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Strengthening seafood export capabilities in the South Pacific

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This research, commissioned by the Economic and Social Commission for Asia and the Pacific (ESCAP) and conducted by Ila Temu and Colin Hunt of the National Centre for Development Studies, concluded with a workshop for Pacific island and Indian Ocean country representatives, in Bangkok, in March 1996. The background to the research and recommendations of the workshop are presented here.

The South Pacific tuna fishery is one of the great fisheries in the world and one of the few not in decline due to overfishing. Annual tuna catches have doubled every decade for the last three decades and tuna catches in the South Pacific Commission statistical area now total some one million tonnes annually—worth some US$1.5 billion.

The fishery and its stocks represent an important world food source and at the same time an important resource for South Pacific islands. Indeed for many small island states, only marine resources have any significance. Tuna is one of the most important of these.

Poor economic performance, rapid population growth and a withdrawal of aid, are socioeconomic trends in the sub-region forcing a reappraisal of the contribution that tuna stocks can make to development, particularly as there are large and growing markets for processed and fresh tuna.

Tuna is the only regionally available marine product with sufficient volume to support significant and sustainable exports. These are mainly in the form of processed fish, from the canneries of the Solomon Islands and Fiji, and fish caught and frozen by vessels of distant water fishing nations and transported to canneries outside the region and to Japanese markets. Production for chilled fish export by the six countries studied is emerging and while still relatively minor (except in the case of Fiji) has potential for growth.

The inshore fisheries of island countries have traditionally provided much of the protein requirement of the inhabitants. Over-fishing has reduced yields however and attention has turned to the relatively abundant offshore tuna stocks for domestic supply. Export fisheries also increase domestic supply through by-catch.

While much effort has been devoted by South Pacific governments to stimulating the development of export fisheries, it is the private sector—with strategic support from governments—that should take the initiative.

Presently, most of the catching and value-adding is in the hands of foreign enterprises (Table 1). A high participation rate by South Pacific countries is found in the pole-and-line fishery supplying the

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canneries in the sub-region. In the purse seine and longline fisheries, the South Pacific countries are increasing their share of the catch but from a low base. Nevertheless there has clearly been a rapid response in the catching sector to the existence of the high-priced markets for fresh fish.

The traditional canned tuna exports, mainly to Europe, are being supplemented by fresh exports to Japan, Hawaii and the United States (Tables 2 and 3).

The ESCAP workshop

The theme of the workshop, which was also attended by representatives of the Forum Fisheries Agency, the Forum Secretariat, the South Pacific Commission, Infofish, Food and Agriculture Organisation and the Thailand Government, was the enhancement of fresh tuna exports.

Country papers were presented for Fiji, the Maldives, Samoa, Solomon Islands, Sri Lanka, Tonga and Vanuatu, as well as a paper covering issues common to Pacific island countries.

The papers and recommendations (ESCAP 1996) focused on the need for tuna management as well as on training and management issues.

Recommendations

The recommendations of the workshop are summarised as follows.

Trade policy. The need for reassessment of export and import duties in the Pacific and the need to study the regulations and requirements of importing countries and to ensure this information reached Pacific island administrators and the fishing sector.

Quality requirements. Major importing countries are adopting Hazard Analysis Critical Control Point (HACCP) principles. It was therefore recommended that HACCP should be implemented in Pacific island countries to ensure the safety and quality of fish exports and to enhance export prospects.

Human resource development. Specialised training is required for inspectors and fishers in handling, processing and quality control, HACCP, and the integration of systems with requirements of importing countries. The supply of trained maritime and refrigeration engineers should also be increased.

Investment. Shore-based infrastructure and the lack of foreign investment guidelines were restraints. In-country seminars for potential investors were recommended.

Sustainable management and development of tuna stocks. Tuna stocks were the basis for expansion of exports and held the key to the development of island countries. While taking account of the ongoing discussions in various forums, the workshop recommended that the formulation of regional management and development plans for the major tuna species should be further discussed.

Economic analysis. The benefits of costs of domestication policy, and the questions surrounding levels of licence fees, access fees and associated concessions—that would generate maximum benefits—required research.

Market information. Market demand and market regulation information were required to facilitate fish exports. The Pacific island country export promotion office was due to open in Tokyo in 1996, and the workshop noted that the services of Infofish are also available.

Product diversification. Niche market opportunities can be exploited through diversification and value-adding to Pacific fish products.

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Table 1 **Tuna fishing in the South Pacific, 1990–94**

	Distant water fishing nations[a]		South Pacific countries[b]	
	No. vessels	Catch ('000 t)	No. vessels	Catch ('000 t)
Purse seine fishing (canning)				
1990	150	624.9	4	8.2
1991	164	788.0	9	22.2
1992	163	781.0	10	26.7
1993	158	665.3	10	28.1
1994	160	777.6	11	34.1
Pole and line fishing (canning)				
1990	62	54.8	105	26.8
1991	54	53.2	77	42.0
1992	39	45.6	84	23.4
1993	38	45.6	64	21.7
1994	41	45.6[E]	112	27.5
Long-line fishing (fresh market)				
1990	..	113.0	14	2.4
1991	..	95.8	18	2.7
1992	..	121.1	52	2.8
1993	..	124.3	54	5.0
1994	..	136.3	134	8.0

[E] estimate
[a] purse seine: the Republic of Korea, Taiwan Province of China, United States and Japan; pole-and-line: Japan; longline: Japan, the Republic of Korea, Taiwan Province of China, the United States and China.
[b] purse seine: Solomon Islands, Federated States of Micronesia; pole-and-line: Solomon Islands, French Polynesia, Fiji, Kiribati, Palau, Tuvalu; longline: Fiji, French Polynesia, Tonga, Federated States of Micronesia, New Caledonia, Marshall Islands.
Note: The quality of data on distant water fishing nations is variable, and poor in the case of long-lining; minor fishing methods such as trolling are excluded; vessels and catch of Australia and New Zealand is excluded.
Sources: South Pacific Commission, 1994. *Tuna Fishery Yearbook*, South Pacific Commission, Noumea; Fiji Fisheries Division, 1994. *Annual Report, 1994,* Ministry of Agriculture Fisheries and Forests, Suva.

Table 2 **Value of seafood exports, selected South Pacific countries, 1990–94**

	Papua New Guinea (kina million)	Solomon Islands (SI$ million)		Fiji (F$ million)		Tonga (pa'anga million)	Vanuatu (vatu million)
	Marine products	Processed (canned and smoked)	Frozen	Canned	Other, mainly fresh	Fish, mainly fresh	Crustaceans, molluscs
1990	8.2	22.0	31.3	39.2	10.1	1.27	..
1991	10.4	38.8	67.0	35.7	10.9	1.39	..
1992	7.8	39.9	48.1	28.7	10.6	1.37	1.4
1993	18.7	59.4	35.9	31.4	11.8	2.16	15.1
1994	20.6	94.7	46.1	39.2	26.6	3.26	23.3

Source: ESCAP, 1996. *Promoting exports of fish and fishery products of selected island developing countries of the ESCAP region*, ESCAP, Bangkok.

Table 3 **Main destinations of seafood exports, selected South Pacific countries, 1990–94**

	Destination country
Papua New Guinea	
Marine products	Various
Solomon Islands	
Canned	United Kingdom
Frozen	Philippines and others
Smoked	Japan
Fiji	
Canned	United Kingdom, Canada
Other, mainly fresh	Japan, Hawaii
Tonga	
Frozen	American Samoa
Fresh	Hawaii, United States
Vanuatu	
Crustaceans, molluscs	Hong Kong, Taiwan, Singapore, Australia
Western Samoa	
Fresh	Hawaii, United States

Source: ESCAP, 1996. *Promoting exports of fish and fishery products of selected island developing countries of the ESCAP region*, ESCAP, Bangkok.

Integration of environmental issues into economic decision-making. Environmental requirements relating to harvesting, waste disposal, packaging and aquaculture were noted, as was the need for more comprehensive data on by-catch with the aim of its reduction.

Seafood and export product standards. The compendium on exports standards, prepared in conjunction with the workshop, should be updated regularly and expanded, and linked with importing countries' standards and requirements.

A companion publication to ESCAP (1996) is a compendium of standards for seafood exports of 6 Pacific island countries (Hunt and Choo 1996) documenting regulations and standards concerning health, hygiene and the environment. The compendium is of importance, given the tightening of standards by the the main tuna-importing countries.

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