Overview of tuna fisheries in the Western and Central Pacific Ocean, including economic conditions - 2004

(WCPFC-SC1-GN-WP-1)

Oceanic Fisheries Programme (OFP-SPC)
Forum Fisheries Agency (FFA)
The WCPFC Convention Area (= “WCP-CA“)
WCP-CA Tuna Catch by gear

Highlighting 2004 catches

Total Catch 2,021,773 mt (record)

Purse seine 1,263,161 mt (62%) - record

Pole-and-line 297,515 mt (15%)

Longline 225,786 mt (11%)

Other gears ~ 11%

Catch (mt)

WCP-CA Tuna Catch by species
Highlighting 2004 catches

- **SKIPJACK**: 1,376,670 mt (68% - record)
- **YELLOWFIN**: 413,201 mt (20%
- **ALBACORE**: 105,962 mt (5%)
  - (56,740 mt for south Pacific)
- **BIGEYE**: 125,940 mt (6%)
- **ALBACORE**: 105,962 mt (5%)
  - (56,740 mt for south Pacific)
WCP-CA Purse seine fishery

Annual catch (mt) by species - Highlighting 2004 catches

Total: 1,263,161 mt
Record!!

YFT: 179,310 mt
(14% - lowest since 1996)

SKJ: 1,059,061 mt
(84% - record)

BET: 24,790 mt
(2%)
WCP-CA Purse seine fishery

Recent trends in annual catch (by major fleets in the tropical fishery)
WCP-CA Purse seine fishery

Trends in the proportion of effort by set type (major fleets)

Drifting FAD
(Stable - except the US fleet, which was higher)

Log
(increase in 2004)

Unassociated
(reduction in 2004)
WCP-CA
Purse seine fishery
Distribution of effort
WCP-CA Purse seine fishery

Distribution of effort (by major fleets)

2003

FSM Arrangement

Japan

Korea

Taiwan

USA

2004
WCP-CA Purse-seine fishery

Distribution of catch by set type - Skipjack

Unassociated

Log

Drifting FAD
WCP-CA Purse-seine fishery

Distribution of catch by set type - SKJ vs YFT
(selected years)

- **2000**
  - **SKJ**: mostly from DFAD sets
  - **YFT**: mostly from UnAssoc. sets

- **2001**
  - **SKJ**: mostly from Unassoc. sets
  - **YFT**: mostly from Assoc. sets
WCP-CA Purse seine fishery
Nominal Skipjack CPUE by set type

Free-school

Log

Drifting FAD

All set types
WCP-CA Purse seine fishery
Nominal Yellowfin CPUE by set type

Free-school

Log

Drifting FAD

All set types
Purse seine - Economic Overview

Bangkok Skipjack Prices, 1984 - 2005

Monthly price

12 month moving average

US$ per metric tonne

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Purse seine - Economic Overview

Yellowfin Prices, Jan 2002 - June 2005
Purse seine – Economic Overview

Bangkok Yellowfin Prices, 1995 – 2005

12 month moving average
Monthly price
Purse seine – Economic Overview

All tuna in the WCPFC purse seine fishery – Catch, delivered value of catch and composite price, 1995-2004
Purse seine – Economic Overview

Skipjack in the WCPFC purse seine fishery - Catch, delivered value of catch and composite price, 1995-2004
Purse seine – Economic Overview

Yellowfin in the WCPFC purse seine fishery - Catch, delivered value of catch and composite price, 1995-2004
WCP-CA Pole-and-line fishery

Annual catch by species

NPacific ALB : (2003 - 12%)

YFT+BET : (2003 - 5%)

SKJ : (2003 - 82%)

2004 Total 297,515 mt ??
(Key fleets have yet to provide estimates)
WCP-CA Pole-and-line fishery
Average distribution of effort, 1995-2002
Pole-and-line - Economic Overview

All tuna in the WCPFC pole and line fishery - Catch, delivered value of catch and composite price

[Graph showing trends for delivered value (LHS), catch (RHS), and composite price (RHS) from 1995 to 2003.]
Pole-and-line - Economic Overview

Skipjack in the WCPFC pole and line fishery - Catch, delivered value of catch and composite price

![Graph showing catch, delivered value, and composite price over years]

- Delivered value (LHS)
- Catch (RHS)
- Composite Price (RHS)
WCP-CA Longline fishery

Number of vessels

- Domestic (Offshore - non Pacific Is.)
- Foreign (Distant water)
- Foreign (Offshore-Pacific Is. based)
- Domestic (Offshore - Pacific Is.)

Number of vessels

- 1972
- 1974
- 1976
- 1978
- 1980
- 1982
- 1984
- 1986
- 1988
- 1990
- 1992
- 1994
- 1996
- 1998
- 2000
- 2002
- 2004
WCP-CA Longline fishery

Annual catch (mt) by species - Highlighting 2004 catches

Total: 225,786 mt

- **BET**: 84,394 mt
  - (37% - 2nd highest ever)

- **YFT**: 70,757 mt
  - (31% - lowest since 1999)

- **ALB**: 65,865 mt
  - (30% - 51,967 mt for south Pacific)
WCP-CA Longline fishery
Distribution of effort by fleet category, 2000-2003

Domestic: blue
Foreign-offshore: red;
DWFN: green;
WCP-CA Longline fishery
Distribution of Catch by species, 2001

- Yellowfin
- Albacore
- Bigeye
WCP-CA Longline fishery

Some recent developments in the Longline Fishery

- **Significant expansion of Pacific-Island domestic albacore fisheries**
  - … but concerns regarding low catches in recent years
  - … more detail provided in the Fishery Reports (e.g. FR WPs -9, -12 and -15)

- **Vietnamese longline fishery?**
  - Reports of annual catches ~20,000t, but no official estimates yet provided
  - Recent review provides the best available information to date → see ST IP-5 (Lewis, 2005)

- **Change in species composition of catch by Chinese-Taipei DWFN fleet**
  - More vessels now fishing in eastern areas of tropical WCP-CA
  - In 2000, (BET+YFT) : ALB = 25%
  - In 2004, (BET+YFT) : ALB = 195%
  - …more detail provided in the Chinese Taipei Fishery Report (FR WP-6)

- **Significant increase in catches by the Chinese fleet in 2004**
  - Tuna catch for the DWFN & offshore fleets in 2003 was ~18,500 t. (...up from 7,000 t in 2002)
  - Increase due to establishment of DWFN fleet in eastern areas of tropical WCP-CA
  - … more details in the China Fishery Report (?)
2004 Japanese market conditions - Yellowfin

- Average prices at 10 major Japanese wholesale markets –
  - rose 2 per cent for fresh yellowfin to 1007 JPY/kg, and
  - fell 3 per cent for frozen yellowfin to 703 JPY/kg.
- Longline caught yellowfin prices for product landed at Yaizu declined by 6 per cent to 414 JPY/kg.
- Average fresh yellowfin prices at selected Japanese ports rose 13 per cent to 639 JPY/kg.
- Fresh yellowfin import prices (c.i.f) were steady at 714 JPY/kg, although in US$ terms rose 7 per cent to US$6.60/kg.
- Fresh yellowfin import prices from Oceania fell by 2 per cent to 818 JPY/kg (in US$ terms rose 5 per cent to US$7.56/kg).
Longline - Economic Overview

Japanese import prices for fresh YFT from Oceania
Longline - Economic Overview
Yaizu prices for longline-caught YFT
Longline - Economic Overview

2004 Japanese market conditions - Bigeye

- Average prices at 10 major Japanese wholesale markets –
  - declined marginally for fresh bigeye to 1191JPY/kg, and
  - rose 6 per cent for frozen bigeye to 911JPY/kg.
- Average prices at selected Japanese ports
  - declined 12 per cent to 880JPY/kg for fresh bigeye, and
  - rose 5 per cent to 652JPY/kg for frozen bigeye.
- Import prices (c.i.f)
  - were steady at 880JPY/kg for fresh bigeye (in US$ terms rose 7 per cent to US7.26/kg).
  - rose 10 per cent to 654JPY/kg for frozen bigeye (in US$ terms rose 18 per cent to US6.05/kg).
- Fresh bigeye import prices from Oceania rose 2 per cent to 973JPY/kg (in US$ terms rose 10 per cent to US$9.00/kg.)
Longline - Economic Overview

Japanese import prices for fresh BET from Oceania
Longline - Economic Overview

Japanese import prices (CIF) of frozen BET

[Graph showing trends in JPY and USS prices over years with moving average lines]
Longline - Economic Overview

2004 US market conditions - Fresh albacore, bigeye and yellowfin

- Fresh albacore import prices (f.a.s) declined 20 per cent to US$3.11/kg.
- Fresh bigeye import prices (f.a.s) increased 3 per cent to US$7.18/kg.
- Fresh yellowfin import prices (f.a.s) increased 4 per cent to US$6.36/kg.
Longline - Economic Overview

US import prices for fresh ALB, YFT and BET

[Graph showing the economic overview of Longline]
Longline - Economic Overview

Bangkok Albacore prices (10kg and up, c&f)
Longline - Economic Overview

All tunas in the WCPFC longline fishery - Catch, delivered value of catch and composite price
Longline - Economic Overview

Bigeye in the WCPFC longline fishery - Catch, delivered value of catch and composite price

Graph showing the catch, delivered value, and composite price for Bigeye in the WCPFC longline fishery from 1995 to 2004.
Longline - Economic Overview

Yellowfin in the WCPFC longline fishery - Catch, delivered value of catch and composite price
Longline - Economic Overview

Albacore in the WCPFC longline fishery - Catch, delivered value of catch and composite price

![Graph showing catch, delivered value, and composite price over years 1995 to 2004.](image-url)
South Pacific Troll fishery

Annual catch

4,623 mt.
(Provisional – US fleet catch not yet available)
South Pacific Troll fishery

Distribution of effort - 2002/2003 season

New Zealand domestic fishery

STCZ fishery
WCP-CA Tuna Fisheries
2004 - Points of interest

• Record catches in the WCP-CA fisheries...
  • Total tuna catch - 2,021,773 mt
  • Purse-seine tuna catch - 1,263,161 mt
  • Skipjack catch (all gears) - 1,376,670 mt
  • Skipjack purse seine - 1,059,061 mt

• Relatively low catches of YFT in the PS and LL fisheries...
  • PS lowest since 1996 and LL lowest since 1999

• Increasing contribution by Pacific-islands fleets (both PS & LL)...
  • FSM Arrangement and PI domestic PS fleets took ~25% of total PS catch
  • PI longline fleets took close to 50% of the south Pacific albacore catch

• Continued decline in US PS fleet catch

• Increases in Chinese LL and PS catches ...
  • Increase in catches for both fleets were three-fold from 2002 to 2003

• Reduction in Total EPO catch compared to recent years
  • … detail provided in FR WP-3 (IATTC)