Status of the United States Western Pacific Tuna Purse Seine Fleet and Factors Affecting Its Future

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Summary

The study focuses on aspects of the dynamics of the U.S. tuna purse seine fleet with the intention of increasing the information available for management of western Pacific tuna fisheries. To carry out the study the authors used published material as well as their experience with the U.S. fleet and interviews of a large number important stakeholders, including present and past U.S. vessel owners/managers, fishing vessel operators, representatives of several tuna processing companies, representatives of the U.S. tuna industry, and tuna fishery managers.

The review involves examining the fleet's history, interest groups, factors affecting its operation, and forces influencing the future. Specific topics addressed are the fleet's history, fishing patterns, physical specifications, stakeholders, and major issues affecting the fleet. To gain insight into the future of the fleet, positive and negative factors affecting the fleet are analyzed and the most important threats to its survival identified. These are viewed in light of how the fleet has coped with previous threats in the period from the mid-1950s to the late 1980s.

Information on the future of the U.S. fleet is conceptually divided into three categories: (1) opinions expressed by other studies and individuals; (2) what can be stated with some degree of confidence; and (3) what can be speculated upon from information in this report and from other sources. The management implications of both a declining fleet and the demise of the fleet are subsequently explored.

In 1976 the U.S. purse seine fleet consisted of 143 large vessels, of which about 98% were operating in the eastern Pacific. By 2002 the situation had changed considerably with less than 30 vessels remaining, almost all of which are based in the western Pacific. A great deal of uncertainty currently exists regarding the future of the U.S. purse seine fleet, with its continued viability being threatened by four major factors: (1) low or stagnant prices; (2) the fleet's high costs of production; (3) the reduction of advantages for American Samoa; (4) and an underlying threat of the lack of generational continuity in vessel-owning families.

With respect to the future of the fleet, no evidence is available to the authors indicating that major factors causing the downward trend in U.S. vessel numbers are changing. This pessimistic view needs to be balanced with the observation that most of the events that have had a major effect on the U.S. fleet (both negative and positive) have been largely unexpected. Much of the optimism that exists within the fleet revolves around the possibility of such unexpected positive developments.

In the longer term, the composition of the fleet is likely to evolve, and be made up of corporate-owned vessels and vessels owned by individuals who have other than strictly financial reasons to stay involved. This change may be similar to what has occurred in the U.S. agriculture sector, with evolution from family-owned farms to agro-business ownership.

Depending on one’s perspective and knowledge of the industry from other sources, the information contained in this report could lead to a wide range of additional hypothetical future scenarios for the U.S. tuna purse seine fleet. Speculating on the fleet’s future requires making some guesses on the outcome of a multiplicity of issues affecting the future of the industry as a whole, as well as conjecturing on the resultant responses of processors and others to those outcomes.

The management implications of two possible scenarios in changes to the U.S. fleet are described. The entry of additional fleets into the western Pacific and a consequential increase in overall effort in the fishery, degradation of the quality of fisheries data, and increases in FAD-related fishing are identified as some of the most likely consequences. There are several indicators, including experience in the eastern Pacific where the U.S. fleet is no longer active, that point strongly to the U.S. Government continuing its engagement in the management of the western Pacific tuna fishery should its purse seine fleet cease to exist.