

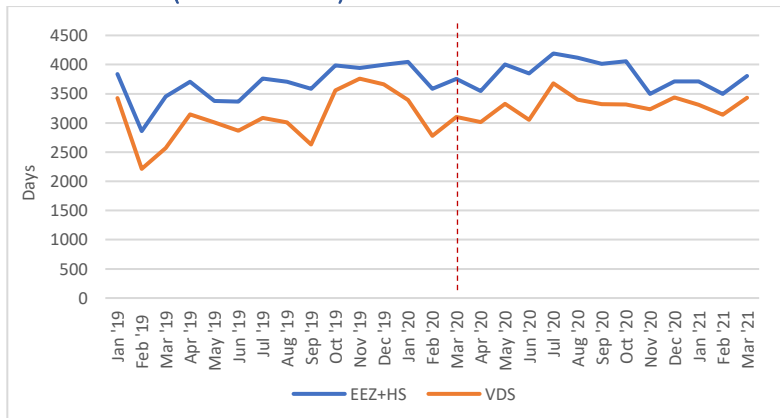


Key trends:

- Preliminary figures indicate that overall purse seine fishing days rose in March, albeit fishing intensity (fishing days/calendar day) fell slightly. Note that March figures may be adjusted as NFDs are processed.
- Total purse seine catch rose by around 22% in March, reaching some of the highest volumes in the '20-'21 period. Catch and effort remained highest in PNG, with catch and effort rising in FSM and KI.
- Based on preliminary figures, overall catch rates rose slightly in March, reaching some of the highest levels in the previous 18 months. Catch rates for SKJ rose by around 17%, while catch rates of large YFT remained at low levels.
- Transshipment volumes rose sharply in March, reaching their highest level since at least mid-2019. PNG ports continued to dominate transshipments, accounting for around 60% of total PNA volume. Collectively PNG and KI ports accounted for 88% of total transshipment volume.
- Bangkok SKJ prices rose from US\$1,300 in February to \$1,350 in March, according to Thai Union figures. Notwithstanding that, the 2021 figure is the lowest March price since 2015. Singapore MGO price continued its steady rise in March, recovering to near pre-pandemic levels. The differential between SKJ price and Singapore MGO price remained below the 10 yr average for the third month running.
- Thailand continues to remain less affected by COVID cases than other key processing centres (e.g. Ecuador/Philippines/Spain), although has experienced a spike in cases in April. PNG is continuing to experience a spike in cases which started in late Feb/March.

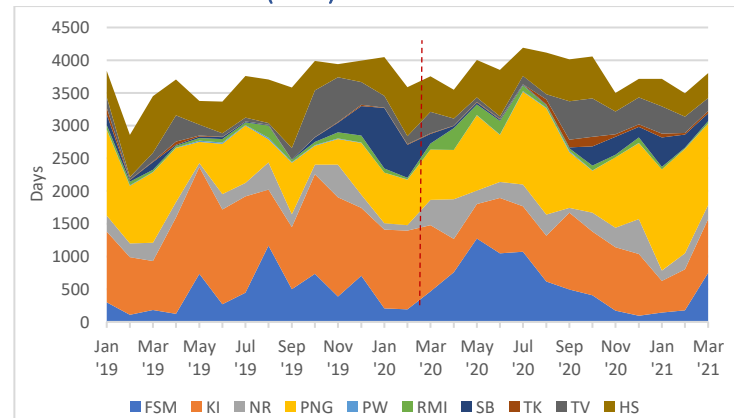
Fishing effort

Overall effort (PNA EEZs+HS)



- Overall fishing effort (EEZ+HS) rose in Mar, albeit fishing intensity (fishing days/calendar day) dipped slightly from Feb. Note that Mar figures are preliminary and may reduce slightly as NFD applications are processed.

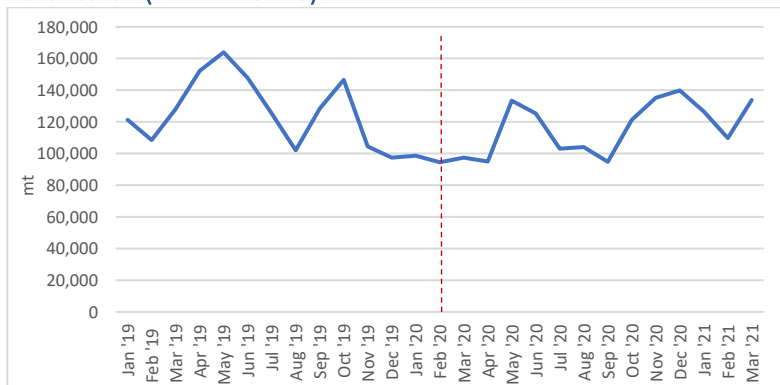
Distribution of effort (EEZs)



- Effort fell slightly in PNG, but still accounted for the highest effort amongst PNA Parties (36%). Effort rose in both FSM and KI.
- Preliminary figures indicate effort is highest in PNG and KI in April.

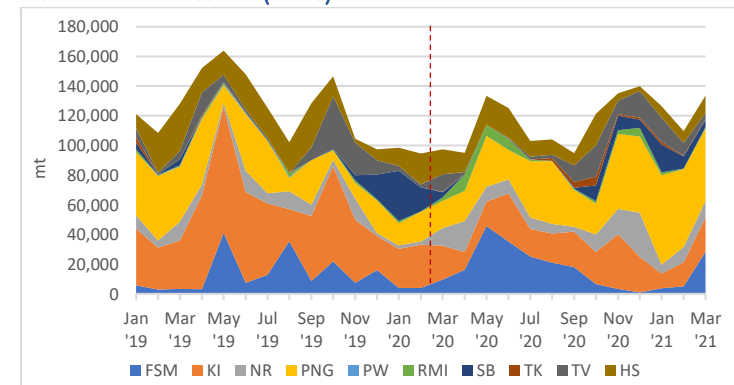
Catch

Total catch (PNA EEZs+HS)



- Catch (EEZ+HS) in Mar (133,696t) rose by around 22% on the Feb figure, reaching one of the highest volumes in the '20-'21 period. Mar catch figures are preliminary and may be adjusted upwards slightly as additional reports are received.

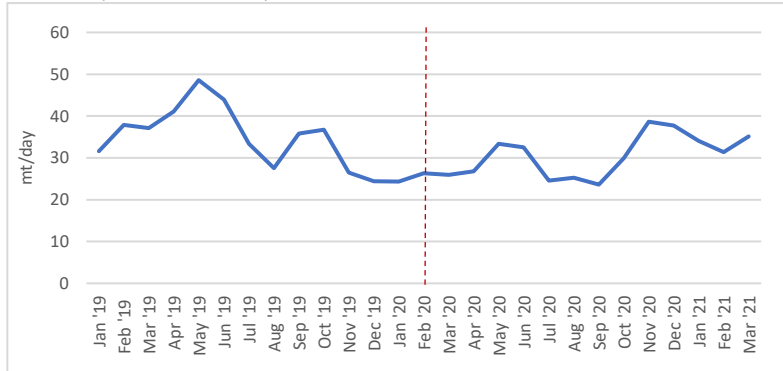
Distribution of catch (EEZs)



- Catches in Mar broadly reflected effort trends; catches were highest in PNG, accounting for 36% of the total catch. Catches rose sharply in FSM and also rose slightly in KI and the HS. Catches fell in SB and TV.

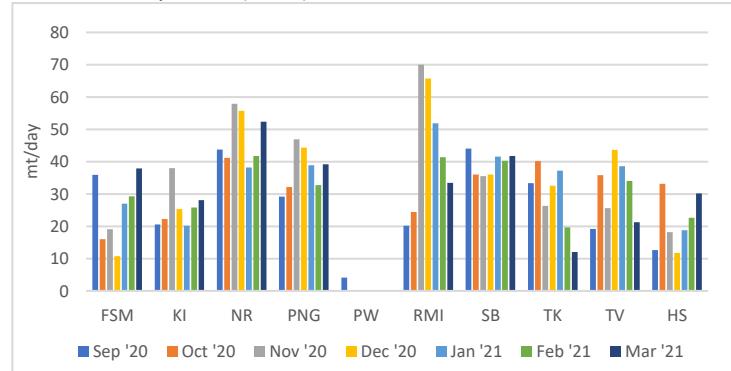
Catch rates

Overall (PNA EEZs+HS)



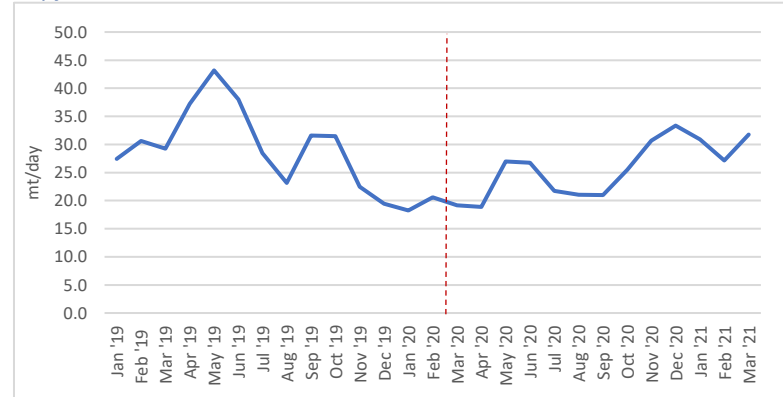
- Overall catch rates rose in Mar to some of the highest levels in the previous 18 months. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

Catch rate by zone (EEZs)



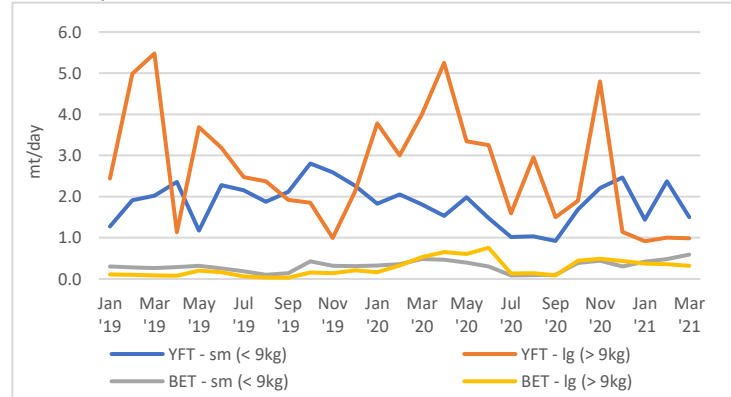
- Preliminary figures indicate that catch rates rose slightly in most EEZs, but fell slightly in RMI, TK and TV. The highest increases in catch rate were in FSM, NR and the HS.

Skipjack



- SKJ catch rate rose by around 17% in Mar, reaching some of the highest levels since mid-2019.

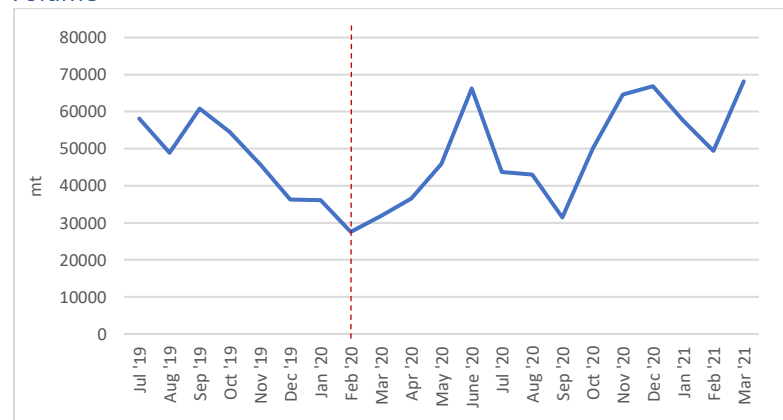
Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT remained low in Mar, stabilising around their lowest level in the 2019-2021 period. Catch rates of small YFT fell, while BET catches remained relatively stable.

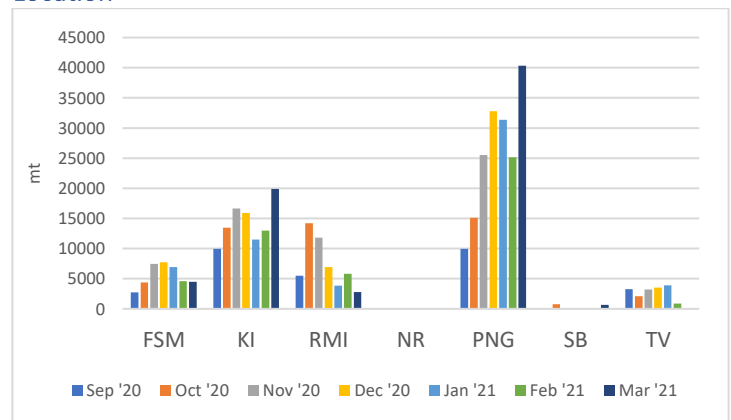
Transshipment

Volume



- Transshipment volumes in PNA ports rose sharply in Mar (from 49,382t to 68,185t) to the highest level since the start of the COVID pandemic.

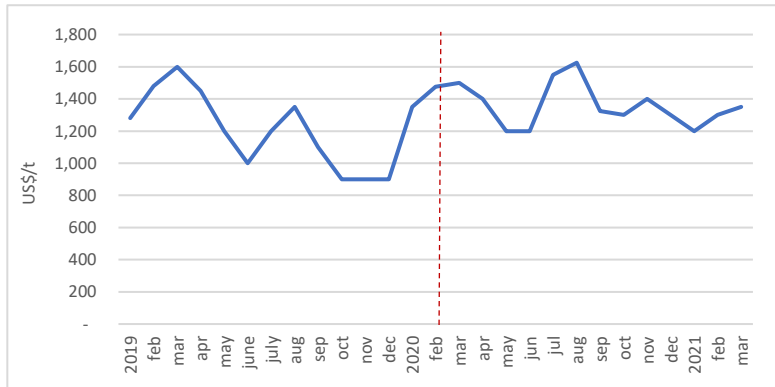
Location



- Transshipment volumes rose sharply in PNG ports, accounting for around 60% of all PNA volume. Volumes grew in KI, but fell in FSM, RMI and TV. Between them, PNG and KI accounted for 88% of all PNA transshipment volume.

Prices

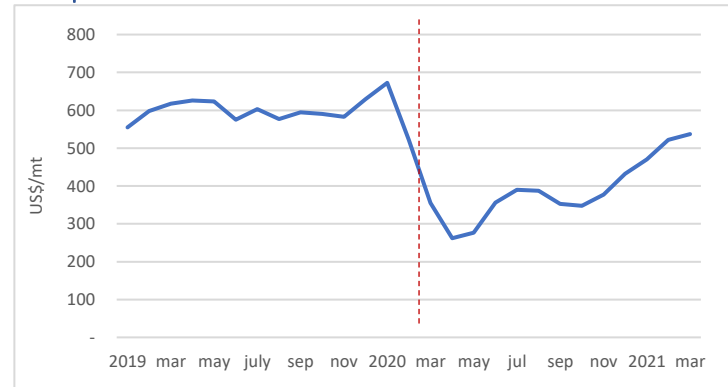
SKJ Price



https://investor.thaiunion.com/raw_material.html

- Thai Union report that Bangkok SKJ prices increased to \$1350 in Mar, up from \$1300 in Feb. The 2021 figure of \$1350 is the lowest Mar price since 2015. As at mid April '21, Atuna reports that Bangkok CFR price for SKJ remained stable at \$1,350. Manta price had fallen slightly to \$1600.

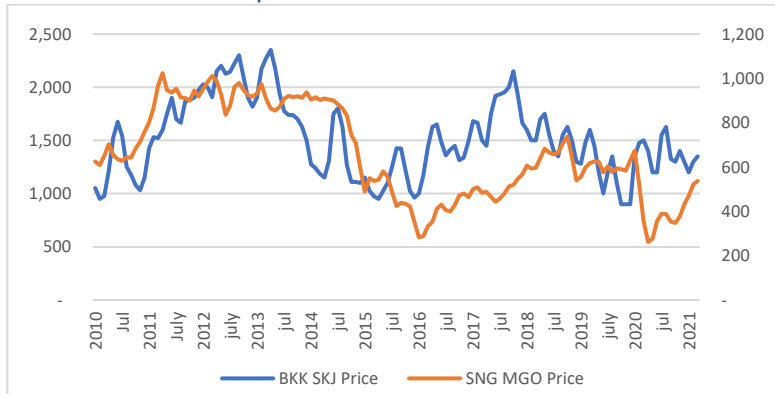
Fuel price



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

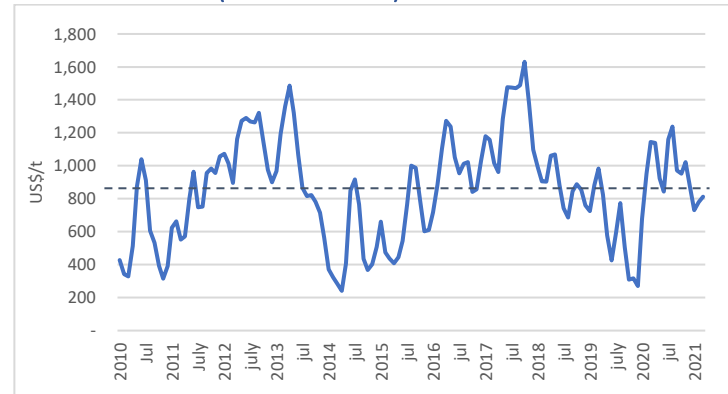
- Singapore MGO price continued to rise in Mar, averaging US\$537/mt. Price remains below pre-COVID levels, but has recovered much of the ground. As of Apr 22nd 2021, price remained stable around \$532/mt.

BKK SKJ Price vs Fuel price



- BKK SKJ price and Singapore MGO price diverged slightly in Mar, driven by the rise in SKJ price.

Price differential (BKK SKJ – Fuel)



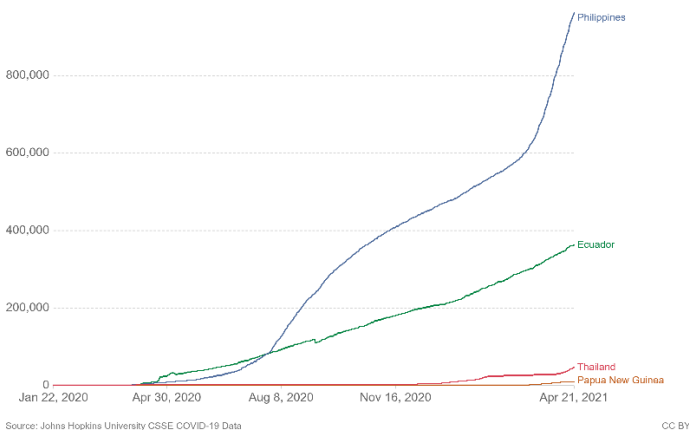
- The price differential between BKK SKJ price and Singapore MGO price increased from \$779 in Feb to \$813 in Mar. The Mar figure is below the average 10 year price difference of \$852 for the third month running.

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

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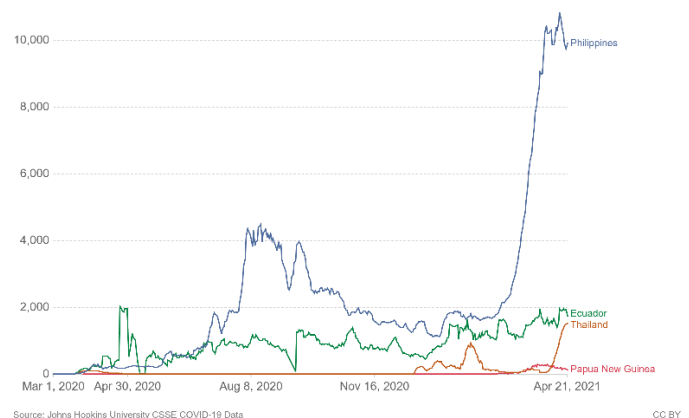
<https://ourworldindata.org/covid-cases>

- 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

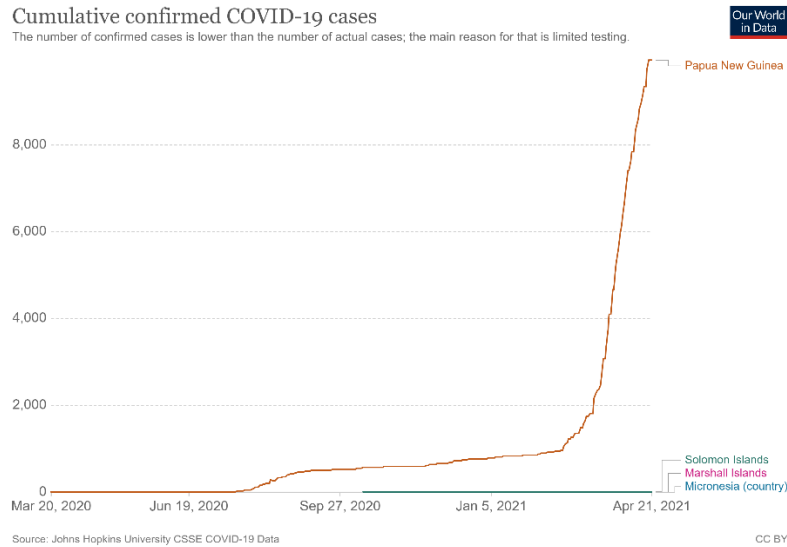
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<https://ourworldindata.org/covid-cases>

- The Philippines suffered a renewed spike in COVID cases in March. Thailand has also experienced a spike in April.

Other issues:

- As at April 21st, PNG is reported to have a cumulative total of 9,952 confirmed COVID cases, Solomon Is 20, Marshall Is 4 and FSM 1¹.
- PNG is continuing to experience a steep spike in COVID cases which began in late February/March (see below), with 99 confirmed deaths as at April 22nd. The country has reportedly received around 140,000 vaccine doses as of mid-April, including 132,000 through the COVAX facility.²



- The Pacific Fusion Centre has prepared a summary of the COVID situation and status of vaccine rollouts across Pacific Island countries³. Vaccinations are reportedly underway or available in most countries. Note that COVAX allocations refer to the amount allocated to the country, rather than the amount currently delivered. In addition to the 132,000 doses received by PNG, as at mid-April amongst the PNA Parties, Solomon Is and Tuvalu had received 24,000 and 4,800 from the COVAX facility.⁴ Vaccines have also been provided to some countries outside of the COVAX facility (e.g. FSM, RMI, Palau).

Country	Population (World Bank 2019)	Total confirmed cases of COVID-19 as of 15 April (as a percentage of population)	Total confirmed deaths as of 15 April	Initial COVAX allocations	Vaccinations underway Vaccines in country, but yet to commence Planning underway/awaiting delivery (refers to vaccination programs from all sources, not just COVAX)
Australia*	25,364,307	29,437 (11.0%)	910	-	Vaccinations underway
Fiji*	889,953	68 (0.007%)	2	100,800	Vaccines in country, but yet to commence
Kiribati*	117,606	0	0	48,000	Planning underway/awaiting delivery
Nauru*	12,381	0	0	7,200	Vaccinations underway
Papua New Guinea*	8,776,109	8,984 (0.1%)	71	588,000	Vaccinations underway
Samoa*	197,097	4 (0.002%)	0	79,200	Vaccines in country, but yet to commence
Solomon Islands*	669,823	19 (0.002%)	0	108,000	Vaccinations underway
Tonga*	104,494	0	0	43,200	Vaccinations underway
Tuvalu*	11,046	0	0	4,800	Vaccines in country, but yet to commence
Vanuatu*	299,882	3 (0.001%)	0	100,800	Planning underway/awaiting delivery
Fed. States of Micronesia*	113,815	0	0	48,000	Vaccinations underway
Marshall Islands*	58,791	4 (0.006%)	0	-	Vaccinations underway
Palau*	18,008	0	0	-	Vaccinations underway
French Polynesia*	279,287	18,678 (6.7%)	141	-	Vaccinations underway
New Caledonia*	287,800	121 (0.04%)	0	-	Vaccinations underway
Wallis and Futuna*	11,558 (2018 census)	446 (3.9%)	5	-	Vaccinations underway
New Zealand**	4,917,000	2,33 (0.05%)	26	211,200	Vaccinations underway
Cook Islands*	17,500	0	0	-	Planning underway/awaiting delivery
Niue*	1591 (2017 census)	0	0	-	Planning underway/awaiting delivery
Tokelau*	1,499 (2016 census)	0	0	-	Planning underway/awaiting delivery

- Authorities in the Seychelles are reportedly pushing to have all foreign fishing vessel crews vaccinated against COVID.⁵ This follows the deaths of two crew members aboard a purse seiner owned by French company Samper.⁶ The remaining 33 crew aboard the vessel also tested positive, although they are reportedly not showing signs of illness.
- A crew member on the cargo vessel MV Cheefo, which arrived in Honiara from Lae, PNG in mid-April, has tested positive to COVID⁷. The vessel has been placed in strict quarantine with remaining crew members being tested. The Prime Minister has asked the Solomon Is Oversight Committee to assess the ongoing entry of people from PNG into the Solomon Is.

Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 23rd April, 2021. Some data may change as more information is added over time. Figures for March 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.

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

² <https://www.gavi.org/covax-vaccine-roll-out/papua-new-guinea>

³ <https://www.pacificfusioncentre.org/coronavirus-covid-19/#cmreg-only-login-click>

⁴ <https://www.gavi.org/covax-vaccine-roll-out>

⁵ <https://www.atuna.com/news/seychelles-pushing-for-vaccinating-foreign-tuna-fishermen>

⁶ <https://www.atuna.com/news/two-crew-dead-remaining-men-positive-with-virus-on-io-seiner>

⁷ <https://solomons.gov.sb/mv-cheefo-under-strict-quarantine-pm/>