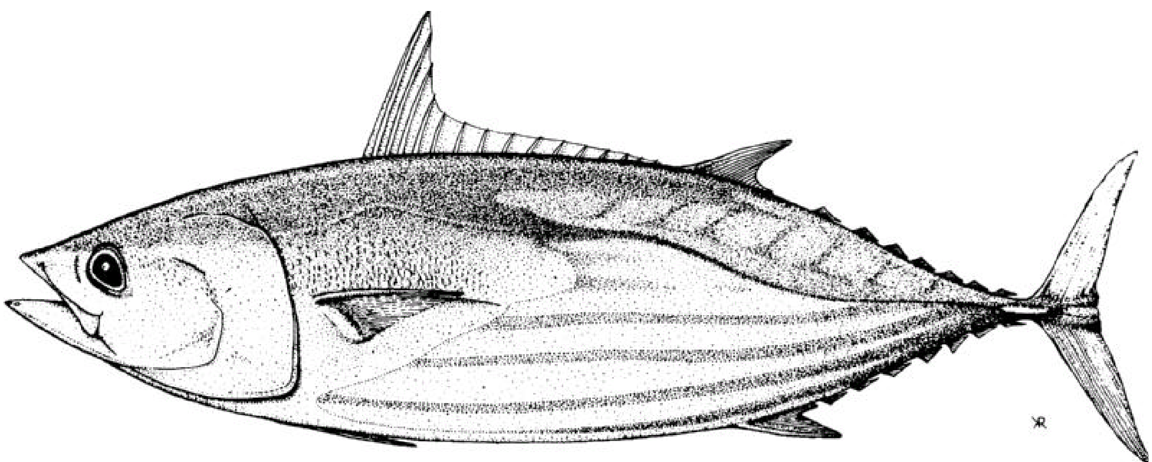
15th Meeting of the Standing Committee on Tuna and Billfish
SCTB 15
Honolulu, Hawai'i
22-27 July 2002

SCTB15 Working Paper

NFR-11

Marshall Islands National Tuna Fishery Report 2000-2001



Glen Joseph
MIMRA Oceanic and Industrial Affairs
Marshall Islands Marine Resources Authority
Majuro, Republic of Marshall Islands

Marshall Islands
National Tuna Fishery Report
2000-2001

This report presents the status of the tuna fishery in the Republic of the Marshall Islands (RMI) 200 Nautical Miles Exclusive Economic Zone (EEZ) for the fiscal year 2000/2001*(October-00 – September01)*. The Marshall Islands Marine Resources Authority (MIMRA) is the responsible agency tasked by the National government to manage, exploit the living and non-living marine resources of the RMI EEZ.

The sector experienced a mixed reaction of deep sea Fishing Operations for the fiscal year 2000/2001, while maintaining the fishing agreements it has with the common Distant Water Fishing Nations (DWFN) of the Western, Central Pacific Oceans (WCPO).

Table 1. Access Agreements in the RMI Exclusive Economic Zone for 2000/2001.

Country/Party	Type	Administrator	Type
USA	Multilateral	FFA	Regional
Japan	Bilateral	MIMRA	Government to Government
Taiwan	Bilateral	MIMRA	Industry to Government
Korea	Bilateral	MIMRA	Industry to Government
FSM Arrangement*	Multilateral	FFA	Regional
Fong Seong Co.	Bilateral	MIMRA	Industry to Government

Table 1, presents the parties or fishing entities of which has an arrangement/agreement to carry out fishing operations in the RMI EEZ. Carriers and Bunkers are not necessarily included as they are either chartered or commissioned based on the fishing operation.

Table 2. Number of Vessels Licensed in RMI for 2000/2001.

Country/Party	Purse Seine	Pole & line	Longline	Carriers/bunkers	Total
USA	30				
Japan	36	68	27		
Taiwan	43		5		
Korea	27				
FSM Arr.	12				
Fong Seong Co.	2				
Others			3	63	
Total	150	68	35	63	**316**

Note: Figures does not include the Locally Based Foreign longline Boats. They arrived late last year, therefore does not include in this fiscal year report. Under the FSM arrangement, the RMI has 5 flagged and registered vessels operating as domestic vessels. They are Koos, 101, 102, 103, 106, and 107

Recent developments in the RMI includes the:

1. Federated States of Micronesia (FSM) Arrangement
2. Longline fishbase
3. Shark Fishery
4. Loining plant

FSM Arrangement:

The RMI became a party to the FSM arrangement in early 2000. The Arrangement is administered by the Forum Fisheries Agency FFA, and operates similarly to the U.S treaty. Members of the FSM arrangement are considered a sub-regional group of the FFA, mostly from the Parties to the Nauru Arrangement group, the PNA. They are the Federated States of Micronesia, Palau, Kiribati, Solomon Islands, PNG, Nauru, and the RMI.

The arrangement allows for the domestic fleet development of the purse seine fishery, and the RMI currently has five sponsored and flagged vessels operating under the arrangement. The fleet operated a full calendar year for the first time in 2001 landed just over 30,000 MT.

Table 3. Catch and Effort for RMI Purse Seine in the RMI EEZ.

Year	Days	Boats	SKJ (MT)	YFT (MT)	Others	Total (MT)
2000	14	3	385	0	0	385
2001	172	5	4,358	370	0	4,728

Source: SPC - based on available logsheets. Note coverage may not be 100%. Figures for 2000/2001.

Table 2, presents catch and effort of the RMI domestic fleet in the RMI EEZ, while table 3 presents the catch and effort of the same fleet in the WCPO area of the same time series.

Table 4. Catch and Effort for the RMI Purse Seine in the WCPO.

Year	Days	Boats	SKJ (MT)	YFT (MT)	Others	TOTAL (MT)
2000	262	5	6,625	935	0	7,560
2001	1179	5	31,983	3,011	50	35,044

Source SPC – based on available logsheets. Note coverage may not be 100%. Figures for 2000/2001..

Table 4 presents the catch of foreign fleet purse seine fishery in the RMI for the years 2000-2001.

Table 5. Foreign Purse Seine Fleet catch in the RMI EEZ.

Year	Flag	Days	Boats	SKJ (MT)	YFT (MT)	OTHERS	TOTAL (MT)	TOTAL (MT/DAY)
2000	FM	1	1	0	0	0	0	0
2001	FM	68	4	1,193	174	0	1,367	20.096
2000	JP	551	37	12,348	1,147	237	13,732	24.922
2001	JP	335	34	6,586	884	352	7,822	23.349
2000	KI	1	1	0	0	0	0	0
2000	KR	149	23	2,275	110	0	2,385	16.007

2001	KR	500	25	12,823	605	0	13,428	26.856
2000	PG	10	3	180	0	0	180	18
2001	PG	91	5	2,722	596	0	3,318	36.458
2000	TW	249	35	2,675	190	0	2,865	11.506
2001	TW	642	43	6,545	1,659	20	8,224	12.81
2000	US	6	3	168	30	0	198	33.017
2001	US	84	12	1,297	60	3	1,360	16.188
2000	VU	137	7	3,135	45	0	3,180	23.212

Source : SPC Note: Statistics are compiled for calendar year, and coverage may not be 100%.

Longline:

The longline fishery and the shark fishery are fairly new operations in the RMI. Both operations began in late 2001. Currently 46 fresh chilled longline type are licensed through the fishbase, targeting tuna species for the fresh sashimi market in Japan, and two are licensed longliners targeting shark for the Asian market. It should be noted that effort and catch statistics are not covered in this report, as it is relatively early in its operations, as well as the reporting period for which this report covers.

The longline fishery is predominately by the Japanese Longliners. They are the Utlra freezer type of longline fishing vessels over 100 tons as GRT. The fleet operates on a license per trip basis, and offloads its catch entirely in the Japanese Market.

Table 6. Foreign longline catch and effort for fishing in Marshall Islands waters during 2000 and 2001 – Target species

			ALBACORE		BIGEYE		YELLOWFIN	
Year	**Flag**	**100s of hooks**	**MT**	**CPUE**	**MT**	**CPUE**	**MT**	**CPUE**
2001	CN	180	0	0.0	0	0.0	0	0.0
2000	JP	45,267	51	0.1	823	0.5	1,148	0.9
2001	JP	55,773	14	0.0	1,853	0.9	1,056	0.6
2000	TW	1,272	0	0.0	5	0.1	9	0.2
2001	TW	230	0	0.0	0	0.1	0	0.0

Source:SPC. based on available logsheets; note that coverage may not be 100%

Table 7: Foreing Longline catch and effort for fishing in Marshall Island waters during 2000 and 2001 – non target species

			BLACK MARLIN		BLUE MARLIN		BLUE MARLIN	
Year	**flag**	**100s of hooks**	**MT**	**CPUE**	**MT**	**CPUE**	**MT**	**CPUE**
2001	CN	180	0	0.0	0	0.0	0	0.0
2000	JP	45,267	2	0.0	49	0.0	5	0.0
2001	JP	55,773	0	0.0	60	0.0	2	0.0
2000	TW	1,272	0	0.0	2	0.0	0	0.0
2001	TW	230	0	0.0	1	0.1	0	0.0

Source:SPC. based on available logsheets; note that coverage may not be 100%

Japan is the only Pole and line operators in the RMI EEZ. As at 2001, a total of 16,000 tons of fish were caught by the fleet, a significant increase in catch from the record catch in 1998, 17,000 tons.

Loining Plant:

The Loining plant went into full production in November 1999. Since then, it has employed over 300 people and has produced approximately 10,000 tons of fish annually, as raw materials from fishing boats and carriers.

As at the end of 2001, the plant had bought fish from 37 vessels, including purse seiners, carriers, and jig boats. The plant projects 42% loin production from 100% raw material. The rest is produced into fishmeals. The primary market of the produced loins is Pago Pago, in American Samoa. While there, it is further processed into canned Tuna.

Table 8: Vessel numbers and tonnage transshipped to the loining plant by year.

Year	2000	2001
Total vessels	15	16
Raw product (MT)	10,296	9,632
Processed/Exported (MT)	4,118	3,852

Transshipment:

The Transshipment activity continues to be dynamic in the Majuro port. The measures put in by the WTPO continues during the year, but with a slight improvement to the market situation, as a result. Table 7 is an indicative of the number of vessels and fee associated with the transshipment activity for the year.

While it is obvious that mostly purse seine vessels transshipped in Majuro, longliners and most recently, Albacore boats *(commonly referred to as **Jig Boats**)* often call in Majuro for Transshipment as well.

Table 9. Transshipment Trips and Fee Revenue in RMI for 2000/2001

Country/Party	Purse Seine	Pole & line	Longline	Carriers/bunkers	Total
USA	5				5
Japan					
Taiwan	157		9	12	180
Korea	60			3	63
FSM Arrangement	57				
Fong Seong Co.	7				
Others				61	61
Total Vessels	286		9	76	**374**
FEE (U.S$ 000)	171		5.4	45	**221**

Total number of Vessels transshipped in Majuro at 374, with an earning of $221,000 as transshipment revenue. The Taiwanese fleet continues to be dominant in port calls, with 157 purse seine transshipment. The declining market forced the vessel operators, especially those under the WTPO, to make drastic operation cuts, and limit the fishing effort. The limit includes a fifteen (15) days port stay, after each purse seine vessels transshipment. Transshipping Purse Seiner at Majuro Port. Purse seiners also call Majuro port for net repair and other maintenance.

It should be noted that not all fish transshipped in Majuro are caught in the RMI EEZ. At the same time, not all fish caught in the RMI are transshipped in Majuro, in the case of the Japanese boats; they go directly back to Japan to offload its catch.

Transshipment began in Majuro port in early 1998. Since than a total of 684 vessels have transshipped in the port, with a record number during 2000/2001, 374 vessels with an estimate of 119,700 MT of mixed species transshipped.

Total Catch in Zone:

For the year 2000/2001, total catch in zone is just over 70,000 tons of mixed tuna for all gear types. Table 10 depicts the break down of catch by gear and fleet types. Figures 1,2, and 3 compares data for the last 3 years.

Table 10. Catch by gear and fleet in RMI for 2000/2001 FY.

Country/Party	Purse Seine	Pole & line	Longline	Total
USA	1,000 tons			
Japan	12,000 tons	16,000	3,000	
Taiwan	7,000 tons		10	
Korea	12,000 ? tons			
FSM Arrangement	2,000 tons			
Domestic fleet	20,000 tons			
Total	54,000 tons	16,000	3,010	~70,000 tons

Source: SPC (Calendar year) MIMRA (fiscal Year)
Estimates based on analyzed logsheets. Analysis is still in process for logsheets submitted in 2001.

Figure 1.: Licensed Vessels (all fleet)

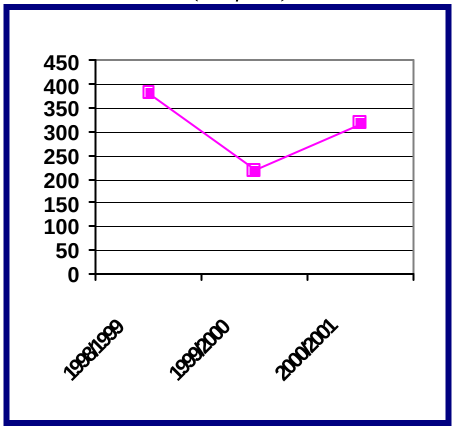


Figure 1 shows the fluctuations of the total number of vessels in the RMI EEZ. 1998 at 385 vessels, 1999 at 219 vessels while in 2000/2001 at 316.

Figure2: Catch in RMI (Metric Tons)

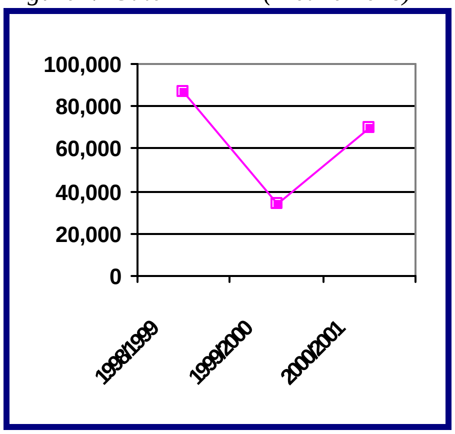


Figure 2 shows catch in the RMI zone by all gears and vessels licensed through MIMRA. 1998 (record high) at about 87,000 metric tons, 1999 at 33,000 metric tons, and 2000/2001 at 70,000 metric tons. Figures are estimates, and is also an indicative of improvement in performance by catch in zone. The drop, from 1998-2000 can be attributed to the slump in the market value of tuna during the 3 years, the oversupply of tuna in the market, variables in the exchange rate, fleet reduction (Japanese longliners), and the effects of El Nino/La nina period..

Figure 3: Transshipped Vessels in Majuro Port (all vessels)

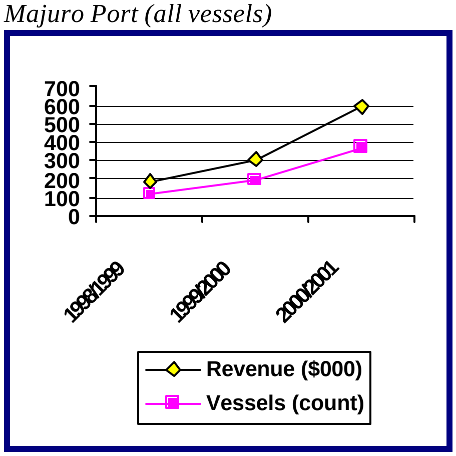


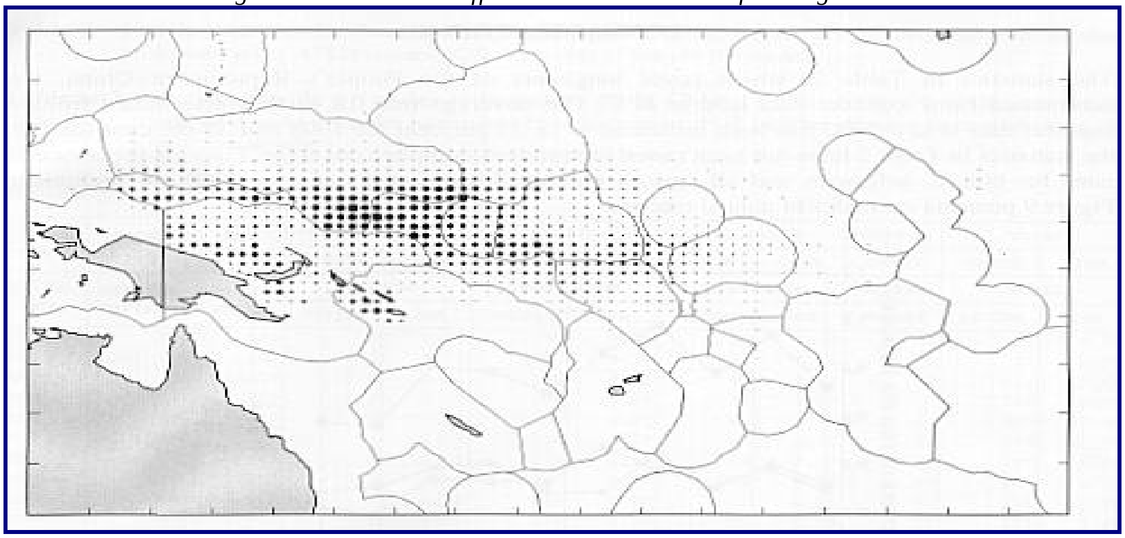
Figure 3 represent the total number of vessels by all gears that call in Majuro port for purposes of Transshipment. 1998 at118, with an earning of about $70,000 as fee. In 1999 at 192 vessels, with a revenue of $115,000, and 2000/2001 at 374 vessels, with an earning of $221, as transshipment fee.

The figures and numbers seemed to be on the rebound, from that of last year, with the increase in total number of licensed vessels, catch in-zone, number of transshipped vessels and overall revenue generation. It is anticipated to increase in the coming years as well, with the inclusion of the locally based Foreign longline fleet.

EFFORTS OF THE FISHERY:

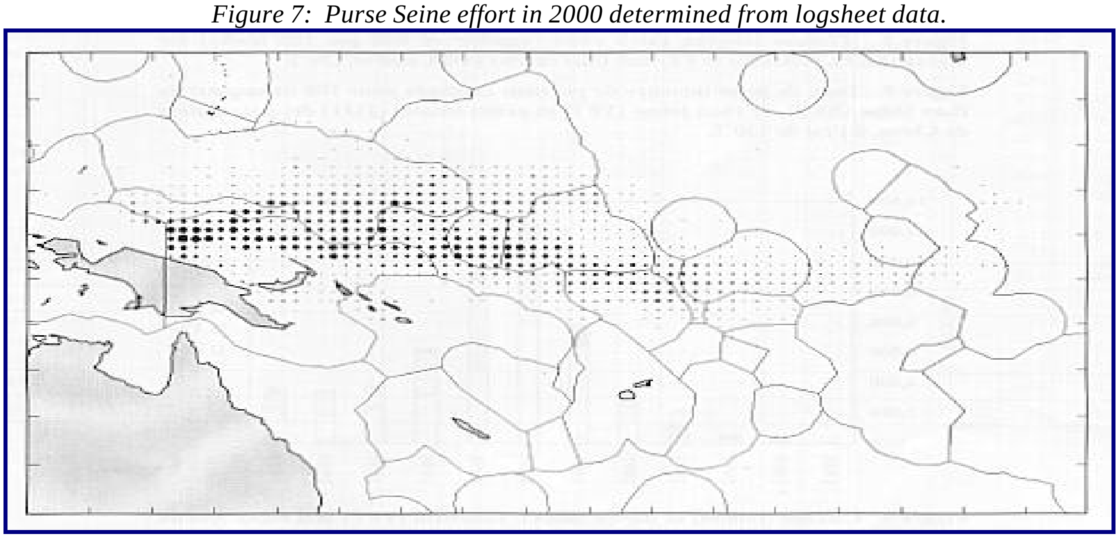
The Marshall Islands, through MIMRA, Currently compliments the ongoing data collection efforts of the SPC and the FFA. Programs such as Observers and port sampling are standardized through the efforts and collaborations of the two agencies. As a result, important management and scientific issues' regarding the Oceanic fishery is being addressed through these Secretariats at the national and the regional level. The fact that most, if not all the DWFN, operates on a bilateral or multilateral arrangements with Pacific Island Nations, the management and operation details of the fleet are streamlined and regionally harmonized. The concentration of the operations, fishing effort based on gear types are depicted in figures 6 and 7, for purse seine in the region for the years 1999 and 2000 respectively.

Figure 6: Purse Seine effort in 1999 determined from logsheet data.



Source: SPC

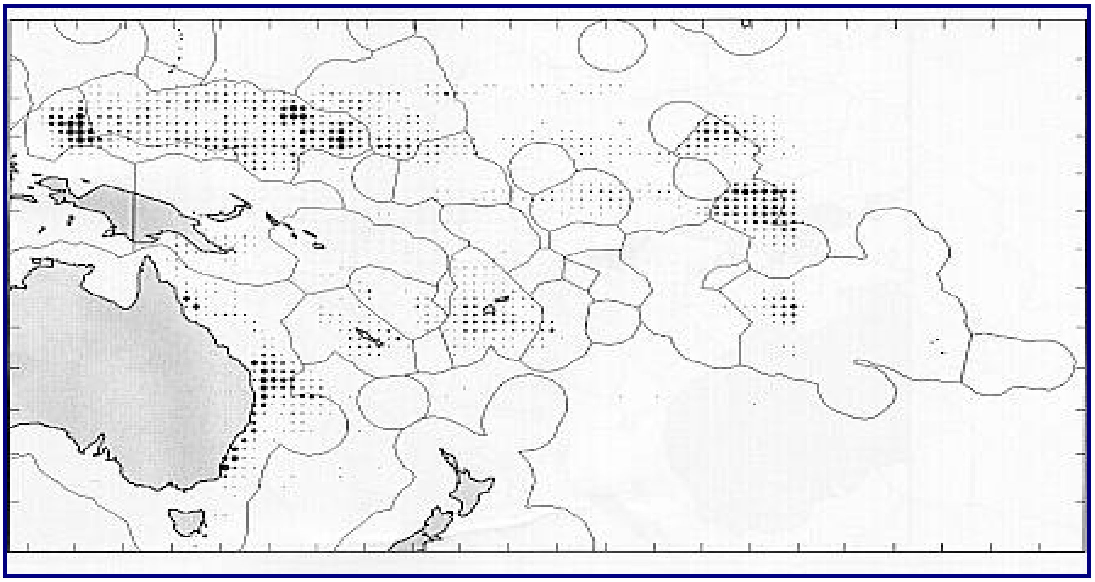
Figure 7: Purse Seine effort in 2000 determined from logsheet data.



Source: SPC

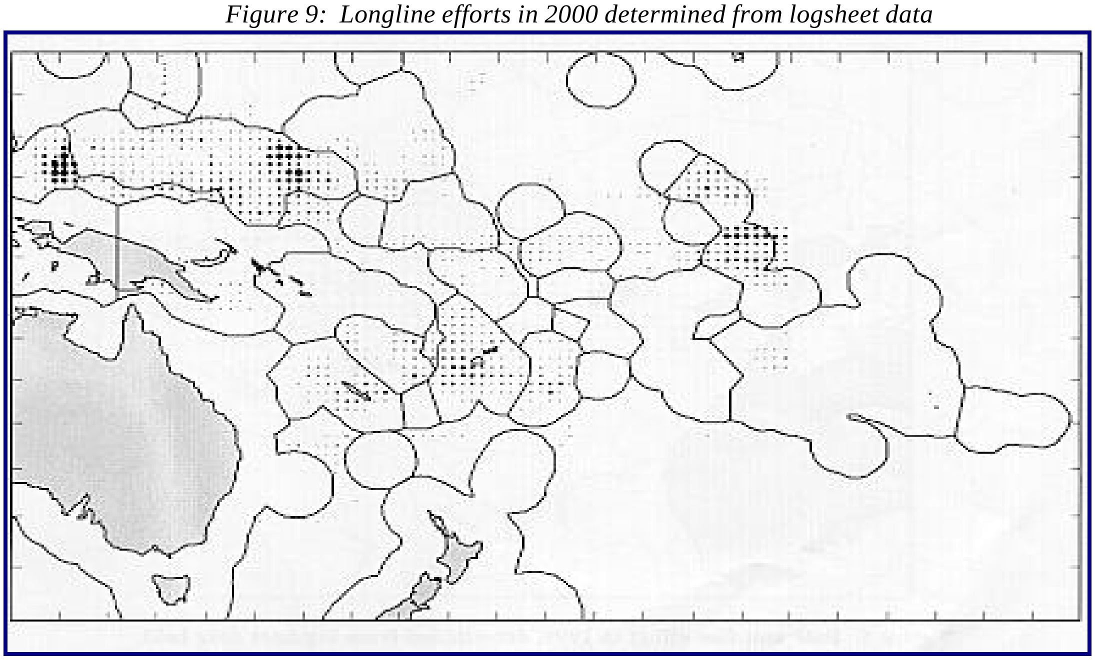
As indicated in the figures 6 and 7, the purse seine fishery appears to be shifting more to the southeast, from 1999 to 2000. It shows relatively, where the fishery operated in the RMI and the region as a whole. This is the dominant fleet licensed in the RMI, with 150 vessels.

Figure 8: Longline efforts in 1999 determined from logsheet data



Source: SPC

Figure 9: Longline efforts in 2000 determined from logsheet data



Source: SPC

Figure 8 and 9 shows the area of operation in the region for all longliners during 1999 and 2000. The RMI was fairly inactive during 2000, with 27 licensed issued to Japan as compared to 1999, 55 licensed. Japan also underwent a fleet reduction late last year, resulting in fewer number of domestic longliners operation out of Japanese ports.