Domestic Tuna Fisheries in the Solomon Islands

A National Tuna Fishery Report

Prepared for

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Introduction

The domestic tuna fishery of the Solomon Islands (SI) began in 1972 with the establishment of Solomon Taiyo Limited (STL). Since then the fishery has grown to become one of the major foreign exchange earners and the largest employer in the country. The current domestic fleet comprised of pole-and-line, purse seine and longline fleets. In addition to this, Japanese foreign longline and pole-and-line vessels also fish in the SI waters under bi-lateral arrangements whilst US seiners have access to a restricted zone(10%) of the EEZ under the Multi-lateral Treaty. Bilateral arrangements with Taiwan to operate longline vessels in the SI waters have come to a halt following unsuccessful negotiations for new arrangements.

The commercial tuna fishery sector is largely based on the country's rich tuna resources and is currently being managed based on a quota system which allocates a Total Allowable Catch (TAC) of 120,000 mt for the surface fishery and 8,500 mt for the longline fishery. Each of the companies that has been licensed to fish in the SI waters has been given a quota.

Total Catches

An overview of historical annual catches in the SI waters, from1971 - 1997, is shown in **Table 1**. The total catch for 1995, 1996 and 1997 were 70,402.4 mt, 70,408.0 mt and 50,247.9 mt respectively, which were just about half the TAC. Domestic fleets have been dominating tuna catches during each of the last 10 years accounting for about 95% each year. **Table 2** presents the total domestic catches by number of companies and number of fishing vessels.

Domestic Pole-and-line(DPL) catches for 1995, 1996 and 1997 were 34,388 mt, 23,636 mt and 22,234 mt respectively. The DPL fleet have accounted for 44% of the total 1997 catch. The catch by single purse seiners (SPS)have dropped markedly from a high of 33,449 mt in 1996 to 17,571 mt in 1997. The group purse seine (GPS)catch on the other hand has increased from 5,464 mt in 1996 to 6,305 mt in 1997. SPS catches for 1995, 1996, and 1997 were 7,410 mt, 6,457.6 mt and 6,305 mt respectively.

Of the 1997 SPS catch, NFD accounted for about 65%, having increased its catch from 7,806 mt in 1996 to 11,462 mt in 1997. The low catch record for single purse seiners could probably be due to non-reporting and failures to return catch logsheets by vessels. Steps have now been taken to curb this weakness. The SPS catch up to March this year now stands at 20,962 mt, which is already higher than the catch for 1997.

The longline (DLL) catch dropped from 5,540 mt in 1996 to 4,138 mt in 1997. The catch to March this year currently stands at 525 mt.

Fleet Structure

The current fleet structure is presented in **Table 3**. A total of 10 locally based companies have been licensed to fish for tuna. Of this, 8 companies were licensed to operate purse seiners, 2 companies pole-and-liners and 5 companies longliners. Only STL has been and continues to operate a GPS fleet. In addition to the domestic fleets, 2 Japanese associations have been granted licence to operate foreign longline and pole-and-line vessels in the SI waters under a bi-lateral arrangement whilst US seiners also have access under the multi-lateral treaty arrangement. Four companies have been licensed to do shark longlining.

In total, 218 fishing vessels have been licensed to fish in the SI waters. This comprised 42 tuna longliners, 57 pole-and-liners (26 local & 31 foreign), 73 purse seiners, 33 US seiners and 13 shark longliners.

Catch by Species for Each Gear Type

Table 4 presents the annual catch composition, by species for each gear type for the domestic fleets for 1995 – 1997 and part of 1998 (to March). The 50,248 mt catch of 1997 comprised of 31,868 mt skipjack *(Katsuwonus pelamis)*, 9,913 mt yellowfin *(Thunnus albacares)*, 1,317 mt bigeye *(Thunnus obesus)*, 608 mt Albacore *(Thunnus alalunga)*, 145 mt billfishes and 90 mt other species. Skipjack (≈70%) and yellowfin (≈20%) have accounted for an average of about 90% of the catches for the last 3 years.

Skipjack has always been the predominant species of pole-and-line catches accounting for almost 90% of total catches. Yellowfin has been accounting for about 10%.

Final Market Destination of Catches (1996)

Table 5 gives the export destinations of SI tuna products in 1996 (1997 data not available yet). Major buyers of frozen fish were Japan and Thailand; canned products were UK, Vanuatu and Papua New Guinea; fishmeal were Taiwan, Singapore and Hong Kong. Only Japan imports smoked fish from the SI.

SI' s fresh tuna are principally exported to Japan and Taiwan.

Onshore Developments

Transshipment

A total of 92 (PS-83 & LL-9) transshipments were made in Honiara Port in 1997. Most of these transshipments took place towards the end of the year, and this has remained active since then until now. Since the beginning of this year, a total of 183 transshipments have been made and this is still continuing strongly. These activities have so far earned the Government SI$915,000 through levies and port entry fees. Additionally, since the beginning of the year, companies and agents responsible for transshipping vessels have paid in excess of SI$200,000 to Fisheries Observers who have been monitoring these activities.

Sampling coverage of transshipment activities is about 50%.

Processing

Only STL had been and continues to operate a cannery. STL also operates a fishmeal and a fish smoking (arabushi) plants.

Solgreen Enterprises Limited alone is currently engaged in onshore packaging of fresh tuna and billfish for export. A total of 474 mt of fresh tuna comprising of 265 mt bigeye, 150 mt yellowfin, 31 mt albacore and 28 mt marlin have been exported since the beginning of this year.

Future Prospects and Developments

The following are areas that would enhance a more beneficial development of the tuna fishery in the country.

Tuna policy review

The SI Tuna Fisheries Policy has recently been reviewed with the technical assistance of the Forum Fisheries Agency experts. The last review of the policy was done in 1985. The review was centred on maximising the economic benefits derivable from the tuna resources on a sustainable basis.

Further the Fisheries Act of 1972 has recently been repealed and replaced with a new one, The Fisheries Act of 1998. The new Act allows for the long-term conservation and sustainable utilisation of fishery resources that would enhance the maximisation of benefits and participation of nationals in the exploitation, management and development of fishery resources including tuna.

Observers Programme

The Solomon Islands has been running a domestic observers programme for the last 12 years. The programme has recently been re-strengthened by employing 18 additional observers on a contract basis after having passed the FFA/SPC observers training course. A total of 37 observer trips have been made since the beginning of this year. The observers are also being utilized to undertake transshipment sampling and monitoring in Honiara and other designated ports as well as undertaking sampling at Solgreen's fresh tuna packaging site in Honiara.

Four(4) port samplers, with the funding assistance from SPC, are also being stationed at the two major landing fishing ports, Noro (STL)-2 and Tulagi (NFD)-2.

Fisheries Observers' allowances are being met by fishing companies. In addition to this, companies are now required to pay an observers annual fee of US$200 per vessel.

Eligibility Point Evaluation System

An eligibility point evaluation system has been introduced to ensure that vessels and companies to be involved in tuna fishing are genuine, hence maximise benefits derivable from the country's tuna resources. An investment proposal has to score 25 points before the Foreign Investment Board can approve its application and Fisheries Division issues a licence. This has come about as a result of investors continuous failure to implement their promises. The system takes into consideration equity, vessel flag, nationals employed, local purchases and onshore development in awarding points.

Table 1: Annual Tuna Fishery Catch Overview by Gear Type.

YEAR	DOMESTIC				FOREIGN				TOTAL
					Japanese		US	Taiwan	
	Pole & line	Group seiner	Single seiner	Longline	Long line	Pole & line	Seiners	Longliners	
1971	4,711.0								4,711.0
1972	7,905.0					45.0			7,950.0
1973	6,512.0			132.0		269.0			6,913.0
1974	10,331.0					6,831.0			17,162.0
1975	7,169.0					8,255.0			15,424.0
1976	15,799.0			212.0		19,865.0			35,876.0
1978	12,115.0			287.0		8,138.0			20,540.0
1979	18,354.0			300.0	192.2	270.0			19,116.2
1980	23,801.0			715.0	2,603.7	535.0			27,654.7
1981	21,935.0	961.0		818.0	2,699.3	545.9		33.3	26,992.5
1982	22,626.0	2,873.0		209.0	4,644.3	801.9		12.5	31,166.7
1983	17,322.0	3,091.0		350.0	3,139.7	383.5		187.1	24,473.3
1984	29,266.0	5,415.0		552.0	2,175.8			94.5	37,503.3
1984	30,599.6	5,438.0		363.0	1,128.4	414.5	-	384.1	38,327.6
1985	25,234.9	5,977.0		242.2	4,547.8	3,323.4	-	277.8	39,603.1
1986	38,822.8	5,895.0		-	2,910.1	61.5	-		47,689.4
1987	23,925.1	7,333.0	952.0	-	788.3	79.8	-		33,078.2
1988	33,051.7	6,646.0	4,073.9	-	7,662.7	188.0	158.0	35.5	51,815.8
1989	25,868.8	6,923.0	4,286.5	-	4,697.9	73.0	30.0	3.7	41,882.9
1990	21,557.1	6,830.0	2,212.6	-	4,934.0	6,453.0	57.0	16.3	42,060.0
1991	37,939.7	6,897.0	6,499.6	-	5,039.0	181.0	1,774.0	70.5	58,400.8
1992	22,520.1	5,580.0	16,026.0	-	2,401.0	105.0	6.0	20.8	46,658.9
1993	19,969.9	6,805.0	12,331.5	-	2,914.0	18.0	255.0	79.2	42,372.6
1994	22,971.7	6,844.8	13,159.0	-	3,007.0	4,574.0	1,366.0	121.0	52,043.5
1995	34,388.4	7,410.0	24,679.4	852.0	1,573.0	71.0	1,141.6	287.0	70,402.4
1996	23,636.0	6,457.6	33,649.0	5,540.0	2,036.0	608	2,119.0		74,045.6
1997	22,233.9	6,305.0	17,571.0	4,138.0	N/A	N/A	N/A		(50,247.9)

Table 2: Domestic fleets by number of company and vessels and total catches from 1993 –1997

	Pole and Line			Longline			Single Purse Seine			Group Purse Seine		
YEAR	No. of Companies	No. of vessels	Catch (mt)	No. of Company	No. of vessels	Catch (mt)	No. of Company	No. of vessels	Catch (mt)	No. of companies	No. of vessels	Catch (mt)
1993	2	27	19,969.9	0	-	-	5	10	13,503.0	1	1	6,805.0
1994	2	27	22,972.0	1	-	-	5	9	21,582.4	1	1	6,844.8
1995	2	30	34,388.4	4	20	852.0	6	28	24,679.4	1	1	7,410.0
1996	2	27	23,636.0	7	36	5,540.0	8	34	33,649.0	1	1	5,457.6
1997	2	26	22,233.9	5	31	4,084.0	8	31	17,963.0	1	1	6,305.0
1998 - March	2	26	na	2	16	525.0	6	36	20,962.0	1	1	na

Table 3: The current fleet structure (as of 15th May 1998)

	Company/ Agent	FREEZER	LIGHT BOAT	LONGLINE	POLE & LINE	PURSE SEINE	SHARK LONGLINE	Grand Total
Domestic								
	GLOBAL INVESTMENT	0	0	0	0	4	5	**9**
	MAKO	0	0	1	0	47	0	**48**
	MAY FISHING	0	0	0	0	0	2	**2**
	NFD	0	0	0	5	3	0	**8**
	S I TUNA SERVICES	0	0	1	0	5	0	**6**
	SF & SHIPPING CO LTD	0	0	1	0	4	0	**5**
	SOLFISH & TUNA CO.	0	0	0	0	0	2	**2**
	SOLGREEN	0	0	21	0	0	0	**21**
	SOLSSA	0	0	4	0	7	0	**11**
	STL	1	1	0	21	2	0	**25**
	SUNRISE	0	0	0	0	1	0	**1**
	TUTUSA	0	0	3	0	0	0	**3**
	YU-MAY FISHING	0	0	0	0	0	2	**2**
	(blank)	0	0	0	0	0	2	**2**
Foreign								
	JAPANTUNA	0	0	4	26	0	0	**30**
	KINKATSUKYO	0	0	7	5	0	0	**12**
	US Vessels	0	0	0	0	33	0	**33**
	Grand Total	**1**	**1**	**42**	**57**	**106**	**13**	**220**

Table 4: Domestic fleet catches by gear type and species

a) 1997

VESSEL TYPE	No. of V	SKJ	YFT	BET	ALB	BFT	STM	BLM	BKM	BBS	SLF	SHK	OTH	TOTAL
Single Purse Seine	31	11,179.5	6,391.5	-	-	-	-	-	-	-	-	-	-	17,571.0
Group Purse seine	1	no ls	no ls	no ls	no ls	no ls	no ls	no ls	no ls	no ls	no ls	no ls	no ls	6,305.0
Pole and Line	26	20,688.8	1,517.0	-	-	-	-	-	-	-	-	-	28.1	22,233.9
Longline	31		2,004.9	1,317.1	607.9	5.2	3.0	100.0	21.2	18.3	2.9	54.1	3.4	4,138.0
TOTAL (mt)		**31,868.3**	**9,913.4**	**1,317.1**	**607.9**	**5.2**	**3.0**	**100.0**	**21.2**	**18.3**	**2.9**	**54.1**	**31.5**	**50,247.9**
Catch composition		*72.52%*	*22.56%*	*3.00%*	*1.38%*	*0.01%*	*0.01%*	*0.23%*	*0.05%*	*0.04%*	*0.01%*	*0.12%*	*0.07%*	*100.00%*

b) 1996

VESSEL TYPE	No. of V	SKJ	YFT	BET	ALB	BFT	STM	BLM	BKM	BBS	SLF	SHK	OTH	TOTAL
Single Purse Seine	34	20,198.2	13,430.8	20.0	-	-	-	-	-	-	-	-	-	33,649.0
Group Purse seine	1	2,909.6	3,430.1	-	-	-	-	-	-	-	-	-	117.9	6,457.6
Pole and Line	27	20,274.2	3,268.9	-	-	-	-	-	-	-	-	-	92.9	23,636.1
Longline	36	-	2,271.1	1,315.1	1,154.1	57.2	105.6	130.9	40.4	124.5	5.5	106.5	229.1	5,540.1
TOTAL (mt)		**43,382.0**	**22,400.9**	**1,335.1**	**1,154.1**	**57.2**	**105.6**	**130.9**	**40.4**	**124.5**	**5.5**	**106.5**	**439.9**	**69,282.8**
Catch composition		*62.62%*	*32.33%*	*1.93%*	*1.67%*	*0.08%*	*0.15%*	*0.19%*	*0.06%*	*0.18%*	*0.01%*	*0.15%*	*0.63%*	*100.00%*

c) 1995

VESSEL TYPE	No. of V	SKJ	YFT	BET	ALB	BFT	STM	BLM	BKM	BBS	SLF	SHK	OTH	TOTAL
Single Purse Seine	28	16,246.0	7,773.2	31.2	-	-	-	-	-	-	-	-	629.0	24,679.4
Group Purse seine	1	4,660.9	2,629.0	-	-	-	-	-	-	-	-	-	120.3	7,410.2
Pole and Line	30	30,804.9	3,509.8	-	-	-	-	-	-	-	-	-	73.7	34,388.4
Longline	20	-	242.5	399.4	160.9	-	1.0	19.7	2.4	4.5	0.7	17.2	4.2	852.5
TOTAL (mt)		51,711.8	14,154.6	430.6	160.9	-	1.0	19.7	2.4	4.5	0.7	17.2	827.1	67,330.6
Catch composition		*76.80%*	*21.02%*	*0.64%*	*0.24%*	*0.00%*	*0.00%*	*0.03%*	*0.00%*	*0.01%*	*0.00%*	*0.03%*	*1.23%*	*100.00%*

d) 1998

VESSEL TYPE	No. of V	SKJ	YFT	BET	ALB	BFT	STM	BLM	BKM	BBS	SLF	SHK	OTH	TOTAL
Single Purse Seine	36	7,933	13,157.0	12.0	-	-	-	-	-	-	-	-	-	20,962.0
Group Purse seine	1	-	-	-	-	-	-	-	-	-	-	-	-	0
Pole and Line	26	-	-	-	-	-	-	-	-	-	-	-	-	0
Longline	16	-	148.9	257.0	77.9	-	0.5	22.3	3.6	5.6	0.4	9.0	-	525.0
TOTAL (mt)		31,868.3	9,913.4	1,317.1	607.9	5.2	3.0	100.0	21.2	18.3	2.9	54.1	31.5	21,487.0

Code: SKJ - skipjack; YFT - yellowfin; BET – bigeye; ALB - albacore; BFT - bluefin; STM - striped marlin; BLM - blue marlin; BKM - black marlin; BS- broadbill swordfish; SLF - sailfish; SHK - shark; OTH - other species.

Table 5(a): Market destinations of tuna products from Solomon Islands (mt)

Destination:	FROZEN FISH	CANNED FISH	SMOKED FISH	FISH MEAL	FRESH	TOTAL
A.Samoa	361.10	-	-	-		**361.10**
Australia	262.40	75.60	-	0.03		**338.03**
Fiji	36.10	-	-	-		**36.10**
Indonesia	248.02	-	-	-		**248.02**
Japan	15,117.70	149.60	899.20	-		**16,166.50**
Malaysia	295.51	-	-	-		**295.51**
Thailand	5,524.52	-	-	-		**5,524.52**
Philippine	759.12	-	-	-		**759.12**
Taiwan	0.88	-	-	4.31		**5.19**
PNG	-	274.50	-	-		**274.50**
UK	-	4,900.70	-	-		**4,900.70**
Vanuatu	-	512.20	-	-		**512.20**
Greece	-	32.60	-	-		**32.60**
Hongkong	-	-	-	1.32		**1.32**
New Zealand	-	-	0.00	-		**0.00**
Singapore	-	-	-	2.38		**2.38**
TOTALS	**22,605.34**	**5,945.20**	**899.20**	**8.03**		29,457.77

Table 5 (b): Summary of tuna product exports, 1985-1995.

Year	Frozen fish	Canned fish	Smoked fish	Fishmeal	Frozen	TOTALS
1985	27,350	937	212	0	0	**28,499**
1986	39,565	930	226	0	0	**40,721**
1987	26,480	1,200	314	0	0	**27,993**
1988	35,659	1,206	313	0	0	**37,178**
1989	27,935	1,285	409	0	0	**29,629**
1990	17,090	2,794	521	0	0	**20,405**
1991	47,558	4,854	406	0	0	**52,819**
1992	27,845	5,449	429	0	0	**33,723**
1993	15,435	5,774	504	0	0	**21,712**
1994	23,065	7,712	839	0	0	**31,616**
1995	38,698	6	1	0	0	**49,689,038**
1996	22,605	59,459	899	8		**29,669,060**

Source: Statistics Office, Ministry of Finance.