

# PNA COVID-19 Purse Seine Dashboard

## January 2022

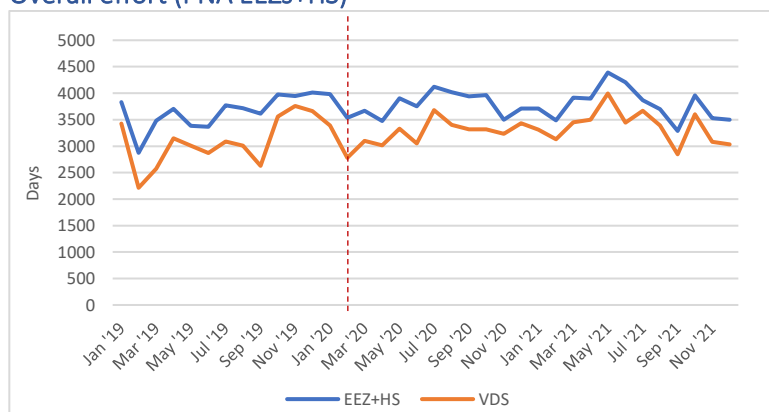


### Key trends:

- Preliminary figures indicate that overall purse seine fishing days remained stable, while VDS usage fell slightly in December. The preliminary VDS figure of 3,031 days is the lowest December monthly total since at least 2010. Fishing intensity (fishing days/calendar day) also fell slightly. Note that December figures may be adjusted as NFDs are processed.
- Total purse seine catch (EEZs+HS) rose in December, up around 19% on November. Increased catch was largely driven by improved SKJ catches. Catch and effort was highest in PNG, but was relatively broadly distributed across the region.
- Based on preliminary figures, overall catch rates rose in December, reaching roughly average levels for the '19-'21 period. SKJ catch rates rose, although remained at relatively low levels, while catch rates of large YFT remained at relatively high levels.
- Transshipment volumes rose slightly in December, up by around 14% on November volumes. Transshipments remained highest in RMI and PNG, collectively accounting for 79% of total volume.
- Bangkok SKJ prices averaged \$1750 in December, up from \$1600 in November, according to Thai Union figures. Singapore MGO price fell slightly in December, but has since risen in January.
- Daily new COVID case numbers have increased sharply in the Philippines, with upticks in recent weeks also in Thailand and Ecuador.

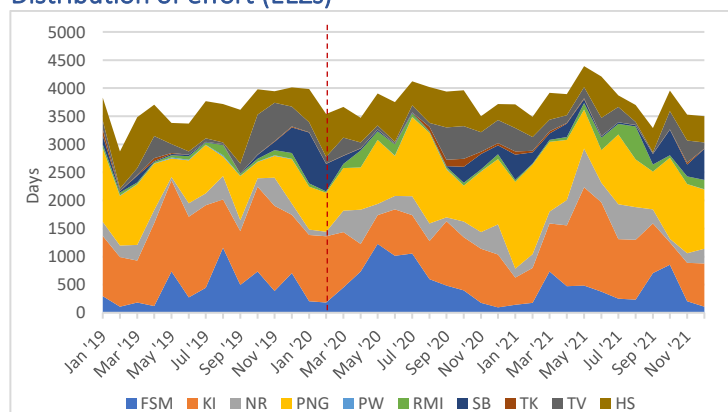
### Fishing effort

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



- Overall fishing effort (EEZ+HS) remained stable in Dec, while usage of VDS days fell slightly. Fishing intensity (fishing days/calendar day) also fell by around 4%. Dec's preliminary VDS usage (3031 days) was the lowest Dec monthly total since at least 2010.

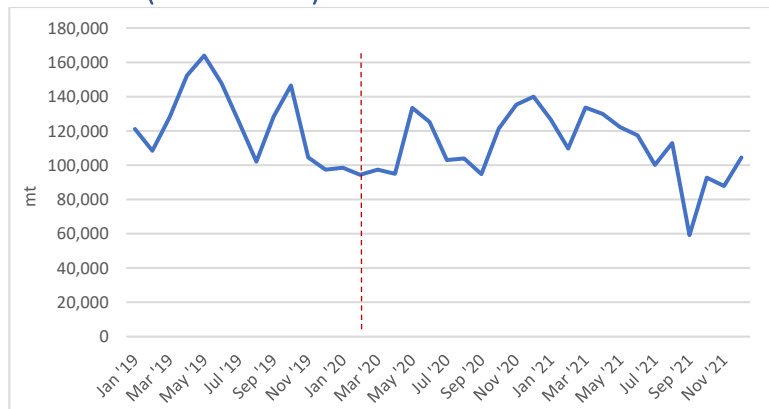
#### Distribution of effort (EEZs)



- Effort remained higher in the west in Dec, but was otherwise relatively broadly distributed. Effort remained highest in PNG, followed by KI. Effort rose in SB and NR, and fell in FSM and TV. Preliminary figures indicate effort has shifted eastwards in Jan, with high levels of effort in KI and the HS.

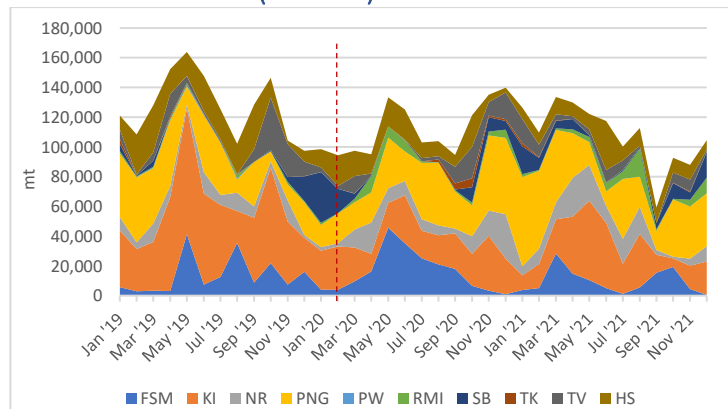
### Catch

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



- Total catch (EEZ+HS) rose in Dec (87,941t), up around 19% on the Nov total. The increase was largely driven by improved catches of SKJ (53,037t to 70,214t), although catches of large YFT remained at relatively high levels (26,023t).

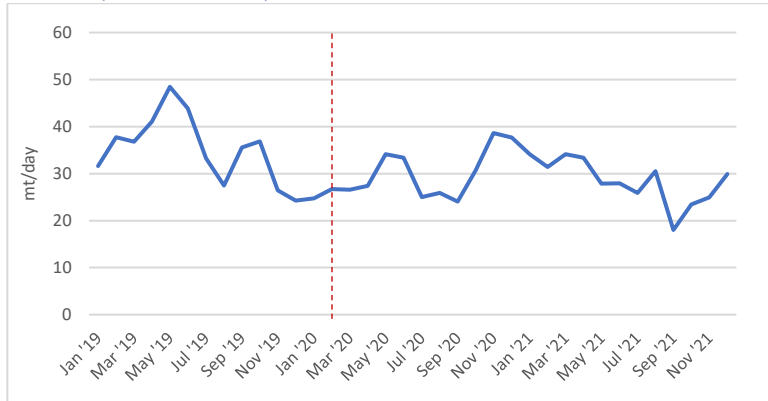
#### Distribution of catch (EEZs+HS)



- Catches continued to be highest in PNG, accounting for 34% of overall catch, although catches were more broadly distributed than recent months. Catches rose in KI, RMI, NR and SB, and fell in FSM, TV and the HS.

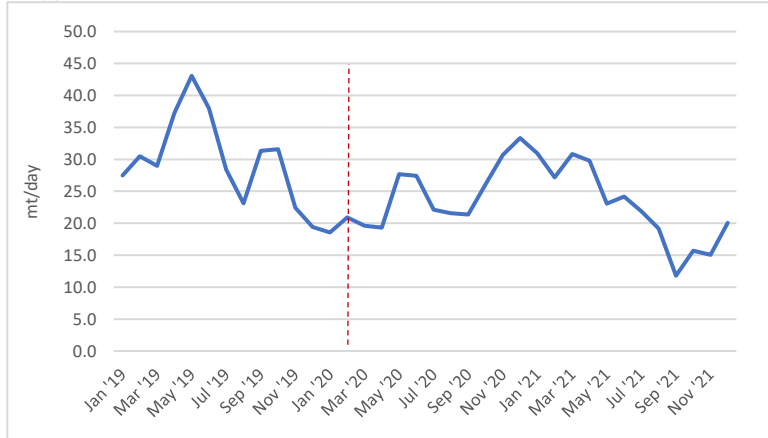
## Catch rates

### Overall (PNA EEZs+HS)



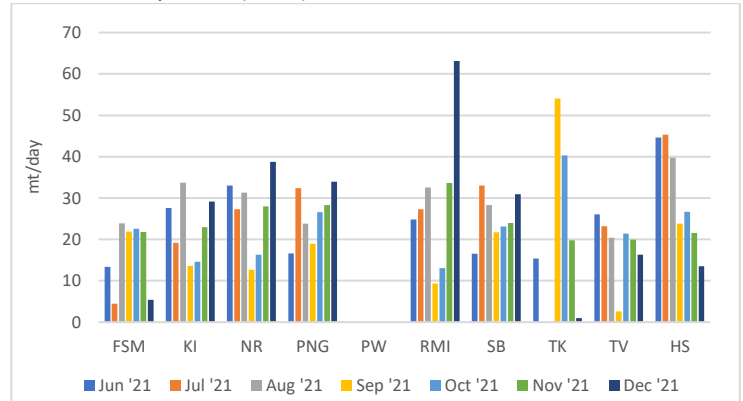
- Overall catch rates rose in Dec, reaching about average levels for the '19-'21 period. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Skipjack



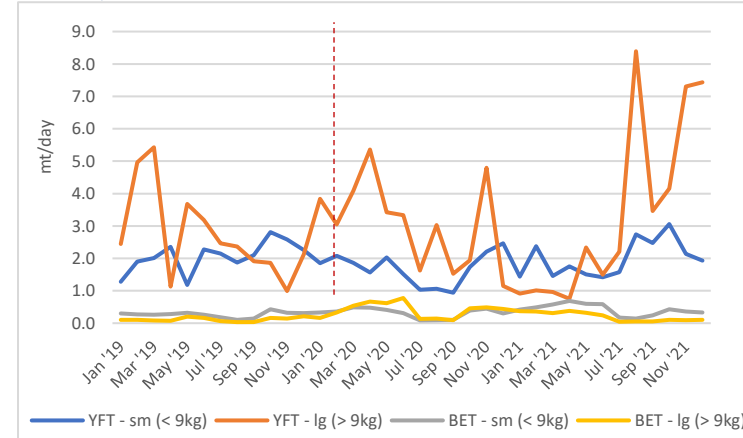
- SKJ catch rate rose in Dec, although remained below average for the '19-'21 period.

### Catch rate by zone (EEZs)



- Preliminary figures indicate that catch rates varied across the region. Catch rates rose sharply in RMI, and also rose in KI, NR, PNG and SB. Catch rates fell in FSM, TV, TK and the HS.

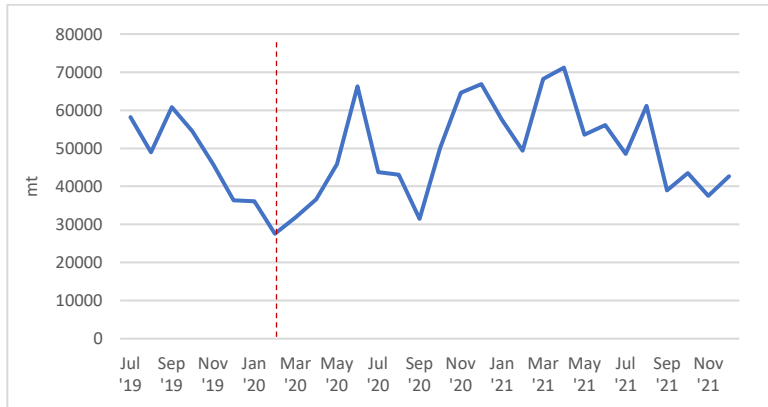
### Other species



- Amongst the other purse seine species/size categories, catch rates of large YFT remained at high levels in Dec relative to the '19-'21 period. Catch rates of small YFT and BET fell slightly, while catch rates of large BET remained stable.

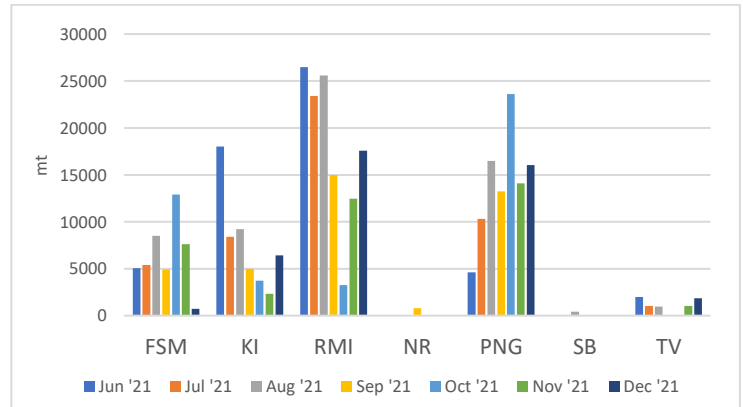
## Transshipment

### Volume



- Transshipment volumes in PNA ports rose slightly in Dec, up by around 14% on Nov volumes (from 37,525t to 42,626t).

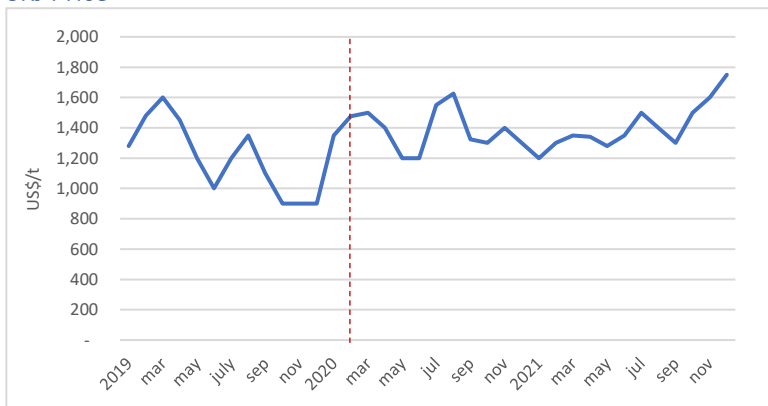
### Location



- Transshipment volumes continued to be highest in RMI and PNG, collectively accounting for 79% of total volume. Volumes in FSM fell sharply, while volumes in KI rose.

## Prices

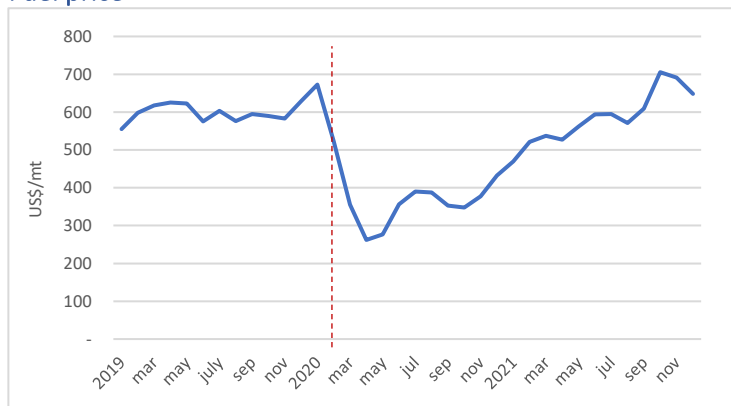
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices averaged around \$1750 in Dec, up from \$1600 in Oct. The Dec '21 price is the highest Dec monthly price since 2017 and the highest price since the start of the pandemic.

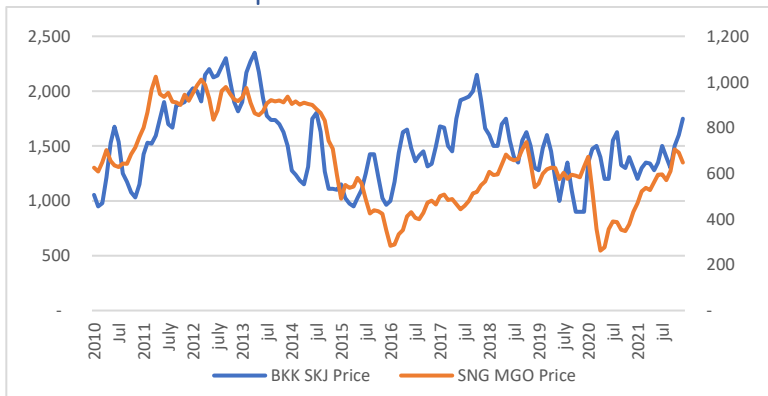
### Fuel price



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

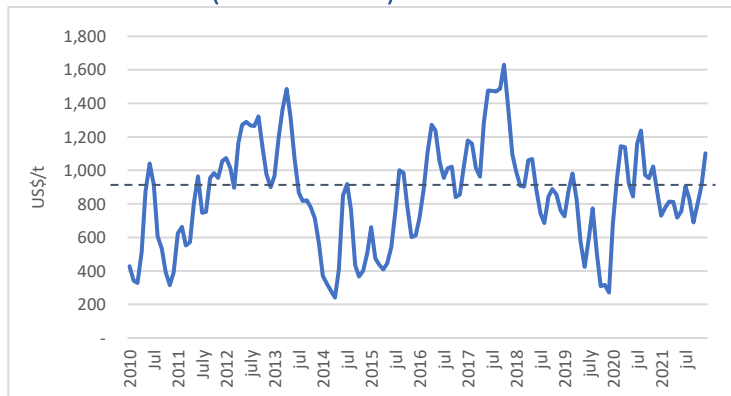
- Singapore MGO price fell in Dec, averaging US\$648/mt, down from US\$692/mt in Nov. Price has rebounded since then, sitting at \$749/mt on 17<sup>th</sup> Jan.

### BKK SKJ Price vs Fuel price



- The BKK SKJ price and Singapore MGO price index lines diverged sharply in Dec, driven by the rise in SKJ price and fall in fuel price.

### Price differential (BKK SKJ – Fuel)



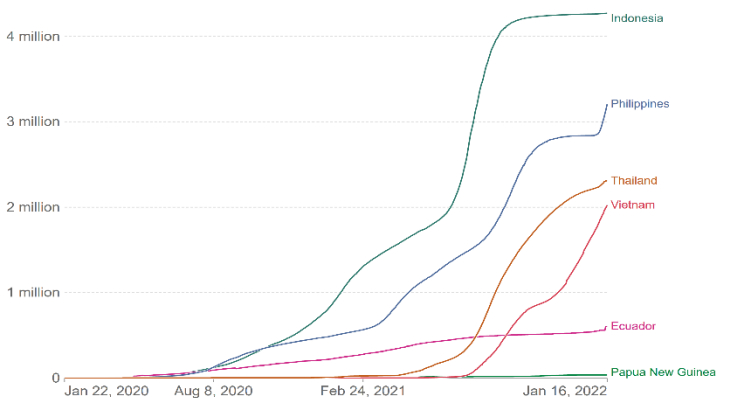
- The price differential between BKK SKJ price and Singapore MGO rose to US\$1102 in Dec, up from \$909 in Nov. The differential was well above the long term average of around US\$885 and the highest since Aug '20.

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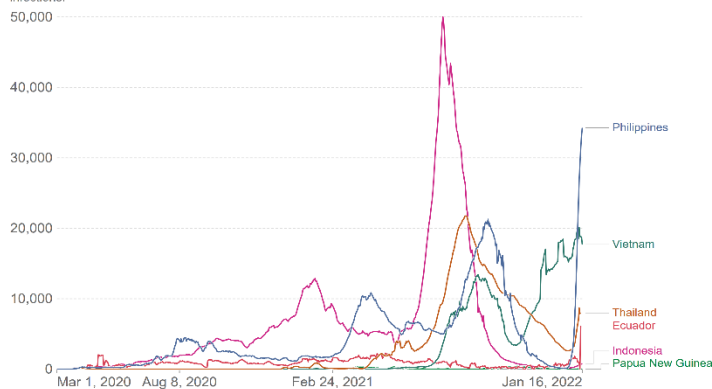
<https://ourworldindata.org/covid-cases>

- Total case numbers in Indonesia remain stable, while numbers in Vietnam continue to rise and those in the Philippines have risen rapidly in recent weeks.

### 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

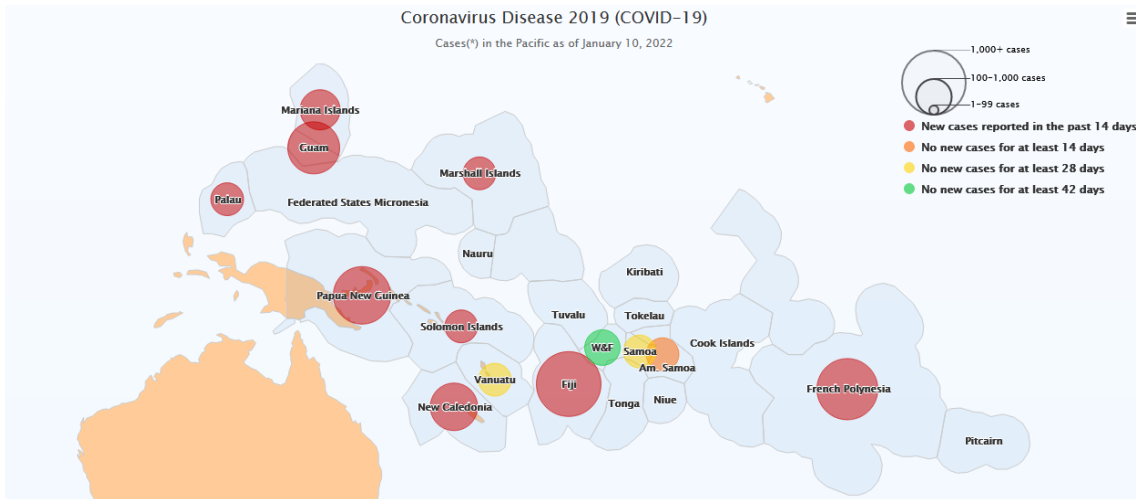
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<https://ourworldindata.org/covid-cases>

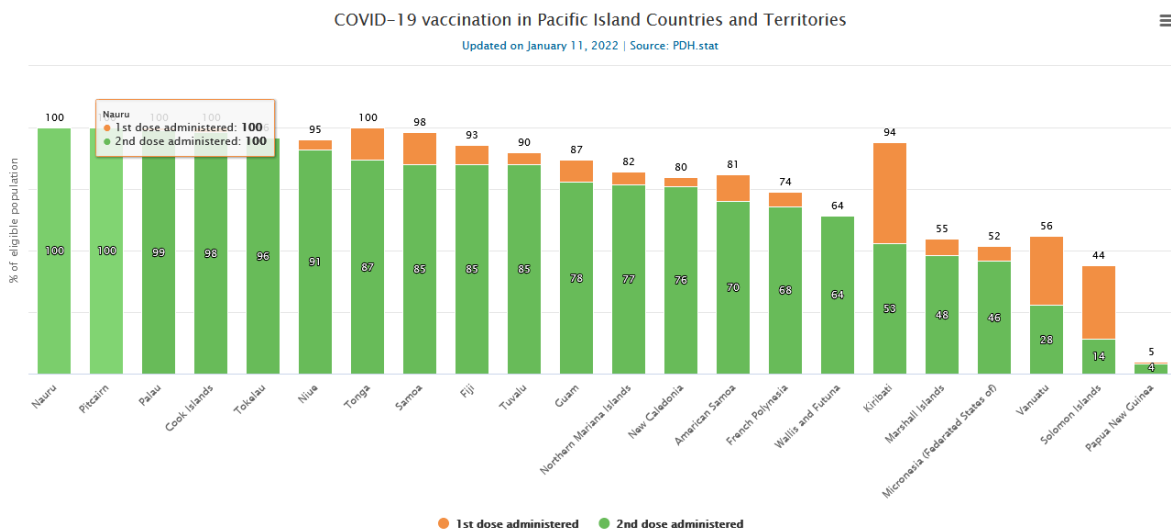
- Philippines daily case numbers have surged in recent weeks, from close to zero in Dec '21 to over 30,000 in mid-Jan '22. Vietnam's second wave continues, while cases in Thailand and Ecuador have both ticked up in recent days.

Other issues:

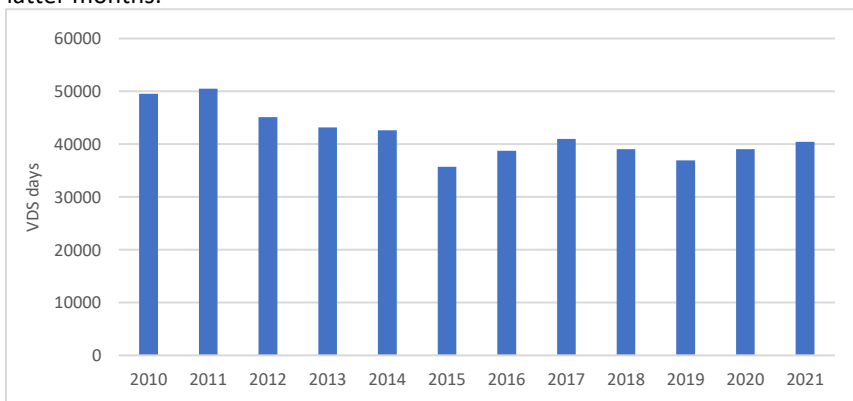
- As at Jan 14<sup>th</sup>, PNG is reported to have had a cumulative total of 36,435 confirmed COVID cases, while 5 new cases were reported in the Solomon Is and 3 in RMI ( Solomon Is 25, Palau 8, Marshall Is 7, Kiribati 2 and FSM 1)<sup>1</sup>. Case numbers in PNG are thought to be an underestimate given testing rates have been low and anecdotal reports indicate the ‘positive rate’ (proportion of all tests returning a COVID positive result) remains high. Note that SPC report Palau has reported 18 cases in the 14 days to 10<sup>th</sup> Jan, bringing total cases to 28<sup>2</sup>.
- Trends in COVID-19 case numbers in the Pacific as of 10<sup>th</sup> Jan (as reported through the SPC ‘COVID-19: Pacific Community Updates’ website<sup>3</sup>) are set out below:



- SPC report that, amongst PNA Parties, vaccination rates are very high in NR, PW, TK and TV. Rates of vaccination in KI are rapidly increasing with 94% of eligible citizens receiving at least one dose, while rates remain low in PNG.



- Reports indicate that the surge in the Philippines has likely been fuelled by the omicron variant, although the delta variant remains in circulation<sup>4</sup>. Some reports suggest that infections have been milder than those in previous waves<sup>5</sup>.
- Atuna reports that high freight rates remain a problem for many in the tuna sector, exacerbated by bottlenecks resulting from COVID-19 outbreaks in major ports<sup>6</sup>.
- Year on year VDS effort data indicate no substantial impact on overall effort during the ‘pandemic years’, with effort in 2020 and 2021 roughly consistent with trends in preceding years. While effort in 2021 was on track to be the highest since 2014, VDS day usage declined in the latter months.



**Notes:**

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 17<sup>th</sup> January, 2022. Some data may change as more information is added over time. Figures for December 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.

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

<sup>2</sup> <https://www.spc.int/updates/blog/2022/01/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://www.philstar.com/headlines/2022/01/15/2154069/doh-sees-community-transmission-omicron-metro-manila>;

<https://www.straitstimes.com/asia/se-asia/philippines-faces-biggest-ever-covid-19-surge-omicron-could-be-dominant-strain-by-january>

<sup>5</sup> <https://www.nytimes.com/2022/01/17/world/asia/philippines-covid-surge-omicron.html>

<sup>6</sup> <https://atuna.com/news/shipping-rates-still-a-headache-for-tuna-sector>