

# PNA COVID-19 Purse Seine Dashboard

## December 2020

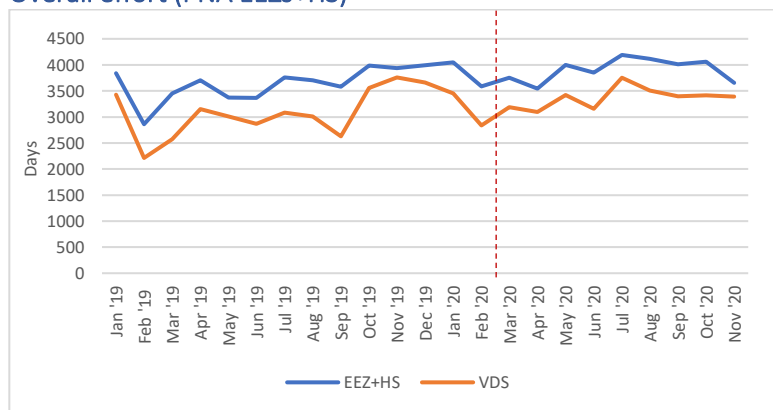


### Key trends:

- Preliminary figures indicate that overall purse seine fishing days fell by around 10% in November, with fishing intensity (fishing days/calendar day) also down by around the same proportion. Despite that, a higher proportion of effort was undertaken in PNA EEZs, so the number of VDS days fell only slightly. Note that November figures may be adjusted as NFDs are processed.
- Total purse seine catch continued to rise in November, reaching the highest monthly catch since October 2019. Effort was broadly distributed, with effort highest in PNG and KI. Collectively, these two zones accounted for 65% of EEZ+HS catches.
- Based on preliminary figures, overall catch rates rose in November to the highest levels since June 2019. Catch rates rose for both SKJ and YFT, with BET relatively flat.
- Transshipment volumes continued to rise sharply in November, reaching the highest level since June 2020 and the second highest level across the full 2019-20 period. Volumes were highest in PNG ports.
- Bangkok SKJ prices rose from US\$1300 in October to \$1400 in November, according to Thai Union figures. This was the first monthly increase in November since 2016, and only the second one in the past decade. At the same time, Singapore MGO price continued a steady rise in November, but remained well below pre-COVID levels.
- Thailand continues to remain less affected by COVID cases than other key processing centres (e.g. Ecuador/Philippines/Spain), although reported it's highest single daily increase in cases on December 19<sup>th</sup> at over 500.

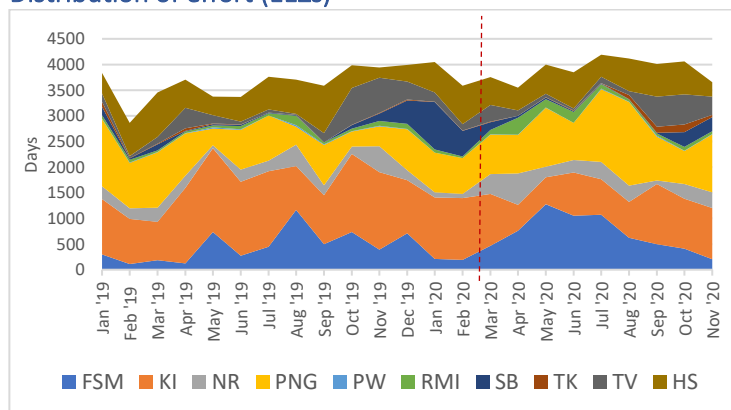
### Fishing effort

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



- Overall fishing effort (EEZ+HS) fell by around 10% in Nov, with monthly effort the lowest since April. Nevertheless, a higher proportion of effort occurred in EEZs such that VDS days fell only marginally (3418 vs 3389). Note that Nov figures are preliminary and may reduce slightly as NFD applications are processed.

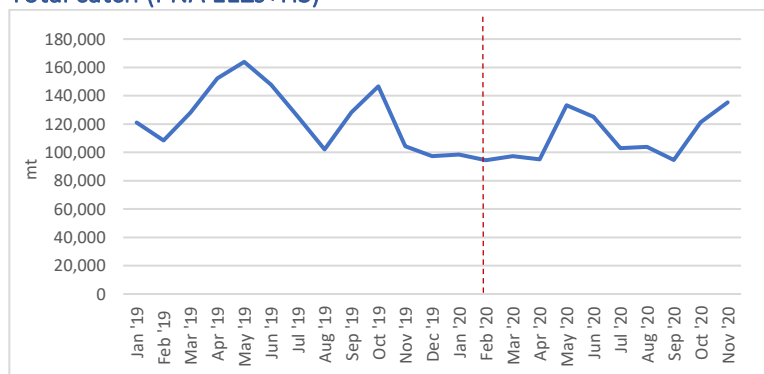
#### Distribution of effort (EEZs)



- Effort was broadly spread in Nov, with effort highest in PNG and KI. Effort in FSM continued a downward trend, while effort in the HS was less than half the Oct figure.
- Preliminary figures indicate highest levels of effort in PNG in Dec, followed by NR and KI.

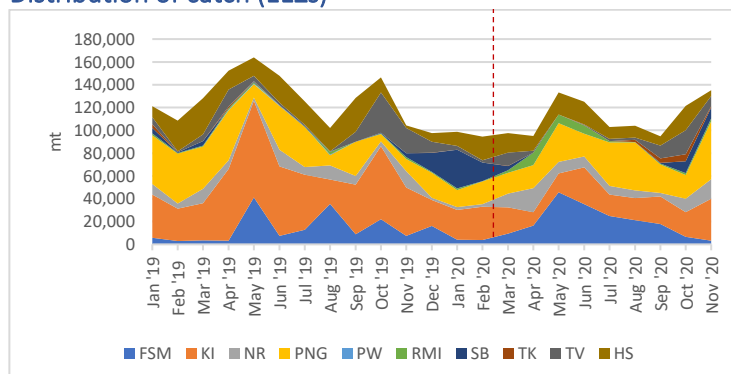
### Catch

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



- Catch (EEZ+HS) in Nov (135,219t) was the highest monthly catch in 2020, up around 13% on the Oct figure. The Nov catch was the highest monthly catch since Oct 2019. Nov catch figures are preliminary and may be adjusted upwards slightly as additional reports are received.

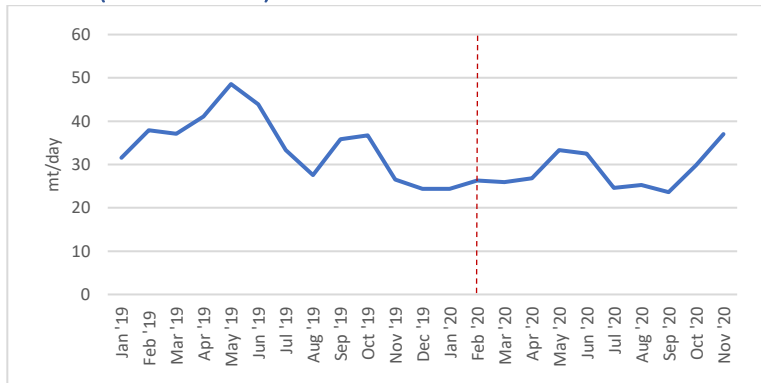
#### Distribution of catch (EEZs)



- Catches in Nov broadly reflected effort trends, with catches highest in PNG and KI. Collectively, these two zones accounted for 65% of EEZ+HS catches. Catch in PNG rose 145% between Oct and Nov; catch in KI rose 70%. Catches on the HS fell sharply from 21,239t to 5,120t.

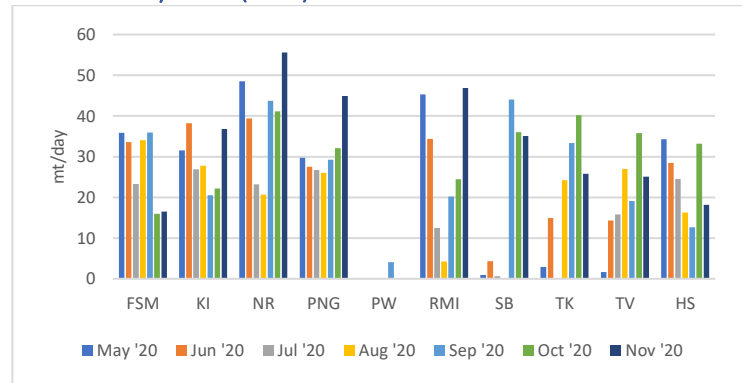
## Catch rates

### Overall (PNA EEZs+HS)



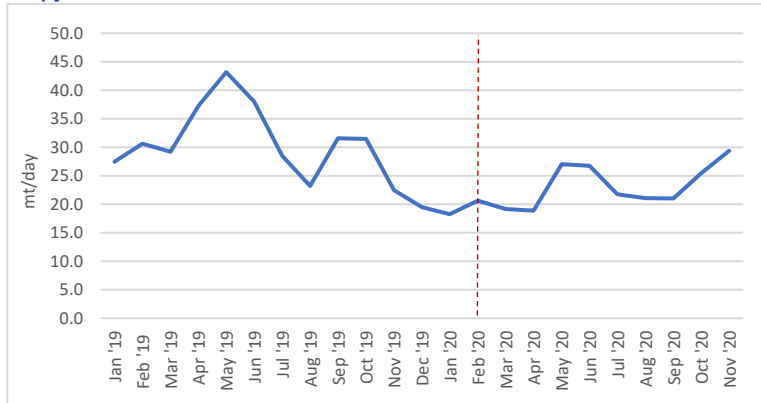
- Overall catch rates continued to increase in Nov (to 37t/day), reaching the highest level since June 2019. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Catch rate by zone (EEZs)



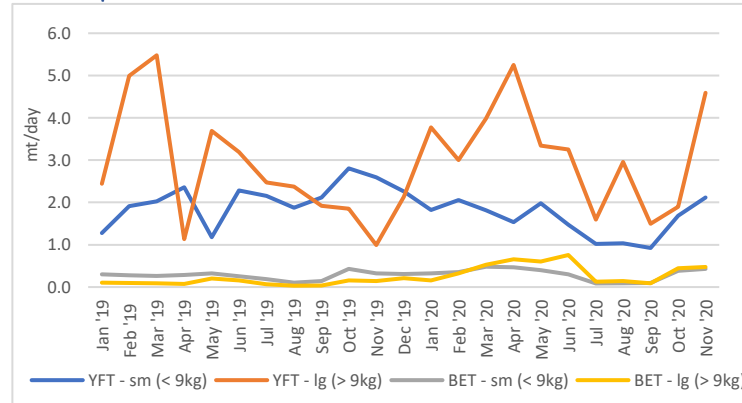
- Preliminary figures indicate that catch rates rose substantially across a number of zones in Nov. Catch rates in NR were the highest recorded of any zone in 2020. Catch rates also rose in PNG, RMI and KI. HS catch rates fell by around half.

### Skipjack



- SKJ catch rate rose in Nov to the highest level since Oct 2019.

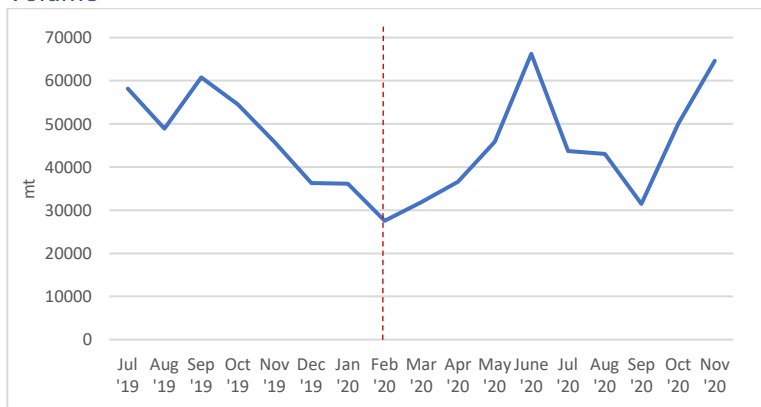
### Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT rose sharply in Nov. Catch rates of small YT also rose, with BET catches relatively flat.

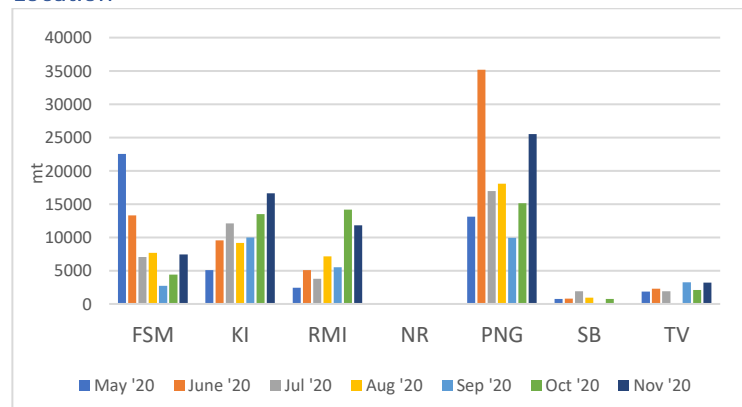
## Transshipment

### Volume



- Transshipment volumes in PNA ports continued to rise sharply in Nov. The Nov transshipment volume (64,610t) was the 2<sup>nd</sup> highest volume in 2020 and 29% higher than the Oct volume.

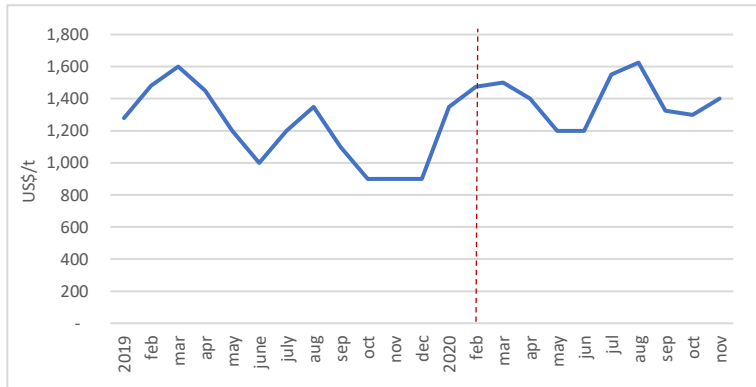
### Location



- Transshipment volumes rose sharply in PNG ports in Nov, accounting for roughly 40% of overall PNA volume. Volumes also rose in FSM and KI. Volumes in Majuro declined slightly, but remained above levels earlier in the COVID period.

## Prices

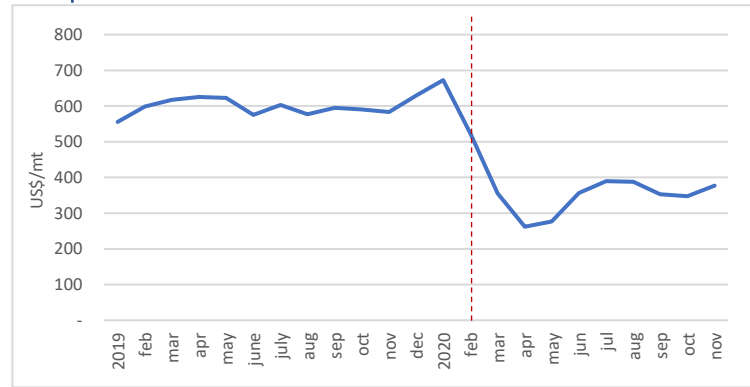
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices increased to \$1400 in Nov, up from \$1300 in Oct. This was only the second time in the past decade that price has risen between Oct and Nov, and the first time since 2016. Note that Atuna reported the price remained closer to \$1300.

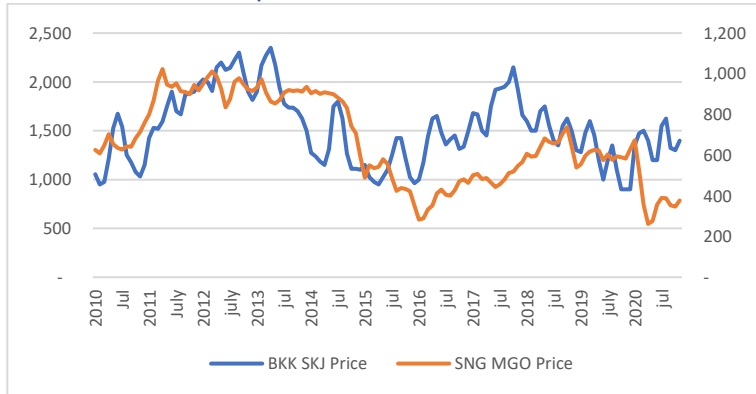
### Fuel price



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

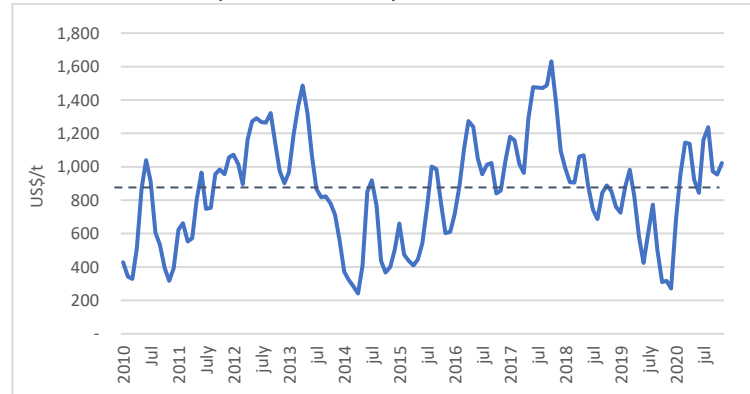
- Singapore MGO price rose slightly in Nov, averaging US\$377/mt and still well below pre-COVID levels. As of December 17<sup>th</sup> 2020, price continued to rise to \$440/mt remained relatively stable at US\$375/mt (roughly 31% lower than at the same time in 2019).

### BKK SKJ Price vs Fuel price



- BKK SKJ prices remain high relative to Singapore MGO price, largely driven by a continuation of historically low fuel prices. The differential increased slightly in Nov.

### Price differential (BKK SKJ – Fuel)



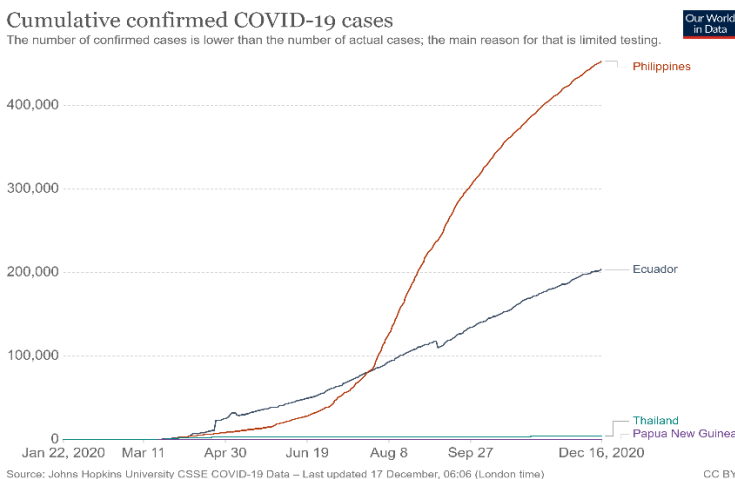
- The price differential between BKK SKJ price and Singapore MGO price increased from \$952 in Oct to \$1,023 in Nov. The Nov figure remains above the average 10 year price difference of \$853.

## 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.



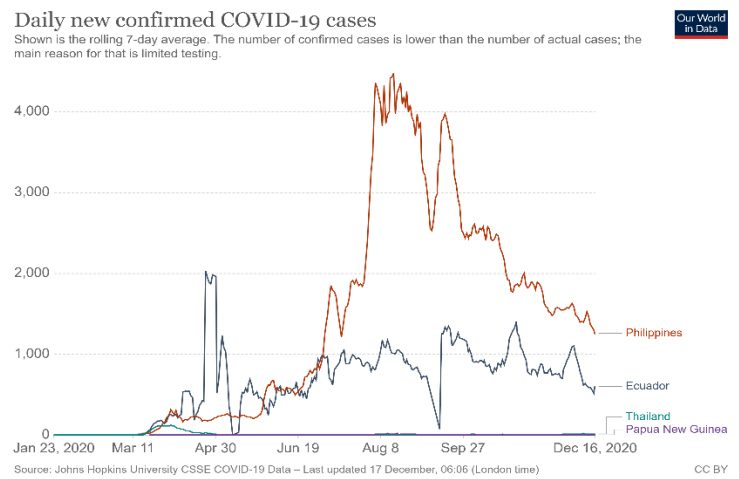
<https://ourworldindata.org/covid-cases>

- 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.



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

- Industry sources indicate that processing in Thailand has been relatively unaffected to date by COVID impacts. Confirmed daily cases in Philippines are declining after a peak in August.

## Other issues:

- As at December 17<sup>th</sup>, PNG is reported to have had 760 confirmed COVID cases, Solomon Is 17 and Marshall Is 4<sup>1</sup>.
- On December 11<sup>th</sup>, the US Food and Drug Administration (FDA) approved the first emergency use authorisations for a COVID vaccine developed by Pfizer-BioNTech<sup>2</sup>. Emergency use authorisation is expected for a second vaccine, developed by Moderna, by the end of December<sup>3</sup>.
- Atuna reports that tuna cannery workers in American Samoa will be ‘second in line’ to receive the Pfizer COVID vaccine, after health care workers and other first responders<sup>4</sup>. Vaccinations are expected to begin in late December.
- Poor catches and the 2<sup>nd</sup> veda period in the IATTC have kept the Manta SKJ price in December at around \$1700<sup>5</sup>. Additional product from the WCPO may flow to Ecuador if the price differential remains.
- On 19<sup>th</sup> December, Thailand reported it’s highest daily increase in COVID cases with over 500 new cases<sup>6</sup>. The new cases were first reported in shrimp market in Samut Sakorn Province southwest of Bangkok. Samut Sakorn is home to a number of tuna processing facilities, including facilities operated by Thai Union and Sea Value.

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### Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 18<sup>th</sup> December, 2020. Some data may change as more information is added over time. Figures for November 2020 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.

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<sup>1</sup> <https://ourworldindata.org/covid-cases>

<sup>2</sup> <https://www.fda.gov/emergency-preparedness-and-response/coronavirus-disease-2019-covid-19/pfizer-biontech-covid-19-vaccine>

<sup>3</sup> <https://www.nytimes.com/2020/12/17/health/covid-vaccine-fda-moderna.html>

<sup>4</sup> <https://www.atuna.com/pages/tuna-workers-have-second-priority-in-covid-19-vaccine>

<sup>5</sup> <https://www.atuna.com/news/worsening-manta-supply-keeps-skipjack-price-at-high-level>

<sup>6</sup> <https://www.aljazeera.com/news/2020/12/19/thailand-reports-daily-covid-record-of-more-than-500-cases>