

# PNA COVID-19 Purse Seine Dashboard

## December 2022

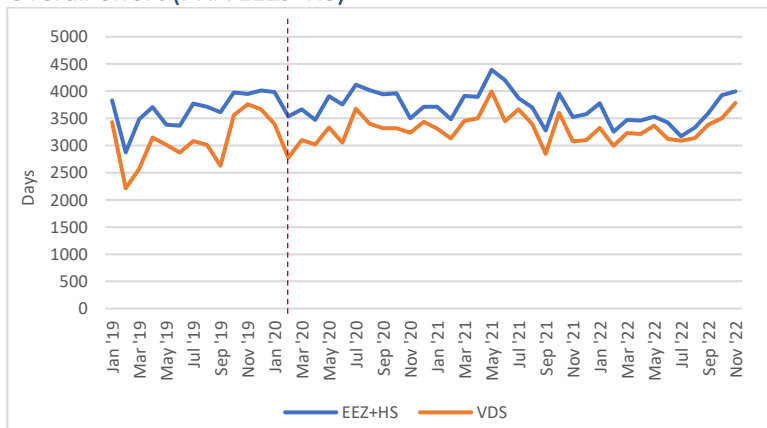


### Key trends:

- Preliminary figures indicate that overall purse seine fishing effort rose in November, with fishing intensity (fishing days/calendar day) increasing to the highest level in 2022. Note that November figures may be adjusted as NFDs are processed.
- Total purse seine catch (EEZs+HS) fell slightly in November, down by around 3% on the October catch. Catch and effort remained concentrated in the west, with PNG and FSM collectively accounting for around 69% of total catch. Preliminary data indicates that effort is high in PNG in December.
- Based on preliminary figures, overall catch rates fell slightly in November. Highest catch rates were in PNG and FSM.
- Reported transshipment volumes remained relatively stable in November, down by around 2% on the October figures. Reported volumes were highest in PNG and FSM. Note that transshipment volumes are not available for all vessels.
- Bangkok SKJ prices averaged \$1,700 in November, up from \$1,580 in October, according to Thai Union figures. Singapore MGO price remained stable, averaging \$1,042/mt in October. The differential between BKK SKJ price and Singapore MGO price rose, but remained below the 10-year average.
- Amongst PNA Parties, all countries (except Tokelau) have now experienced major COVID community transmission events at some stage during the pandemic, although new daily case numbers are now low in each country. Amongst key SE Asian processing countries, case numbers are low levels relative to population size.

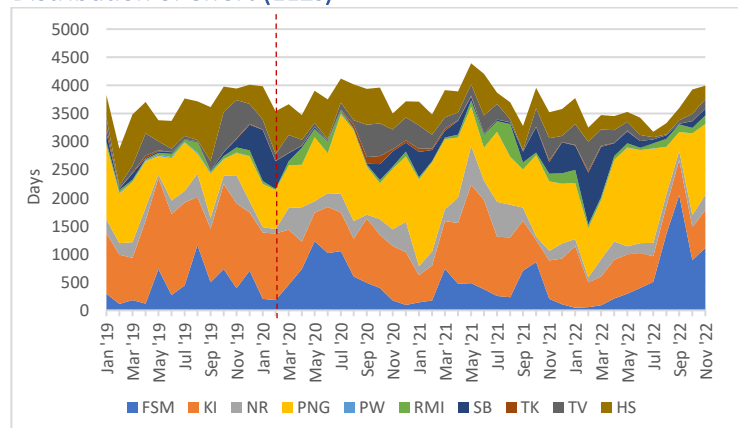
### Fishing effort

#### Overall effort (PNA EEZs+HS)



- Overall fishing effort (EEZ+HS) rose slightly in Nov, up around 2% on Oct. Fishing intensity (fishing days/calendar day) also rose to the highest levels since mid-2021. VDS usage was above average for Nov during the 2015-21 period.

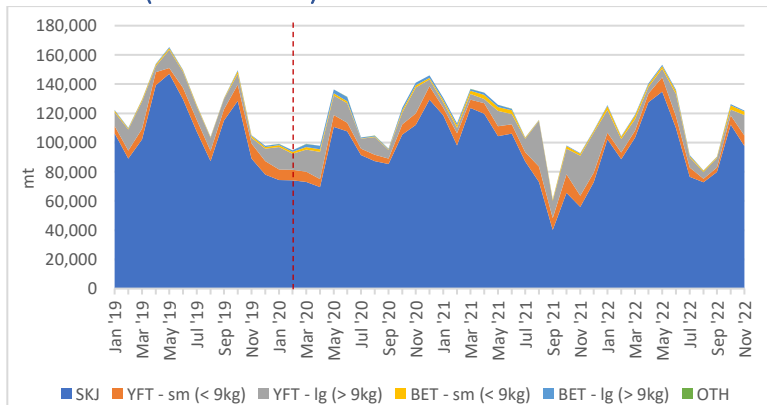
#### Distribution of effort (EEZs)



- Effort was highest in PNG and FSM, collectively accounting for around 59% of overall effort. Effort rose in FSM, and fell in PNG and the HS. Preliminary figures indicate high levels of effort in PNG in Dec.

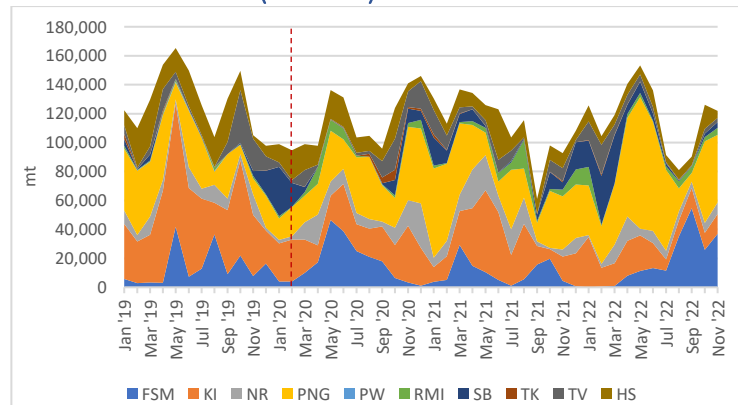
### Catch

#### Total catch (PNA EEZs+HS)



- Total catch (EEZ+HS) fell slightly in Nov, down by 3% on the Oct total (121,971t vs 126,207t). The catch was around average for the 2019-21 period. Catches of SKJ fell slightly, while catches of large YFT rose.

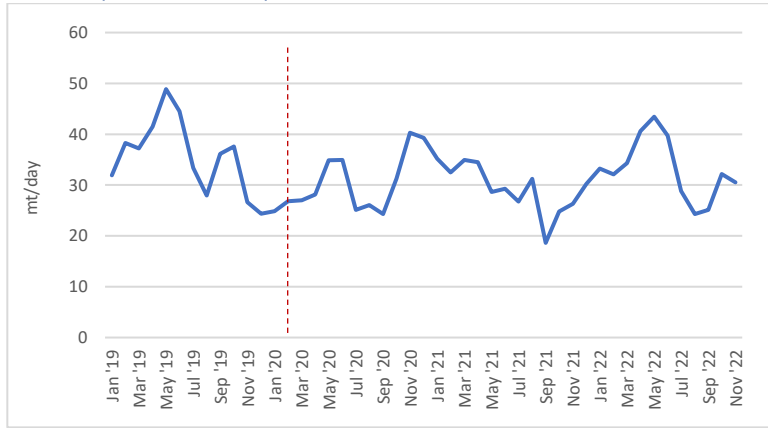
#### Distribution of catch (EEZs+HS)



- Catches remained concentrated in the west in Nov, with catches in PNG and FSM collectively accounting for 69% of overall catch. Catches in FSM rose, while catches in PNG and the HS fell.

## Catch rates

### Overall (PNA EEZs+HS)



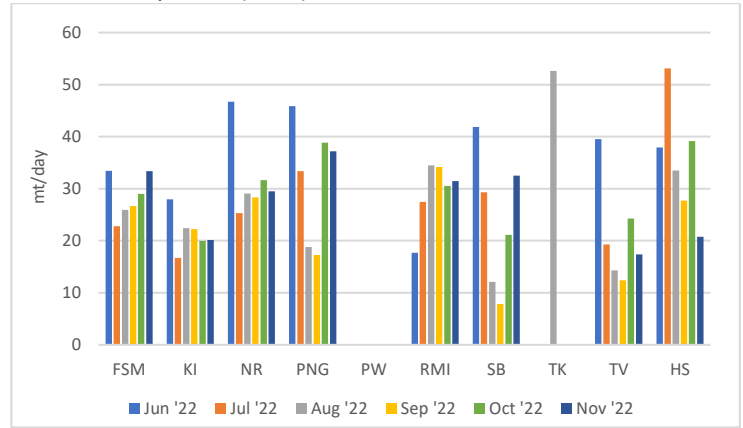
- Overall catch rates fell slightly in Nov, down about 5% on the Oct figure. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Skipjack



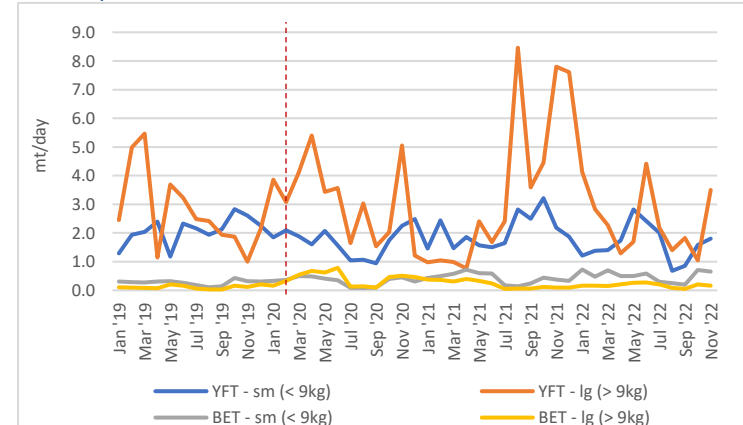
- SKJ catch rate fell in Nov, down by around 15% on the Oct figure.

### Catch rate by zone (EEZs)



- Preliminary figures indicate that catch rates varied across the region, with rates highest in PNG and FSM. Catch rates rose in SB and fell on the HS.

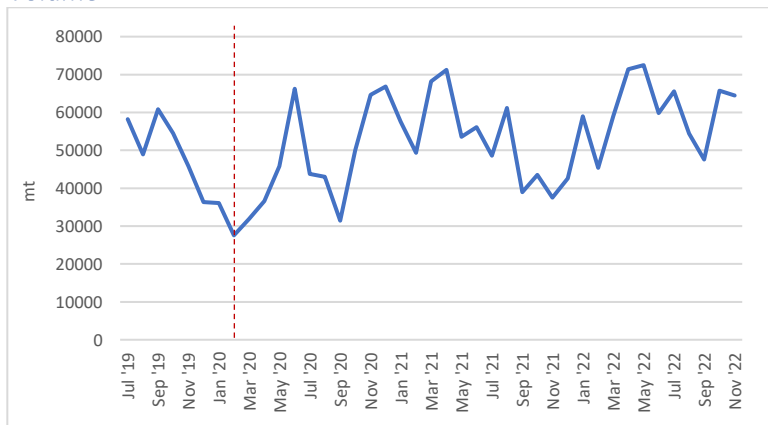
### Other species



- Amongst the other purse seine species/size categories, catch rates rose for large and small YFT, but fell slightly for large and small BET.

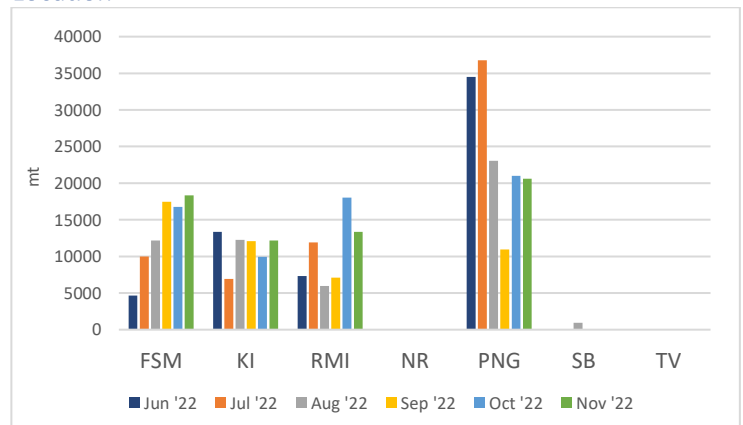
## Reported Transshipment

### Volume



- Reported transshipment volumes in PNA ports remained stable in Nov, down by around 2% on Oct volumes (from 65,696t to 64,447t). Note that transshipment volumes for some vessels are not available, so the figures reported here represent a sub-set of overall volumes.

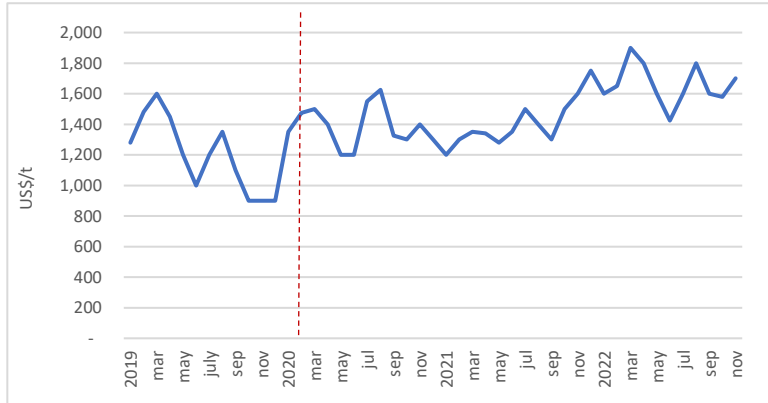
### Location



- Reported transshipment volumes remained highest in the west in Nov, with highest volumes in PNG, FSM and RMI. Reported transshipments in RMI fell slightly, while other ports remained relatively stable.

## Prices

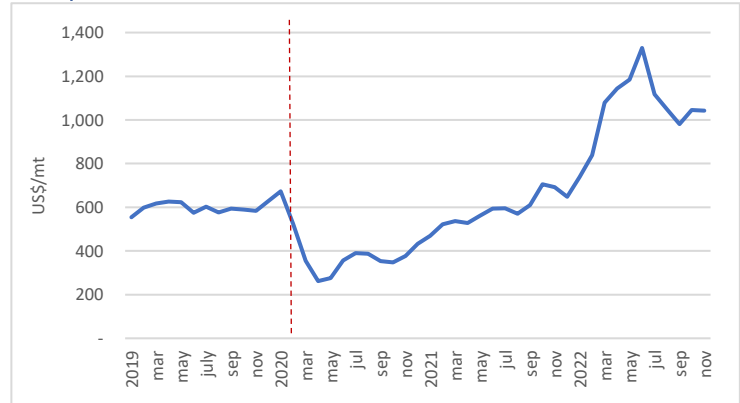
### SKJ Price



[https://investor.thaiunion.com/raw\\_material.html](https://investor.thaiunion.com/raw_material.html)

- Thai Union report that Bangkok SKJ prices averaged around \$1700 in Nov, up from \$1580 in Oct. The Nov '22 price is the highest monthly Nov price since 2017.

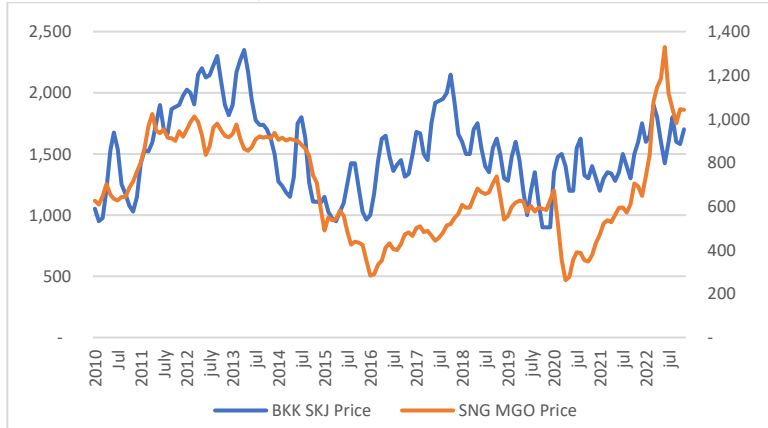
### Fuel price



<https://shipandbunker.com/prices/apac/sea/sg-sin-singapore#MGO>

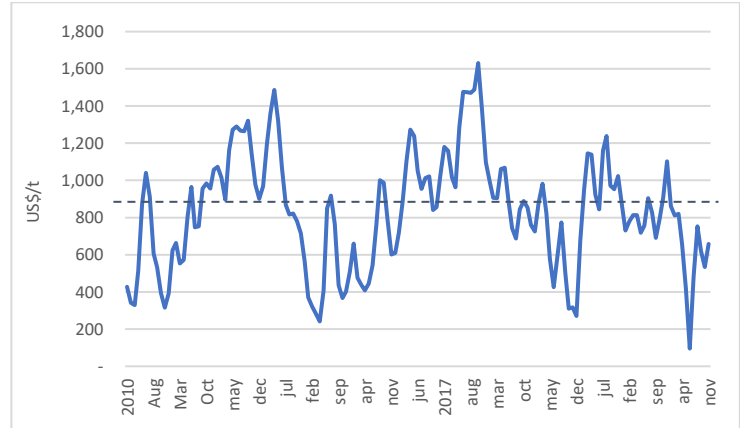
- Singapore MGO price remained stable in Nov, averaging US\$1042/mt, similar to the Oct price (\$1,046/mt). Price has fallen slightly in Dec, sitting at US\$917/mt as at Dec 22<sup>nd</sup>.

### BKK SKJ Price vs Fuel price



- The Singapore MGO price and SKJ price converged slightly in Nov with the rise in SKJ price. Nevertheless, the fuel price remains high relative to the SKJ price in historical terms.

### Price differential (BKK SKJ – Fuel)

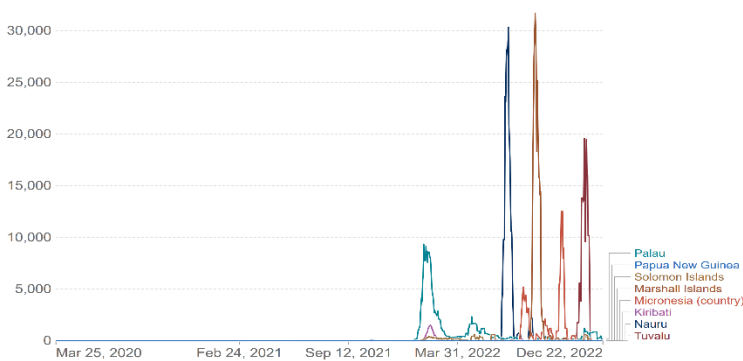


- The price differential between BKK SKJ price and Singapore MGO rose slightly in Nov to US\$658, up from US\$535 in Oct. The differential remains below the 10yr average of \$835.

## COVID-19 cases

### Daily confirmed cases – Pacific Island countries

Daily new confirmed COVID-19 cases per million people 7-day rolling average. Due to limited testing, the number of confirmed cases is lower than the true number of infections.



Source: Johns Hopkins University CSSE COVID-19 Data

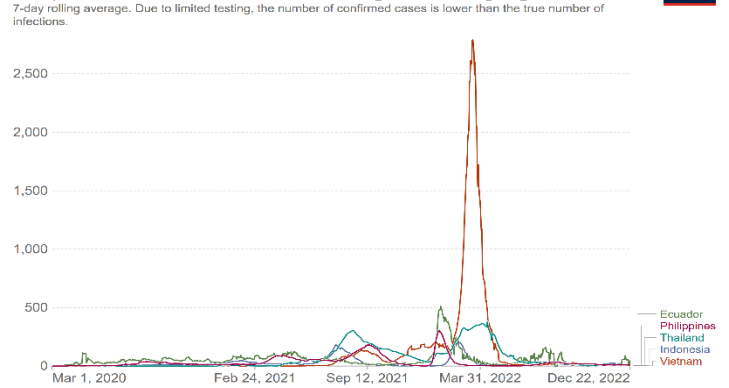
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<https://ourworldindata.org/covid-cases>

- Short, very sharp waves of community transmission experienced in PNA countries in the latter half of 2022 subsided in December, with new daily case numbers now at relatively low levels in each Party.

### Daily confirmed cases – Processing countries

Daily new confirmed COVID-19 cases per million people 7-day rolling average. Due to limited testing, the number of confirmed cases is lower than the true number of infections.



Source: Johns Hopkins University CSSE COVID-19 Data

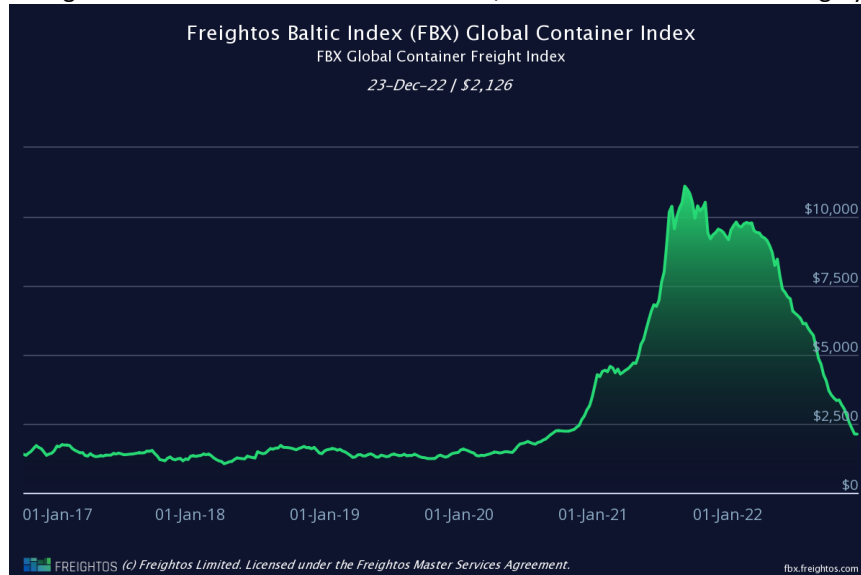
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<https://ourworldindata.org/covid-cases>

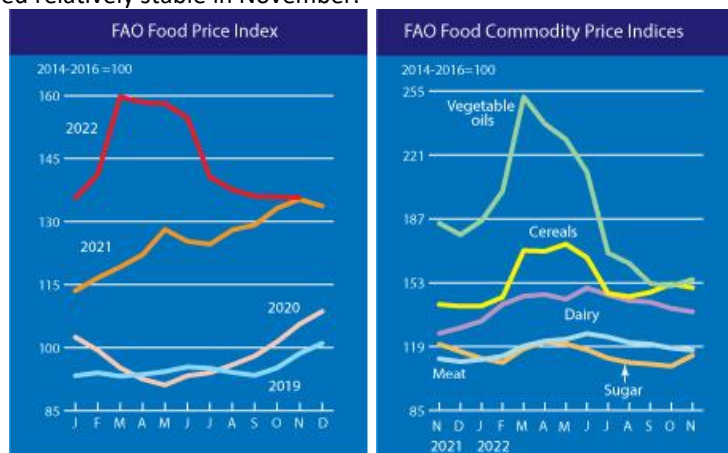
- New daily case numbers across all main processing countries are now at low levels relative to population size.

Other issues:

- Amongst the PNA Parties, all (except Tokelau) have now experienced high levels of COVID community transmission at some point throughout the pandemic. New daily case numbers across all Parties have fallen to relatively low levels<sup>1</sup>.
- SPC report that rates of vaccination in the Pacific are generally very high, with each of NR, PW, TV, TK and KI achieving >90% double dose vaccination rates amongst PNA Parties<sup>2</sup>. Vaccination rates in PNG remain very low.
- The FBX global container freight index continued to fall in November, and has now returned to roughly pre-COVID levels<sup>3</sup>.



- The FAO Food Price Index remained stable in November, but remains at historically high levels<sup>4</sup>. Amongst the other food commodities, most remained relatively stable in November.



Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 24<sup>th</sup> December, 2022. Some data may change as more information is added over time. Figures for November 2022 should be considered preliminary.
- The EEZs+HS effort figures in the fishing effort graph do not include a VDS vessel size adjustment factor. The actual VDS usage figures are adjusted for vessel size. HS days may include some non-fishing time. HS effort figures are those for the eastern high seas and HSPs 4 and 5.
- A dashed-red line has been on many graphs at February 2020 to provide an indication of the time in which COVID-related restrictions were becoming more common globally and regionally.

<sup>1</sup> <https://www.spc.int/updates/blog/2022/10/covid-19-pacific-community-updates#CurrentStatus>  
<sup>2</sup> <https://www.spc.int/updates/blog/2022/06/covid-19-pacific-community-updates#CurrentStatus>  
<sup>3</sup> <https://fbx.freightos.com/>  
<sup>4</sup> <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>