



# Tuna Fishery Report Card 2018

## 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 into account the work of the **Task-force 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 now reflect Task-force-agreed targets.

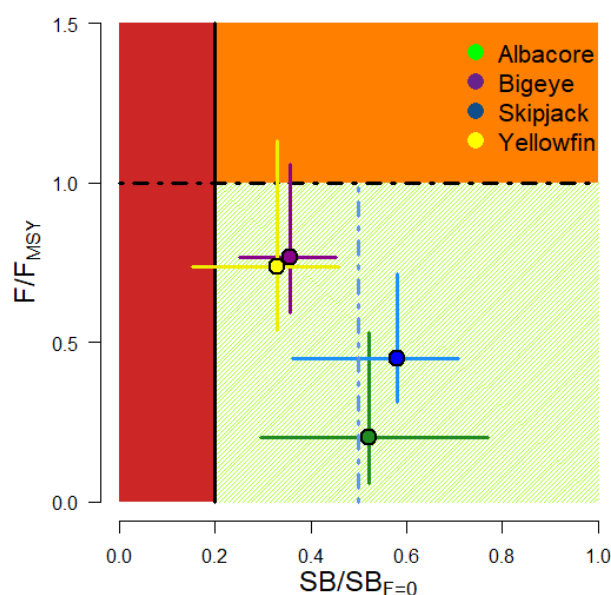
The information provided below indicates there has been continuing progress towards the achievement of these goals and targets.

## 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 only skipjack tuna has a TRP agreed by the Western and Central Pacific Fisheries Commission (WCPFC). FFA members have agreed a TRP for South Pacific albacore internally, but this has yet to be accepted by other WCPFC members.

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. Following more positive scientific advice on the status of the bigeye stock in 2017, all four major tuna stocks are now in the green "healthy" area. However, there is a continuing need for current management arrangements to be strengthened or supplemented to maintain this positive stock status.

"Majuro" Plot



### Target Species:

**Skipjack tuna is not overfished and overfishing is not occurring.** The stock is above the Target Reference Point.

**South Pacific albacore tuna is not overfished and overfishing is not occurring.** While economic conditions have improved slightly in recent years, the longevity of these improvements is unlikely without the implementation of measures to control effort/catch in the fishery.

**Yellowfin tuna, according to the 2017 assessment, is not overfished and overfishing is not occurring.** No work has been undertaken yet to determine a Target Reference Point to ensure an economically viable fishery.

**Bigeye tuna stock, according to the latest assessment undertaken in 2017, is NOT overfished and overfishing is NOT occurring.** The change in stock status is a result of the incorporation of new information into the scientific model, fisheries management measures and favourable biological recruitment of new fish into the stock.

## Other commercial species:

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

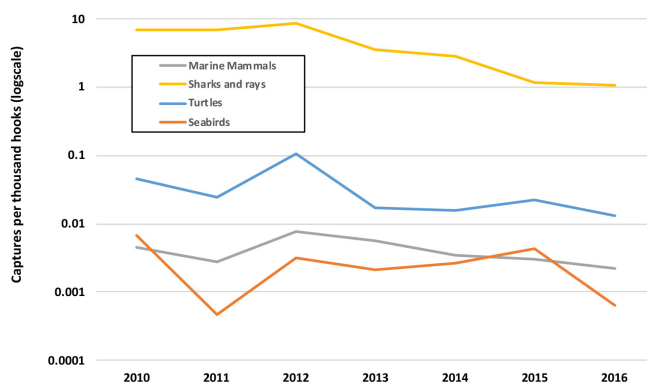
This Report Card does not cover Pacific bluefin tuna as that stock is rarely caught by FFA fleets or in FFA EEZs. As such FFA members have no real control over its exploitation and limited influence on the design of management measures.

## Bycatch:

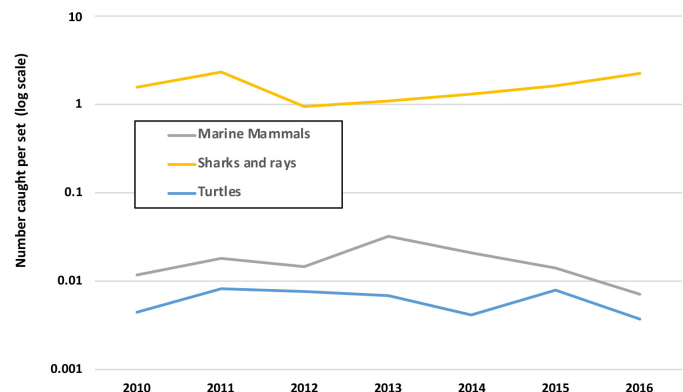
The objective for bycatch species such as **sharks, turtles, marine mammals** and **seabirds** is to significantly reduce capture. In longline fisheries the bycatch rate recorded by observers for sharks and turtles has decreased notably in recent years, which coincides with measures to reduce capture. However, assessments indicate concerns over the declining populations of several shark species including **Silky shark** and **Oceanic Whitetip shark**.

### Longline and purse seine and bycatch rates as measured by ROP observers in EEZs of FFA members

Longline (5% observer coverage target)



Purse seine (100% observer coverage target)

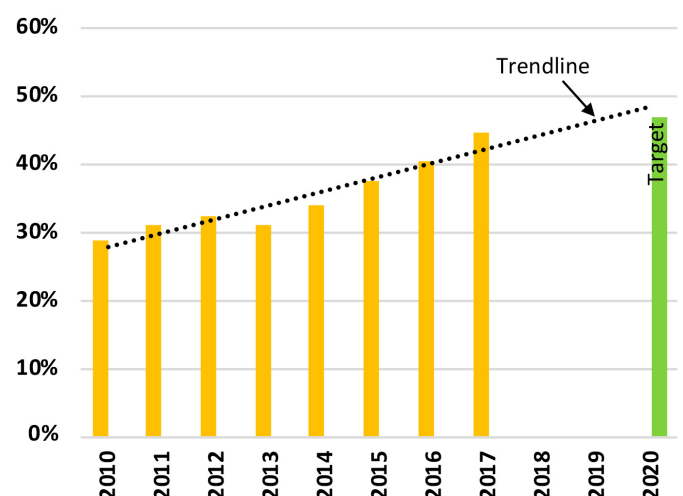


## Goal 2 – Value

Increasing the share of the catch taken by FFA fleets by 25% over 5 years is the agreed Task-force Programme objective, both to increase economic returns and to strengthen coastal state control of the fishery.

While the majority of the catch (both in quantity and value) in FFA Members' waters continues to be taken by foreign vessels the **share taken by FFA fleets has increased significantly in recent years, with the value share rising from 31% in 2013 to 45% in 2017, mainly due to increased participation in the purse seine fishery. Given these trends the 2020 target of 47% remains achievable.**

### FFA fleet's share of the value of the catch

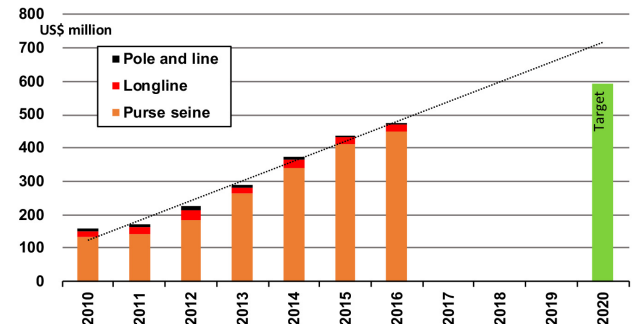


## Economic returns

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.

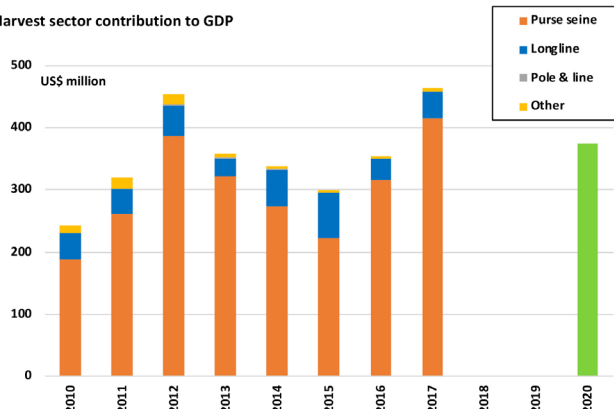
**License and access fee revenue:** The figure at right shows very large growth in the overall value of license and access fee revenue. Under the current trend the **25% increase is likely to be achieved before 2020**. However, this growth has been achieved from purse seine vessels operating under the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

License and access fee revenue

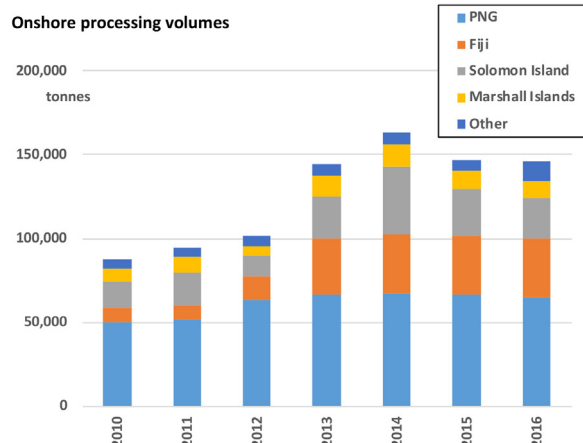


**Contribution to GDP (value added):** The contribution to GDP of the tuna fishery harvest sector (that is, fishing by domestic and locally-based fleets in all waters), after falling between 2012 and 2015 due to declines in fish prices, has since rebounded. **In 2017 the contribution of the harvest sector to GDP of FFA members reached its highest recorded level.** The recent increases have been driven by the purse seine fishery which saw continued increases in the catch taken by FFA fleets and significant increase in skipjack and yellowfin prices. In the processing sector in 2016 volumes remained flat at 2015 levels. Data for 2017 is not currently available.

Harvest sector contribution to GDP



Onshore processing volumes

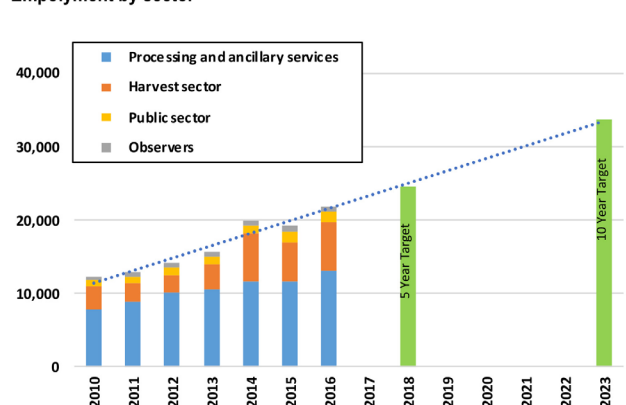


## Goal 3 – Employment

Total direct employment in the fishing industry (FFA Pacific Island members' public and private sectors) continues to grow, providing **22,000 jobs in 2016 – an increase of around 6,300 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.

Employment by sector



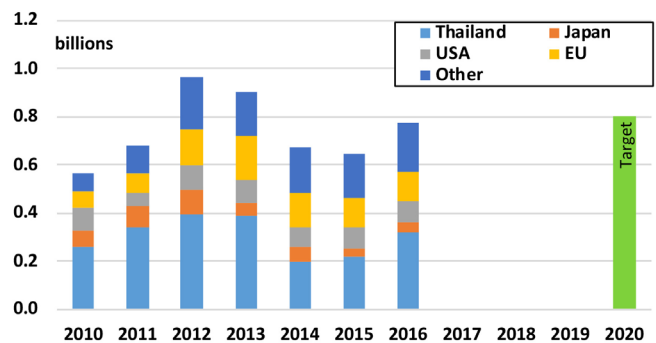


## Trade and Investment

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.

Following substantial growth from 2010 to 2012, values fell each year up to 2015 due to falling prices. In 2016 export values rose as fish prices recovered. The target for 2020 for an increase of 25% from 2015 levels was likely achieved in 2017 as a result of continued growth in the value of catches by the fleets of FFA members. Further diversification of export markets is proposed.

Value of tuna imports from FFA members



## 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 fleets, with several countries requiring licensed vessels to land to onshore bases with by-catch going to the local market. The importance of these tuna landings by commercial fisheries will be examined in a study in late 2018. In addition, many countries have programmes to increase tuna catches by artisanal fleets (mainly by provision of anchored Fish Aggregating Devices (FADs). Recent studies have 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 3,000 tonnes (Solomon Islands) to 3,300 tonnes (PNG) – equivalent to 22,000 tonnes of whole tuna in total.



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