 2024 (from a 2014 value of USD 3.1 billion). It notes, however, that this growth in value must be achieved by a growth in price rather than in volume.

This figure shows the baselines for fishery value in FFA waters and trends since 1997. Of note is the fall in the value of the purse seine fishery in 2013 and 2014 despite the fact that catches actually increased in those years. This was the result of sharp declines in market price, indicative of oversupply. The Roadmap sets out that increasing market prices is the key to achieving this goal (rather than further increases to catch). While FFA catches have increased, catches outside of FFA waters have grown far faster, which presents a substantial management challenge.



Value of access fees to FFA EEZs



Closely linked to the overall value of the catch in the fishery is the value of access that FFA members are able to sell to vessels to harvest fish. The figure shows very large growth in the overall value of access. However, all of this growth has been achieved from foreign flagged purse seine vessels through bilateral licensing under the Vessel Day Scheme and the US Treaty.

These two figures demonstrate that there are clear challenges and opportunities in increasing the returns from the longline fishery.



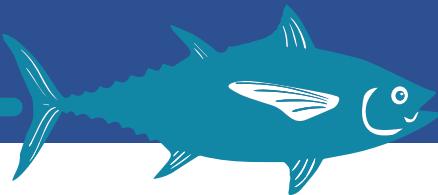


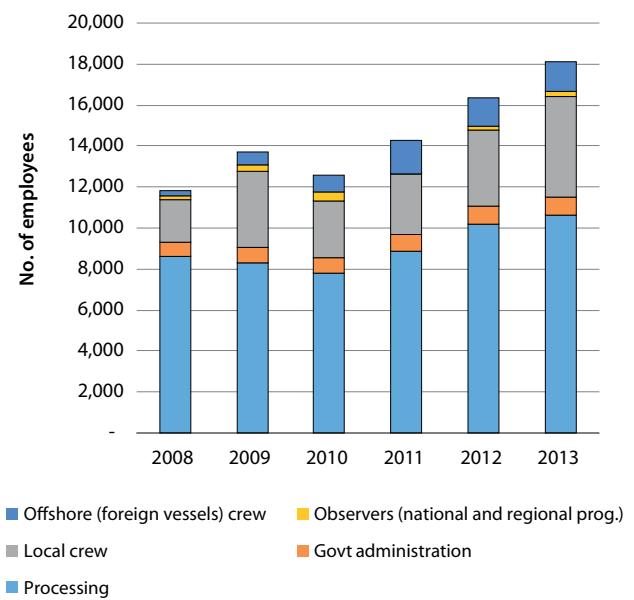
Photo: Malo Hosken

Goal 3 – Employment

Total direct employment in the fishing industry (FFA Pacific Island Country members' public and private sector) is estimated at around 18,000 jobs. The Roadmap anticipates a doubling of this figure within 10 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.

Employment in FFA countries' fisheries sector



Goal 4 – Food security

At present there is very 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. As part of achieving that ambitious target, data collection will need to be substantially enhanced.

Produced by the Pacific Islands Forum Fisheries Agency (FFA) in collaboration with the Secretariat of the Pacific Community (SPC)

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