

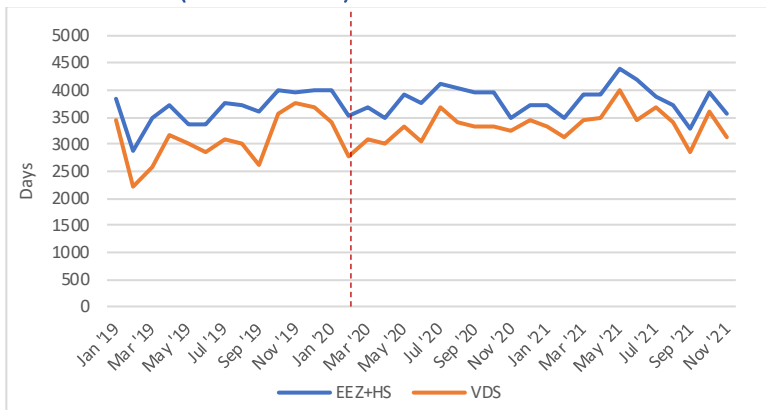


### Key trends:

- Preliminary figures indicate that both overall purse seine fishing days and VDS usage fell in November, with the preliminary VDS figure of 3,123 days the lowest November monthly total since at least 2014. Fishing intensity (fishing days/calendar day) also fell slightly. Note that November figures may be adjusted as NFDs are processed.
- Total purse seine catch (EEZs+HS) fell slightly in November, remaining at low levels relative to much of 2019-2021. Catches of SKJ fell by around 14%, but were offset partially by a rise in the YFT catch. Catch and effort was highest in PNG, but was more broadly distributed across the region than in Oct.
- Based on preliminary figures, overall catch rates rose slightly in November although remained low relative to much of the 2019-2021 period. SKJ catch rates fell slightly, while catch rates of large YFT increased sharply.
- Transshipment volumes fell in November, down by around 14% on October volumes. Transshipments were highest in PNG and RMI, collectively accounting for roughly 70% of total volume. Transshipments in KI remained at very low levels.
- Bangkok SKJ prices averaged \$1600 in November, up from \$1500 in October, according to Thai Union figures. Singapore MGO price fell slightly in November, and has since fallen further in December.
- Daily new COVID case numbers continued to fall across most key southeast Asian processing centres, although Vietnam is continuing to experience a second peak.

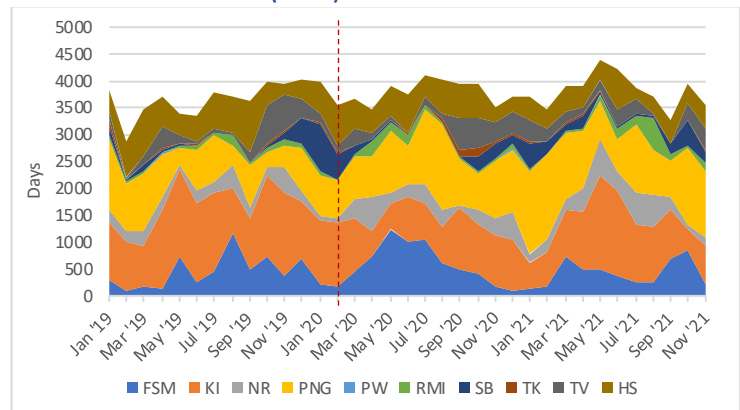
### Fishing effort

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



- Both overall fishing effort (EEZ+HS) and usage of VDS days fell in Nov. Fishing intensity (fishing days/calendar day) also fell by around 7%. Nov's preliminary VDS usage (3123 days) was the lowest Nov monthly total since at least 2014.

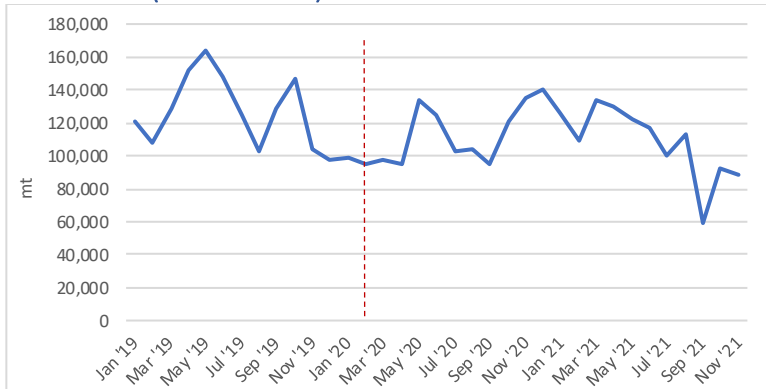
#### Distribution of effort (EEZs)



- Effort was highest in the west in Nov, but was more evenly distributed than Oct. Effort remained highest in PNG. Effort rose in KI, NR and RMI, and fell in FSM and SB. Preliminary figures indicate effort remains high in PNG in December.

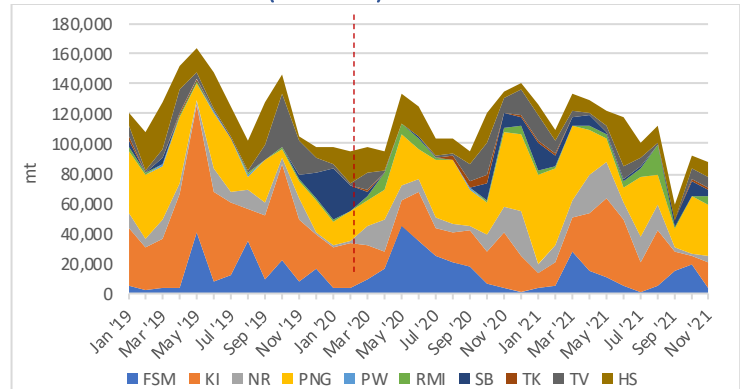
### Catch

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



- Total catch (EEZ+HS) fell in Nov (87,941t), remaining below catch levels for much of the '19-'21 period. Catches of SKJ fell by around 14% (62,028t vs 53,037t), although this was offset partially by an increase in YFT catch (28,541t vs 33,303t).

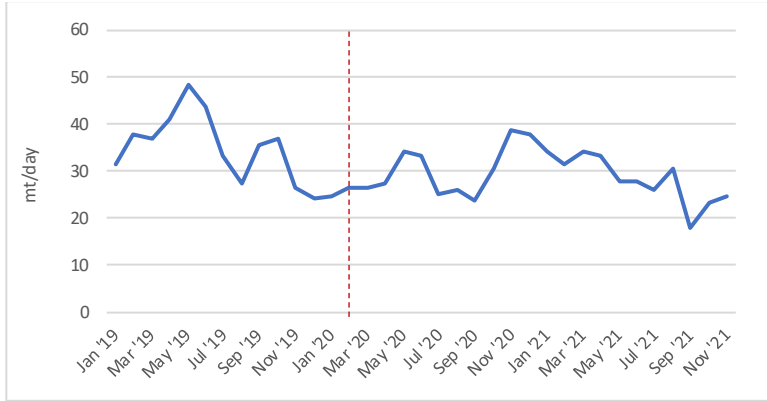
#### Distribution of catch (EEZs+HS)



- Catches were highest in PNG, accounting for around 40% of total catch. Catches were next highest in KI and the HS. Catches fell in FSM and SB, and rose in NR.

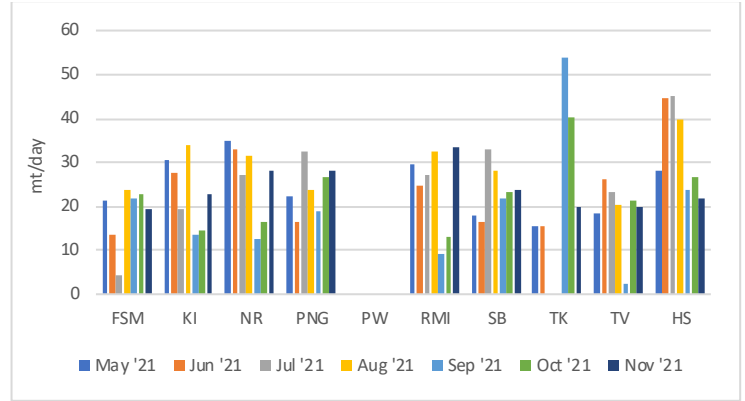
## Catch rates

### Overall (PNA EEZs+HS)



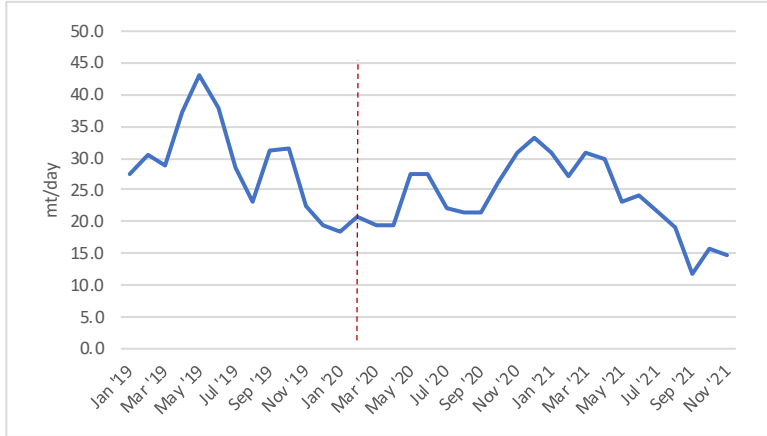
- Overall catch rates rose slightly in Nov, although remained low relative to much of the 2019-2021 period. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Catch rate by zone (EEZs)



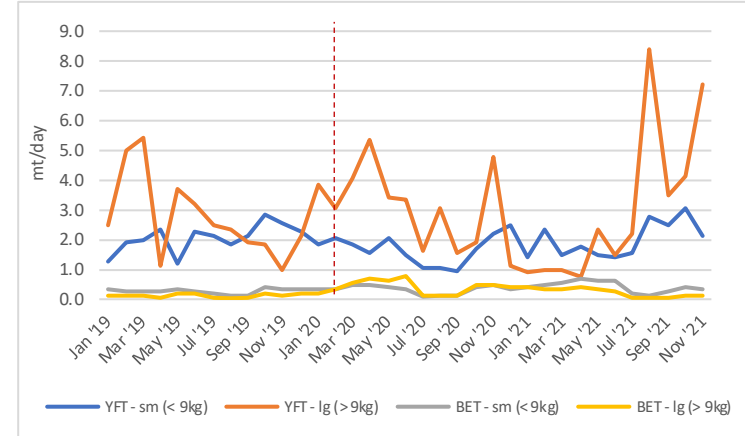
- Preliminary figures indicate that catch rates were relatively consistent across the region. Catch rates rose in RMI, NR and KI, and remained relatively stable in most other zones.

### Skipjack



- SKJ catch rate fell slightly in Nov, remaining at low levels relative to the '19-'21 period. The Nov SKJ catch rate was the second lowest since at least Jan '19.

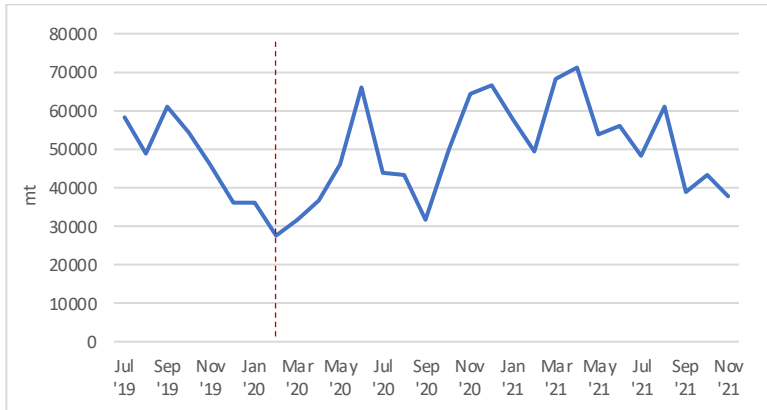
### Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT rose sharply in Nov reaching the second highest level for the '19-'21 period. Catch rates of small YFT and BET fell, while catch rates of large BET remained stable.

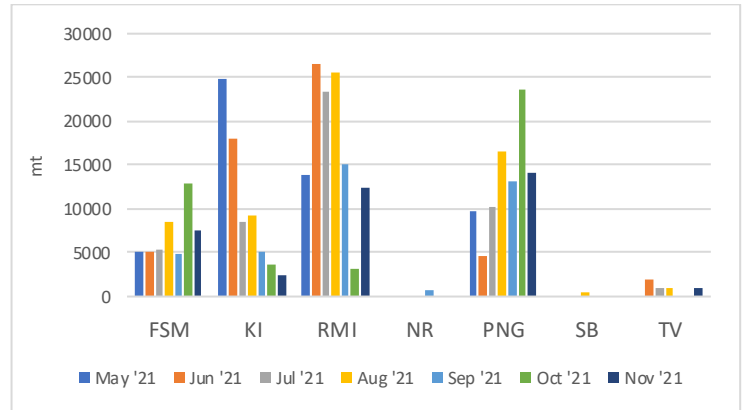
## Transshipment

### Volume



- Transshipment volumes in PNA ports fell in Nov, down by around 14% on Oct volumes (from 43,497t to 37,525t).

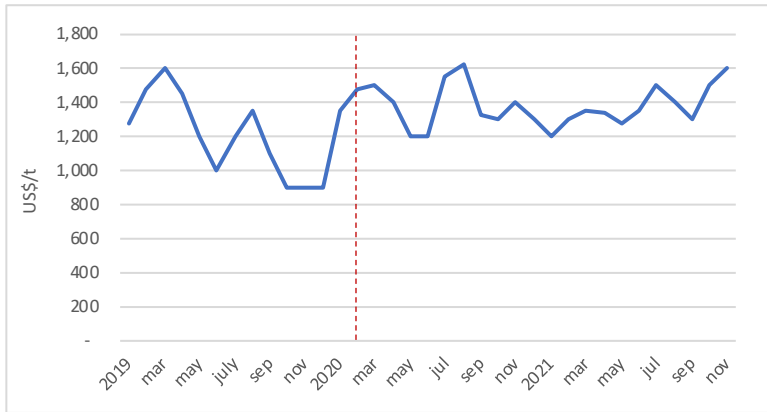
### Location



- Transshipment volumes were highest in PNG and RMI, collectively accounting for 71% of total volume. Volumes in FSM fell slightly, while volumes in KI were the lowest since at least Jul '19.

## Prices

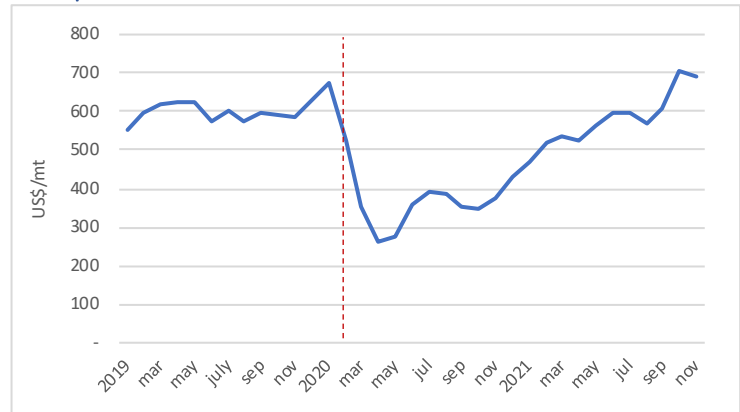
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices averaged around \$1600 in Nov, up from \$1500 in Oct.

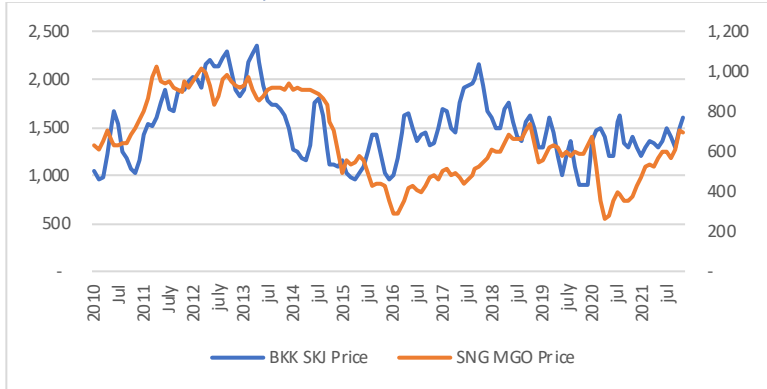
### Fuel price



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

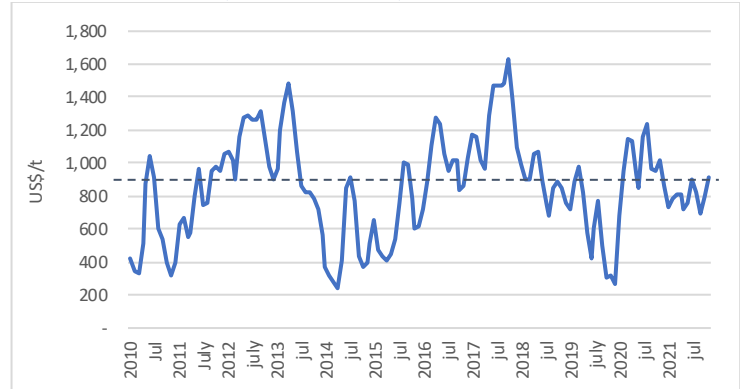
- Singapore MGO price fell slightly in Nov, averaging US\$692/mt, down from US\$706/mt in Oct. Price has fallen slightly since then, sitting at \$648/mt on 19<sup>th</sup> Dec.

### BKK SKJ Price vs Fuel price



- The BKK SKJ price and Singapore MGO price indexlines diverged slightly in Nov, driven by the rise in SKJ price and flattening of the fuel price.

### Price differential (BKK SKJ – Fuel)



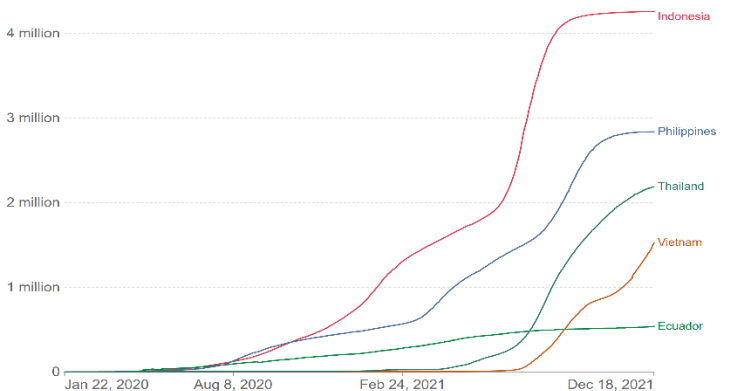
- The price differential between BKK SKJ price and Singapore MGO rose to US\$909 in Nov, up from \$795 in Oct. The differential was the highest since Nov '20.

## COVID-19 in processing countries

### Total cases

#### Cumulative confirmed COVID-19 cases

Due to limited testing, the number of confirmed cases is lower than the true number of infections.



Source: Johns Hopkins University CSSE COVID-19 Data

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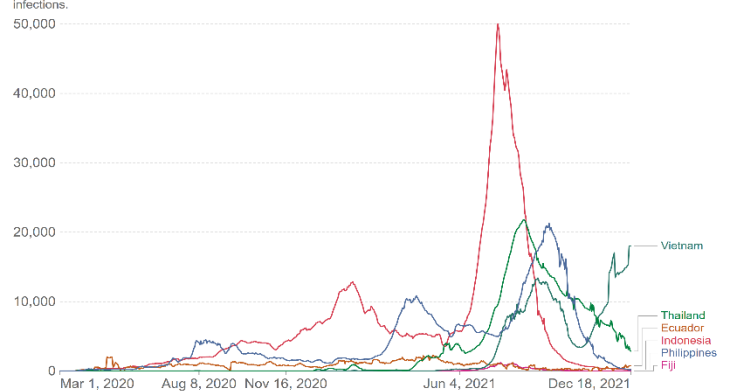
<https://ourworldindata.org/covid-cases>

- Total case numbers in Indonesia and the Philippines have plateaued after large spikes in mid-2021. Case numbers in Vietnam continue to rise.

### Daily confirmed cases

#### Daily new confirmed COVID-19 cases

7-day rolling average. Due to limited testing, the number of confirmed cases is lower than the true number of infections.



Source: Johns Hopkins University CSSE COVID-19 Data

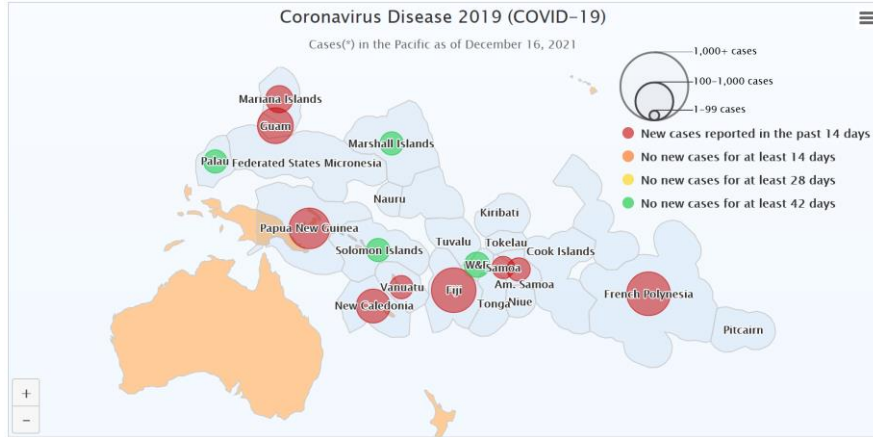
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<https://ourworldindata.org/covid-cases>

- The surge in case numbers across the main SE Asian processing countries during July–Sept continues to decline, although Vietnam continues to experience a second peak. Ecuador’s new daily case numbers remain low.

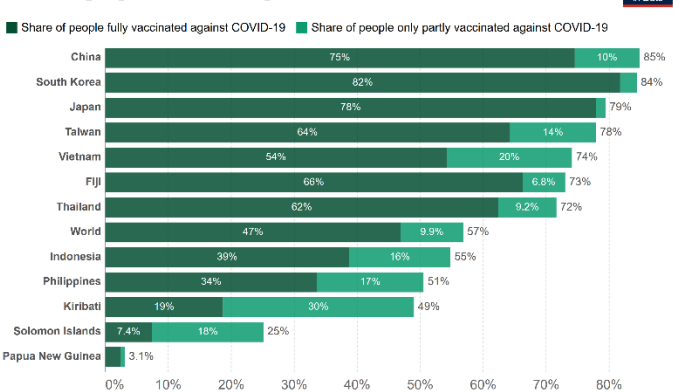
Other issues:

- As at Dec 17<sup>th</sup>, PNG is reported to have had a cumulative total of 36,004 confirmed COVID cases, while no new cases were reported in other PNA Parties (remaining on Solomon Is 20, Palau 8, Marshall Is 4, Kiribati 2 and FSM 1)<sup>1</sup>. Case numbers in PNG are thought to be an underestimate given testing rates have been low and anecdotal reports indicate the ‘positive rate’ (proportion of all tests returning a COVID positive result) remains high.
- The current status of various COVID metrics (cases, deaths, vaccinations) is tracked regularly through an informative SPC ‘COVID-19: Pacific Community Updates’ website<sup>2</sup>. The figure below shows trends in new case numbers in the 6 weeks to Dec 16<sup>th</sup>.



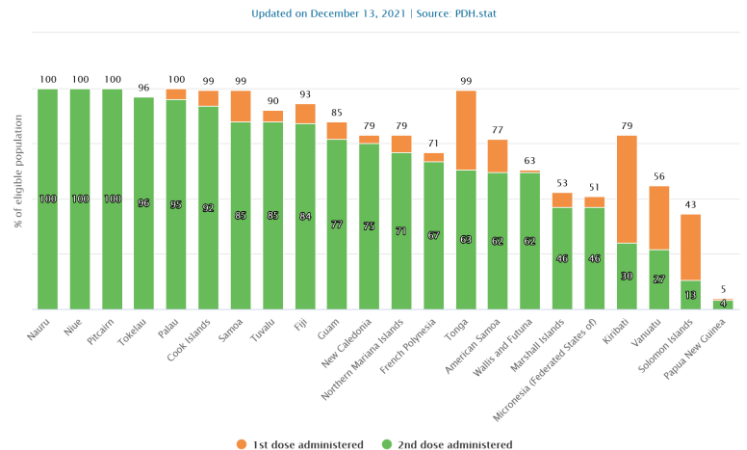
- Fiji opened to all fully vaccinated travellers from Travel Partner Countries for quarantine free travel under certain conditions from 1 December.
- Vaccination rates across major tuna producing and processing countries remain highly variable (note the rates in the graphs below are calculated differently; the left graph calculates percentages of the *total* population; the right graph shows the proportion of people *eligible* to receive vaccinations). According to SPC figures, countries/territories including Nauru, Tokelau and Palau have achieved full, or close to full, vaccination across eligible citizens, while vaccination rates in PNG remain at very low levels<sup>3</sup>. Vaccination rates are improving in Kiribati and Solomon Is with 79% and 43% respectively of eligible citizens receiving at least one dose. Vaccination rates in Thailand and Vietnam are now above the world average, while rates in the Philippines and Indonesia remain below the world average.

Share of people vaccinated against COVID-19, Dec 18, 2021



Source: Official data collated by Our World in Data  
 Note: Alternative definitions of a full vaccination, e.g. having been infected with SARS-CoV-2 and having 1 dose of a 2-dose protocol, are ignored to maximize comparability between countries. CC BY

COVID-19 vaccination in Pacific Island Countries and Territories



- Atuna reports that in early December Kiribati repatriated 141 seafarers stranded in Fiji as a result of COVID travel restrictions<sup>4</sup>.
- Global freight rates have fallen slightly from a peak in Sept/Oct, but remain at very high levels historically<sup>5</sup>.

Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 19<sup>th</sup> December, 2021. Some data may change as more information is added over time. Figures for November 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.

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

<sup>2</sup> <https://www.spc.int/updates/blog/2021/12/covid-19-pacific-community-updates#CurrentStatus>

<sup>3</sup> <https://www.spc.int/updates/blog/2021/12/covid-19-pacific-community-updates#CurrentStatus>

<sup>4</sup> <https://atuna.com/news/kiribati-repatriates-141-fishermen-from-fiji>

<sup>5</sup> <https://www.drewry.co.uk/supply-chain-advisors/supply-chain-expertise/world-container-index-assessed-by-drewry>