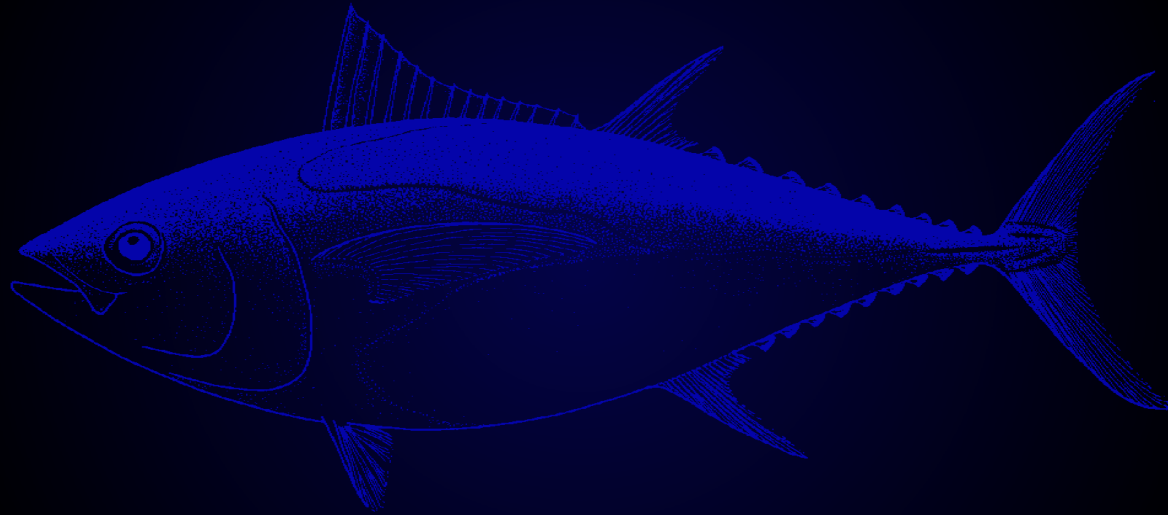


Overview of tuna fisheries in the Western and Central Pacific Ocean, including economic conditions - 2004

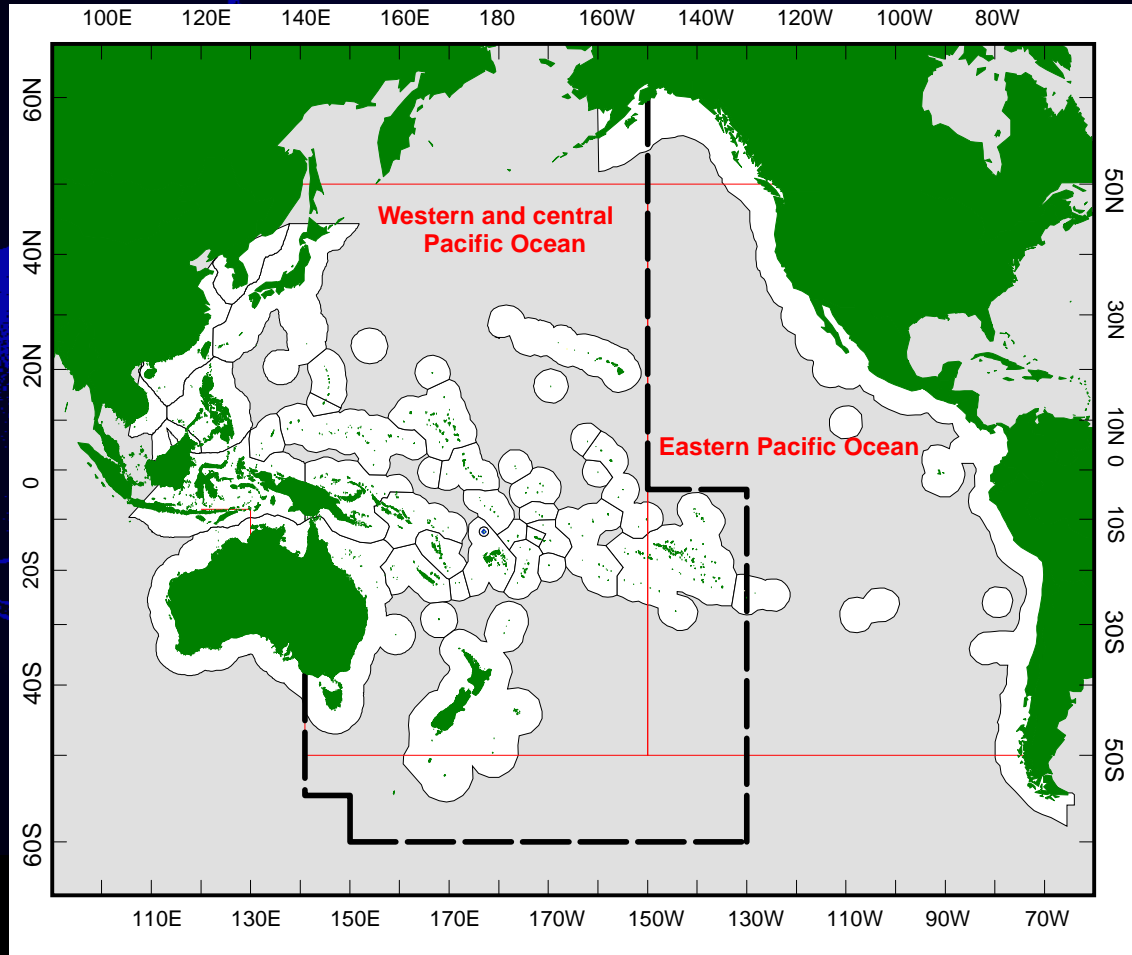
(WCPFC-SC1-GN-WP-1)



Oceanic Fisheries Programme (OFP-SPC)
Forum Fisheries Agency (FFA)

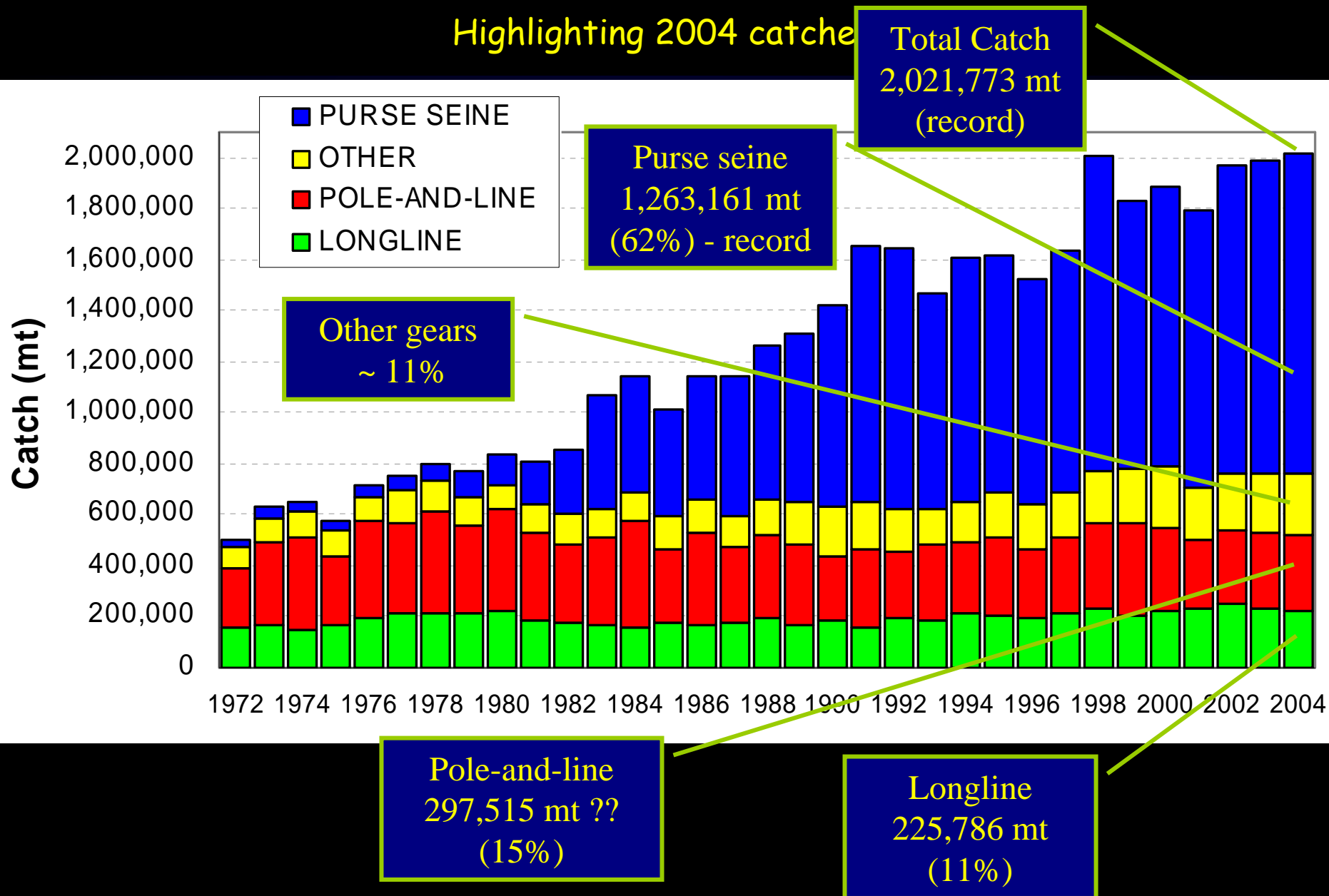


The WCPFC Convention Area (= "WCP-CA")



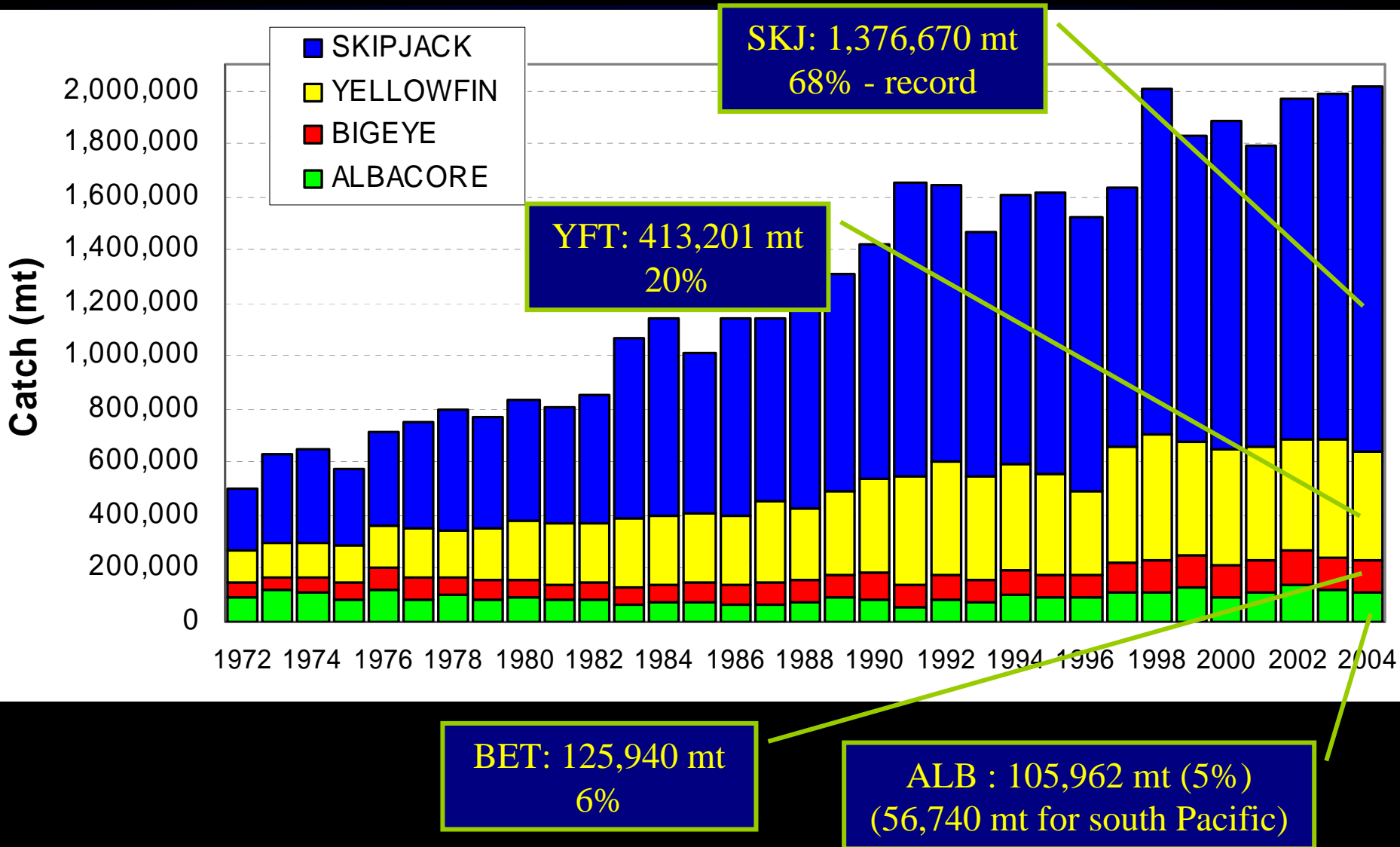
WCP-CA Tuna Catch by gear

Highlighting 2004 catches



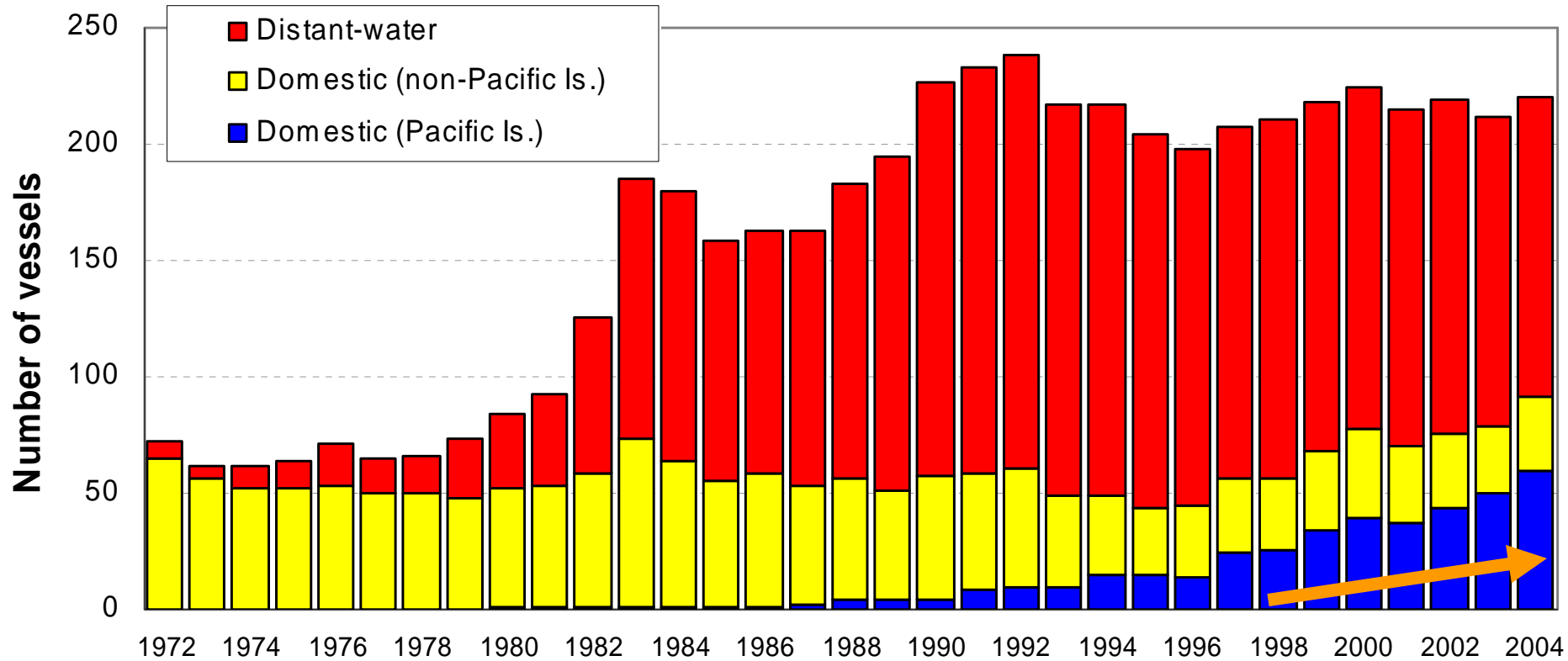
WCP-CA Tuna Catch by species

Highlighting 2004 catches



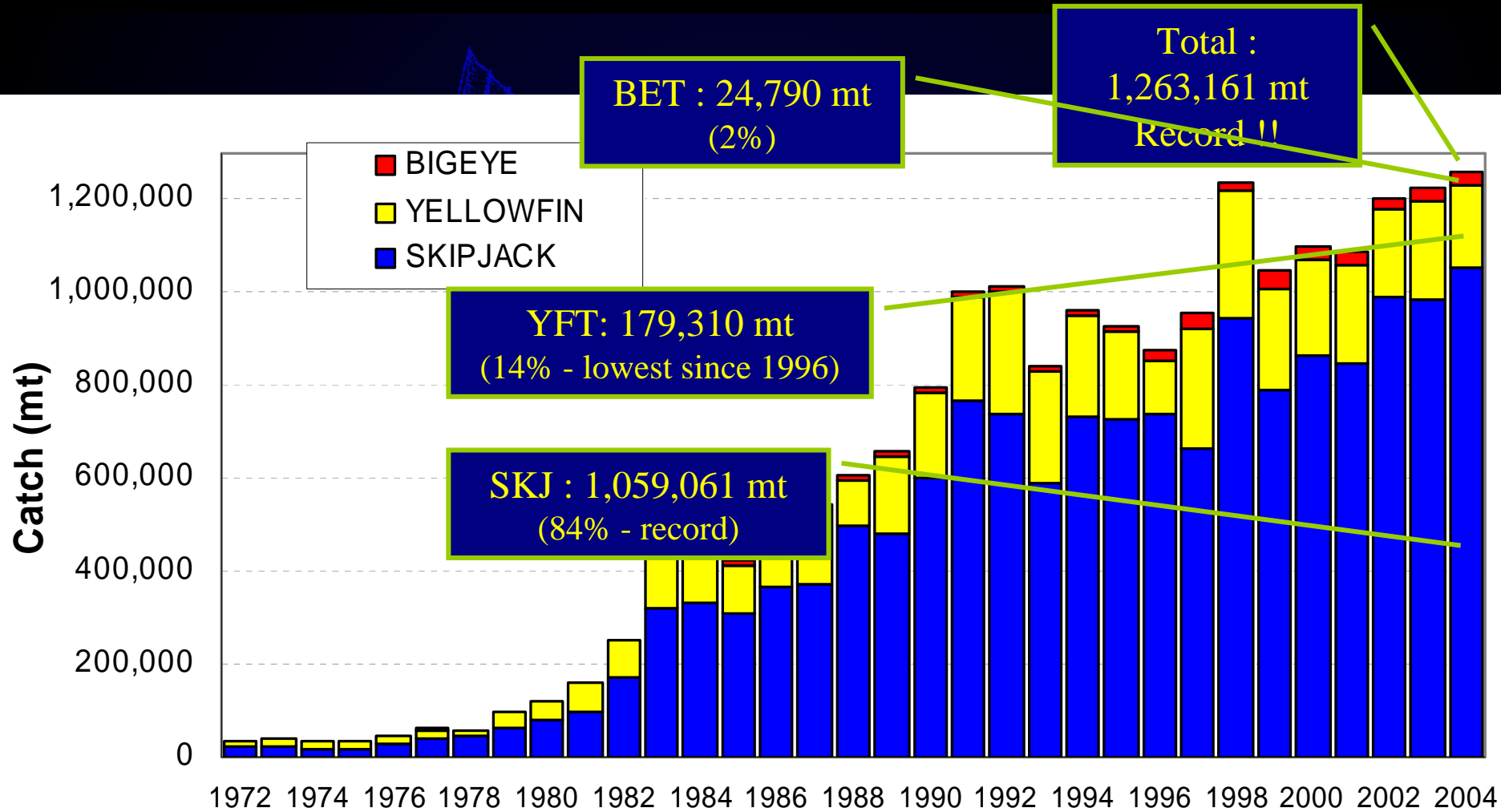
WCP-CA Purse seine fishery

Number of vessels



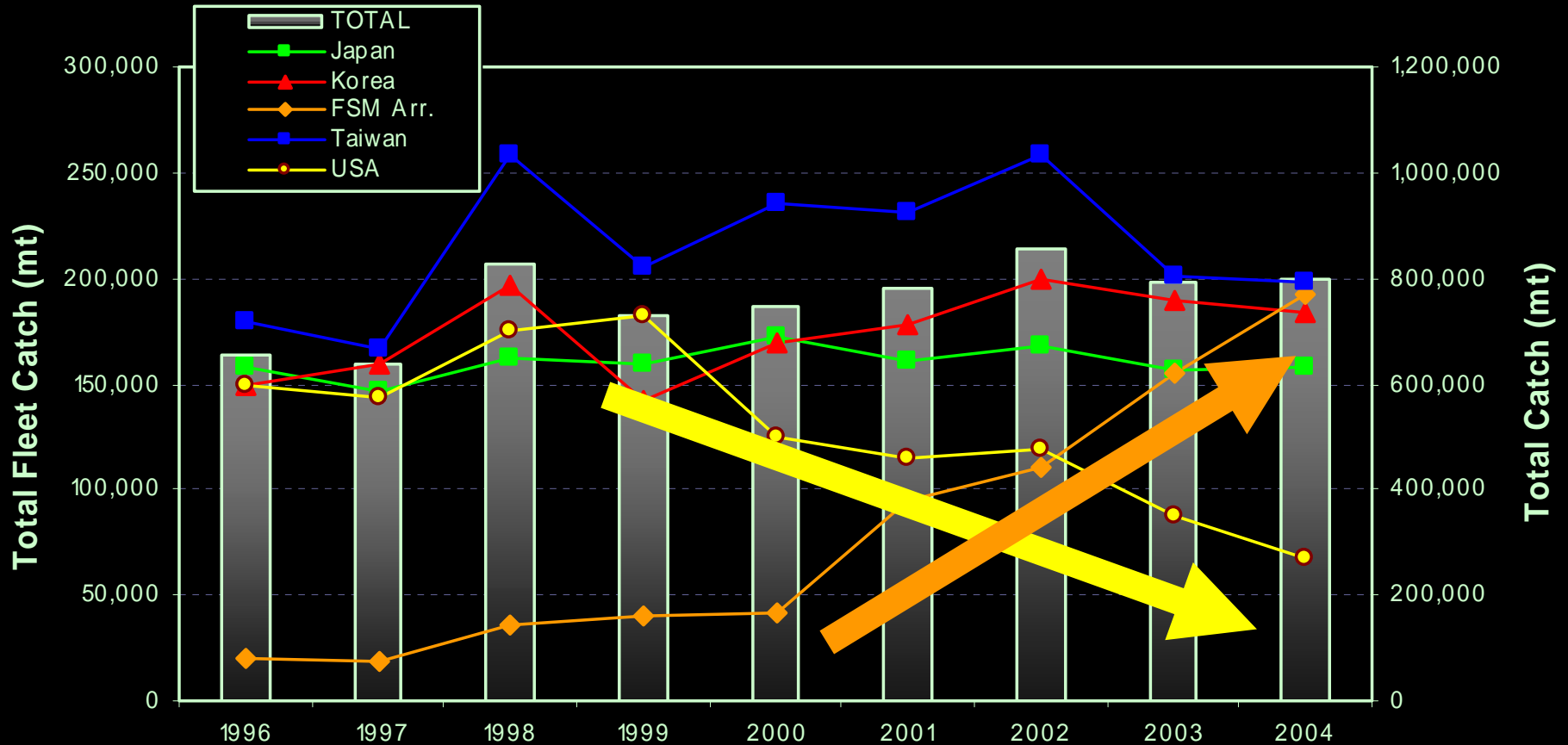
WCP-CA Purse seine fishery

Annual catch (mt) by species - Highlighting 2004 catches



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

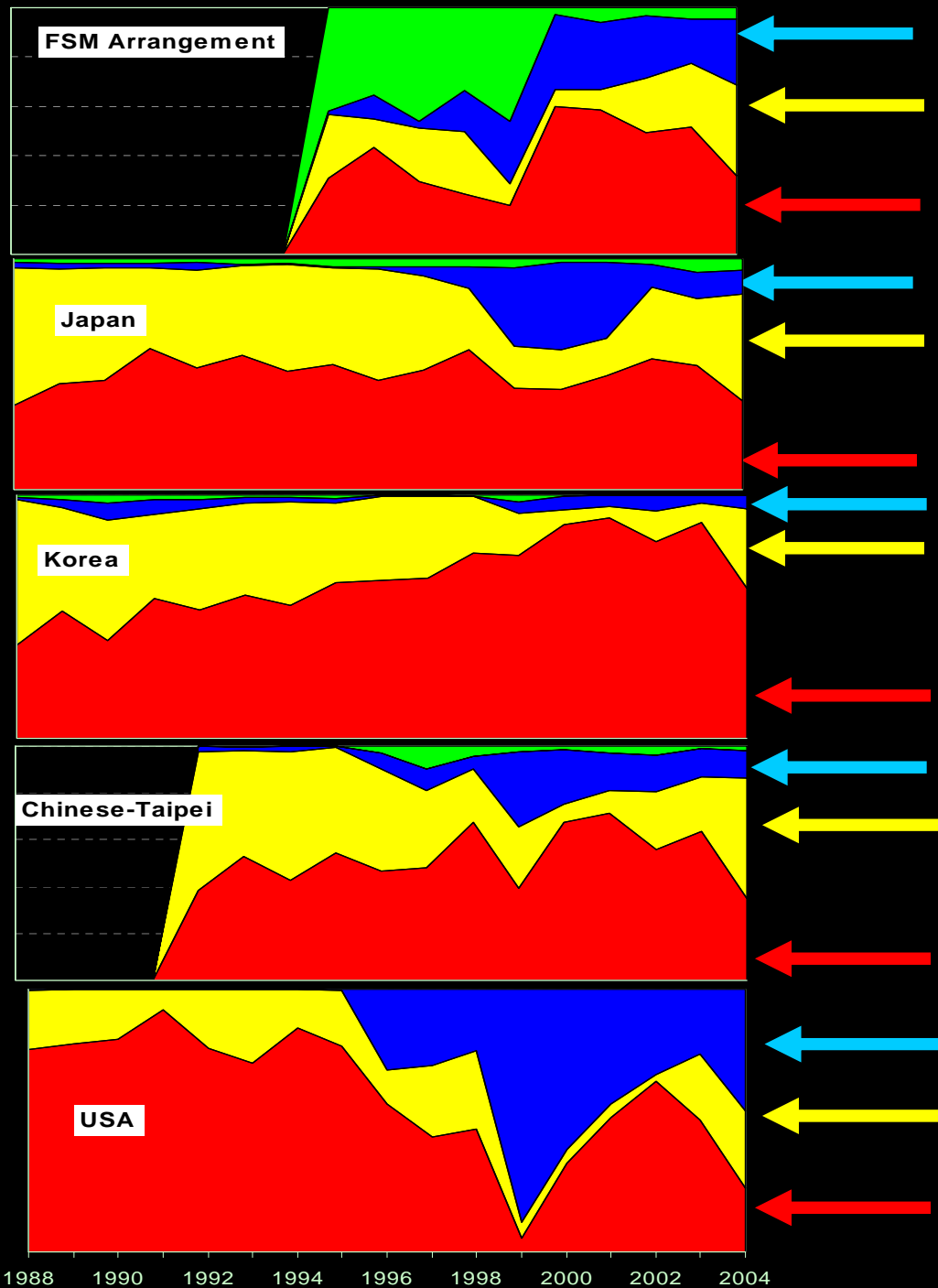
(Stable - except the US fleet, which was higher)

Log

(increase in 2004)

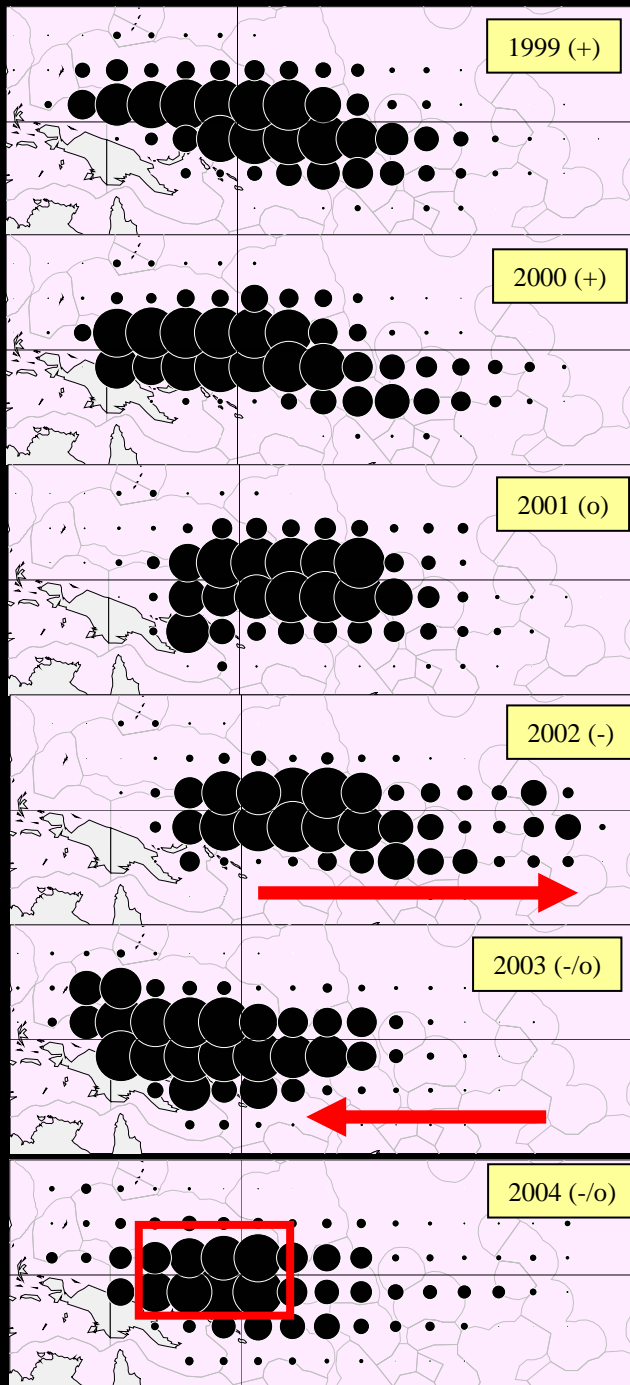
Unassociated

(reduction in 2004)



WCP-CA Purse seine fishery

Distribution of effort

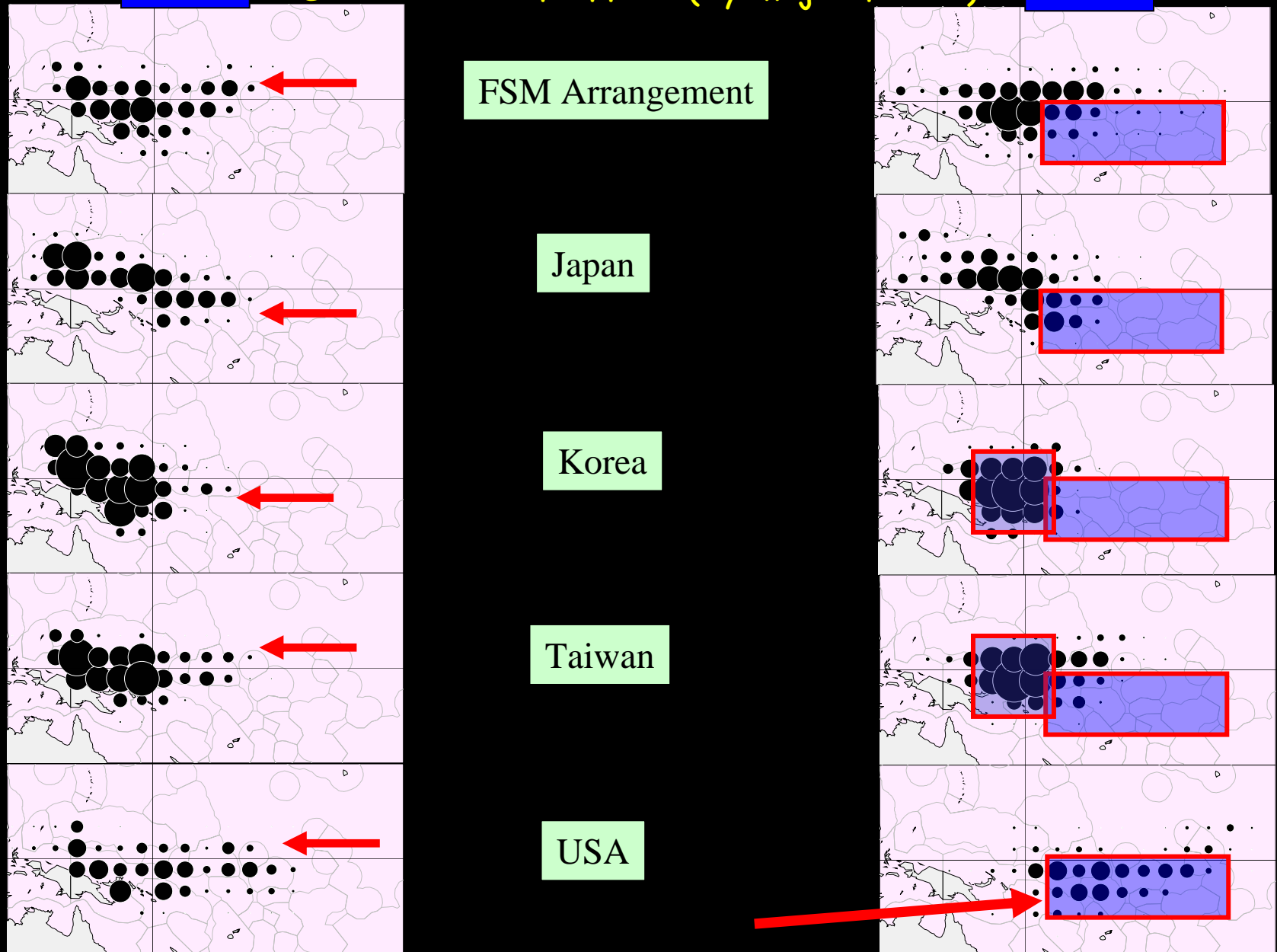


WCP-CA Purse seine fishery

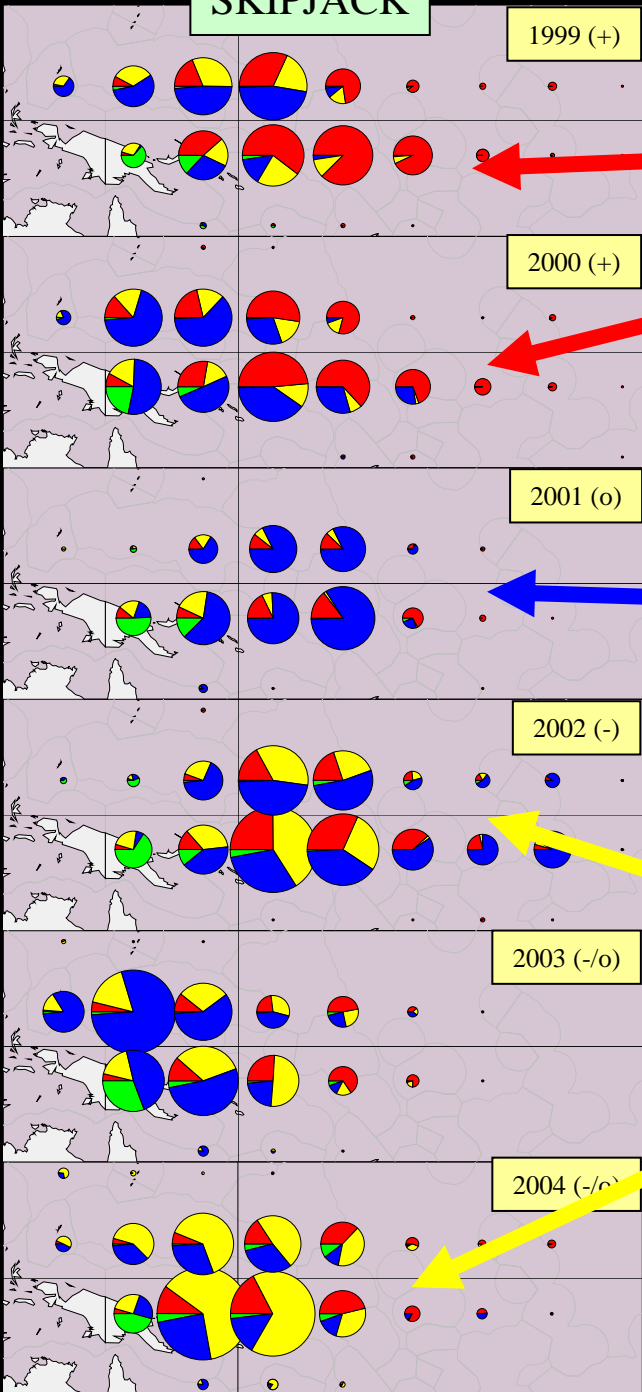
2003

Distribution of effort (by major fleets)

2004



SKIPJACK



1999 (+)

2000 (+)

2001 (o)

2002 (-)

2003 (-/o)

2004 (-/c)

WCP-CA Purse-seine fishery

Distribution of catch by
set type - Skipjack

Drifting FAD

Unassociated

Log

- Unassociated
- Log
- Drifting FAD
- Anch. FAD

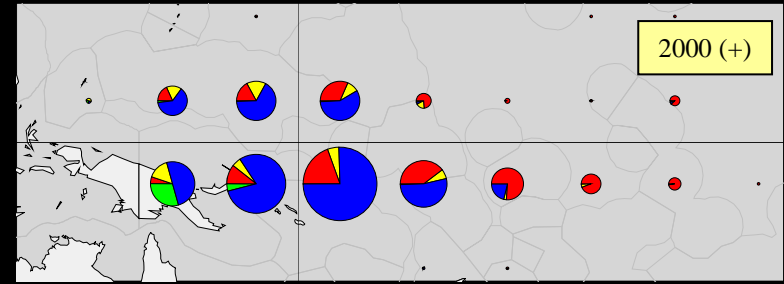
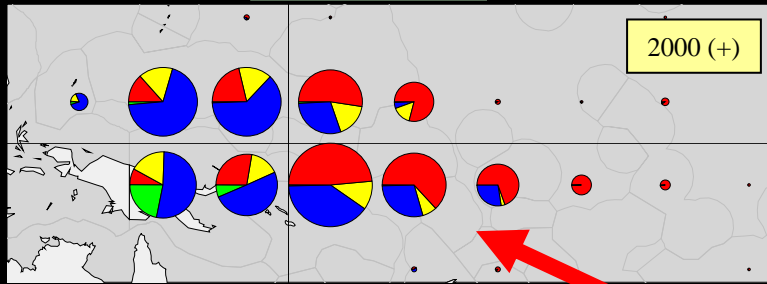
WCP-CA Purse-seine fishery

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

- Unassociated
- Log
- Drifting FAD
- Anch. FAD

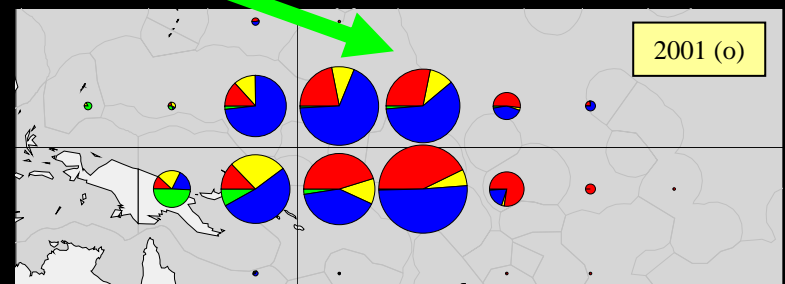
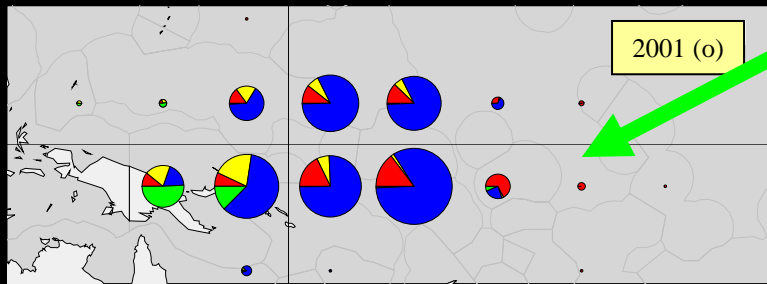
SKIPJACK

YELLOWFIN



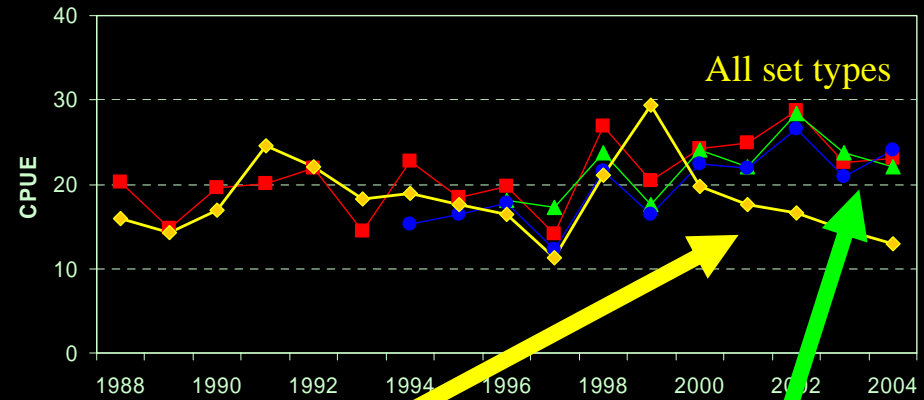
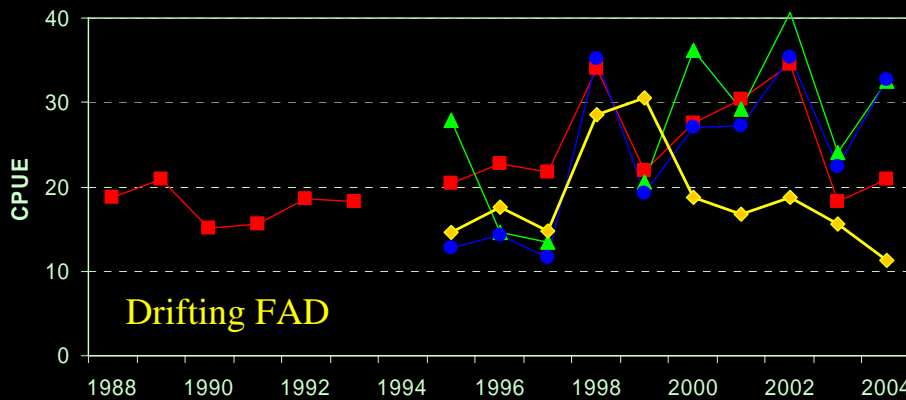
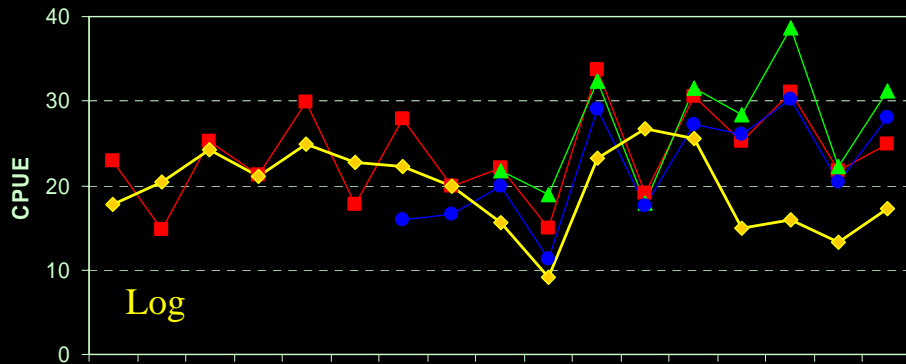
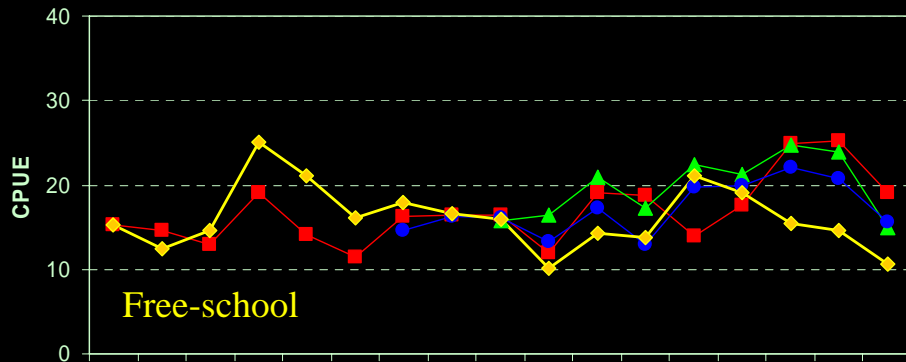
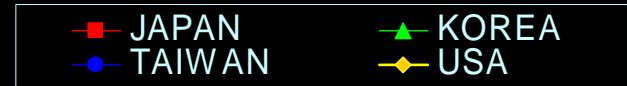
2000
SKJ - mostly from DFAD sets
YFT - mostly from UnAssoc. sets

2001
SKJ - mostly from Unassoc. sets
YFT - mostly from Assoc. sets



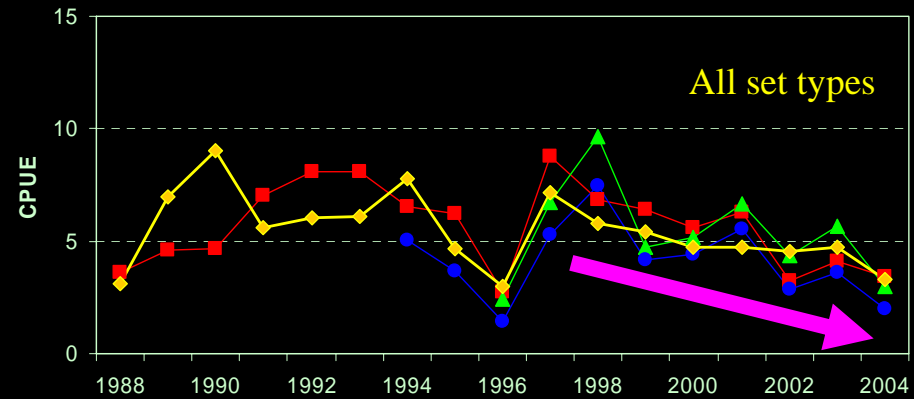
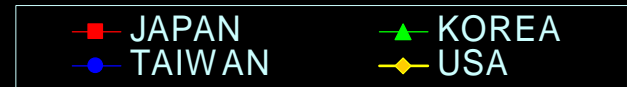
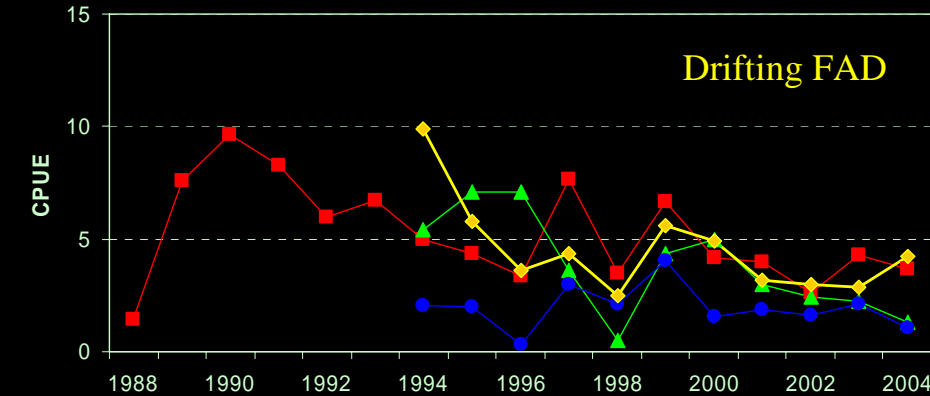
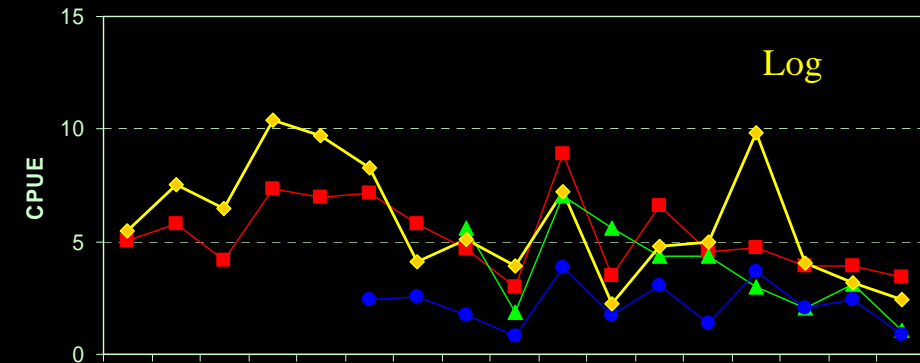
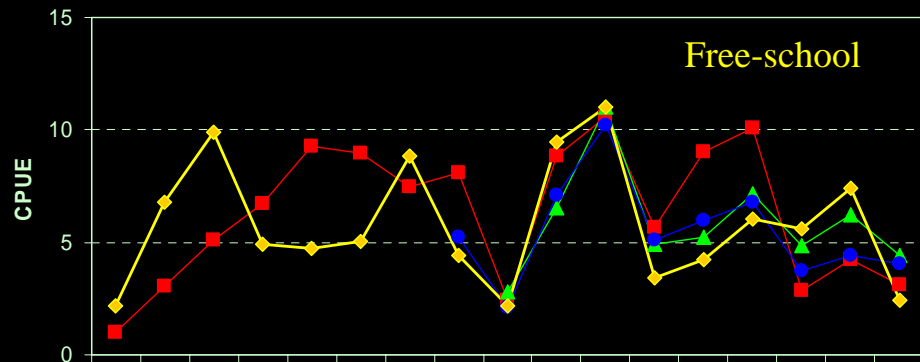
WCP-CA Purse seine fishery

Nominal Skipjack CPUE by set type



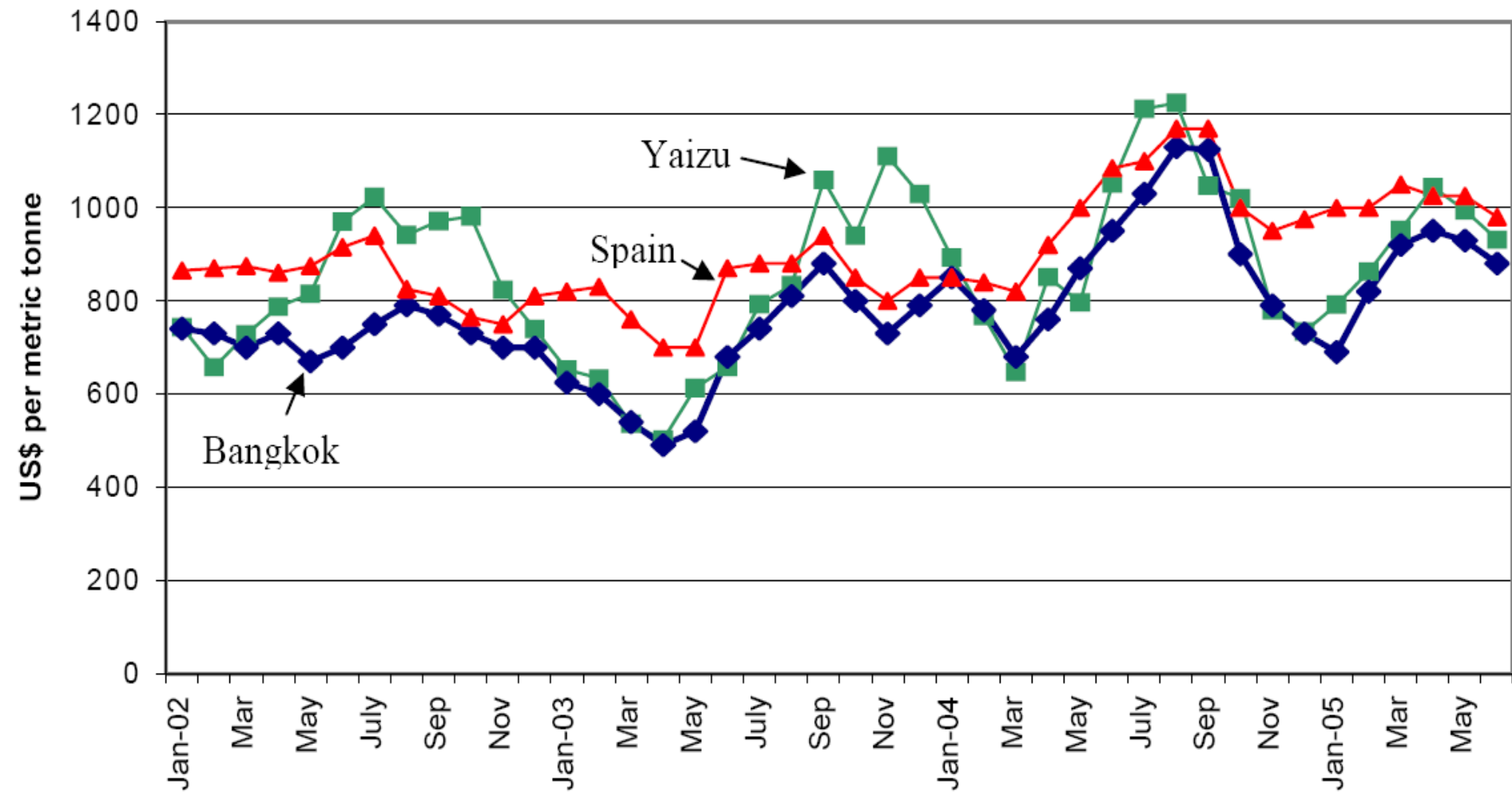
WCP-CA Purse seine fishery

Nominal Yellowfin CPUE by set type



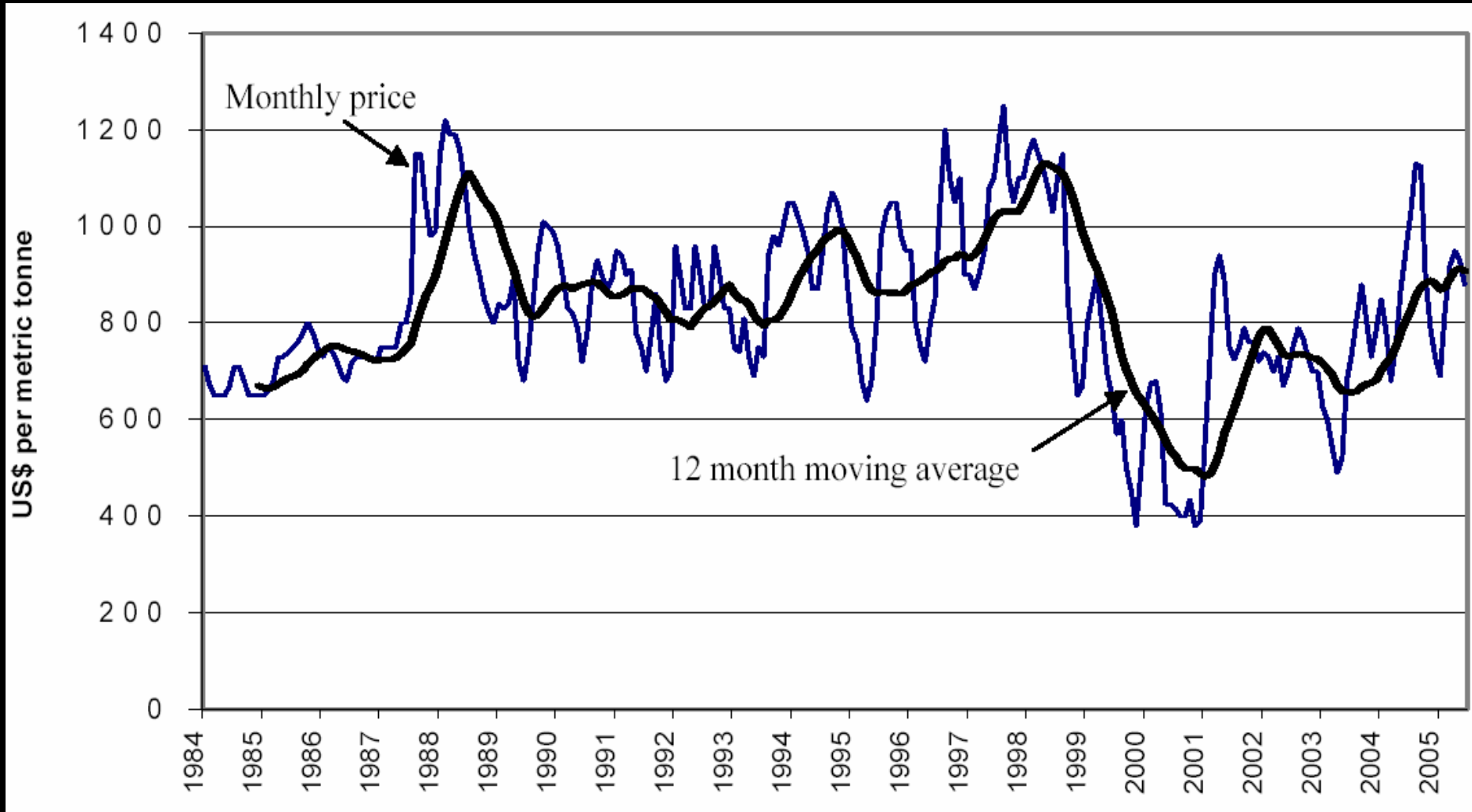
Purse seine - Economic Overview

Skipjack Prices, Jan 2002 - June 2005



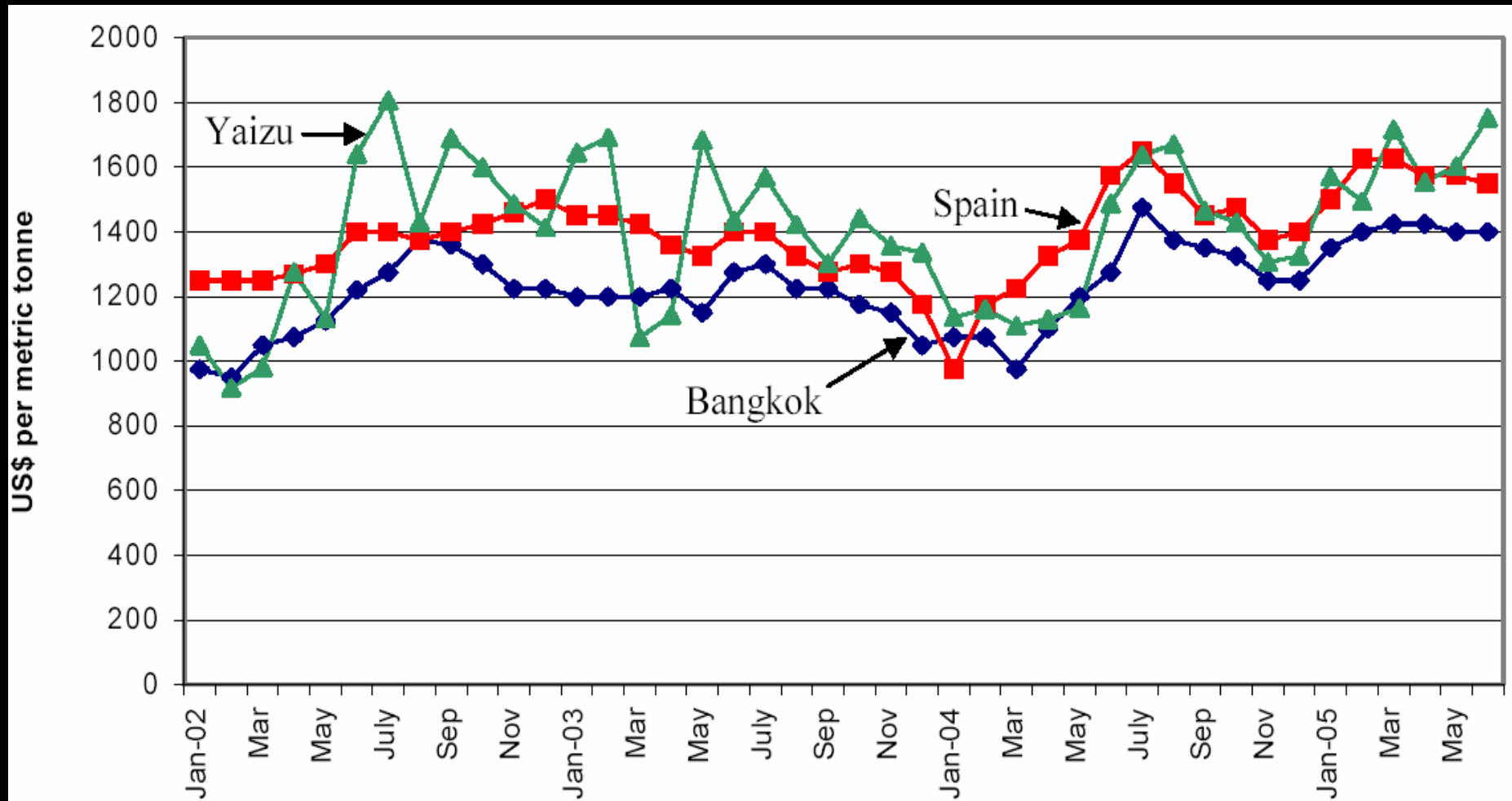
Purse seine - Economic Overview

Bangkok Skipjack Prices, 1984 - 2005



Purse seine - Economic Overview

Yellowfin Prices, Jan 2002 - June 2005



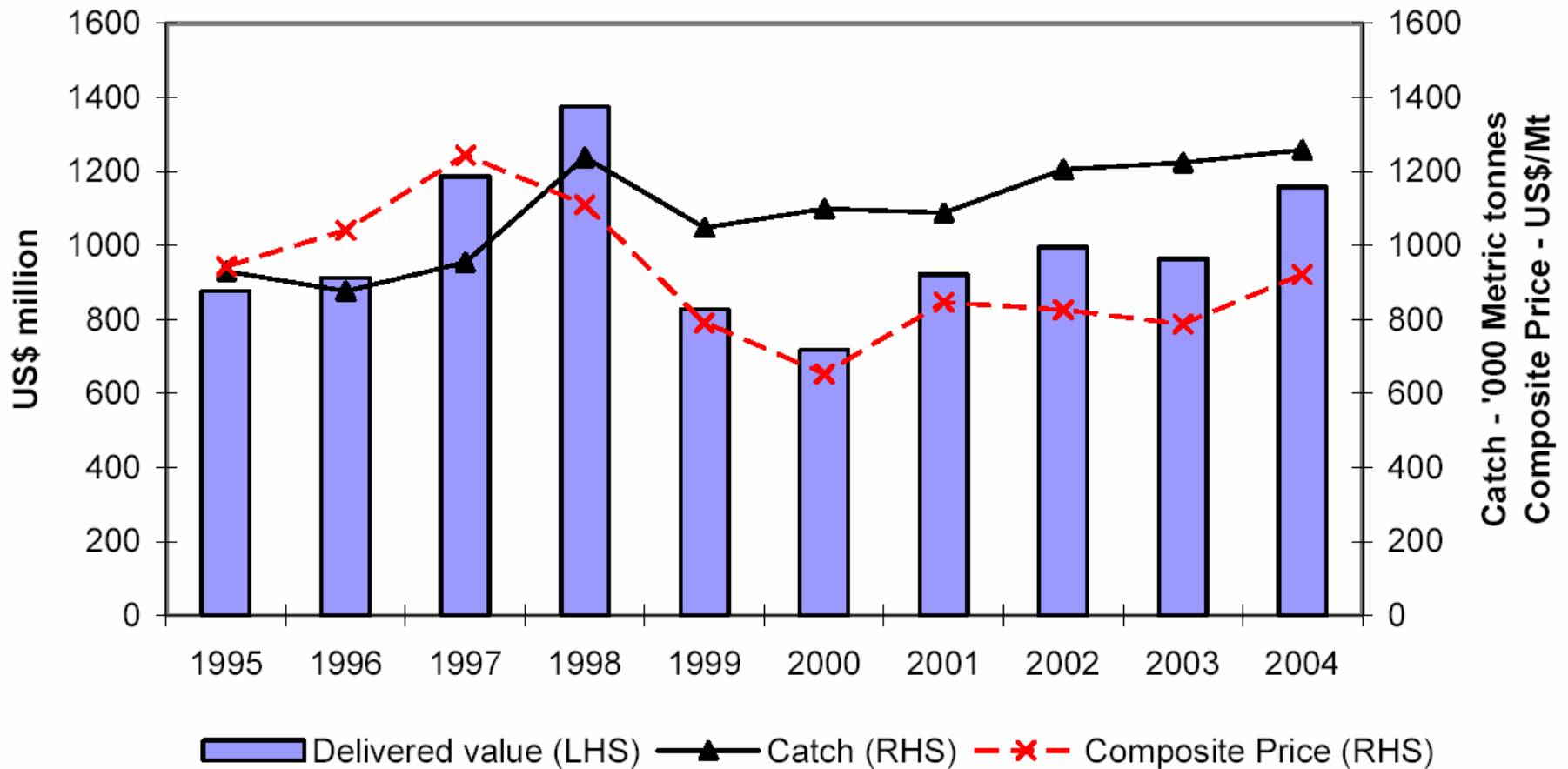
Purse seine - Economic Overview

Bangkok Yellowfin Prices, 1995 -2005



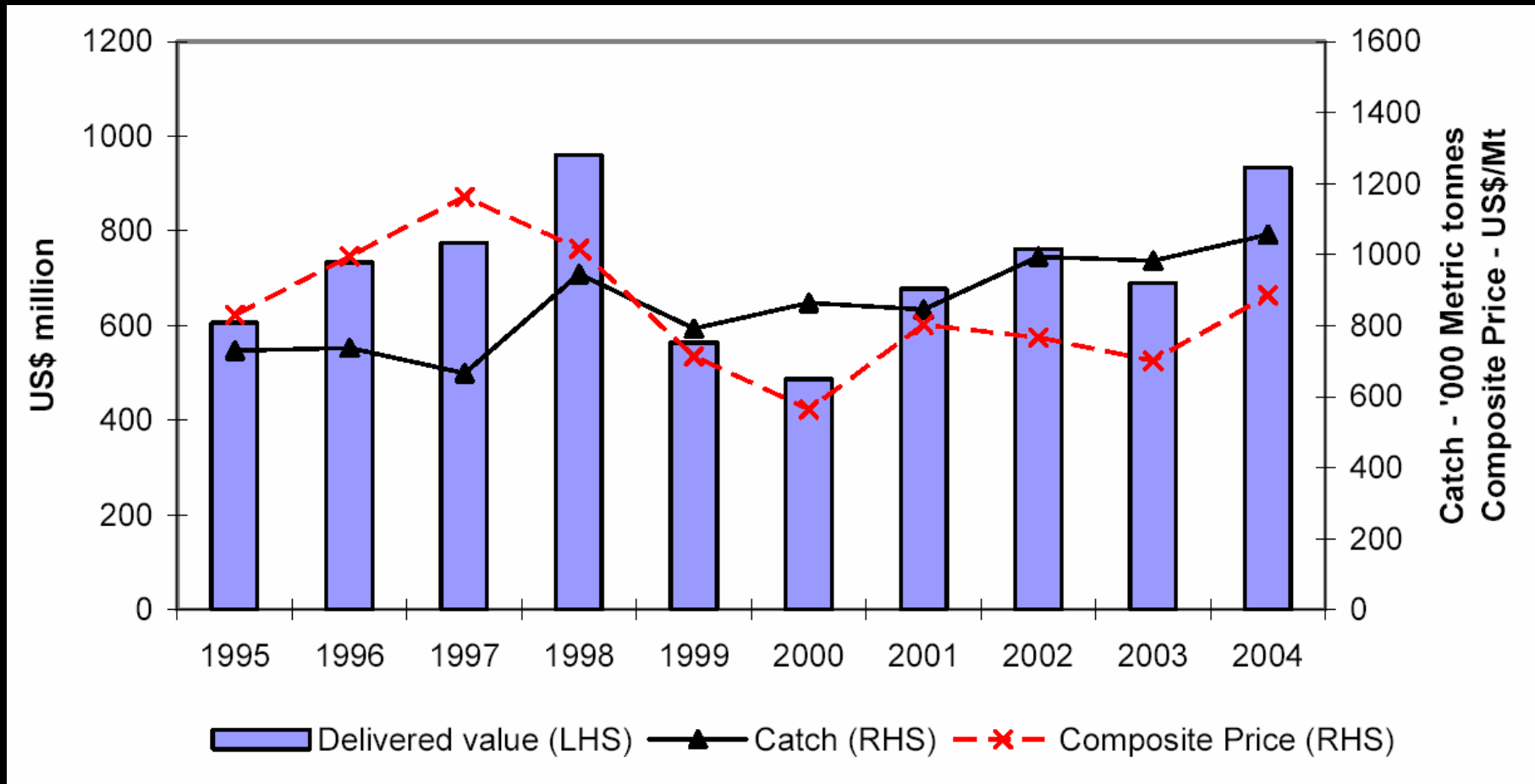
Purse seine - Economic Overview

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



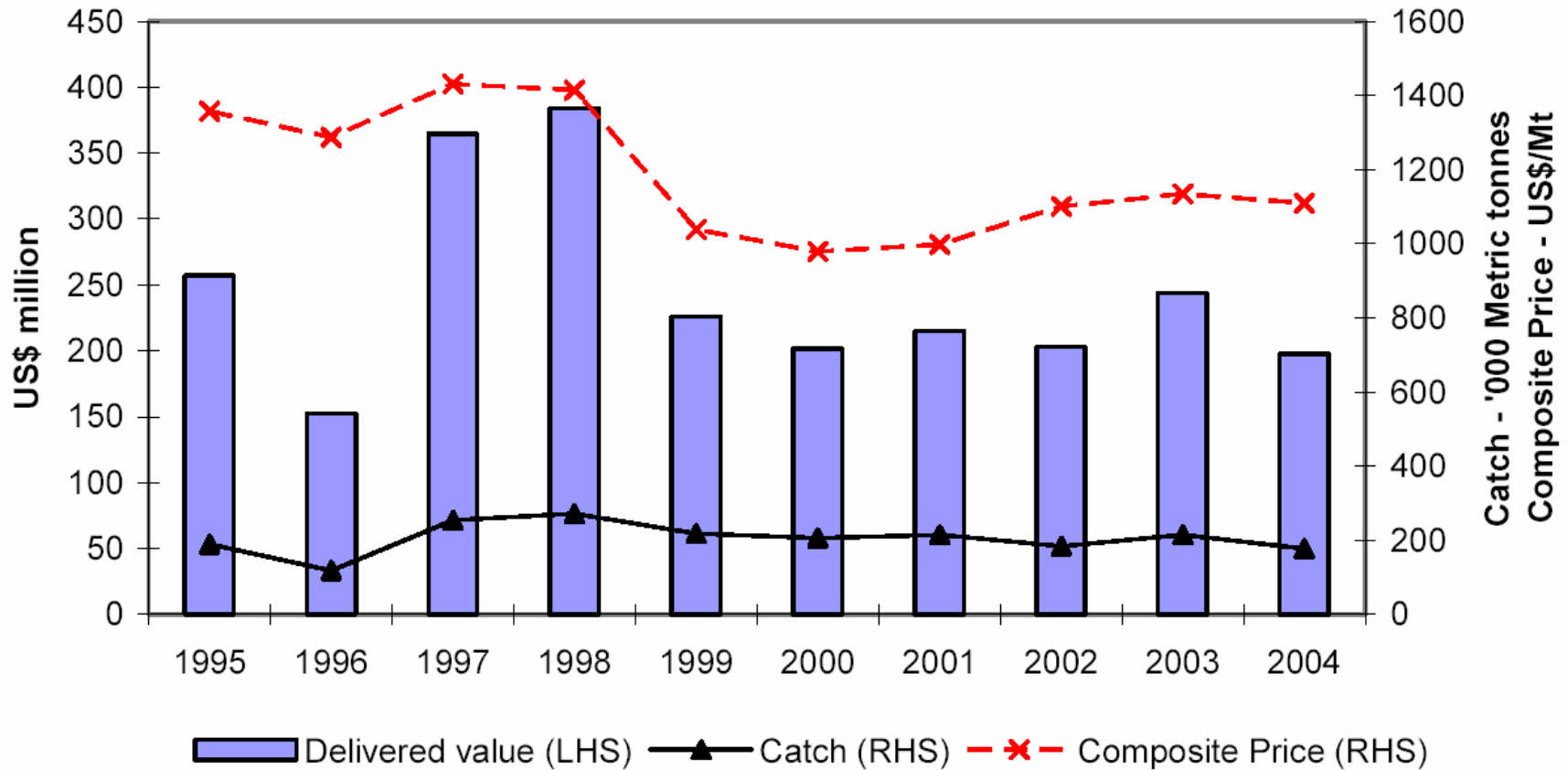
Purse seine - Economic Overview

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



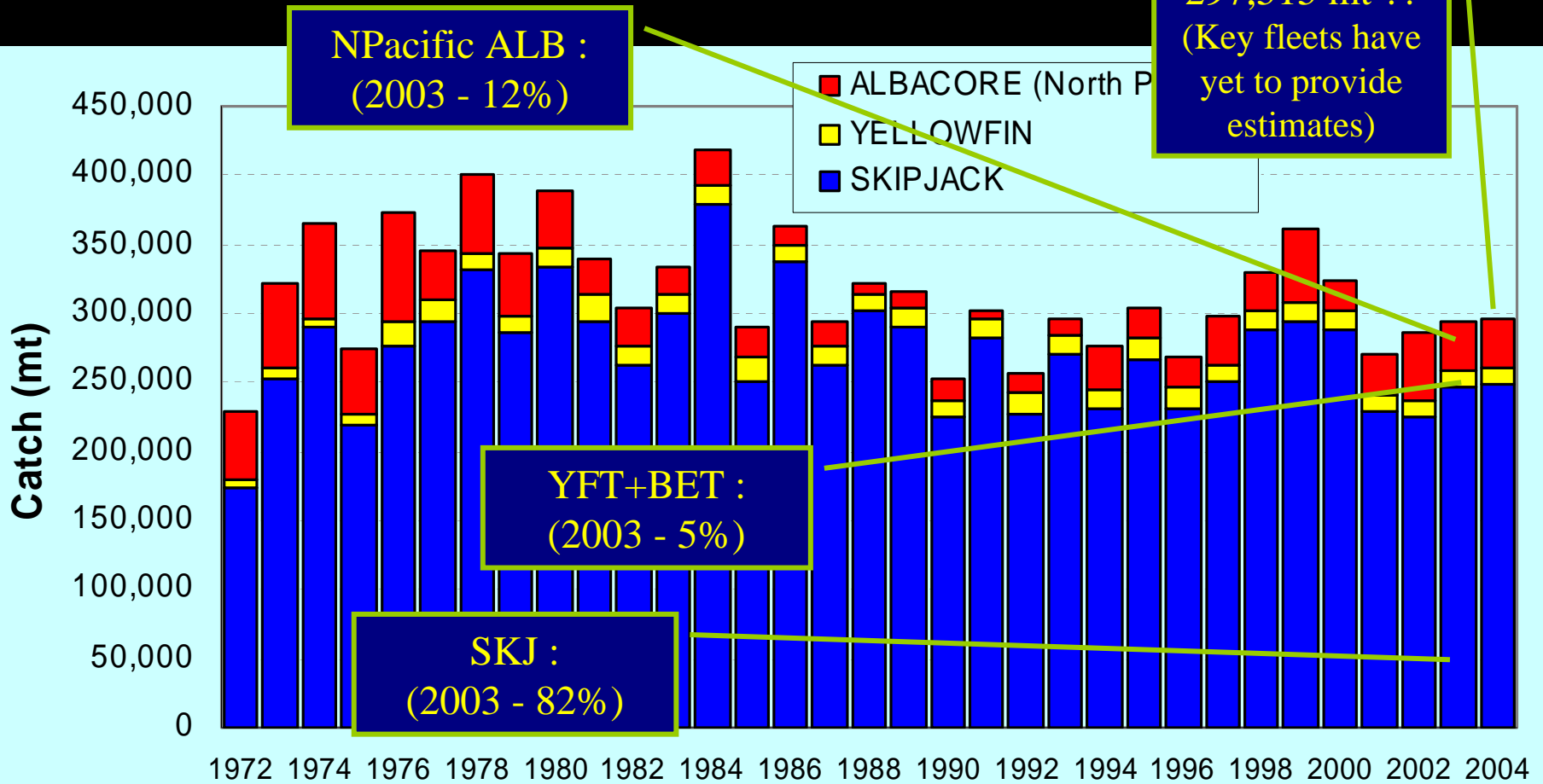
Purse seine - Economic Overview

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



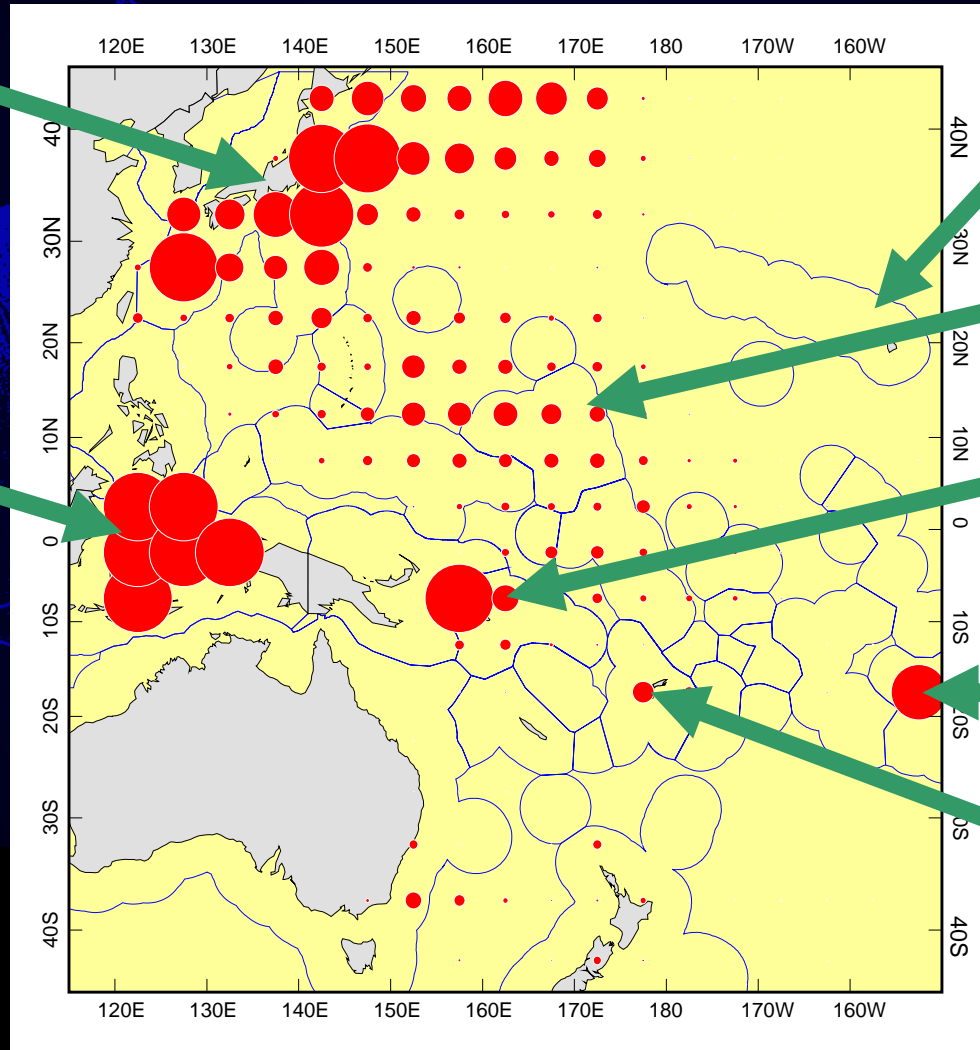
WCP-CA Pole-and-line fishery

Annual catch by species



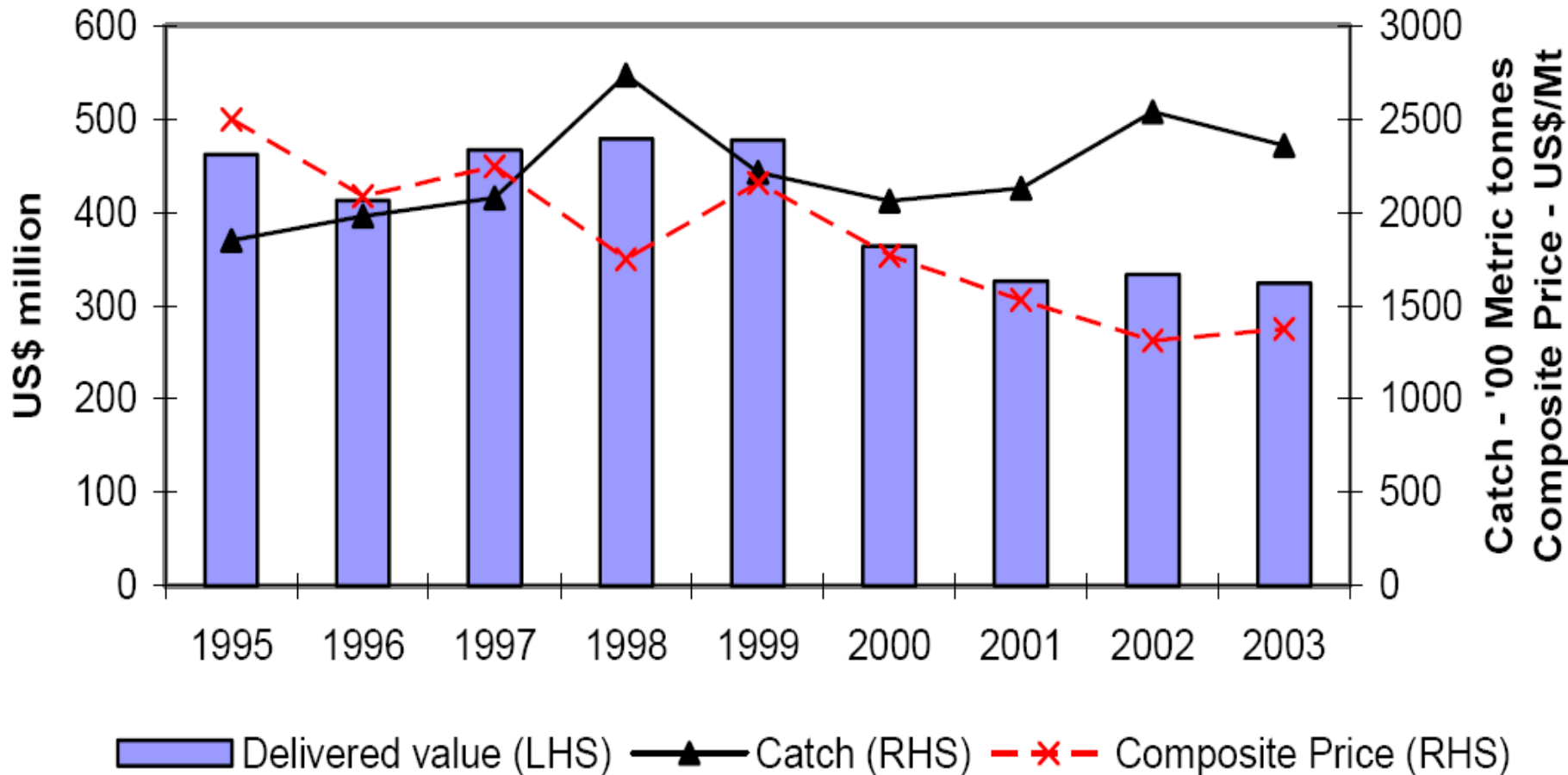
WCP-CA Pole-and-line fishery

Average distribution of effort, 1995-2002



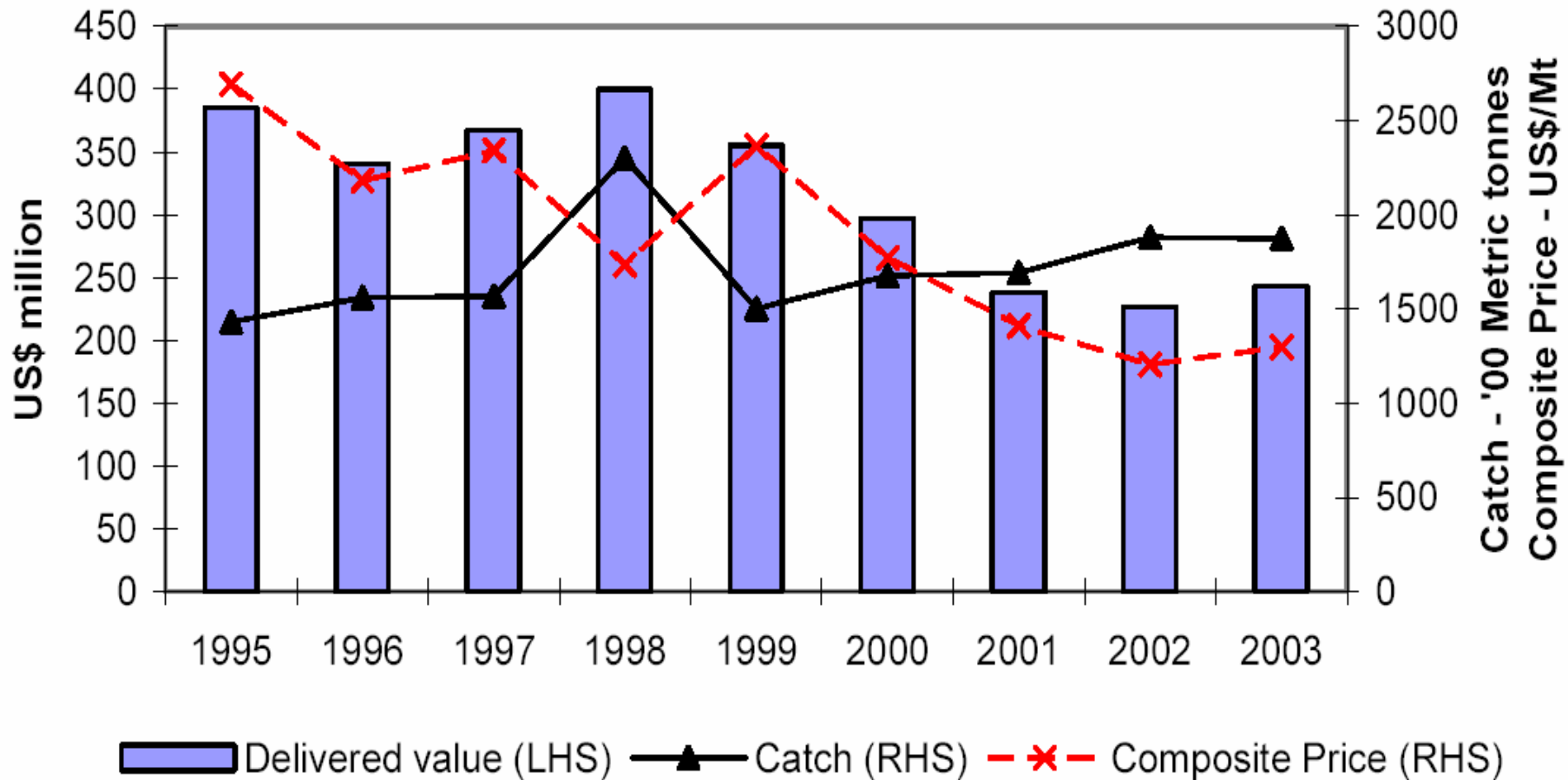
Pole-and-line - Economic Overview

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



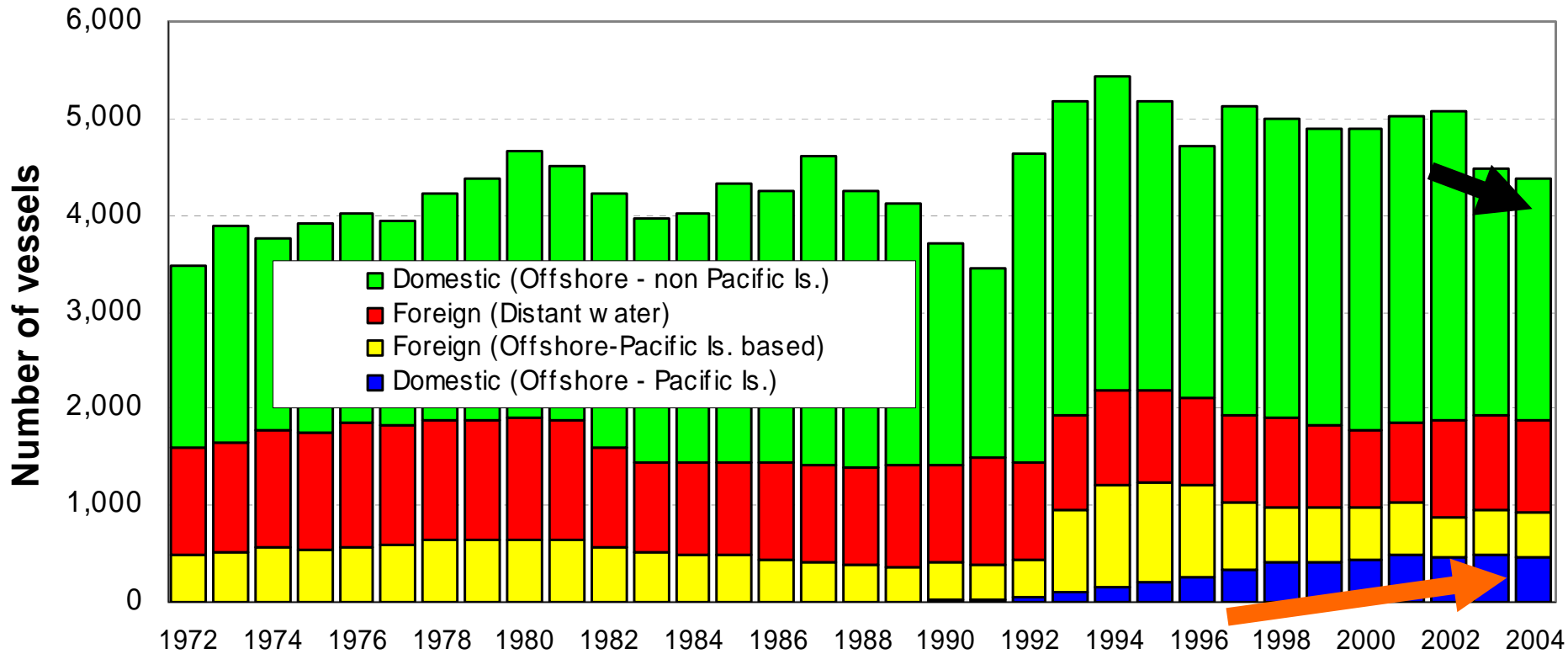
Pole-and-line - Economic Overview

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



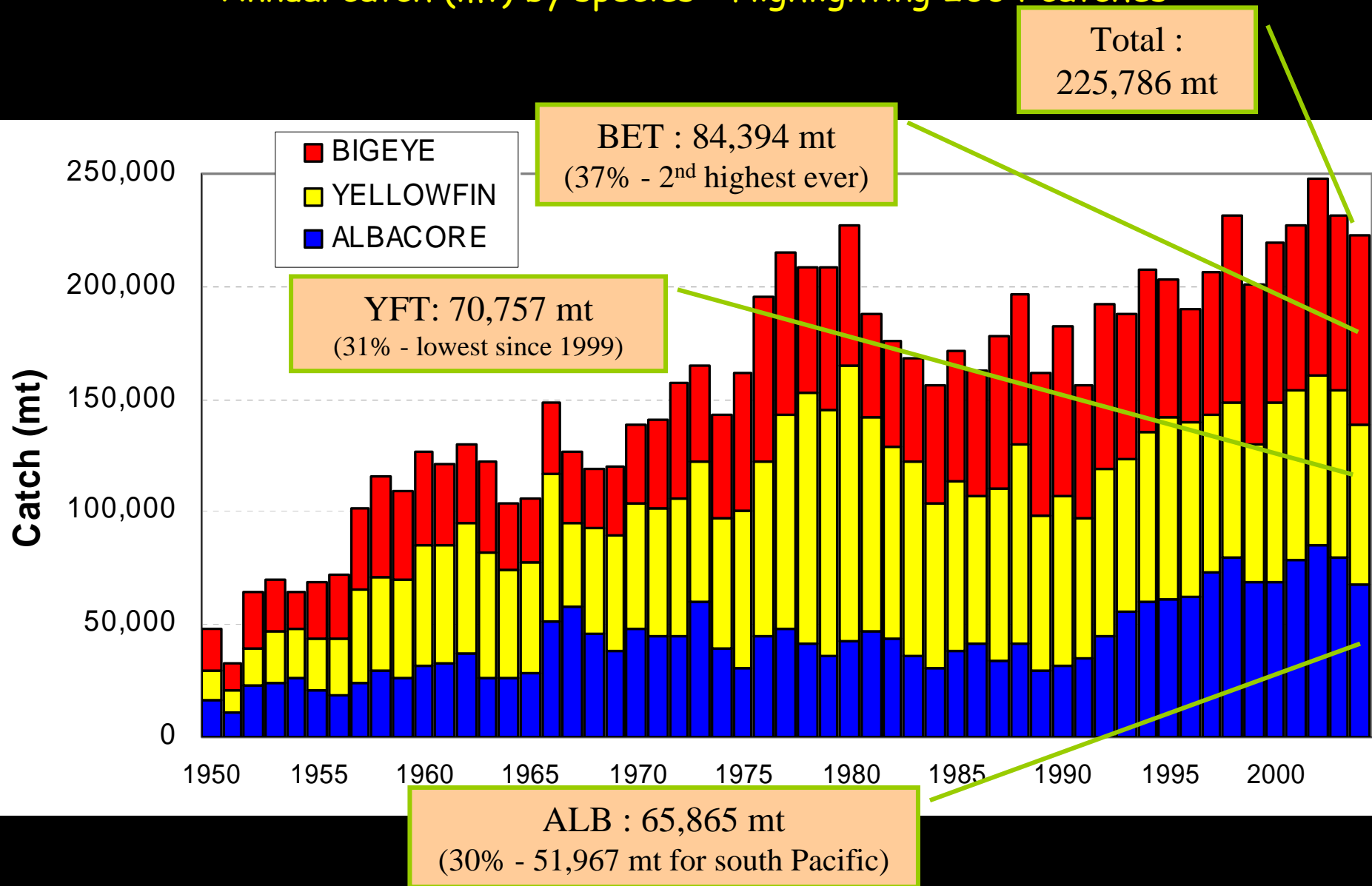
WCP-CA Longline fishery

Number of vessels



WCP-CA Longline fishery

Annual catch (mt) by species - Highlighting 2004 catches



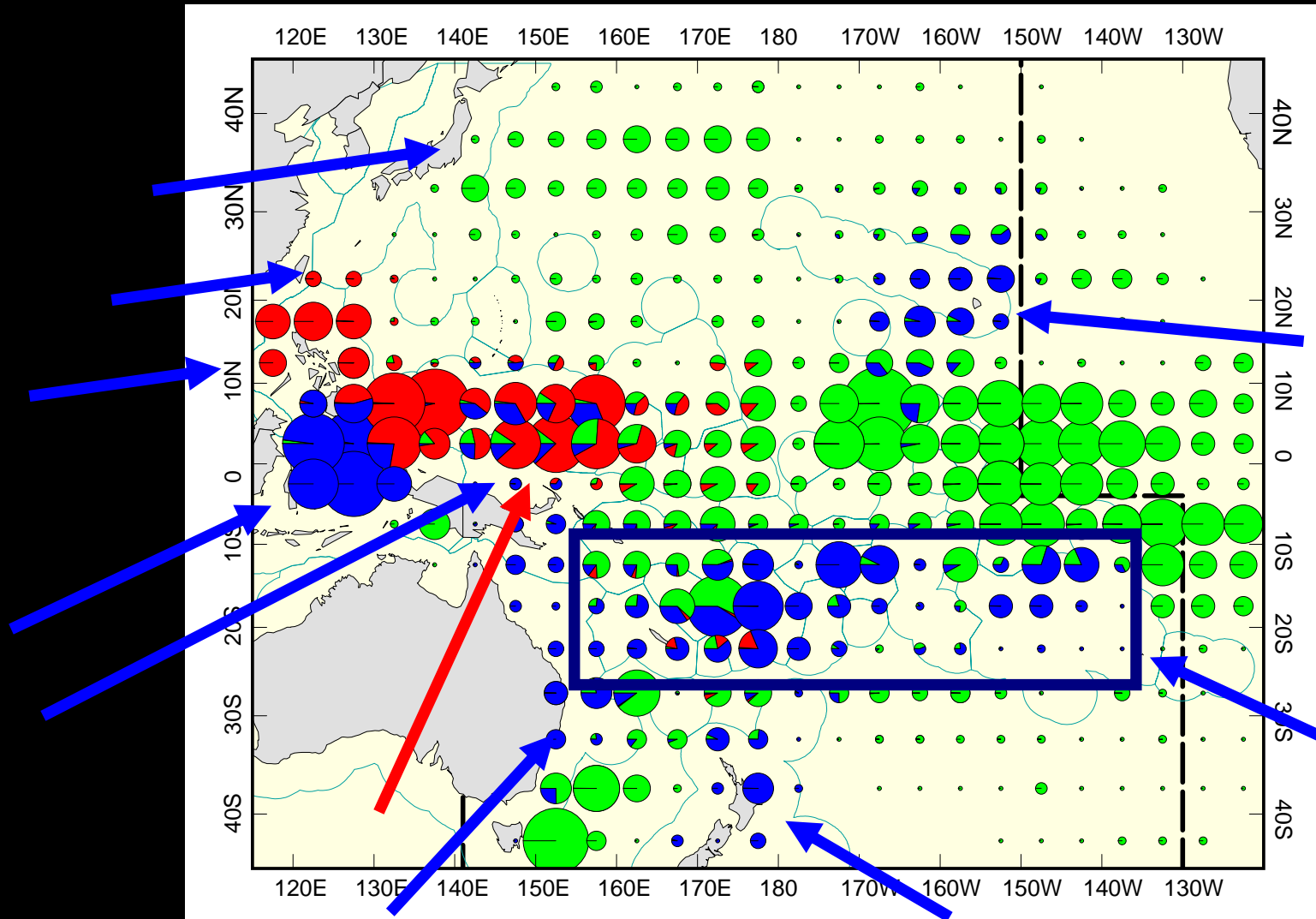
WCP-CA Longline fishery

Distribution of effort by fleet category, 2000-2003

Domestic : blue

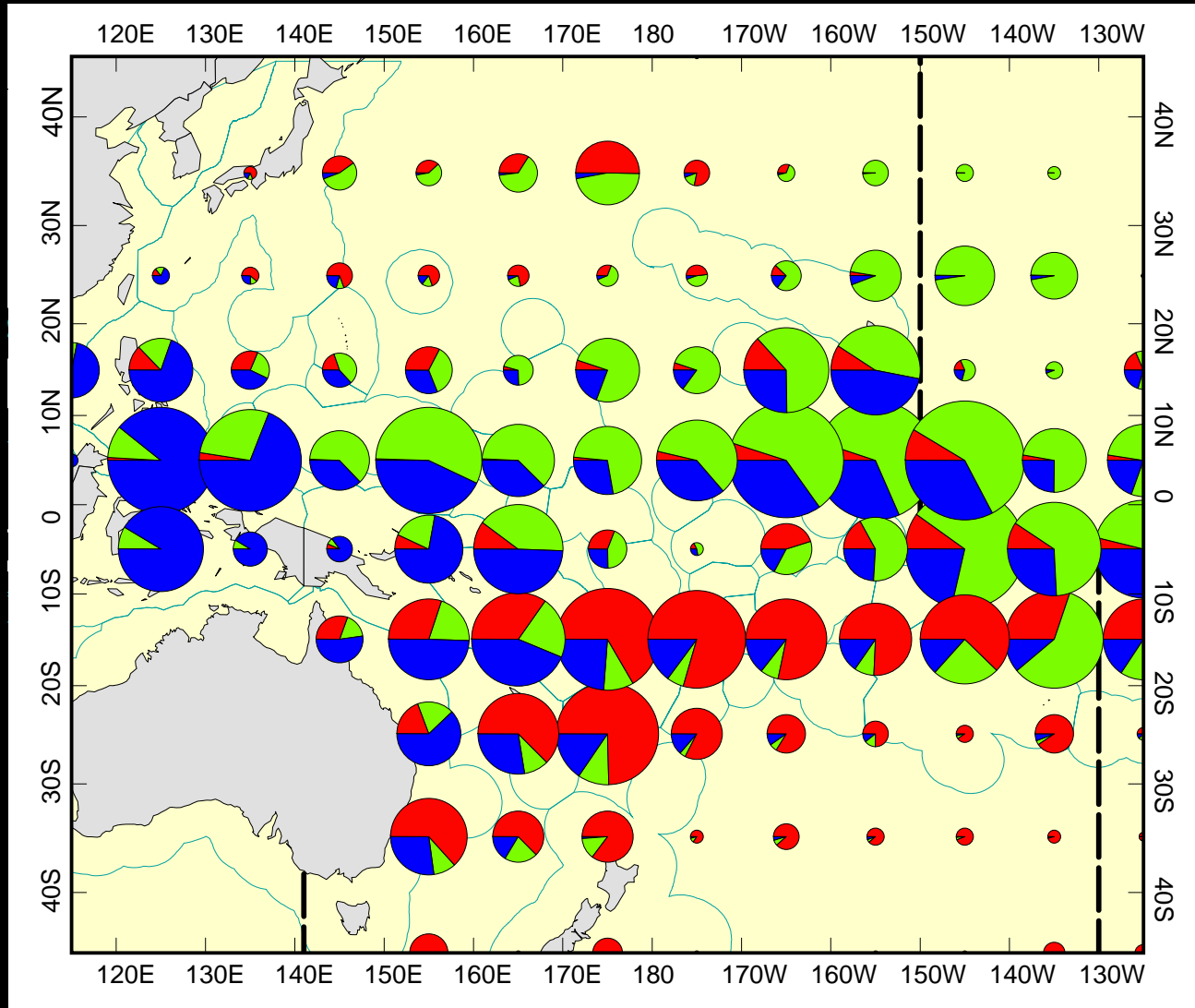
Foreign-offshore : red;

DWFN : green;



WCP-CA Longline fishery

Distribution of Catch by species, 2001



- Yellowfin
- Albacore
- Bigeye

WCP-CA Longline fishery

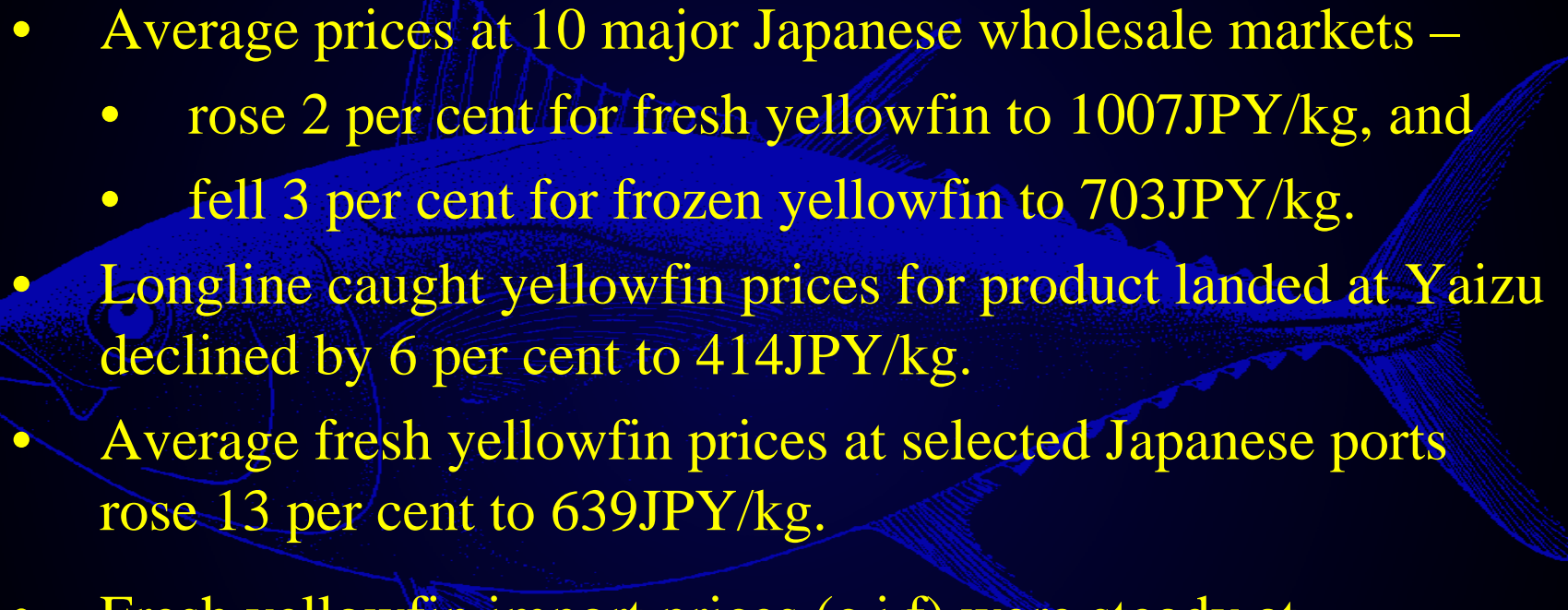
Some recent developments in the Longline Fishery



- **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 (?)

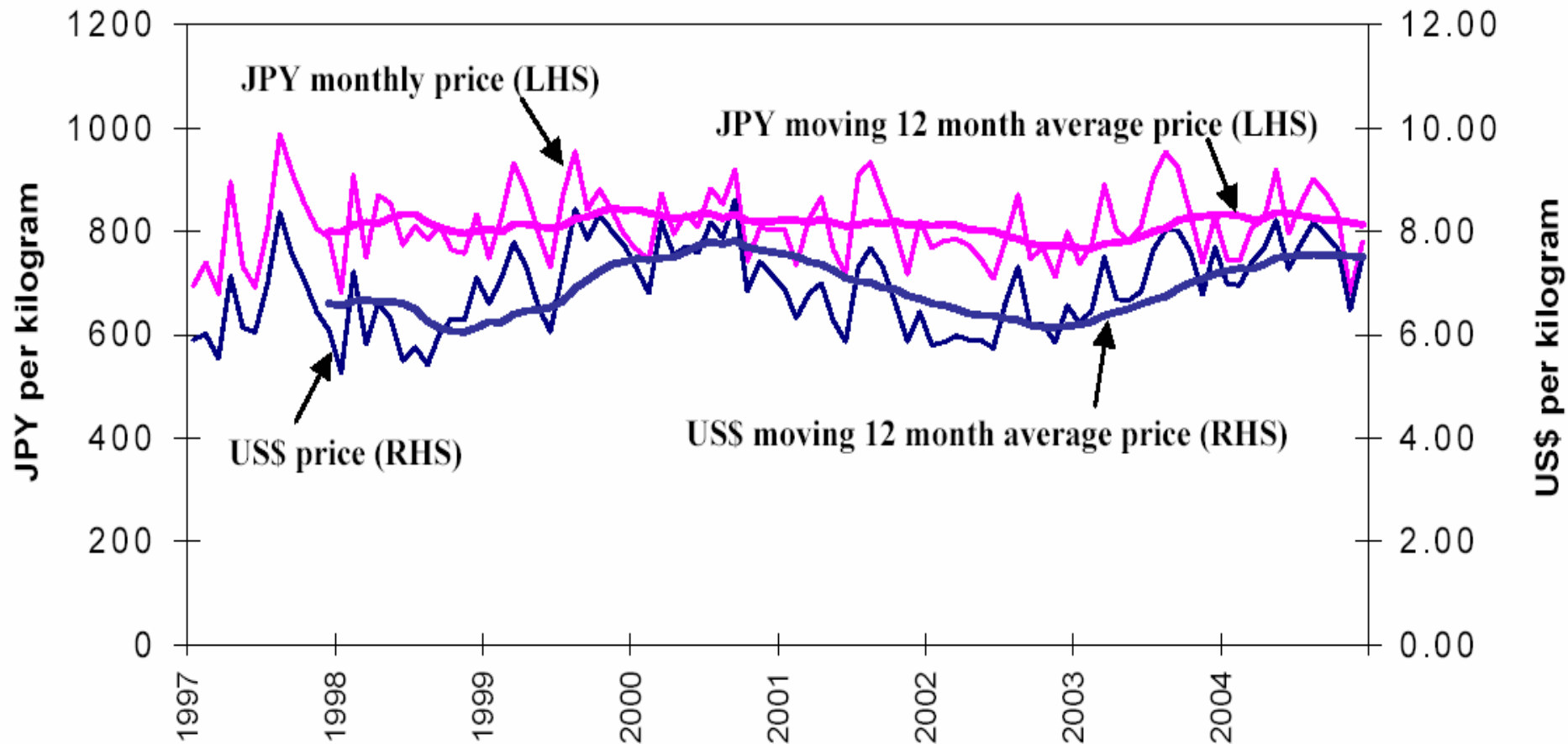
Longline - Economic Overview

2004 Japanese market conditions - Yellowfin

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

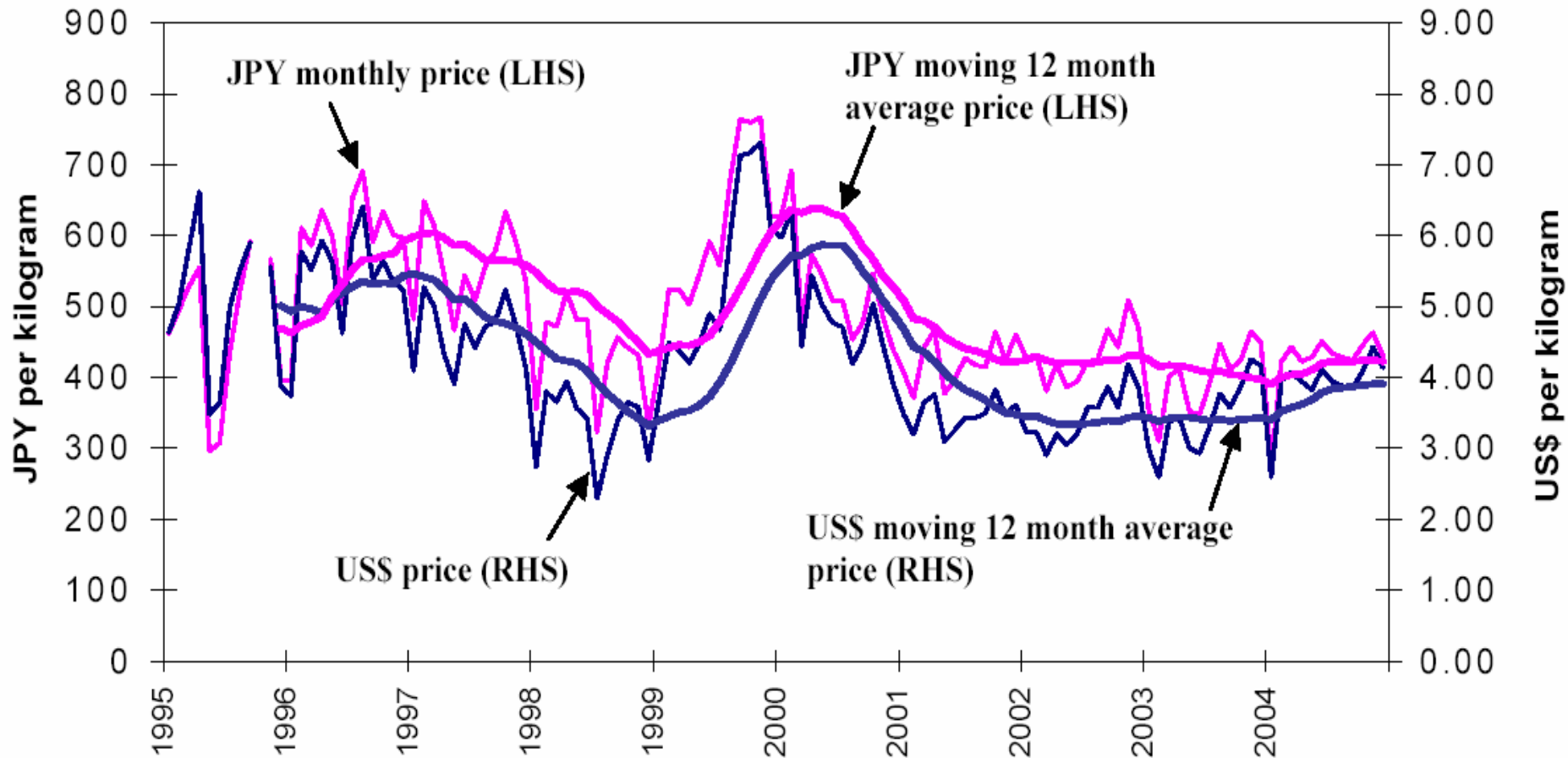
Longline - Economic Overview

Japanese import prices for fresh YFT from Oceania



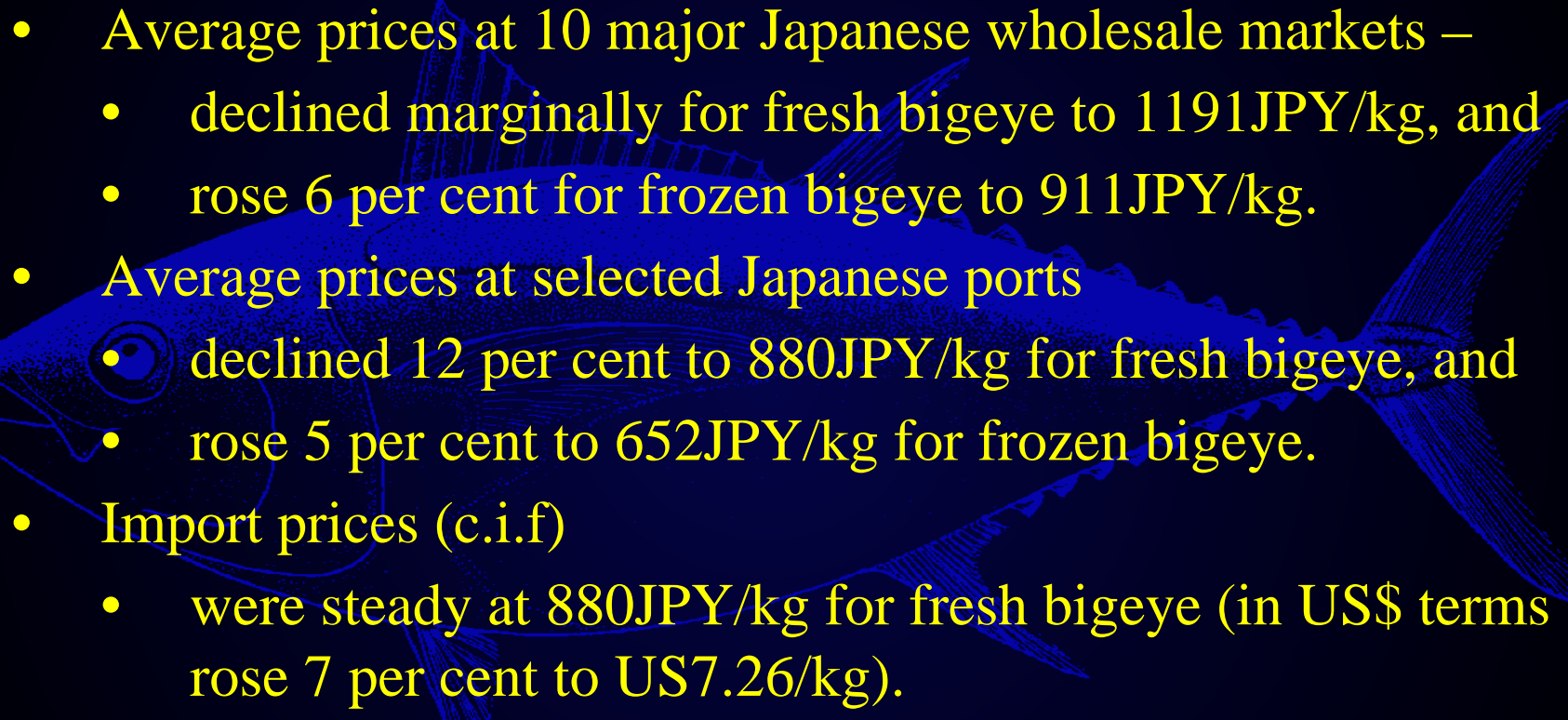
Longline - Economic Overview

Yaizu prices for longline-caught YFT



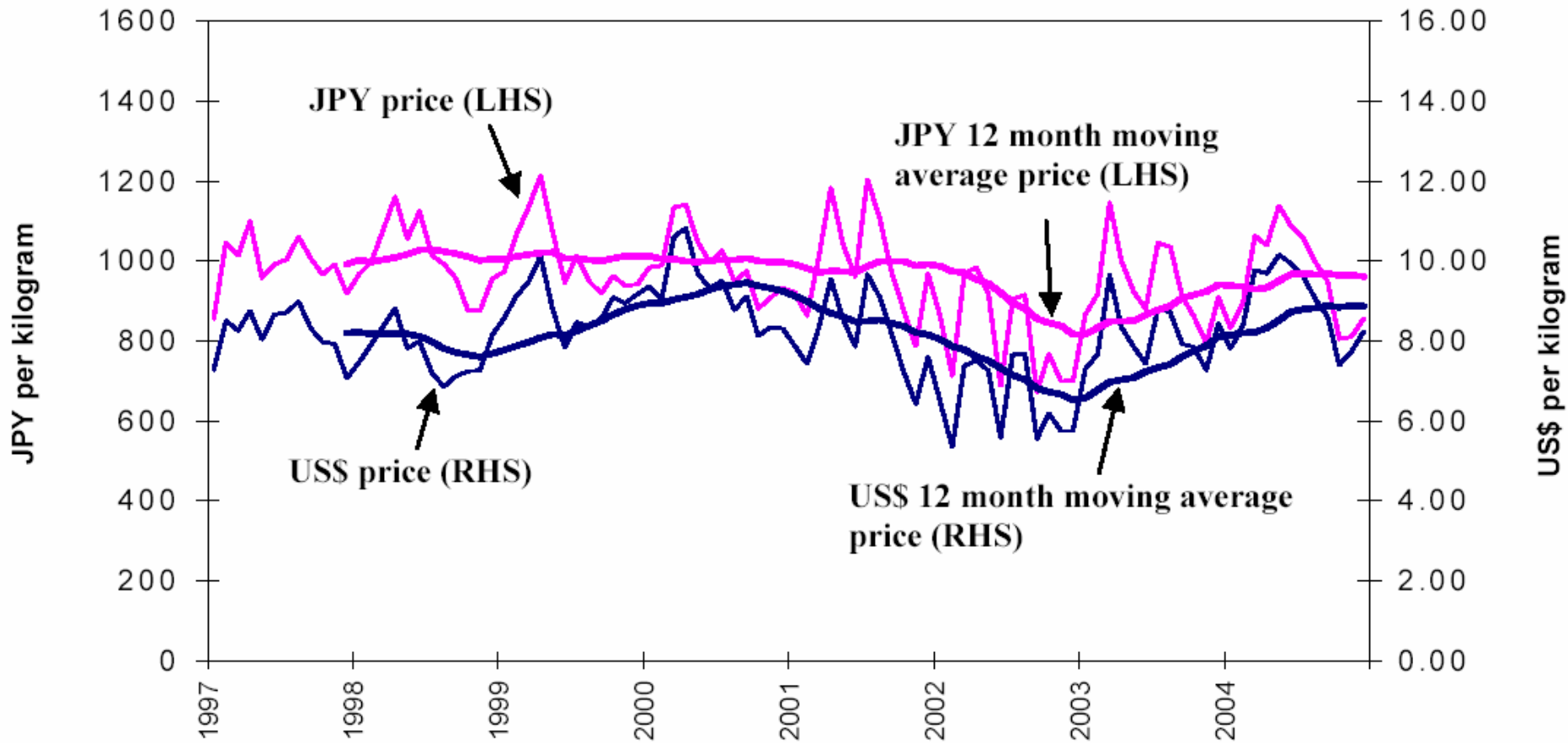
Longline - Economic Overview

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).
- 

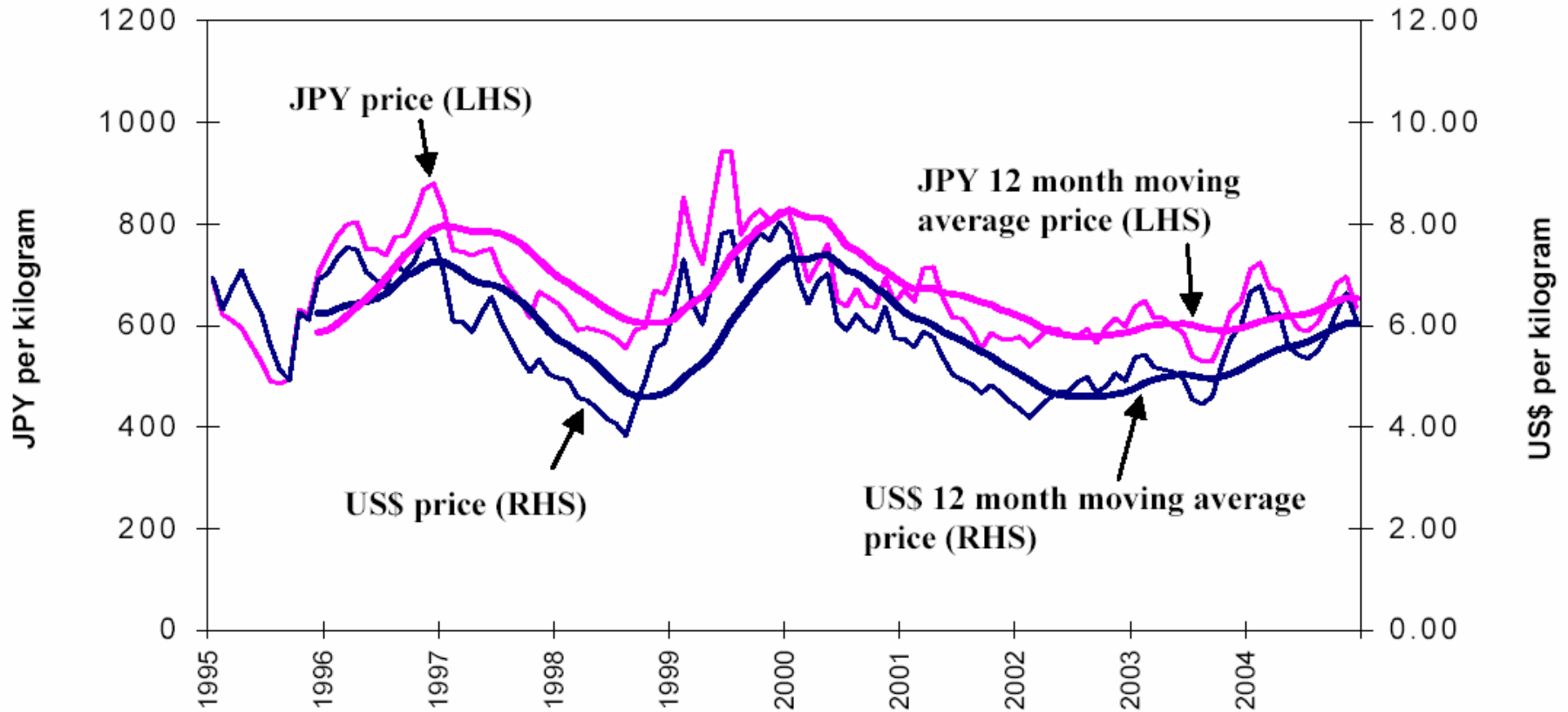
Longline - Economic Overview

Japanese import prices for fresh BET from Oceania



Longline - Economic Overview

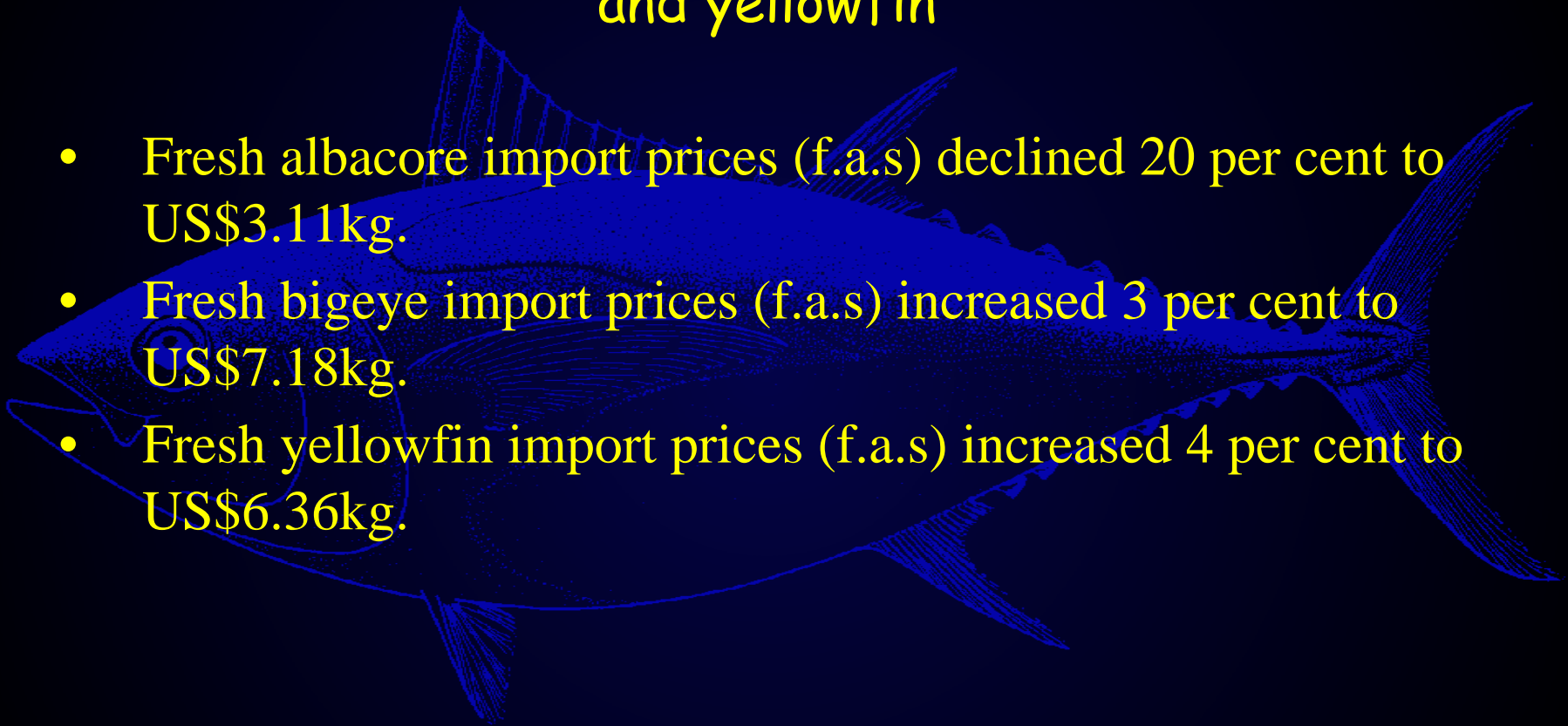
Japanese import prices (CIF) of frozen BET



Longline - Economic Overview

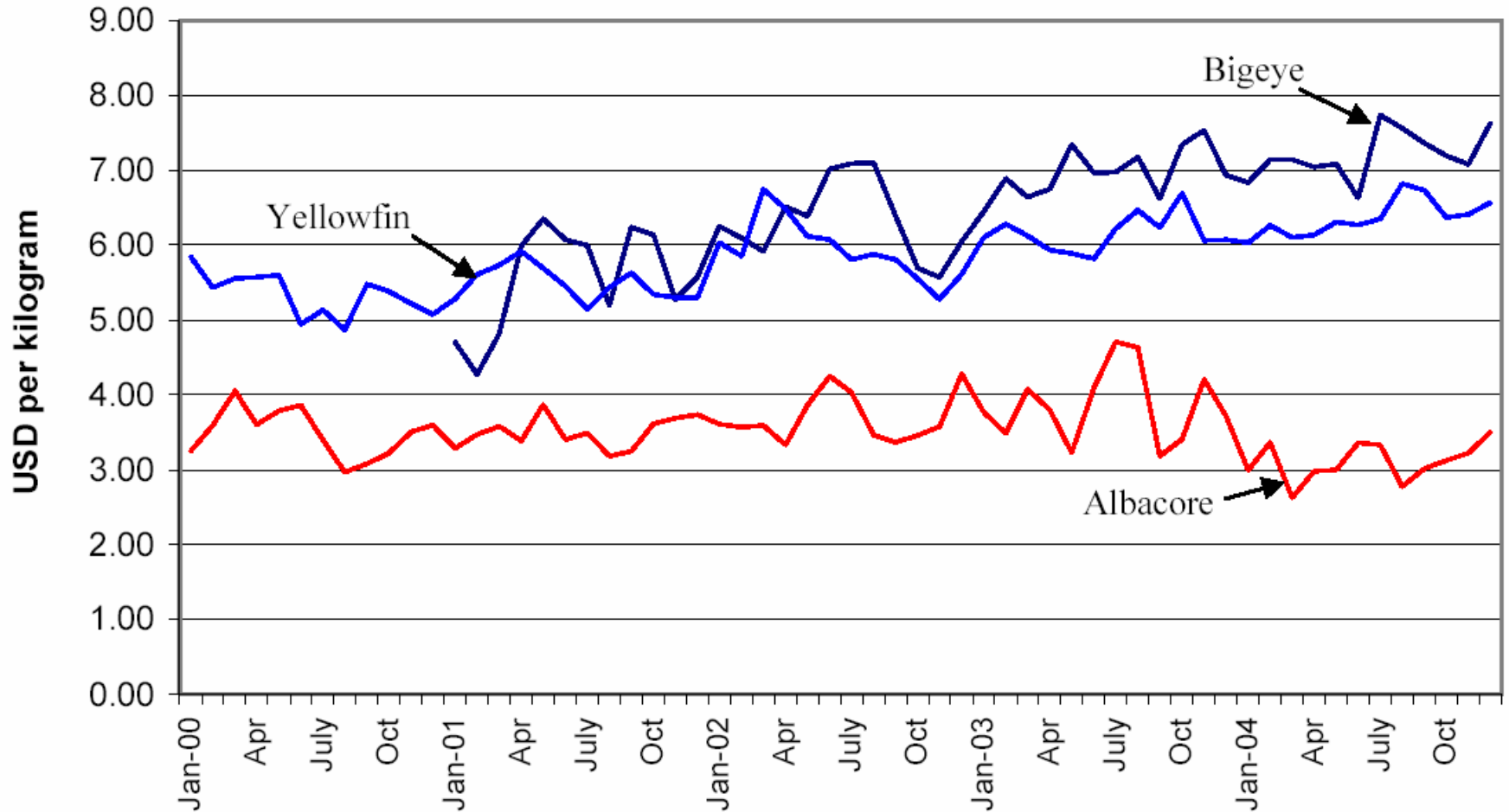
2004 US market conditions - Fresh albacore, bigeye and yellowfin

- 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.



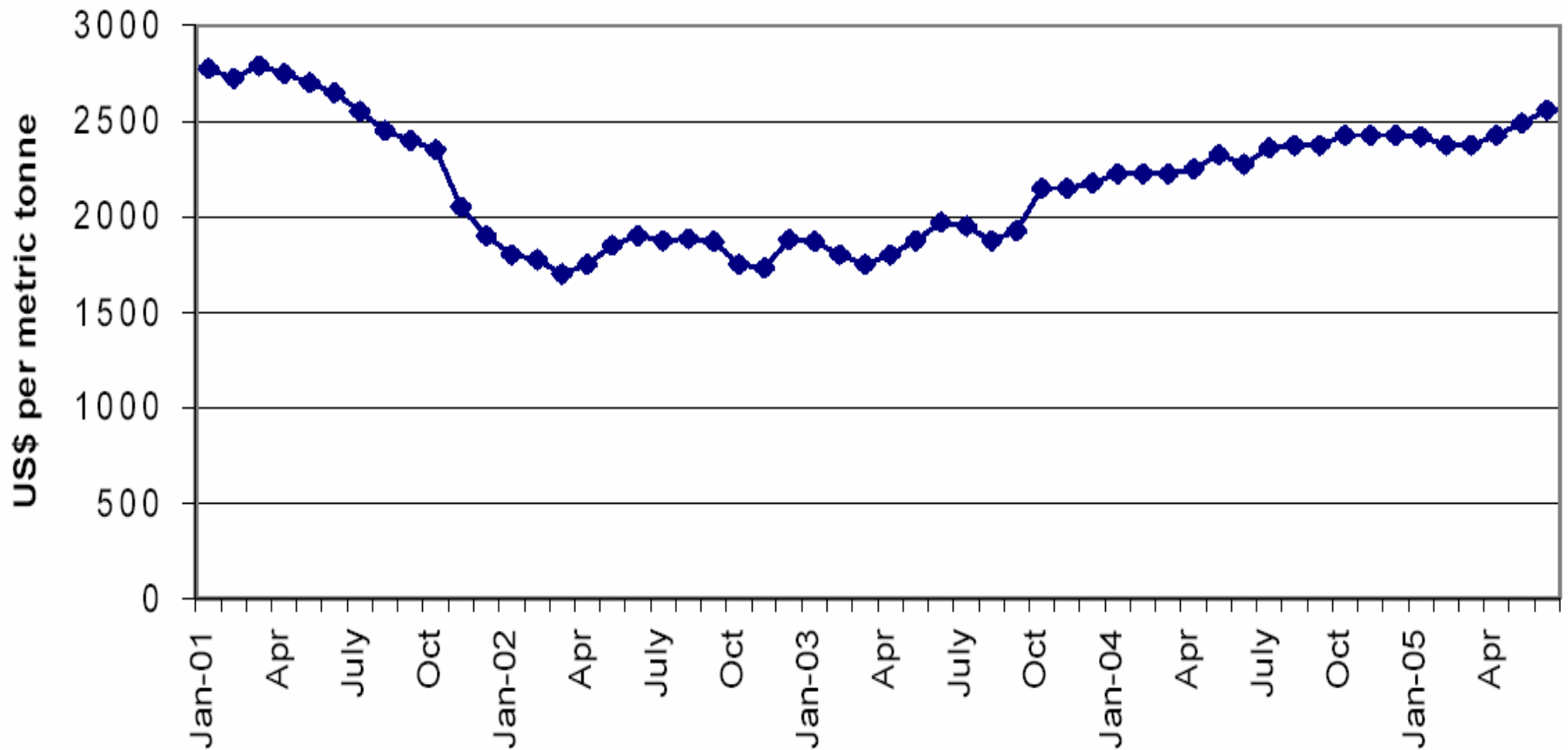
Longline - Economic Overview

US import prices for fresh ALB, YFT and BET



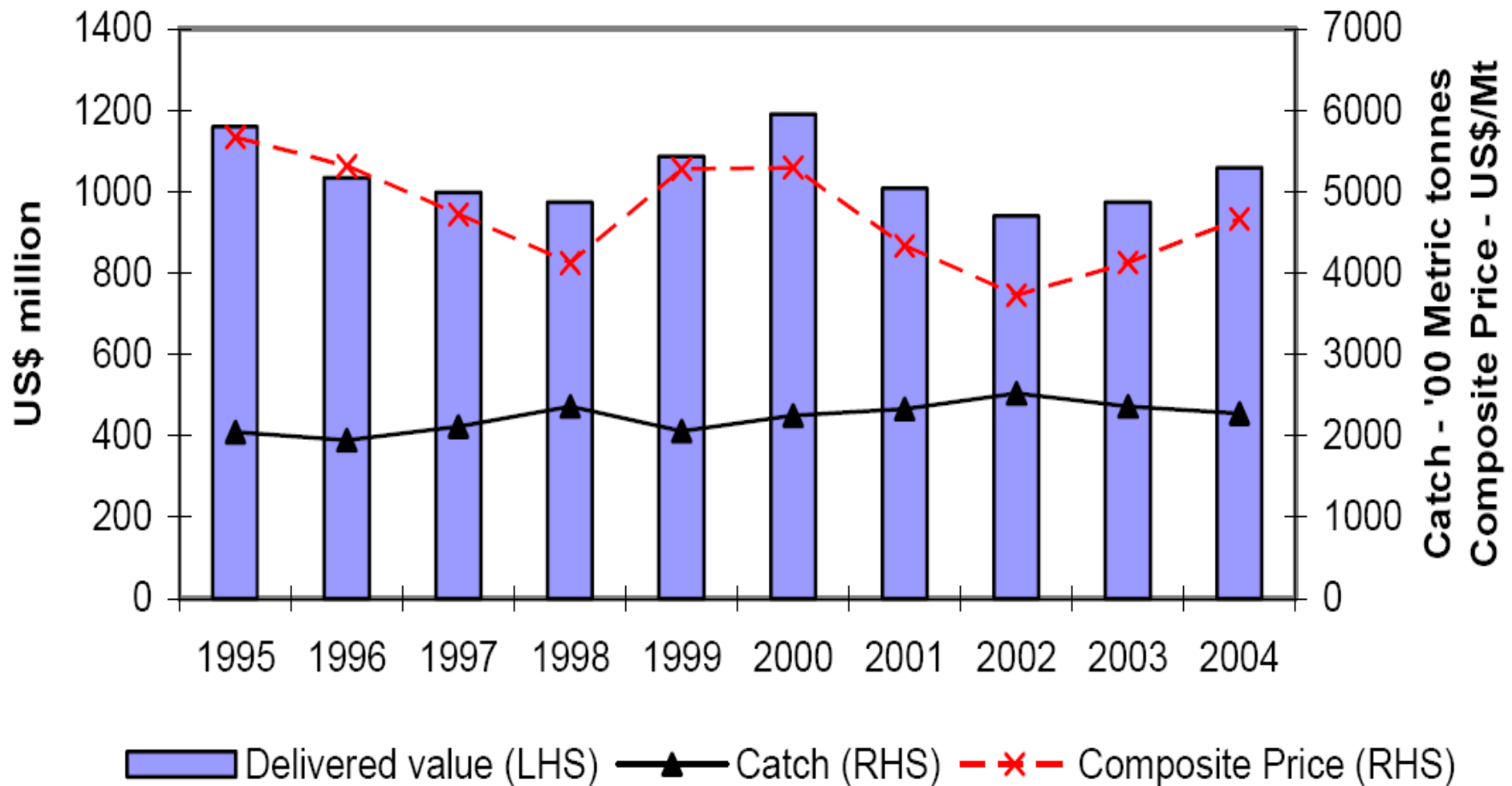
Longline - Economic Overview

Bangkok Albacore prices (10kg and up, c&f)



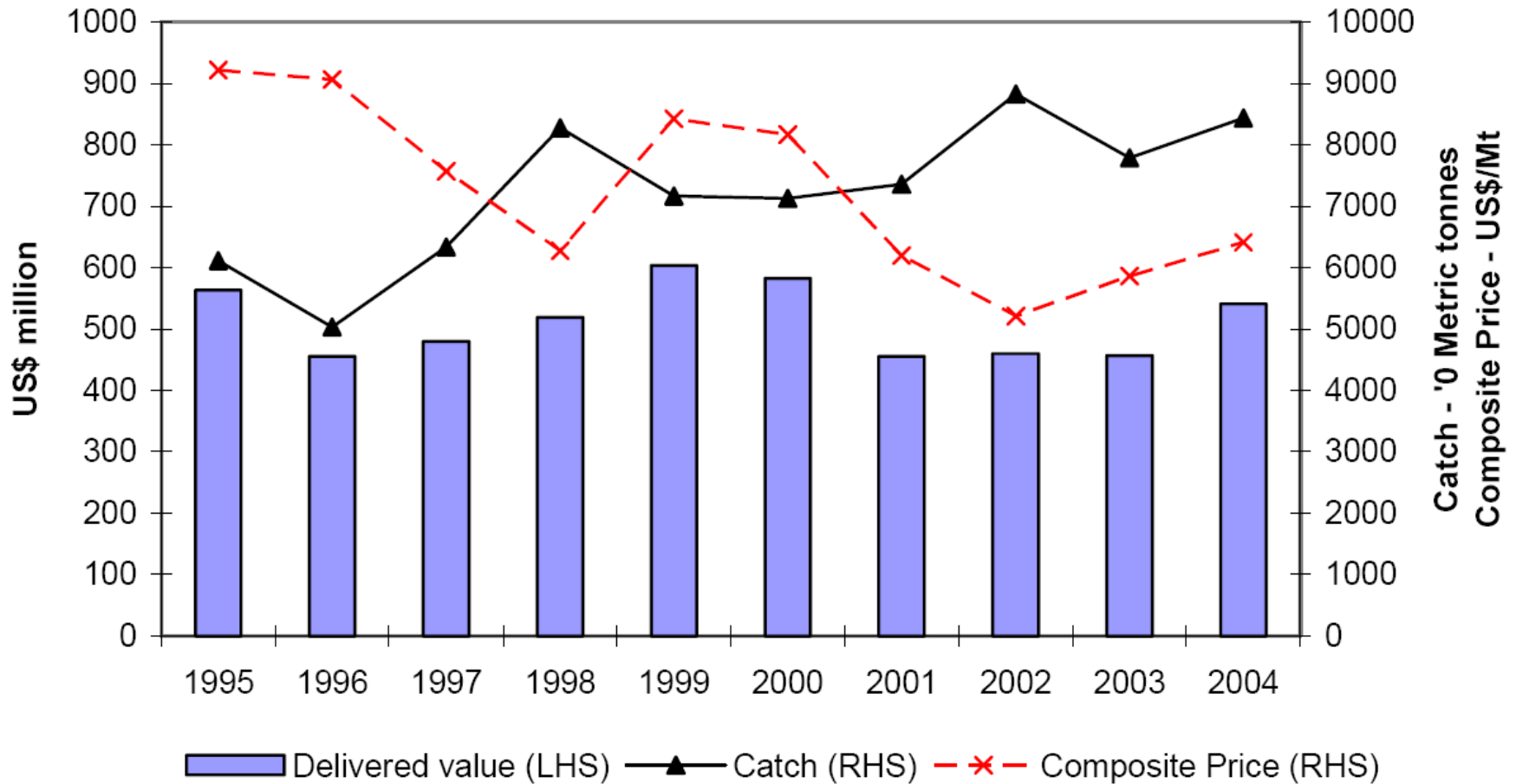
Longline - Economic Overview

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



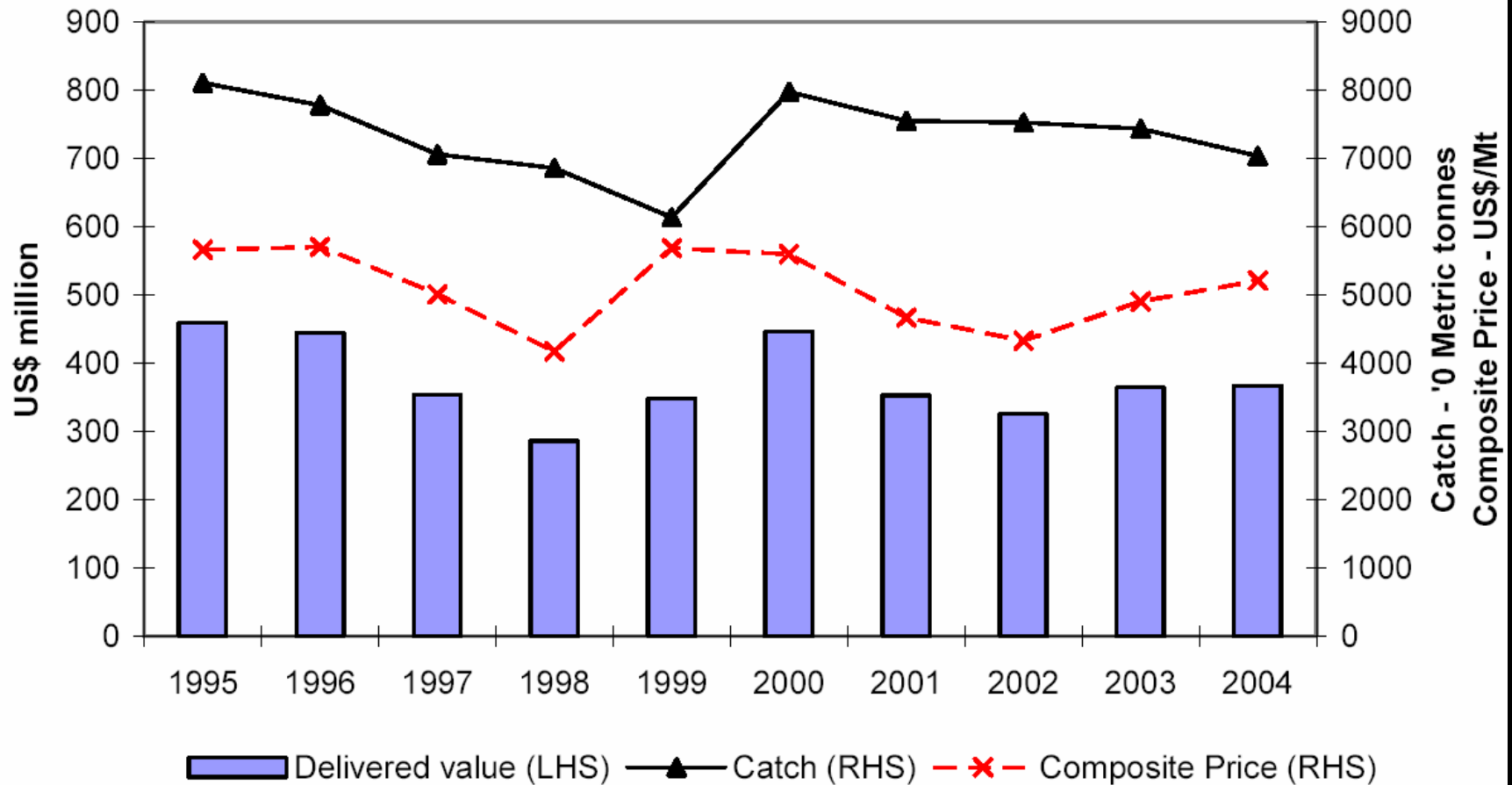
Longline - Economic Overview

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



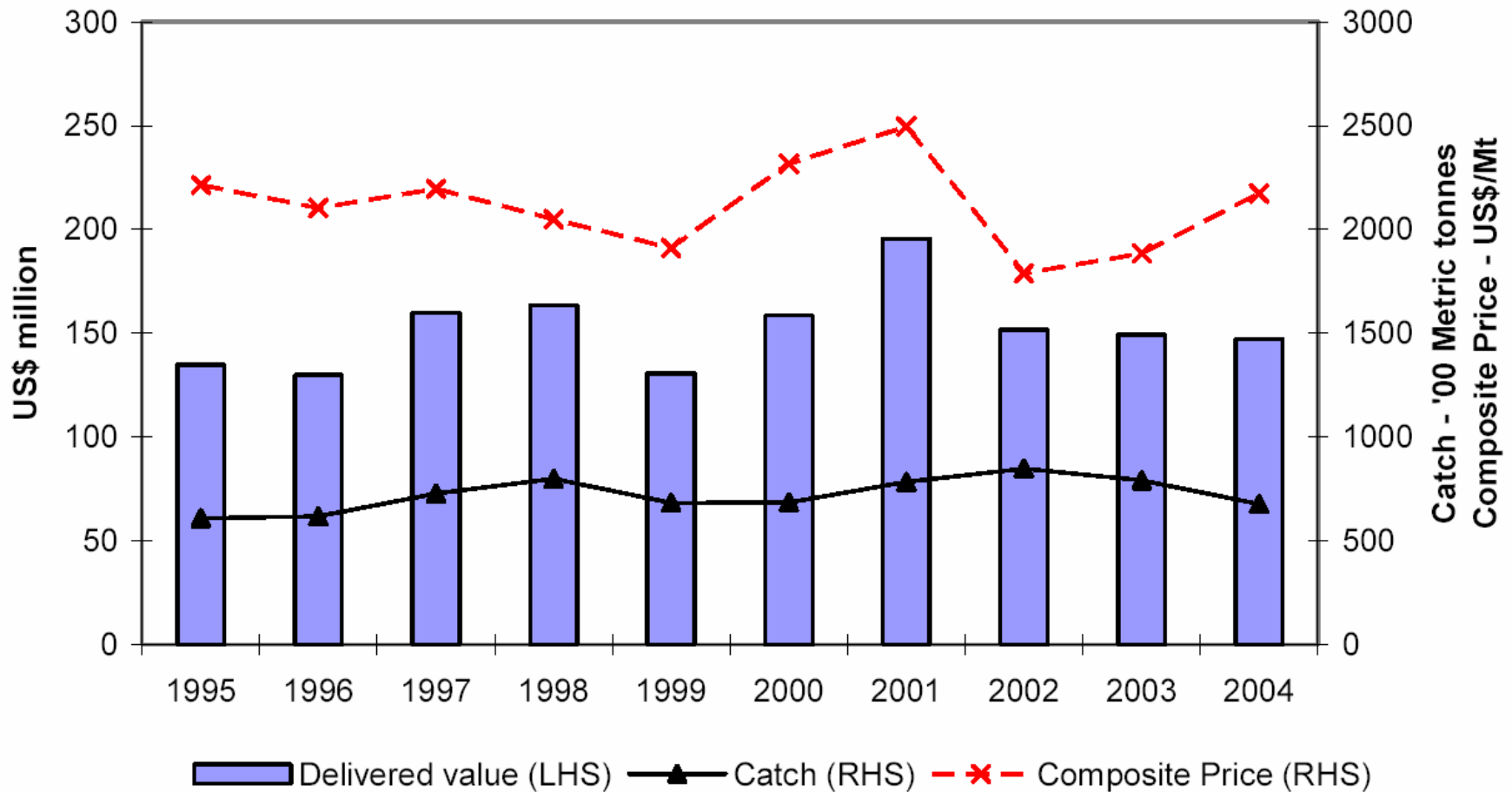
Longline - Economic Overview

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



Longline - Economic Overview

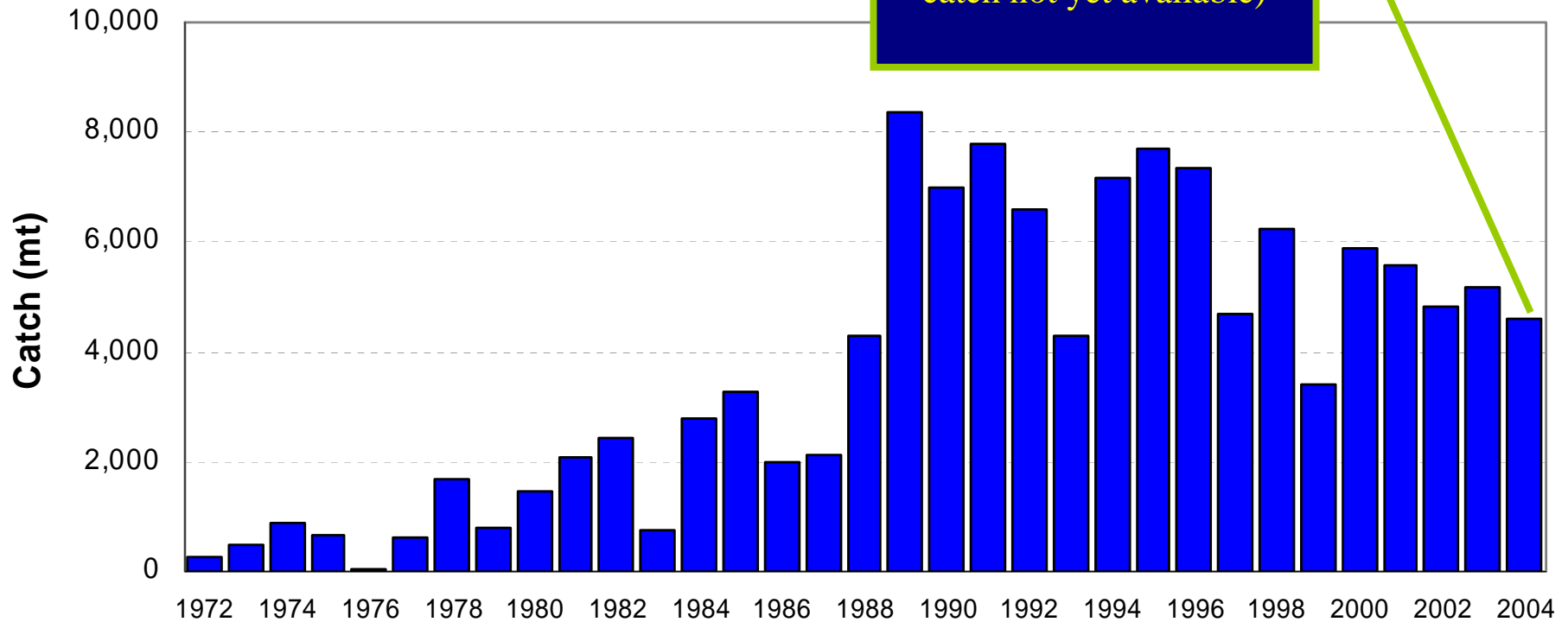
Albacore in the WCPFC longline fishery - Catch, delivered value of catch and composite price



South Pacific Troll fishery

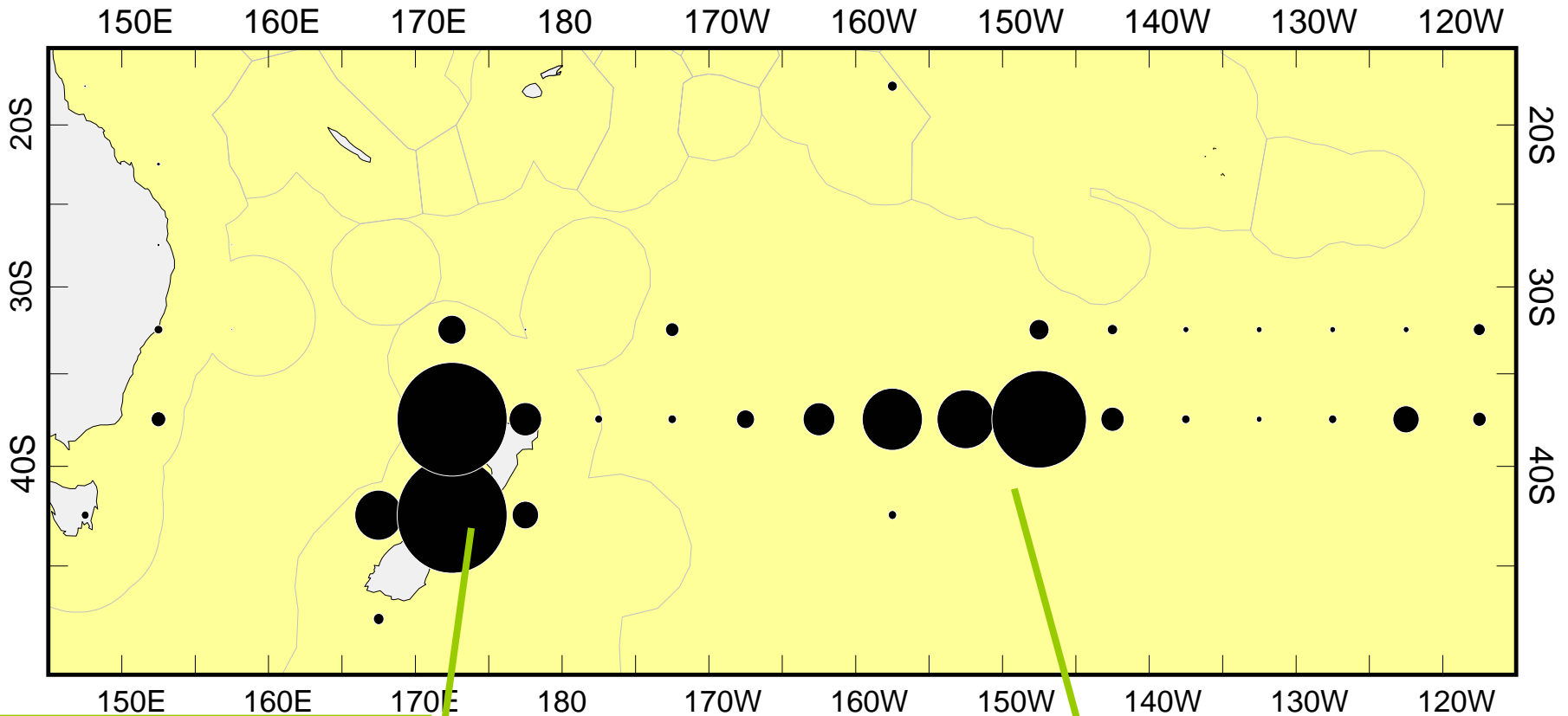
Annual catch

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)