

# PNA COVID-19 Purse Seine Dashboard

## January 2021

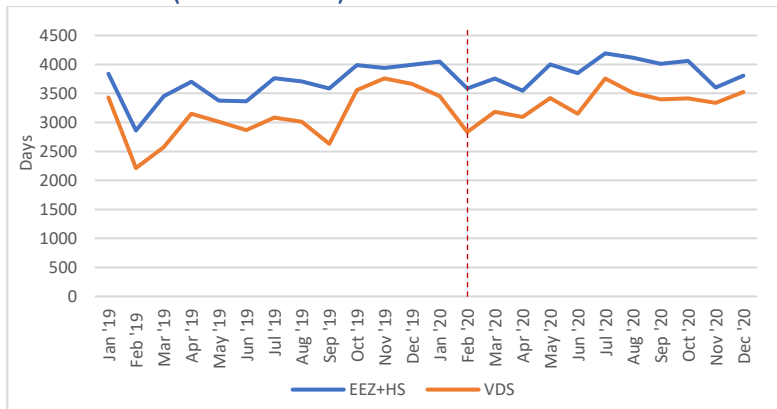


### Key trends:

- Preliminary figures indicate that overall purse seine fishing days rose slightly in December, with fishing intensity (fishing days/calendar day) also rising slightly. VDS day usage was the highest since August '20. Note that December figures may be adjusted as NFDs are processed.
- Total purse seine catch continued to rise in December, reaching the highest monthly catch since October 2019. Effort was broadly distributed, with effort highest in PNG and KI. Catches were highest in PNG, which accounted for 37% of overall catch. Strong catches were also reported in NR, KI and TV.
- Based on preliminary figures, overall catch rates fell slightly in December, but remained at their highest levels since June 2019. Catch rates rose for SKJ and small YFT, but fell sharply for large YFT. BET were relatively flat.
- Transshipment volumes continued at high levels in December, reaching the highest level in 2020. Volumes were highest in PNG ports.
- Bangkok SKJ prices fell from US\$1,400 in November to \$1,300 in December, according to Thai Union figures. The year end figure was higher than 2019 (\$1,050) and the same as 2018. Singapore MGO price continued a steady rise in December, 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), however has suffered a small uptick in new cases in recent weeks. The new cluster of new cases was first detected on December 21<sup>st</sup> at a shrimp market in Samut Sakorn, where many tuna processing facilities are located.

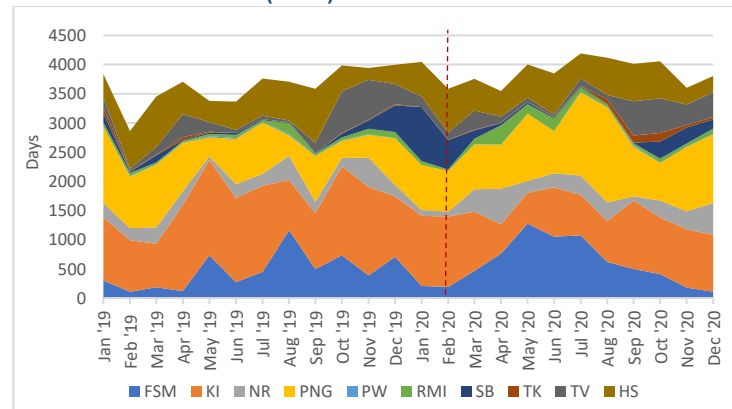
### Fishing effort

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



- Overall fishing effort (EEZ+HS) rose slightly in Dec, with usage of VDS days (3527) the highest since July '20. Effort in the HS remained comparatively low. Note that Nov figures are preliminary and may reduce slightly as NFD applications are processed.

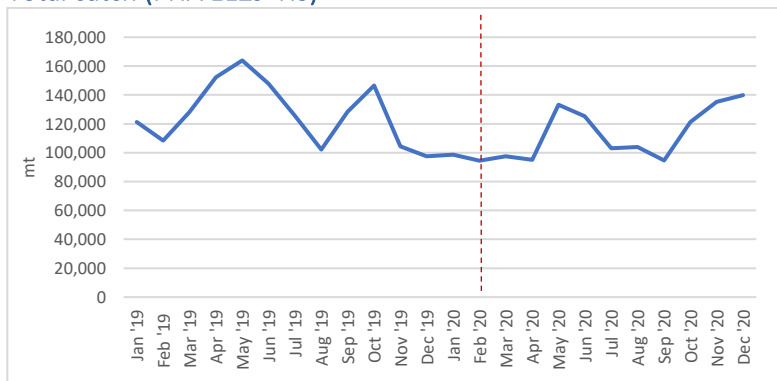
#### Distribution of effort (EEZs)



- Effort was relatively broadly spread in Dec, with effort highest in PNG and KI. Effort rose in NR and FSM continued a downward trend in FSM.
- Preliminary figures indicate high levels of effort in PNG in Jan.

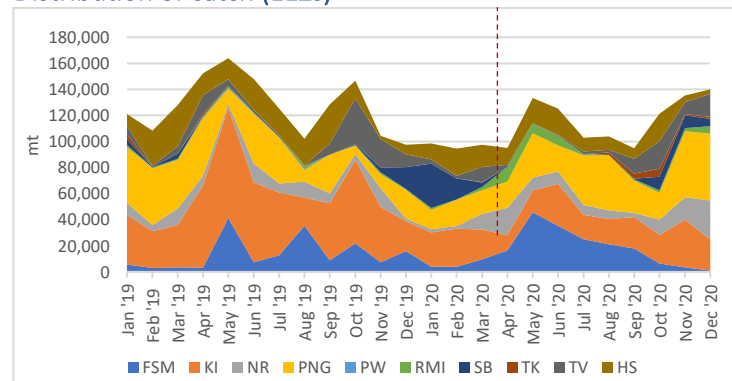
### Catch

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



- Catch (EEZ+HS) in Dec (139,952t) was the highest monthly catch in 2020, up around 3% on the Nov figure. The Dec catch was the highest monthly catch since Oct 2019. Dec catch figures are preliminary and may be adjusted upwards slightly as additional reports are received.

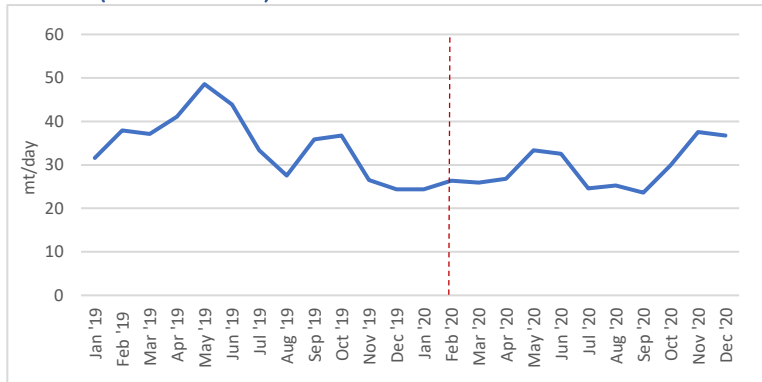
#### Distribution of catch (EEZs)



- Catches in Dec broadly reflected effort trends; catches were highest in PNG, accounting for 37% of the total catch. Catches were next highest in NR, KI and TV, collectively accounting for around half the total catch. Catches on the HS were the lowest since Nov '19.

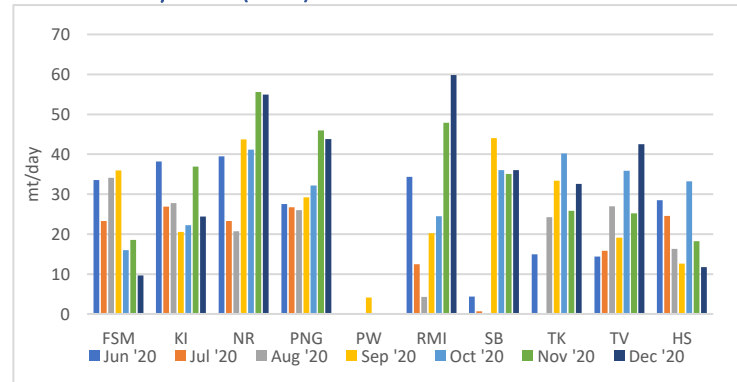
## Catch rates

### Overall (PNA EEZs+HS)



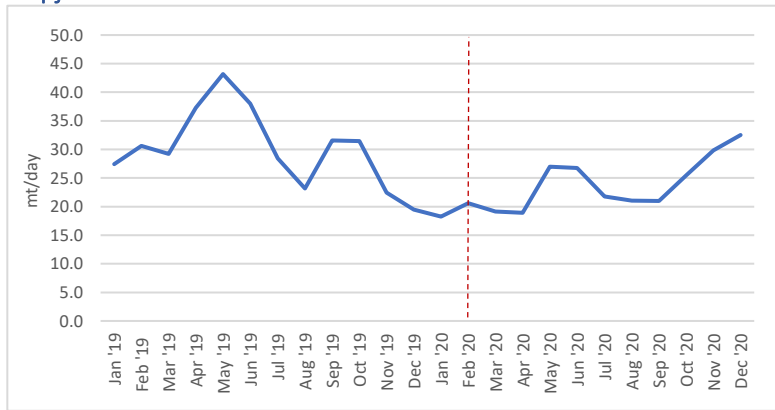
- Overall catch rates remained stable at relatively high levels in Dec (37t/day), reaching the 2<sup>nd</sup> highest level since June 2019. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Catch rate by zone (EEZs)



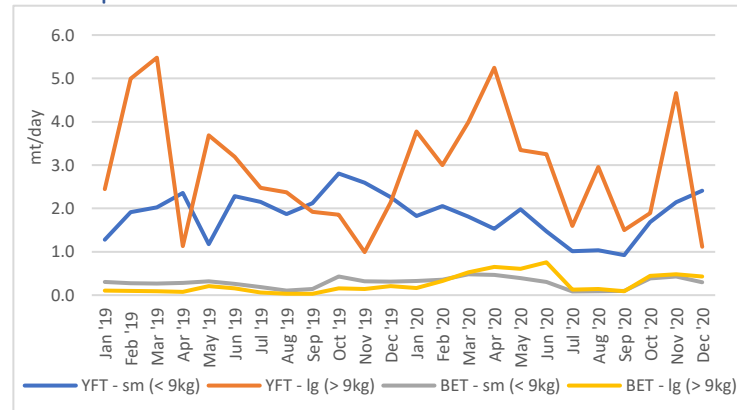
- Preliminary figures indicate that catch rates remained stable at high levels in PNG and NR, and also rose in RMI, TV and TK. Catch rates fell in KI, FSM and the HS.

### Skipjack



- SKJ catch rate continued to rise in Dec, reaching its highest level since Jul 2019.

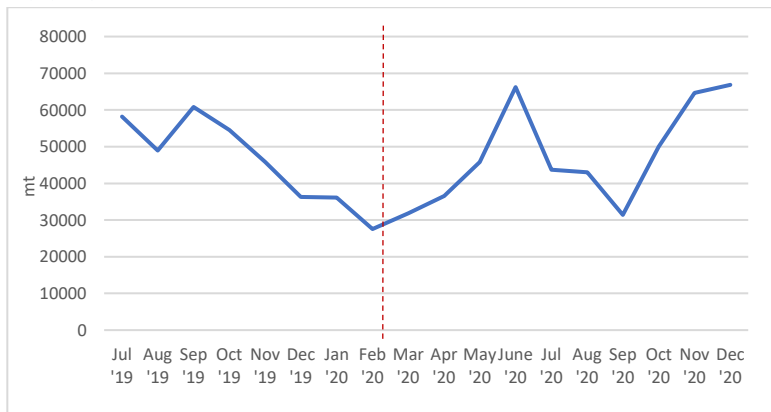
### Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT fell sharply in Dec to the lowest level in 2020. Catch rates of small YT continued to rise following the opening of the FAD close, with BET catches relatively flat.

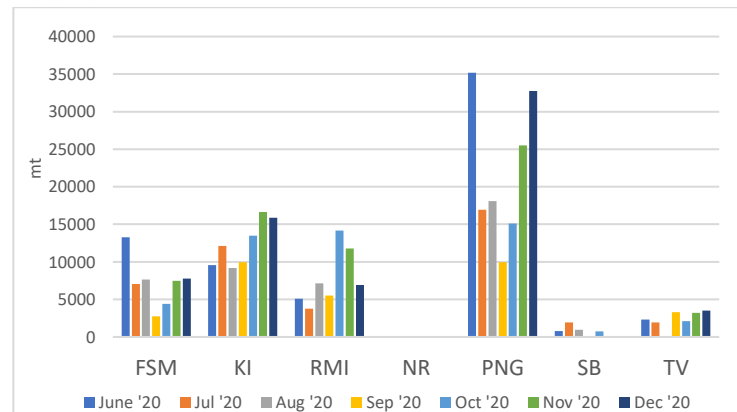
## Transshipment

### Volume



- Transshipment volumes in PNA ports increased again in Dec, rising to a new high for the 2019-20 period (66,846t).

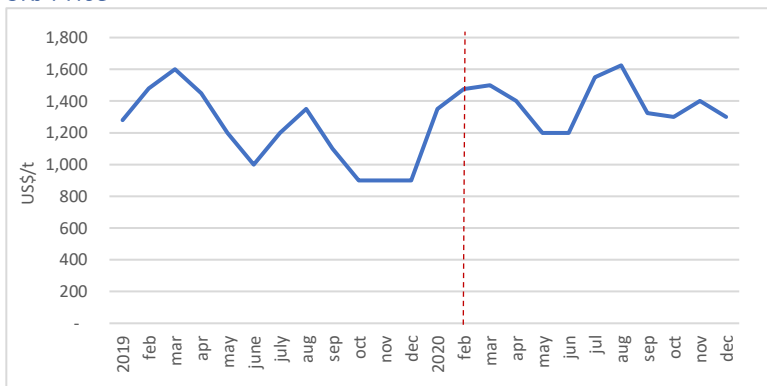
### Location



- Transshipment volumes continued to increase in PNG ports in Dec, accounting for roughly half of overall PNA volume. Volumes remained steady in KI, FSM and TV, and fell in RMI.

## Prices

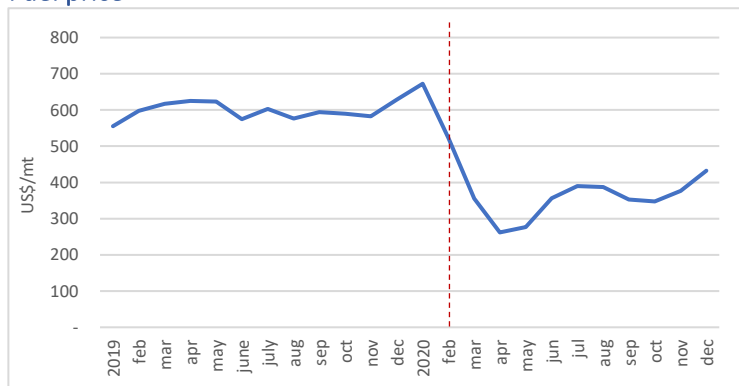
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices decreased to \$1300 in Dec, down from \$1400 in Nov. The year end figure of \$1300 was higher than 2019 (\$1,050) and the same as 2018.

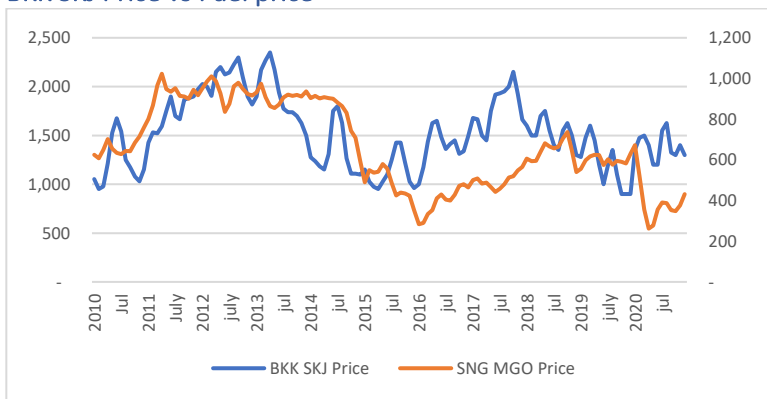
### Fuel price



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

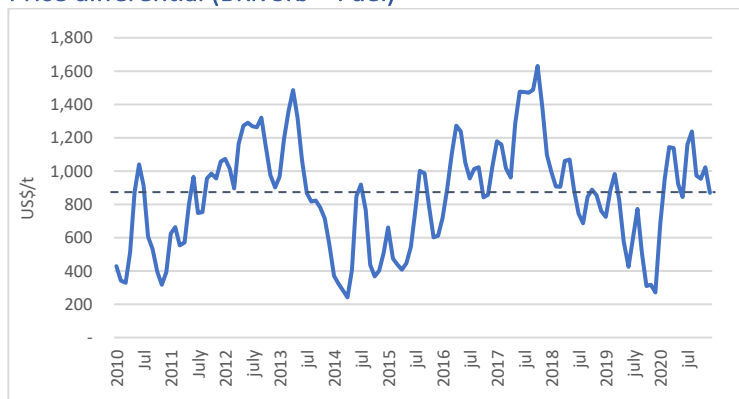
- Singapore MGO price continued to rise in Dec, averaging US\$432/mt, albeit still below pre-COVID levels. As of January 20<sup>th</sup> 2021, price continued to rise to \$474/mt.

### 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 decreased in Dec.

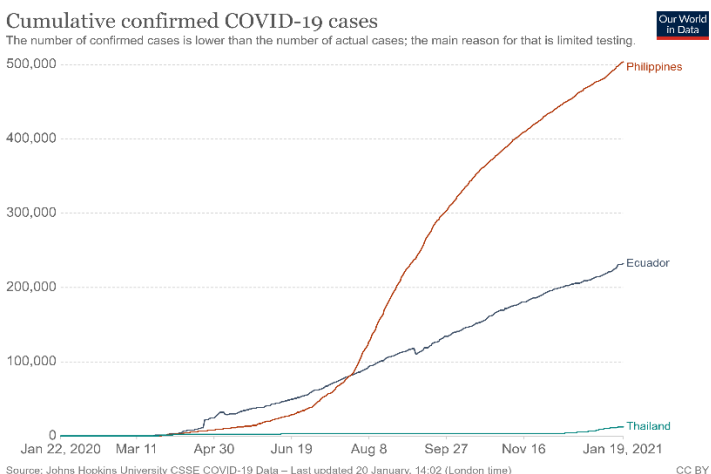
### Price differential (BKK SKJ – Fuel)



- The price differential between BKK SKJ price and Singapore MGO price decreased from \$1,023 in Oct to \$868 in Nov. The Nov figure sits around the average 10 year price difference of \$854.

## COVID-19 in processing countries

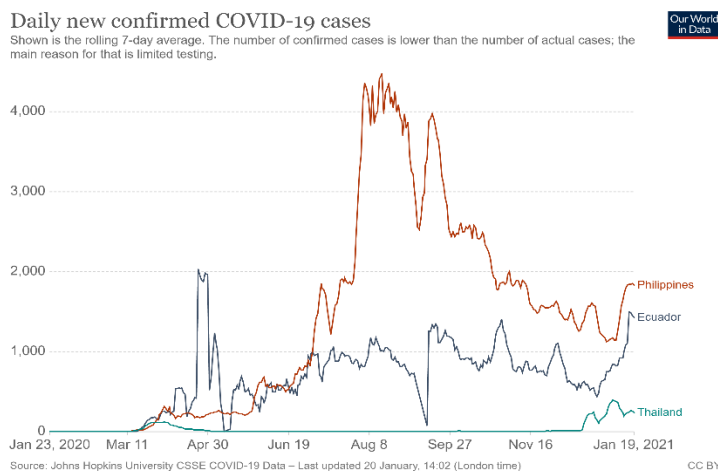
### Total cases



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

- Despite a new outbreak in December, 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



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

- Industry sources indicate that a range of measures have been introduced to manage risks associated with new COVID cases in Thailand in Dec/Jan with some minor short term production impacts possible. New cases in Ecuador rose again Dec/Jan.

## Other issues:

- As at January 18<sup>th</sup>, PNG is reported to have had 834 confirmed COVID cases, Solomon Is 17 and Marshall Is 4<sup>1</sup>.
- On January 8<sup>th</sup> FSM and Pohnpei State Governments announced that one crew member on MV Chief Mailo, a FSM Government-owned cargo and passenger vessel currently in Pohnpei lagoon, had tested positive to COVID. The release noted that the crew remained in isolation on the vessel and do not present any immediate risk of the virus spreading to the broader Pohnpeian community. Subsequent discussions by the FSM COVID-19 Taskforce concluded that the positive test was likely to be a “historical case”, i.e. that he is not presently sick and is not infectious<sup>2</sup>.
- As at January '21, Atuna reports that Bangkok CFR price for SKJ has fallen slightly in the December figure to \$1,230. Manta price is \$1,700.
- Despite an uptick in COVID cases in Thailand, including in Samut Sakorn and Bangkok where many tuna processing facilities are located, processors remain confident that processing volumes will not be significantly affected<sup>3</sup>. One processor noted that the biggest impact from the recent COVID cases is absence of workers due to 14 day quarantine requirements, but they expected these impacts would be short term. On January 4<sup>th</sup>, the Thai Government announced new rules for 28 ‘high risk’ provinces<sup>4</sup>. Thai Union announced that, as at 5<sup>th</sup> January, around 85% of its workers in Samut Sakorn had been tested as part of a broader program of measures to manage COVID risks. The remaining employees were expected to be tested the following week<sup>5</sup>.
- A NOAA study estimated earnings to the Hawaii longline fishery declined by 45% in the first 7 months of 2020, compared to the average of the same period in 2015 to 2019<sup>6</sup>. Atuna reported that the final tuna longline company operating out of Guam closed its doors in December, on the back of the COVID pandemic<sup>7</sup>.

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### Notes:

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

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

<sup>2</sup> <https://gov.fm/index.php/component/content/article/35-pio-articles/news-and-updates/416-confirmed-case-of-covid-19-onboard-the-mv-chief-mailo-deemed-likely-historical-not-contemporary-antigen-test-to-occur-on-january-22nd-while-vaccine-distribution-underway-across-fsm?Itemid=177>

<sup>3</sup> <https://atuna.com/news/skipjack-trading-slow-but-market-confident-thai-plants-will-stay-operational>

<sup>4</sup> <https://atuna.com/news/skipjack-trading-slow-but-market-confident-thai-plants-will-stay-operational>

<sup>5</sup> <https://www.thaiunion.com/en/newsroom/press-release/1243/thai-union-implements-covid-19-tests-for-all-its-employees-in-samut-sakhon-factories-remain-open-and-operational-at-capacity>

<sup>6</sup> <https://atuna.com/news/retail-gains-unable-to-offset-2020-fresh-tuna-revenue-losses-in-us>

<sup>7</sup> <https://atuna.com/news/covid-19-gave-final-blow-to-guam-s-longline-industry>