

# PNA COVID-19 Purse Seine Dashboard

## September 2022

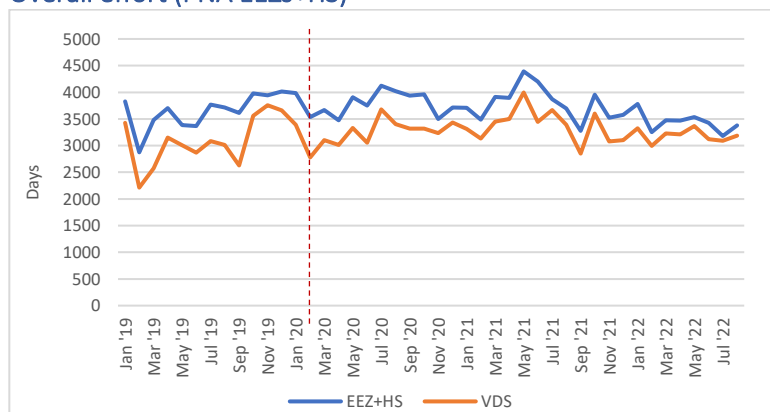


### Key trends:

- Preliminary figures indicate that overall purse seine fishing effort rose slightly in August, with fishing intensity (fishing days/calendar day) also increasing slightly. Note that August figures may be adjusted as NFDs are processed.
- Total purse seine catch (EEZs+HS) continued to fall in August, down by around 13% on the July total. The lower catch continued a trend for lower catches during the FAD closure. Catch and effort remained concentrated in the west, with around 66% of total catch in FSM and PNG. Preliminary data indicates that effort remains high in FSM in September.
- Based on preliminary figures, overall catch rates fell in August, although remained roughly consistent with August catch rates across the 2019-22 period. Catch rates fell across all species/size classes.
- Reported transshipment volumes fell by around 17% on July volumes, with reported volumes highest in PNG. Note that transshipment volumes for some ports are not available.
- Bangkok SKJ prices averaged \$1800 in August, up from \$1600 in July, according to Thai Union figures. Singapore MGO price continued to fall, averaging \$1,048/mt in August, down from \$1,117/mt in July. The differential between BKK SKJ price and Singapore MGO price rose sharply from the long-term low in June.
- Amongst PNA Parties, all countries have now experienced major community transmission events at some stage during the COVID pandemic, with the exception of Tuvalu (and Tokelau). Short, sharp waves of cases experienced by several PNA Parties in recent months have now subsided, with new daily case numbers across all Parties relatively low. Amongst key SE Asian processing countries, case numbers are low levels relative to population size.

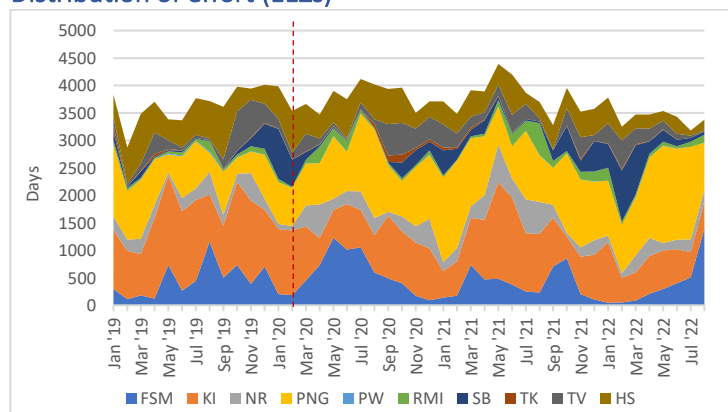
### Fishing effort

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



- Overall fishing effort (EEZ+HS) rose slightly in Aug, up around 6% on July. Fishing intensity (fishing days/calendar day) also rose slightly. VDS usage was roughly average for Aug during the 2015-21 period.

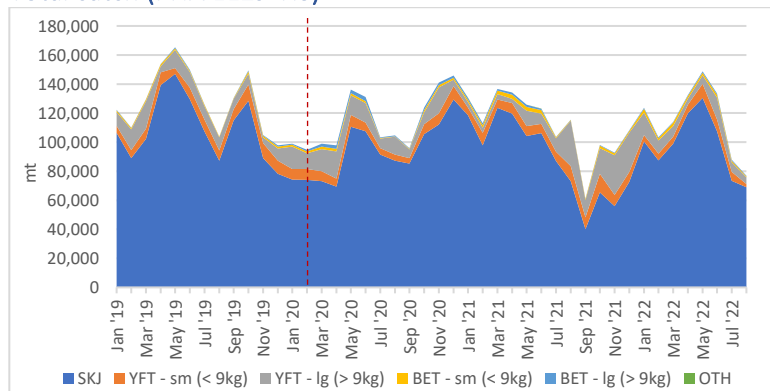
#### Distribution of effort (EEZs)



- Effort continued to be highest in the west, with FSM and PNG collectively accounting for 66% of total effort. Effort rose sharply in FSM, and fell in PNG. Preliminary figures indicate high levels of effort in FSM in Sept.

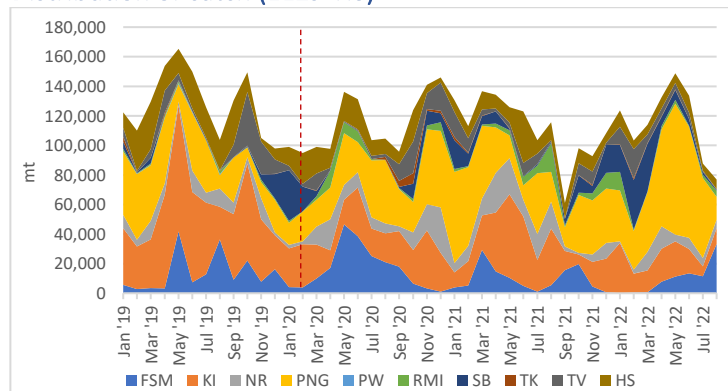
### Catch

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



- Total catch (EEZ+HS) declined again in Aug, down by 13% on the July total (76,797t vs 87,809t). The decrease was consistent with reduced catches in recent years during FAD closure. The catch was well below average for the 2019-21 period.

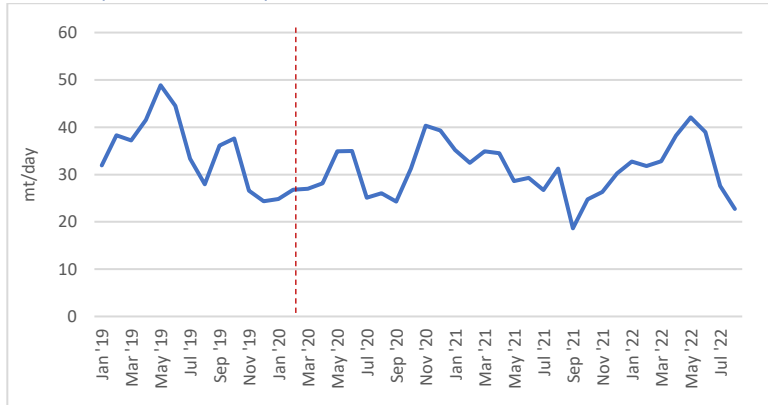
#### Distribution of catch (EEZs+HS)



- Catches broadly reflected effort, with catches highest in FSM. Catches rose slightly in RMI and KI, but fell sharply in PNG.

## Catch rates

### Overall (PNA EEZs+HS)



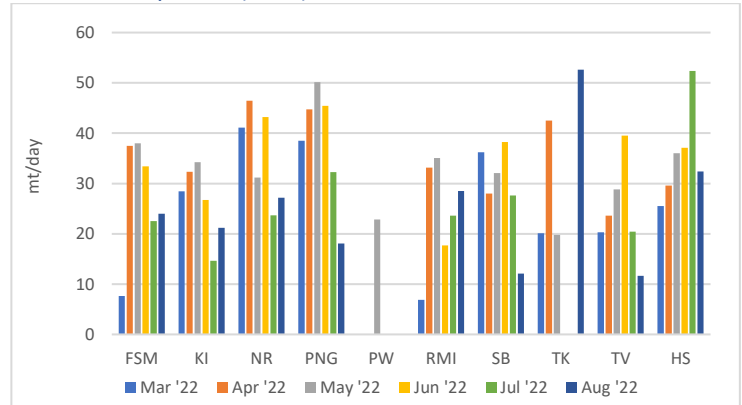
- Overall catch rates fell in Aug, continuing a general trend in recent years to fall through the FAD closure. The Aug catch rate was the second lowest in the 2019-21 timeseries. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Skipjack



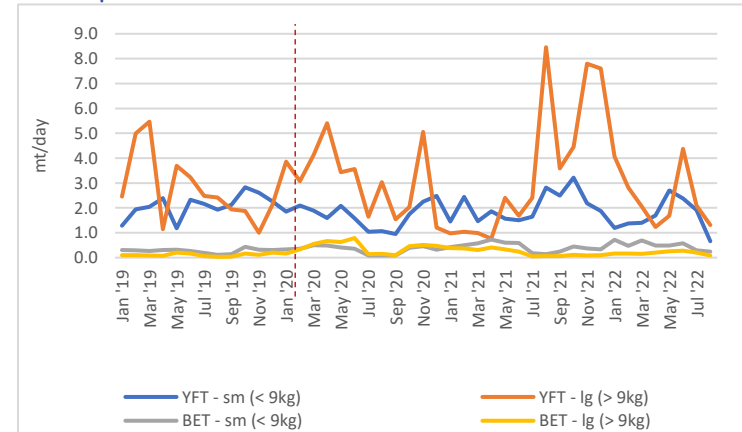
- SKJ catch rate fell in Aug, down around 12% on the July figure, although was similar to Aug catch rates across the 2019-21 period.

### Catch rate by zone (EEZs)



- Preliminary figures indicate that catch rates varied across the region, with rates highest in TK (albeit with negligible catch) and the HS. Catch rates rose in KI and RMI, but fell in PNG, SB and TV.

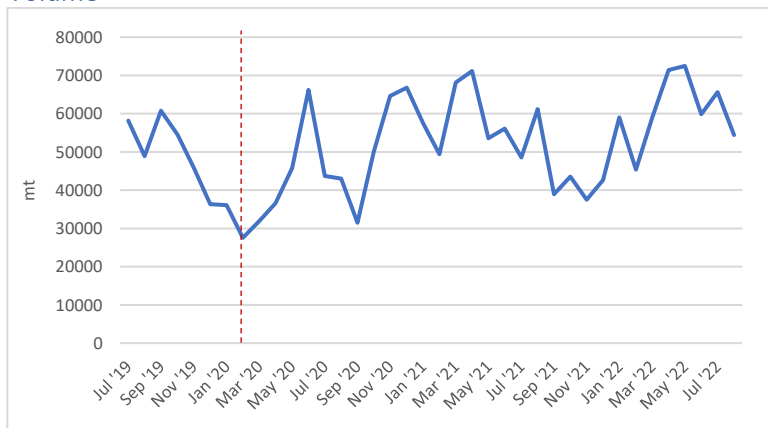
### Other species



- Amongst the other purse seine species/size categories, catch rates fell across all species/size categories.

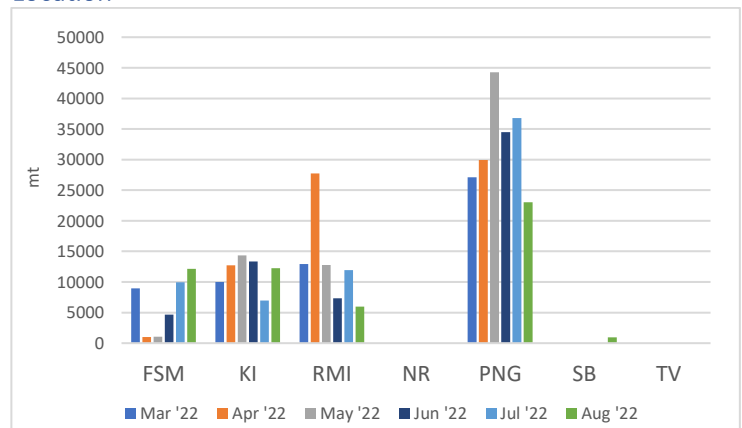
## Reported Transhipment

### Volume



- Reported transhipment volumes in PNA ports fell in Aug, down by around 17% on July volumes (from 65,602t to 54,390t). Note that transhipment volumes for some ports are not available, so the figures reported here represent a subset of overall volumes.

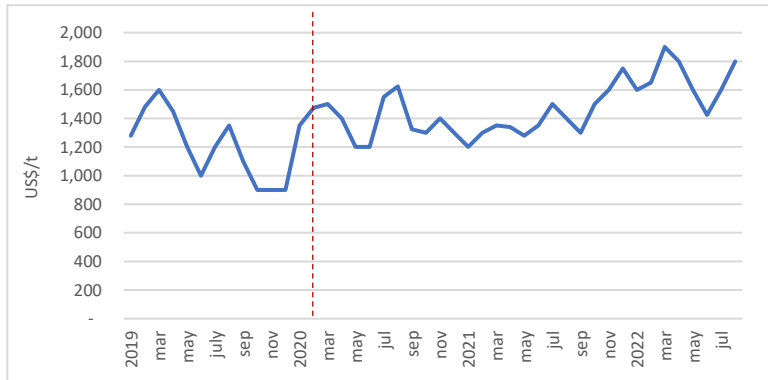
### Location



- Reported transhipment volumes continued to be dominated by PNG ports, accounting for 56% of overall volume. Transhipments rose in FSM and KI and fell in PNG and RMI.

## Prices

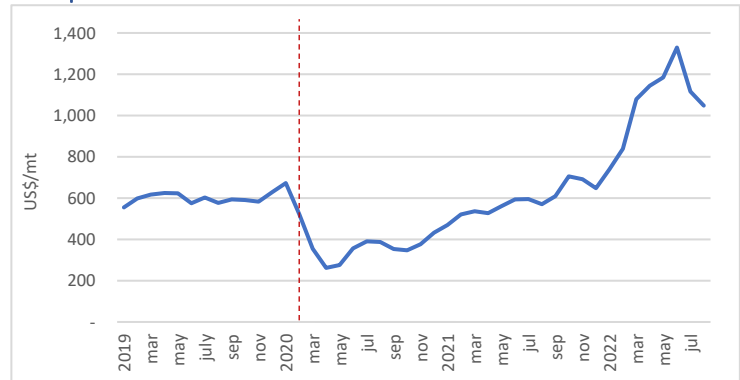
### OSKJ Price



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

- Thai Union report that Bangkok SKJ prices averaged around \$1800 in Aug, up from \$1600 in July. The Aug '22 price is the highest monthly Aug price since 2017.

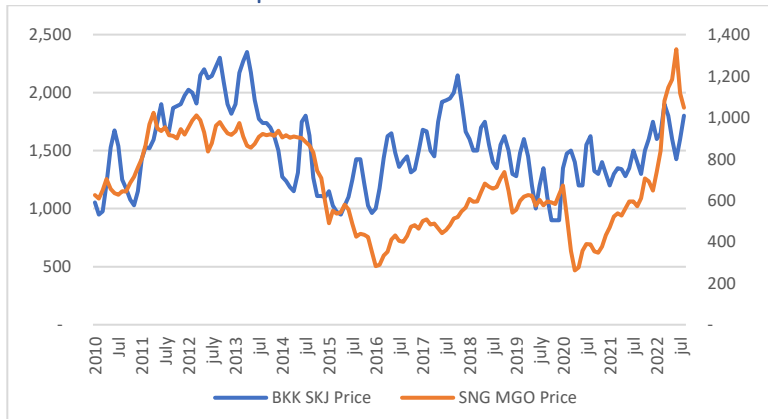
### Fuel price



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

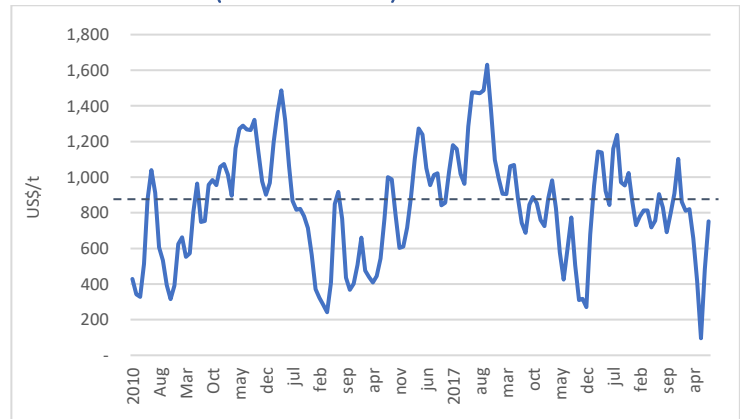
- After a largely consistent increase since May 2020, Singapore MGO price has fallen in recent months, averaging US\$1,048 in Aug, down from US\$1,117/mt in July. Price has continued to fall in Sept, sitting at US\$880/mt as at Sept 19<sup>th</sup>.

### BKK SKJ Price vs Fuel price



- In Aug, the Singapore MGO price line and SKJ price 'converged' with the rise in SKJ price and fall in fuel price.

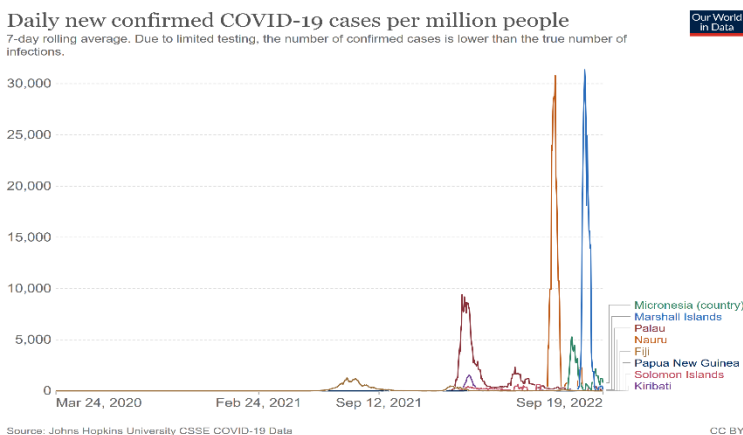
### Price differential (BKK SKJ – Fuel)



- The price differential between BKK SKJ price and Singapore MGO rose sharply in Aug to US\$752, up from US\$483 in July. The differential remains slightly below the 10yr average of \$849.

## COVID-19 cases

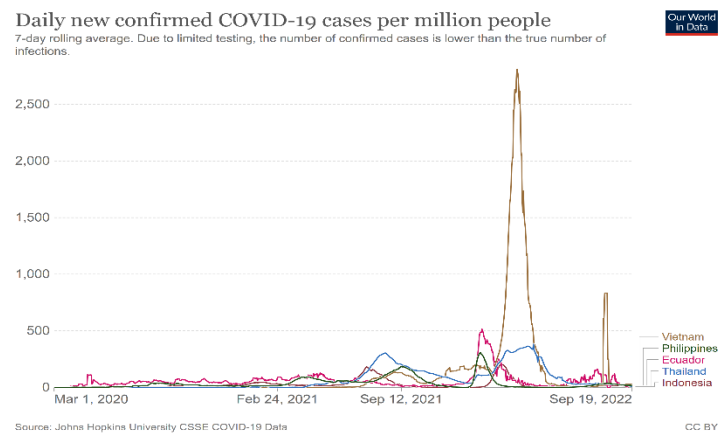
### Daily confirmed cases – Pacific Island countries



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

- Short, very sharp waves of community transmission in several PNA countries experienced between June and August appear to have receded, with most countries now reporting relatively low new daily case numbers in mid-Sept. FSM experienced a second, smaller spike in case numbers in early Sept, but new case numbers are now falling.

### Daily confirmed cases – Processing countries

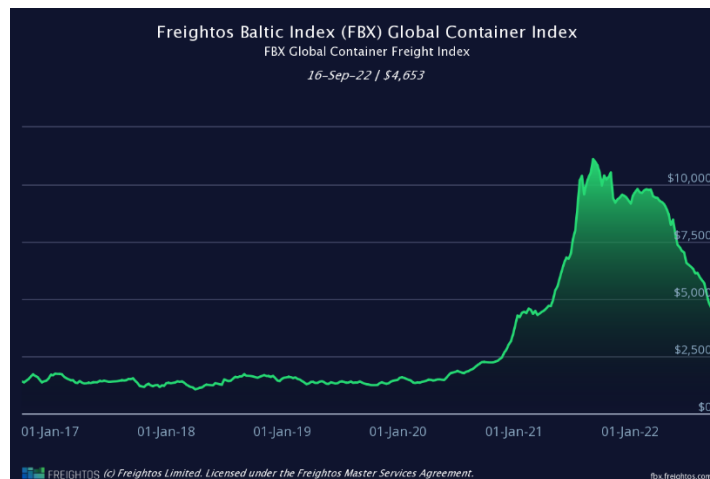


<https://ourworldindata.org/covid-cases>

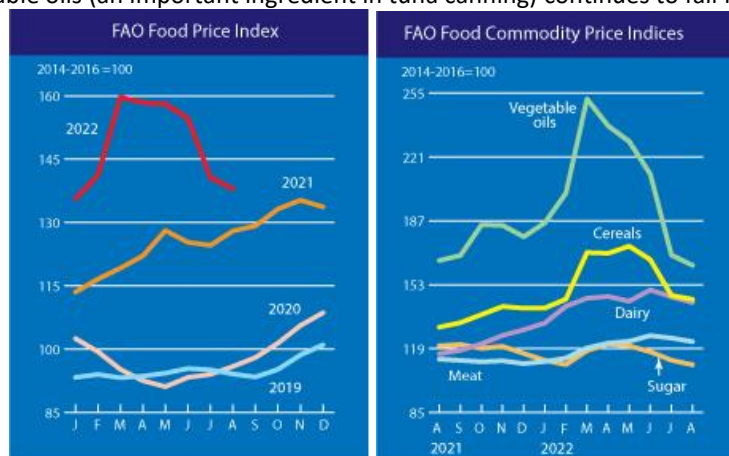
- Vietnam experienced a second, smaller spike in COVID cases in early August, but this since declined. New daily case numbers across all main processing countries are now at low levels relative to population size.

Other issues:

- Amongst the PNA Parties, all except Tuvalu (and Tokelau) have now experienced high levels of COVID community transmission at some point throughout the pandemic. The major wave of cases experienced by RMI has now subsided to low new daily case numbers, although cumulative case numbers reached 15,213 as at 20<sup>th</sup> Sept, with 17 confirmed deaths<sup>1</sup>. FSM experienced a second, more minor wave of cases in early Sept, with 31 confirmed deaths in total to 20<sup>th</sup> Sept. New case numbers in other PNA Parties remain low.
- SPC report that rates of vaccination in the Pacific are generally very high, with each of NR, PW, TV and KI achieving >90% first dose vaccination rates amongst PNA Parties<sup>2</sup>. Vaccination rates in PNG remain very low.
- The FBX global container freight index fell below \$5,000 for the first time since May '21, sitting at \$4,653 for a 40ft container on 16<sup>th</sup> Sept, down from a peak of around \$11,000 in mid-Sept 2021<sup>3</sup>. Nevertheless, freight rates remain around 3 times higher than pre-pandemic.



- The FAO Food Price Index fell for the fifth month in a row in Aug, down 1.9% on the July figure, but remains at historically high levels<sup>4</sup>. The price of vegetable oils (an important ingredient in tuna canning) continues to fall from a peak in early 2022.



Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 21<sup>st</sup> September, 2022. Some data may change as more information is added over time. Figures for August 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://experience.arcgis.com/experience/e1a2a65fe0ef4b5ea621b232c23618d5>

<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/>