

Executive Summary

Global Significance of the Region's Tuna

The Pacific Islands region is now the most important tuna fishing area of the world. It supplies about a third of all tuna in the world and its tuna fisheries dwarf those of the other three major tuna fishing areas both in volume and in value.

Value to the Region

The value of the catch has increased remarkably in the last few years, from about \$375 million in 1982 to \$1.2 billion in 1993, \$1.6 billion in 1994, \$1.7 billion in 1995, and \$1.9 billion in 1998.

The annual tuna catch in the Pacific Islands appears to have a current value of about:

- 11 percent of the combined GDP of *all* the countries in the region
- Half of the value of all exports from the region

It is well known that fish and fishing are tremendously important to the people of the Pacific Islands. Much of the nutrition, welfare, culture, recreation, government revenue, and employment in the region are based on its living marine resources. What is less appreciated is that, besides being the most important of the fisheries in the region, tuna fisheries produce about ten times the amount of fish produced by all the other fisheries of the region combined. Their value is over seven times that of all the other Pacific Islands fisheries combined.

Access Fees

The region received about \$60.3 million in access fees for foreign fishing activity in 1999—402 percent more than the \$15 million it received in 1982.

Access fees are a crucial component of government revenue in many countries, and are important even in the larger resource-rich countries of the region.

Access fees received by many Pacific Islands countries exceed the total value of all exports of those countries.

Employment

Considering only those jobs on tuna vessels and in tuna processing plants, about 10,000 Pacific Islanders are formally employed.

Total direct and indirect tuna-related employment is estimated to be between 21,000 and 31,000 or between 5 percent and 8 percent of all wage employment in the region.

Tuna-related employment provides support to government policies related to decentralization, women's activities, and private-sector development.

The five tuna canneries alone employ 5 percent of all formally employed women in the region.

Benefits from Locally Based Tuna Vessels

There are about 303 industrial-scale tuna vessels based in the region, including 26 purse seiners, 32 pole/line vessel, and about 203 longliners. The annual expenditures by these locally based vessels approach \$150 million.

Transshipment Benefits

Like locally based vessels, transshipping vessels have substantial local expenditures and associated benefits are expected to grow as local businesses expand to cater to vessel and related trade. The 507 transshipments known to have been made by Korean and Taiwanese seiners in 1996 have resulted in about \$3.8 million in local expenditures.

Tuna Exports

Although tuna may be expected to be a major export from some of the smaller countries in the region, tuna products are also an important component of the two most diversified economies of the region.

Commercial Sport Fishing

Tourism is a major part of the economy of the Pacific Islands and the economic plans of many of the countries in the region are predicated on an expansion of tourism. Commercial sport fishing for tuna is a specialized form of tuna fishing that is closely related to tourism. There is a large amount of commercial sport fishing activity in the Pacific Islands and considerable potential for additional benefits.

Small-Scale Tuna Fisheries

Tuna forms a substantial component of the catch of both the subsistence and artisanal fisheries in the Pacific Islands. With respect to volume, tuna appears to be the *most* important family of fish for small-scale fisheries.

Nutrition

Although it is often thought that the tuna caught by the industrial fishing fleets does not enter the food supply of the Pacific Islands, there have always been important exceptions and the situation is now changing.

Tuna makes up a substantial portion of all fish consumed, especially in the most economically vulnerable countries of the region.

Tuna is an important component of the diet of several countries categorized as low-income food-deficit countries. Without tuna, food security would be even more precarious.

Cultural Aspect

The greater respect and status accorded skilled tuna fisherman in his own culture encourage many other members of the community to emulate his success. The ready availability of such role models has a positive effect on daily life.

Future Importance of Tuna

In the future Pacific Islands climate of continued economic stagnation, very high population growth, fully exploited inshore and coastal fisheries, severe economic shocks, and massive unemployment, the currently underexploited tuna resources of the region will inevitably assume a much greater importance than they now have. The future food security of the region will depend heavily on its tuna resources, highlighting the need for effective conservation and management of the region's tuna.