

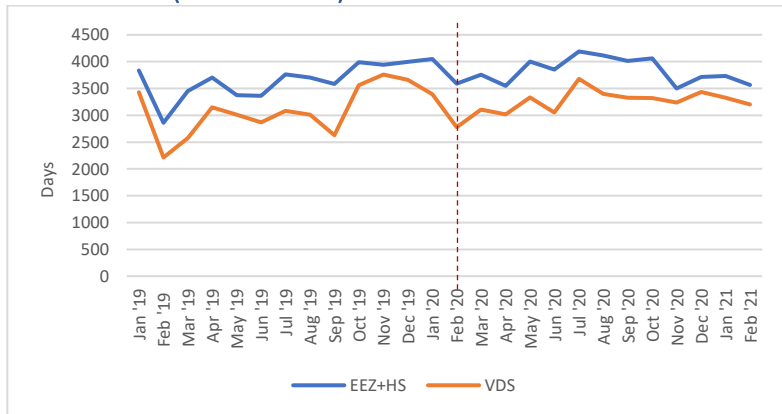


### Key trends:

- Preliminary figures indicate that overall purse seine fishing days fell slightly in February, albeit fishing intensity (fishing days/calendar day) rose in EEZs. Note that February figures may be adjusted as NFDs are processed.
- Total purse seine catch fell slightly in February, although remained above much of the previous 12 months. Catch and effort were highest in PNG, with effort in PNG's EEZ higher than all other PNA EEZs combined.
- Based on preliminary figures, overall catch rates fell slightly in February, but remained above much of the previous 12 months. Catch rates fell slightly for SKJ, while catch rates of large YFT remained at low levels.
- Transshipment volumes fell in February, although remained higher than much of the COVID-19 period. Transshipment continues to be highest in PNG ports, accounting for over half of all PNA volume.
- Bangkok SKJ prices rose from US\$1,200 in January to \$1,300 in February, according to Thai Union figures. The February figure was the lowest since 2016. Singapore MGO price continued its steady rise in February, nearing pre-pandemic levels. The differential between SKJ price and Singapore MGO price remained below the 10 yr average for the second month running (the first two months since the start of the pandemic).
- Thailand continues to remain less affected by COVID cases than other key processing centres (e.g. Ecuador/Philippines/Spain). PNG has experienced a spike in COVID cases since late Feb/March.

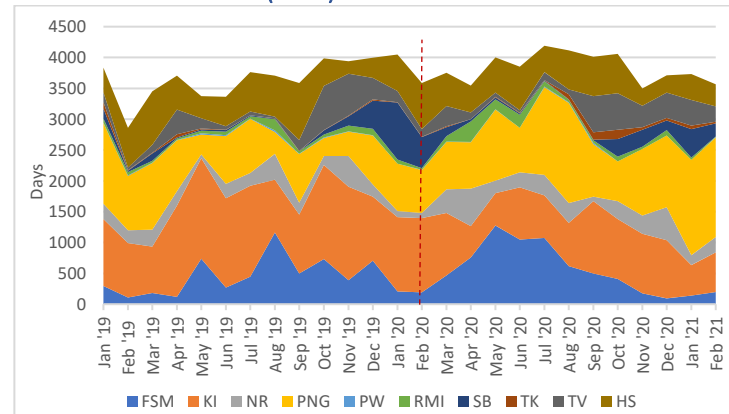
### Fishing effort

Overall effort (PNA EEZs+HS)



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

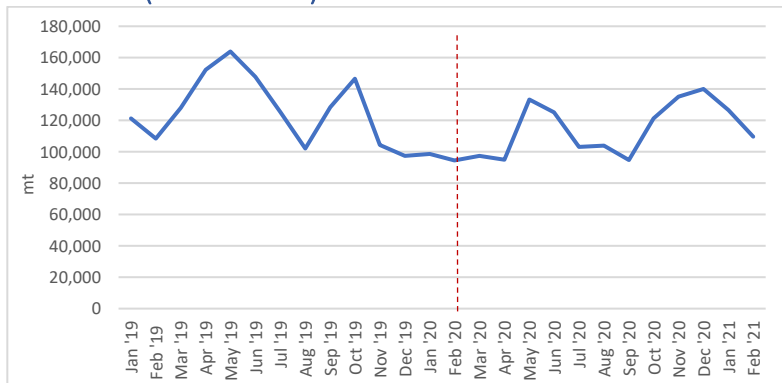
Distribution of effort (EEZs)



- Effort remained highest in PNG, accounting for around 45% of total effort. Effort in PNG was higher than all other PNA EEZs combined. Effort was next highest in KI and the HS.
- Preliminary figures indicate continuing high levels of effort in PNG in Mar.

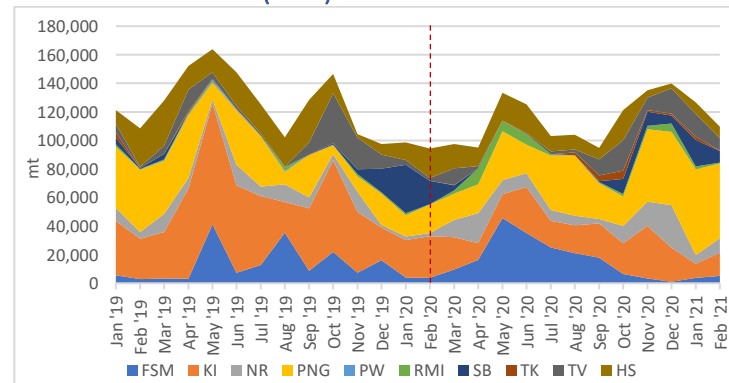
### Catch

Total catch (PNA EEZs+HS)



- Catch (EEZ+HS) in Feb (109,693t) declined by around 13% on the Jan figure, but remained higher than much of the previous 12 months. Feb catch figures are preliminary and may be adjusted upwards slightly as additional reports are received.

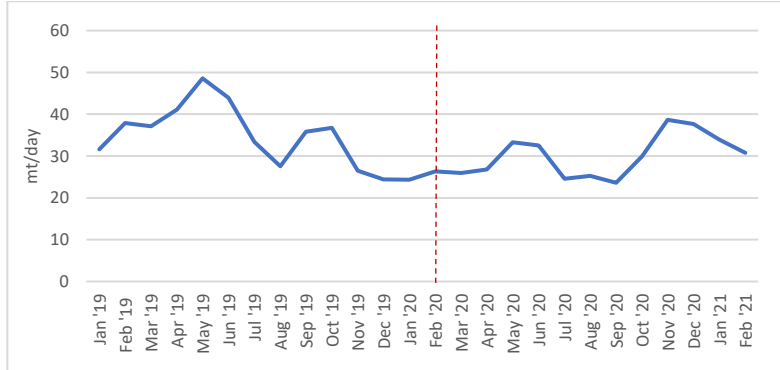
Distribution of catch (EEZs)



- Catches in Feb broadly reflected effort trends; catches were highest in PNG, accounting for 48% of the total catch. Jan and Feb were the highest two monthly catch figures in PNG across the full 2019-2021 period. Catches were next highest in KI and NR, collectively accounting for around 24% of the total catch.

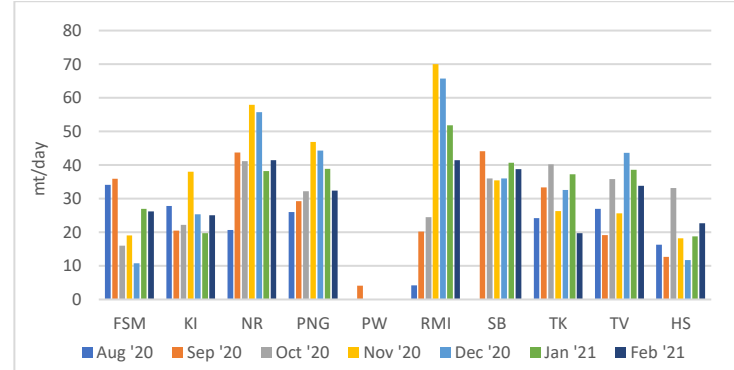
## Catch rates

### Overall (PNA EEZs+HS)



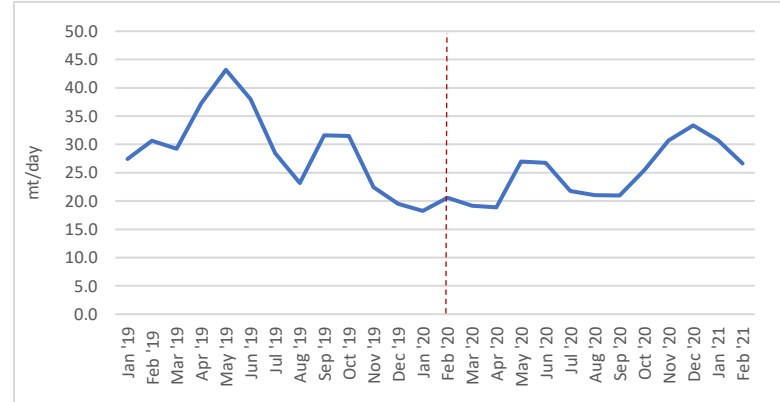
- Overall catch rates declined slightly in Feb, although remained slightly higher than much of the previous 12 months. These figures are preliminary and may be adjusted slightly as NFDs are processed and additional e-reporting is received.

### Catch rate by zone (EEZs)



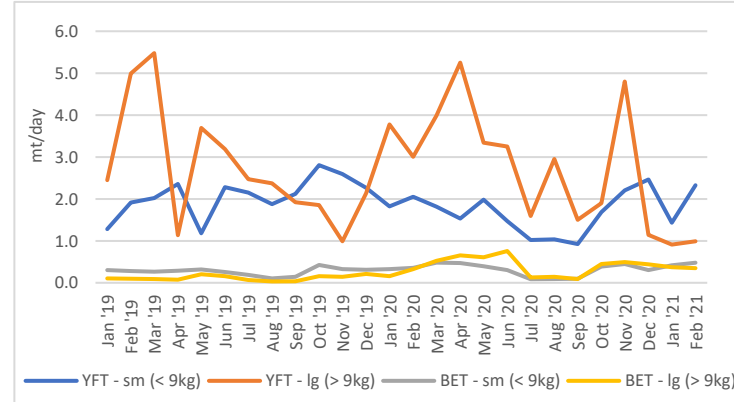
- Preliminary figures indicate that catch rates fell slightly PNG, RMI, TK and TV. Catch rates rose slightly in KI, NR and the HS. Other EEZs remained stable.

### Skipjack



- SKJ catch rate fell slightly in Feb, albeit remained high relative to the previous 12 months.

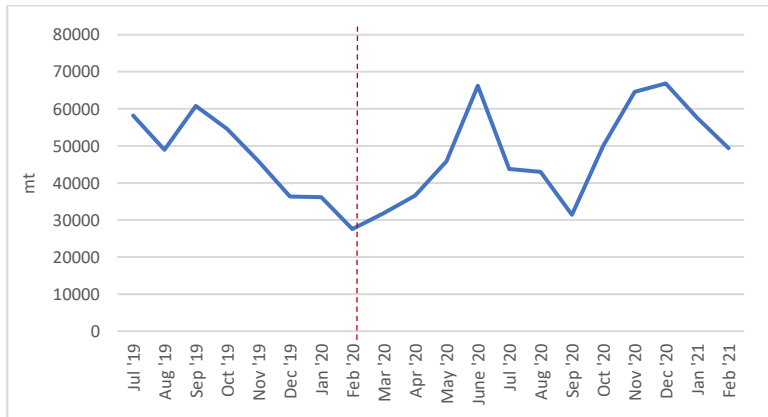
### Other species



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

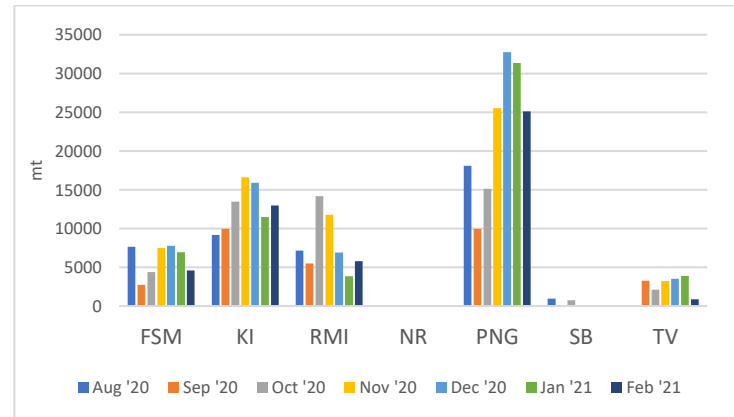
## Transshipment

### Volume



- Transshipment volumes in PNA ports declined for the second month running in Feb (49,382t, down from 57,550t), but remained high relative to most other months of the COVID-19 pandemic.

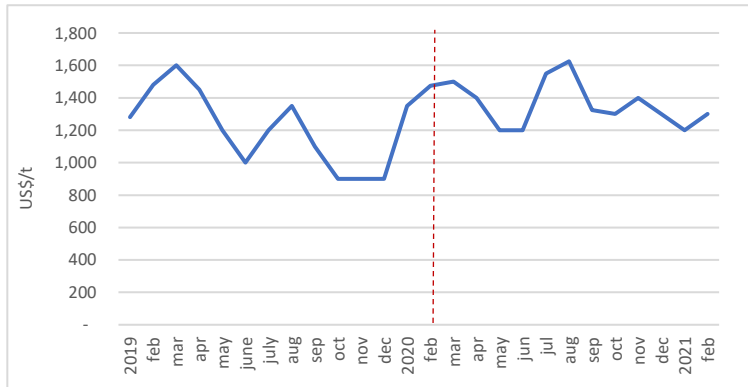
### Location



- Transshipment volumes remained highest in PNG ports in Feb, accounting for slightly over half of overall PNA volume. Volumes grew slightly in KI and RMI, but fell in FSM and TV.

## Prices

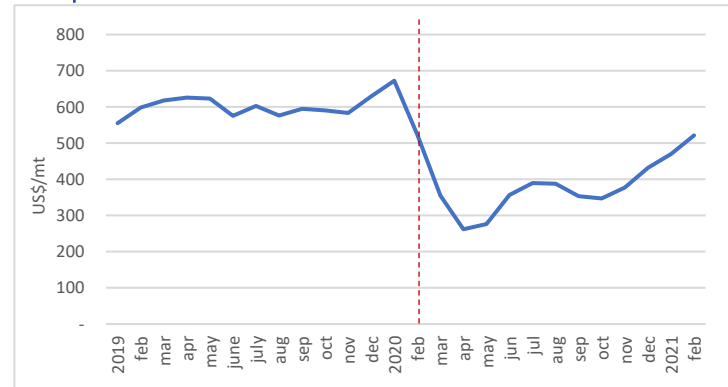
### SKJ Price



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

- Thai Union report that Bangkok SKJ prices increased to \$1300 in Feb, up from \$1200 in Jan. The 2021 figure of \$1300 is the lowest Feb price since 2016. As at early March '21, Atuna reports that Bangkok CFR price for SKJ had risen to \$1,400. Manta price remained stable at \$1700.

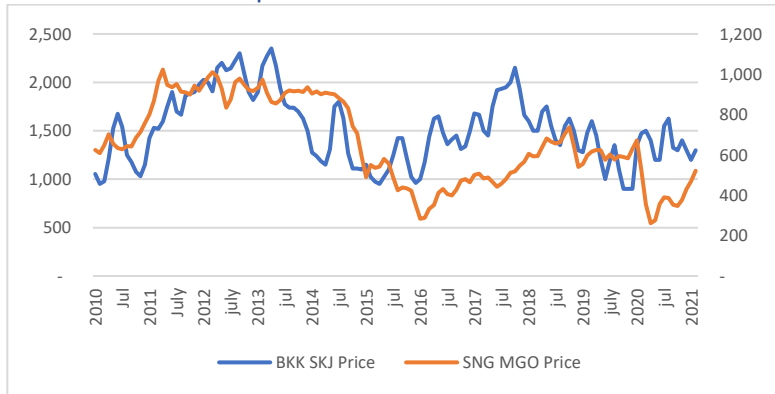
### Fuel price



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

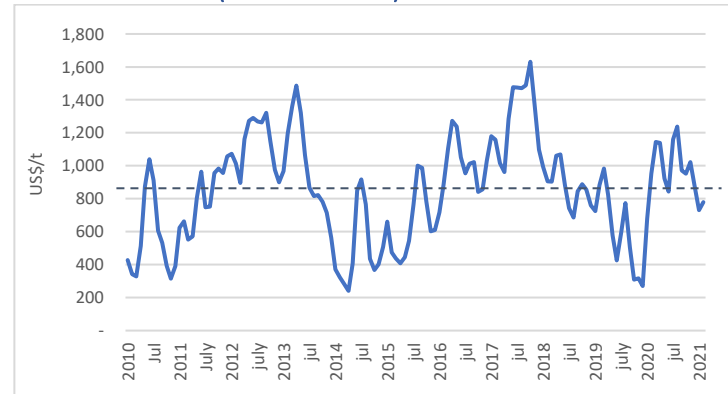
- Singapore MGO price continued to rise in Feb, averaging US\$521.50/mt. As of Mar 19<sup>th</sup> 2021, price continued to rise to \$532.50/mt, climbing closer to pre-COVID levels.

### BKK SKJ Price vs Fuel price



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

### Price differential (BKK SKJ – Fuel)



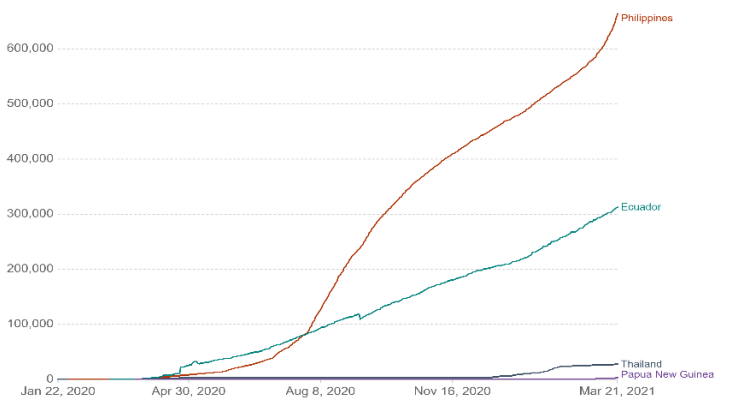
- The price differential between BKK SKJ price and Singapore MGO price increased from \$730 in Jan to \$779 in Feb. The Feb figure is below the average 10 year price difference of \$852 for the second month running.

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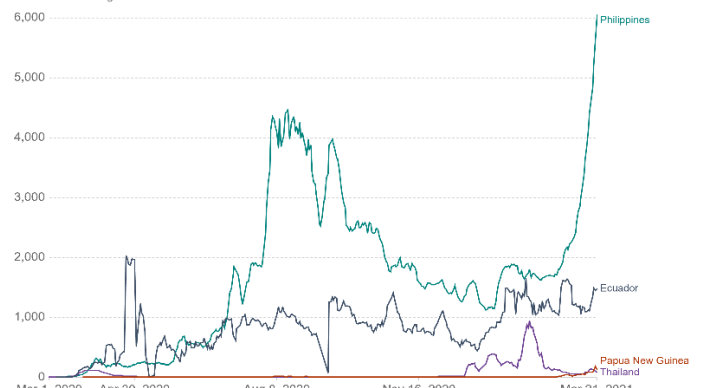
<https://ourworldindata.org/covid-cases>

- 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

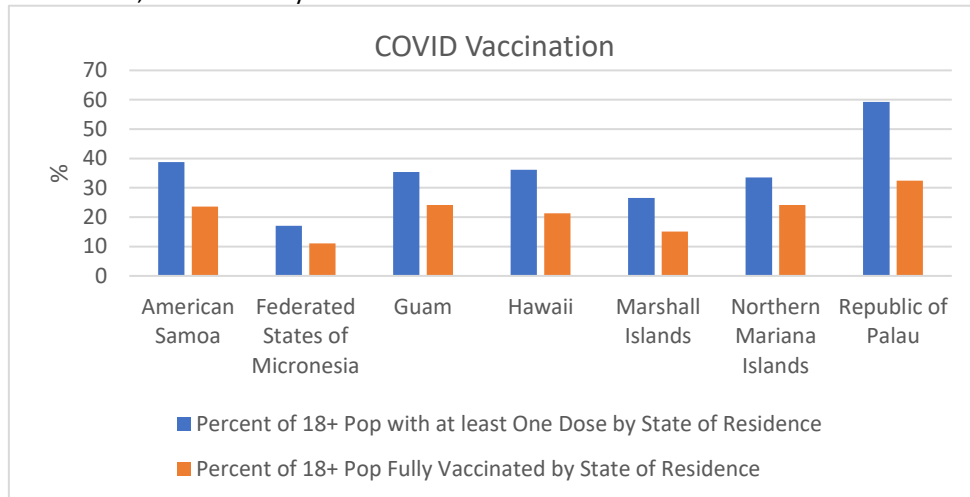
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<https://ourworldindata.org/covid-cases>

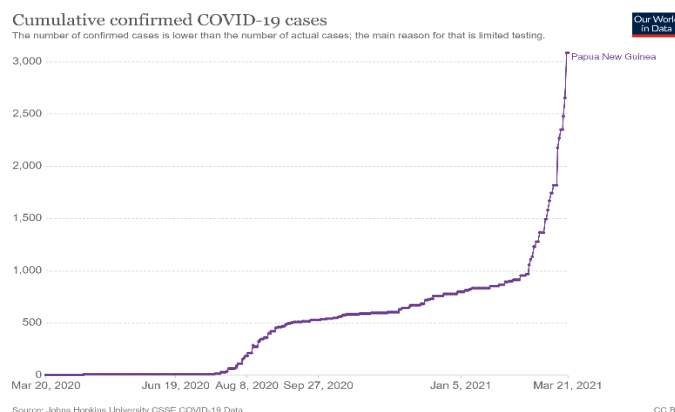
- The Philippines suffered a renewed spike in COVID cases in March.

Other issues:

- As at March 23<sup>rd</sup>, PNG is reported to have had 3,758 confirmed COVID cases, Solomon Is 18, Marshall Is 4 and FSM 1<sup>1</sup>.
- Northern Pacific countries and territories are leading the way in the Pacific on COVID vaccinations, with CDC data reportedly showing around 60% of the population 18 and over in Majuro have been vaccinated by 2<sup>nd</sup> March<sup>2</sup>. Yap has reportedly vaccinated 50% of the population 18 and up, with Palau at 40% and Guam at 30%.
- At the national level, CDC data as at 24<sup>th</sup> March shows Palau leading the way with the highest proportion of the total population 18 and up receiving at least one dose, as well as fully vaccinated<sup>3</sup>.



- PNG has experienced a steep spike in COVID cases since late February/March (see below). In response, Australia has supplied 8,000 doses of AstraZeneca vaccine to treat frontline health care workers, as well as requesting Astra Zeneca and European authorities to divert a further 1 million doses from its contracted supply<sup>4</sup>.



- The Solomon Is received their first 24,000 doses of the AstraZeneca vaccines through the COVAX facility on 19<sup>th</sup> March<sup>5</sup>. The Solomons became the second country in the Pacific to receive vaccines through the COVAX facility after Fiji, who received their first doses in early March.
- The COVID-19 Protocols Steering Committee has released an updated version of the Protocols for review, with news sections included on COVID vaccination and testing, the PNA FIMS app and considerations for vessels detained following compliance inspections (see <https://pnatuna.com/sites/default/files/Fisheries%20-%20COVID-19%20-%20Operating%20Protocols.pdf>). Parties have been invited to review and comment on the draft updated Protocols through an FFA circular.

Notes:

- Data on catch, effort, catch rates and transshipment is based on electronic reporting through iFIMS as at 22<sup>st</sup> March, 2021. Some data may change as more information is added over time. Figures for February 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://marshallislandsjournal.com/rmi-leads-in-covid-vaccinations/>

<sup>3</sup> <https://covid.cdc.gov/covid-data-tracker/#vaccinations>

<sup>4</sup> <https://www.pm.gov.au/media/australia-supporting-papua-new-guineas-covid-19-response>

<sup>5</sup> <https://www.who.int/westernpacific/about/how-we-work/pacific-support/news/detail/19-03-2021-solomon-islands-receive-24-000-doses-of-covid-19-vaccines-through-the-covax-facility>