

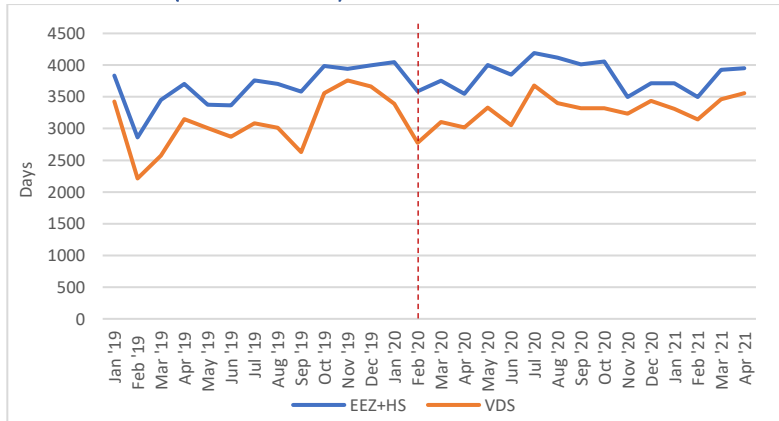


### Key trends:

- Preliminary figures indicate that overall purse seine fishing days and fishing intensity (fishing days/calendar day) rose in Apr. Note that April figures may be adjusted as NFDs are processed.
- Total purse seine catch fell slightly in April, but remained high relative to the '20-'21 period. Fishing effort broadened out, with roughly equal days fished in PNG and KI. Catch was highest in KI, PNG and NR.
- Based on preliminary figures, overall catch rates fell slightly in April, albeit remained high relative to the '20-'21 period. Catch rates for SKJ fell slightly, while catch rates of large YFT fell to their lowest level since at least Jan '19.
- Transshipment volumes rose again in April, reaching their highest level since at least mid-2019. PNG ports continued to dominate transshipments, accounting for around 57% of total PNA volume. Collectively PNG and KI ports accounted for 86% of total transshipment volume.
- Bangkok SKJ prices remained relatively stable in April (falling from US\$1,350 in March to \$1340 in April) according to Thai Union figures. The 2021 figure is the lowest April price since 2015. Singapore MGO price stabilised in April, flattening out at levels slightly lower than those pre-pandemic. The differential between SKJ price and Singapore MGO price remained below the 10 yr average for the fourth month running.
- Thailand is currently experiencing its most pronounced spike of cases to date in the pandemic, with up to 4,000 new cases daily in mid-May. New daily cases in PNG fell briefly in early May, but rose again in mid-May.

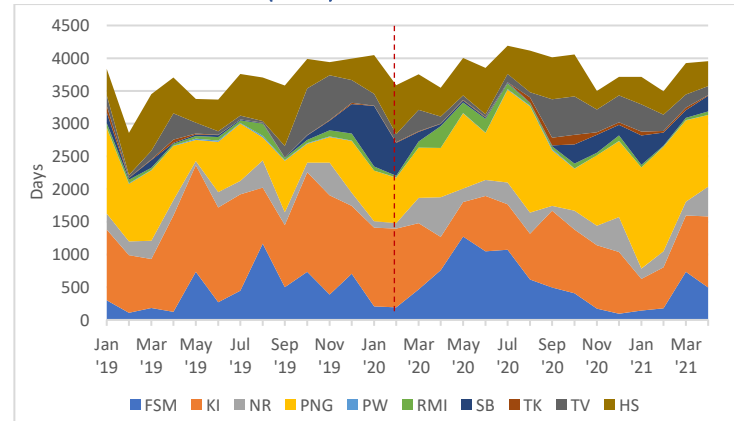
### Fishing effort

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



- Overall fishing effort (EEZ+HS) rose in Apr, with fishing intensity (fishing days/calendar day) also rising slightly. Note that Apr figures are preliminary and may reduce slightly as NFD applications are processed.

#### Distribution of effort (EEZs)



- Effort was broadly distributed in Apr with roughly equal numbers of days in PNG and KI. Effort fell in FSM and TV and rose in NR and SB.
- Preliminary figures indicate effort has shifted east in May with effort highest in KI.

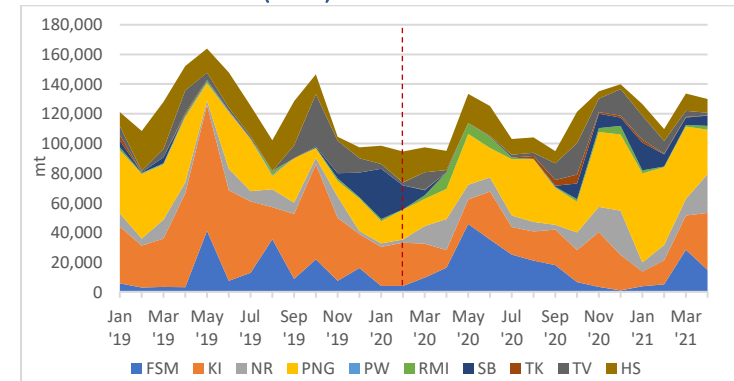
### Catch

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



- Catch (EEZ+HS) in Apr (129,924t) fell by around 3% on the Mar figure, albeit remained at high volumes relative to the '20-'21 period. Apr catch figures are preliminary and may be adjusted upwards slightly as additional reports are received.

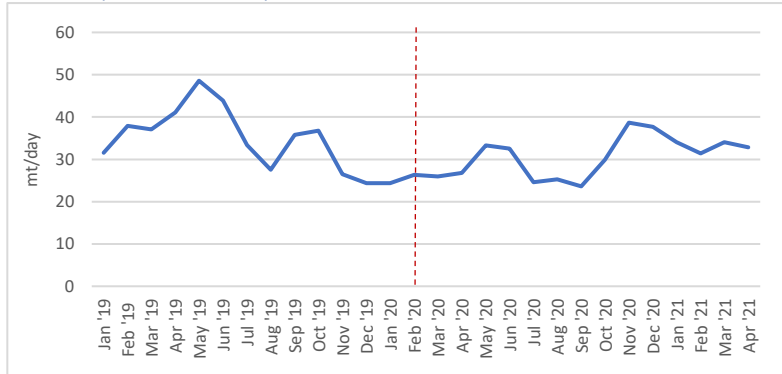
#### Distribution of catch (EEZs)



- After a number of months where catches have been highest in PNG, fishing shifted eastwards in Apr with catches highest in KI. Catch also rose in NR. Catch fell in PNG, albeit still accounted for 23% of the total catch. Catches fell in FSM.

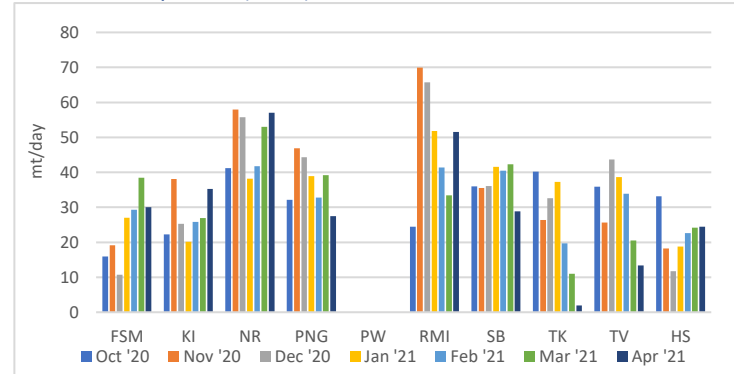
## Catch rates

### Overall (PNA EEZs+HS)



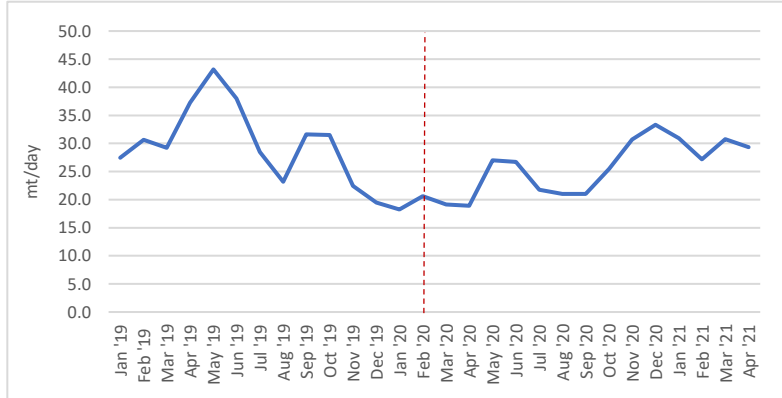
- Overall catch rates were relatively stable in Apr, remaining at some of the highest levels in the previous 18 months. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Catch rate by zone (EEZs)



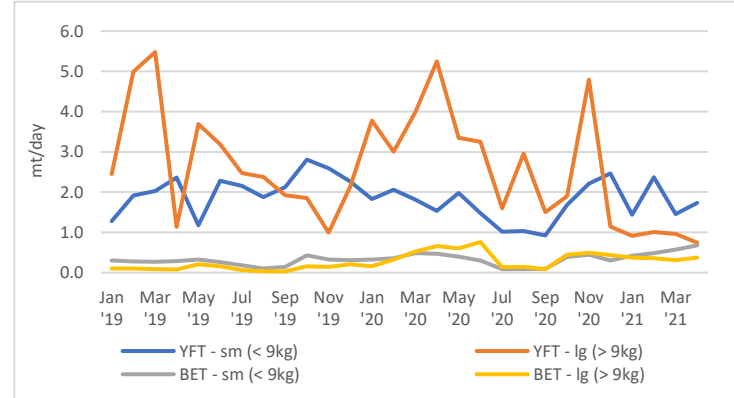
- Preliminary figures indicate that catch rates rose in KI, NR and RMI, but fell slightly in PNG, FSM, SB and TV.

### Skijack



- SKJ catch rate fell slightly in Apr, but remained high relative to the 2020-21 period.

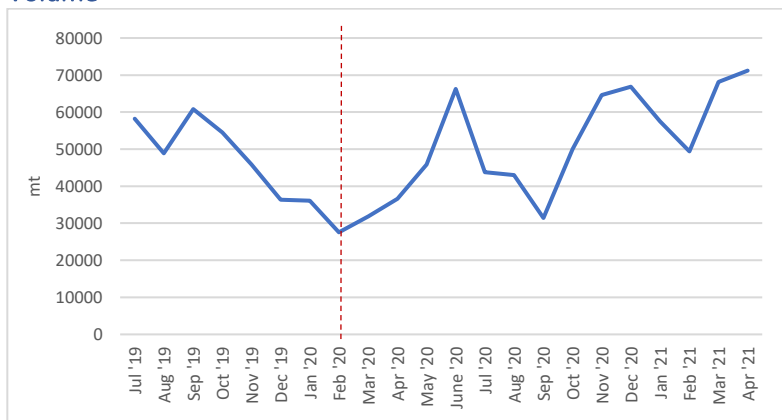
### Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT fell further in Apr to their lowest level in the 2019-2021 period. Catch rates of small YFT and small BET rose slightly.

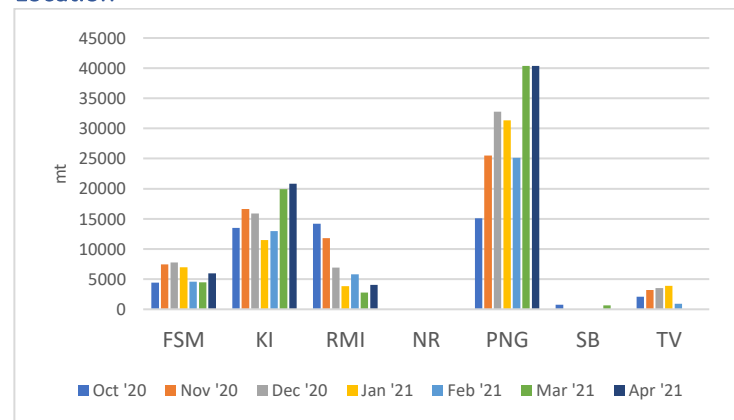
## Transshipment

### Volume



- Transshipment volumes in PNA ports continued to rise in April (from 68,185t to 71,194t) to the highest level since the start of the COVID pandemic.

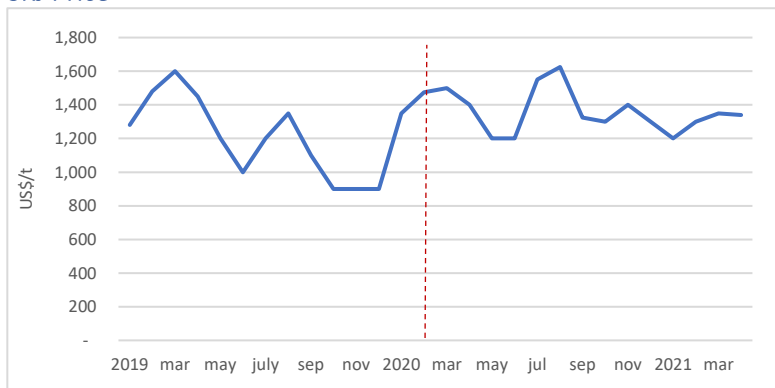
### Location



- Transshipment volumes continued to be highest in PNG ports, accounting for around 57% of all PNA volume. Volumes also grew slightly in FSM, RMI and KI. Between them, PNG and KI accounted for 86% of all PNA transshipment volume.

## Prices

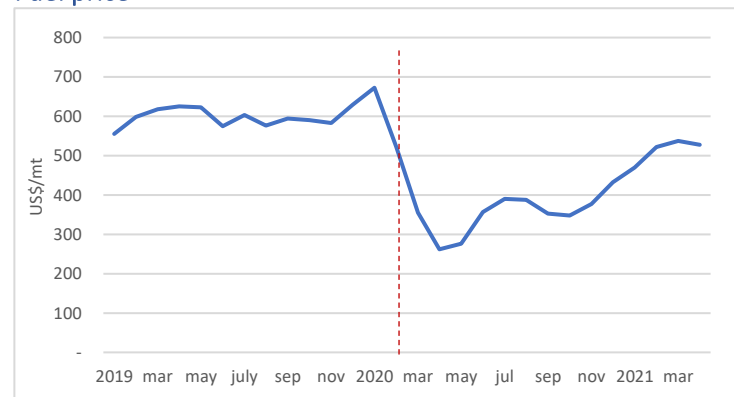
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices decreased very marginally to \$1340 in Apr, down from \$1350 in Mar. The 2021 figure of \$1340 is the lowest Apr price since 2015. As at mid May '21, Atuna reports that Bangkok CFR price for SKJ remained stable at \$1,325. Manta price had fallen slightly to \$1600.

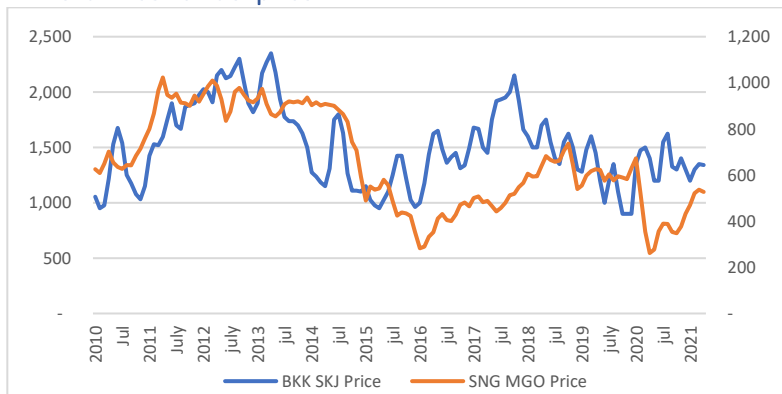
### Fuel price



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

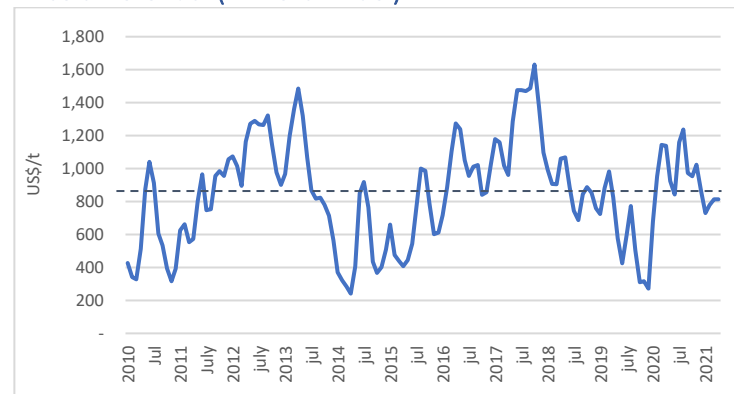
- Singapore MGO price levelled off in April, averaging US\$528/mt. Price remains below pre-COVID levels, but has recovered much of the ground. As of May 20<sup>th</sup> 2021, price had risen slightly to \$558/mt.

### BKK SKJ Price vs Fuel price



- BKK SKJ price and Singapore MGO price both remained relatively stable in Apr.

### Price differential (BKK SKJ – Fuel)



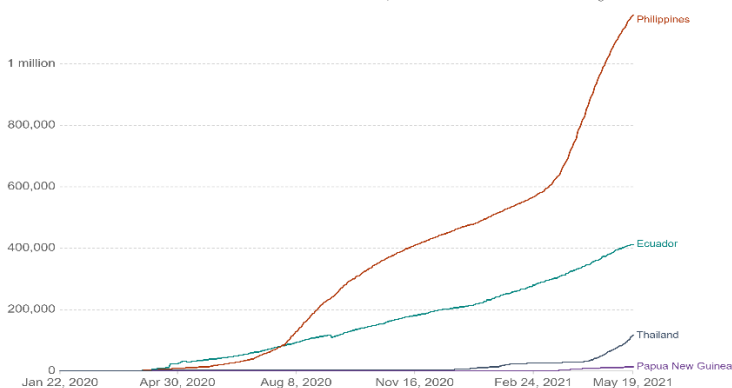
- The price differential between BKK SKJ price and Singapore MGO price remained stable at \$813 in Apr. The Apr figure is below the average 10 year price difference of \$852 for the fourth month running.

## COVID-19 in processing countries

### Total cases

#### Cumulative confirmed COVID-19 cases

The number of confirmed cases is lower than the number of actual cases; the main reason for that is limited testing.



Source: Johns Hopkins University CSSE COVID-19 Data

Our World in Data

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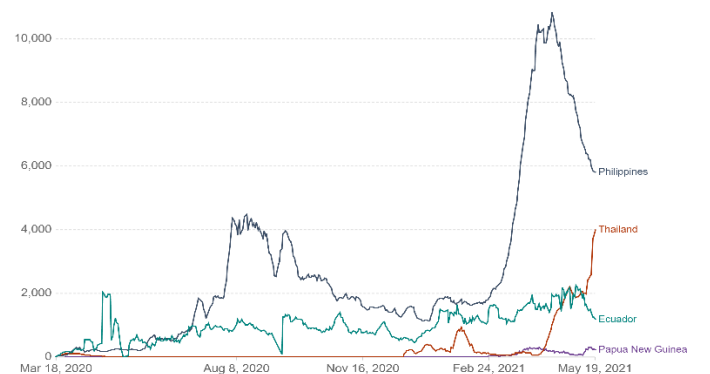
<https://ourworldindata.org/covid-cases>

- Thailand continues to fare comparatively better than other key processing centres including Ecuador and the Philippines in terms of confirmed COVID-19 cases.

### Daily confirmed cases

#### Daily new confirmed COVID-19 cases

Shown is the rolling 7-day average. The number of confirmed cases is lower than the number of actual cases; the main reason for that is limited testing.



Source: Johns Hopkins University CSSE COVID-19 Data

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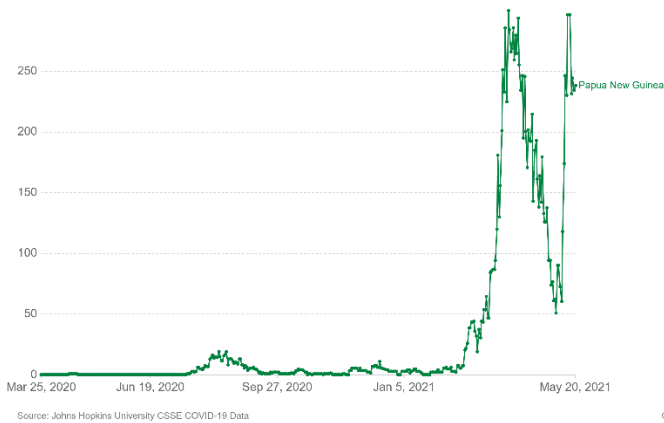
- The number of new cases in the Philippines has fallen substantially from a peak in April, 2021. However, Thailand is currently experiencing its worst peak of the pandemic, with around 4,000 new cases per day in recent days.

Other issues:

- As at May 20<sup>th</sup>, PNG is reported to have a cumulative total of 14,910 confirmed COVID cases, Solomon Is 20, Marshall Is 4 and FSM 1<sup>1</sup>.
- New daily cases in PNG fell in early May, but rose again in mid-May. Anecdotal reports suggest around 1 in 3 people tested at Port Moresby Hospital are returning positive tests<sup>2</sup>. Amongst processing countries, Ecuador’s ‘positive rate’ (proportion of COVID tests that are positive) remains high, while Philippines is falling. Despite a recent spike in cases, Thailand’s positive rate remains relatively low. India’s positive rate is provided for comparison.

Daily new confirmed COVID-19 cases

Shown is the rolling 7-day average. The number of confirmed cases is lower than the number of actual cases; the main reason for that is limited testing.



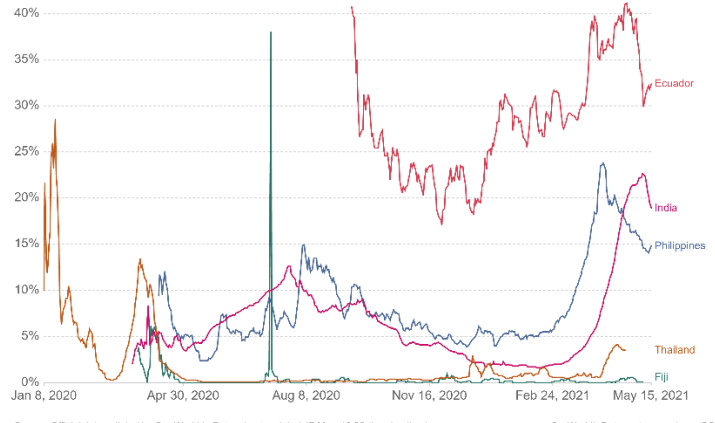
Source: Johns Hopkins University CSSE COVID-19 Data

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The share of COVID-19 tests that are positive

The daily positive rate, given as a rolling 7-day average.



Source: Official data collected by Our World in Data - Last updated 17 May, 16:30 (London time)

OurWorldinData.org/coronavirus - CC BY  
Note: Comparisons of testing data across countries are affected by differences in the way the data are reported. Daily data is interpolated for countries not reporting testing data on a daily basis. Details can be found at our Testing Dataset page

- Kiribati has imposed a night time curfew following the detection of two positive cases on a carrier vessel in Tarawa<sup>3</sup>. The vessel is currently in quarantine. One of the cases is an iKiribati who had reportedly recently completed a year long contract on a Taiwanese flagged purse seiner. The Kiribati national reportedly transferred from the purse seiner to the carrier in PNG. The other case is a foreign national.
- Interviewees in the Thai processing sector indicate that many of the cases in Thailand are in large clusters (e.g. jails, construction camps) that can be contained. Some tuna factories have suffered temporary disruptions, however the larger issue is the shortage of migrant workers which has meant many facilities are operating at 70-80% capacity. This has placed downward pressure on fish price.

Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 21<sup>st</sup> May, 2021. Some data may change as more information is added over time. Figures for April 2021 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://ourworldindata.org/covid-cases>

<sup>2</sup> <https://www.abc.net.au/news/2021-05-04/covid-19-numbers-fall-in-papua-new-guinea-fears-cases-missed/100107888>

<sup>3</sup> <https://www.rnz.co.nz/international/pacific-news/443063/curfew-imposed-in-kiribati-after-covid-discoveries>