2026 Annual Ministerial Forum Fisheries Committee
25th Meeting

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Item No	**6**
Paper No	**FFCMIN25-WP2**
Title	**Tuna Fishery Report Card 2025**

Summary

The Tuna Fishery Report Card is produced annually and reports against the four goals (sustainability, value, employment and food security) of the *Regional Roadmap for Sustainable Pacific Fisheries* as well targets set by the Taskforce on Increasing Economic Returns from Fisheries.

A draft report card is usually provided to FFCMIN with the final version produced around November of the given year. However, with FFCMIN being held earlier than usual this year the SPC catch and effort data used to update many of the indicators presented is not yet available. Furthermore, with the review of the Roadmap in progress and final draft Roadmap 2.0 expected to be endorsed by ministers at RFMM7, this will be the final Report Card based on the current Roadmap. Given this, the final version of the Tuna Report Card 2025 as attached.

Recommendations

Ministers are invited to **note** the trends over the lifetime of the 2015-2026 Roadmap including the continuing biological healthy status of the four main tuna stocks, increases in activity related measures while government revenues have remained relatively flat since 2017.

Tuna Fishery Report Card 2025

Introduction

In 2015 Forum Leaders adopted the **Regional Roadmap for Sustainable Pacific Fisheries** setting out shared goals and strategies for the management of the region's tuna fisheries. The shared goals relate to sustainability, value, employment and food security with the goals to be achieved over the 10-year period to 2024. Subsequently, Forum Leaders established the **Taskforce on Increasing Economic Returns from Fisheries** to deliver real results within 5 years. The Taskforce developed four programme components: reform of the management of the longline fishery; increasing the value of employment and ensuring effective labour standards are in place; facilitating investment and trade; and value chain participation and established a number of specific targets to be achieved over a 5-year period.

This **Tuna Fishery Report Card** reports on the four Roadmap goals and provides commentary on trends against the sustainability, employment and food security targets specified for tuna fisheries in the Roadmap[1] and the targets set by the Taskforce. While some general commentary is provided, it is important to note that this Report Card is not intended to be a detailed report on the implementation of the strategies outlined in the Roadmap or the programmes specified in the Taskforce Report.

Additionally, it is important to note this Report Card reports on trends across FFA Members and fisheries as a whole. This masks the substantial differences between FFA Members at national level given their different resource endowments, different management regimes within their waters and different areas of comparative advantage for development of their fisheries resources.

Overview

With respect to the status of the stocks, all four main Western and Central Pacific Ocean (WCPO) tuna stocks (South Pacific albacore, bigeye, skipjack and yellowfin) are deemed to be "biologically healthy" in that they are not overfished nor is overfishing occurring. A harvest strategy workplan is being implemented to establish management procedures (MP) for each of these stocks. A major achievement has been the adoption of MPs for the stocks of WCPO skipjack (through WCPFC CMM 2025-03) and South Pacific albacore (through WCPFC CMM 2025-01). This includes the specification of corresponding target reference points (TRPs). The skipjack MP was run for the first time in 2023 and recommended no adjustments to the current catch or effort levels for the next three years (2024-2026).

The South Pacific albacore MP is scheduled to be run in 2026, to define catch levels for 2027-2029. The tropical tuna measure (WCPFC CMM 2023-01) was revised in 2023 and includes interim objectives for yellowfin and bigeye tuna stock status. Interim TRPs for these stocks were identified under the harvest strategy workplan to guide that work, and an MP for bigeye is scheduled to be adopted by 2026. The harvest strategy workplan and timeline is regularly updated by the Western and Central Pacific Fisheries Commission (WCPFC) in response to stakeholder input and the progress of technical work. Wider fishery or climate impacts on the ecosystem are not specifically evaluated here, beyond that of the longline bycatch rate of sharks, which shows a declining trend.
With regard to the economic goals in the Roadmap, value and employment, there are contrasting trends over the period since 2015 with significant increases in activity related measures while government revenue measures have remained relatively flat. Regarding activity measures, the proportion of the catch value taken by FFA Members'

[1] Reporting against the Roadmap's coastal fisheries goals and indicators is provided in the Coastal Fisheries Report Card.

fleets in FFA Members' national waters rose to 57% in 2023, up from 38% in 2015. Since 2015, exports to the four major markets, along with other global markets have surged by approximately 71% in 2024. Similarly, the volume processed or handled onshore has increased significantly, rising to nearly 100% above 2015 levels. Additionally, tuna related employment grew by 19% between 2015 and 2024.

In contrast, government revenue from access and licensing fees, which surged by approximately 300% between 2009 and 2015, has remained relatively stable since 2015 with total revenue hovering around $500 million. While the Taskforce's target of a 25% increase in government revenue from access and licensing fees was not achieved it is important to note that for the purse seine fishery the rate of return in 2015 was in excess of 20% and that a similar rate of return continues to be achieved. Given that there were a number of factors placing downward pressure on access fees in recent years the ability of Members to maintain purse seine access fee revenues demonstrates the resilience of PNA purse seine Vessel Day Scheme (VDS).
With regard to food security, given the lack of baseline data on the contribution of tuna to food security, it has been difficult to assess progress against the Roadmap target in this area. However, a number of studies have been conducted in recent years in order to assess how much tuna enters local markets for domestic consumption and the results of these studies are outlined. In addition, a study aimed at providing Members with a detailed analysis of potential policy options with regard to increasing the contribution of tuna fisheries to national food security and the applicability of these to their circumstances was presented to Members for their consideration in October 2022. Funding to assist Members to implement national programs and policies with regard to increasing the contribution of tuna fisheries to food security is available under the PROPER, OFMPIII projects and the GCF Regional Tuna Programme.

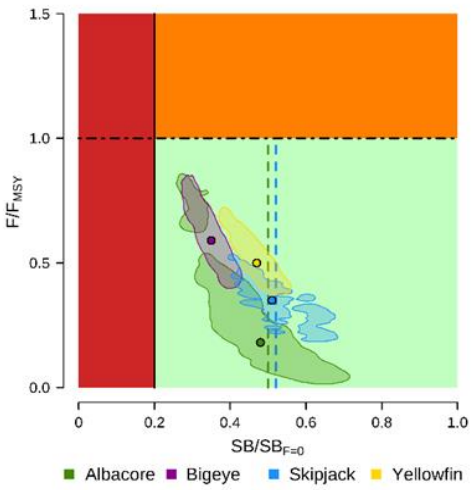
Goal 1 – Sustainability

The **Roadmap** provides a 3-year timeframe for the agreement of Target Reference Points (TRPs) for key tuna stocks, and a 10-year timeframe for the implementation of management measures to achieve these TRPs in order to support economically viable fisheries. Currently, the WCPFC has formally adopted management procedures that specify interim TRPs for skipjack and South Pacific albacore only. Analyses and associated discussions regarding yellowfin and bigeye TRPs are ongoing, with evaluation of a defined range of candidate bigeye TRPs to be presented to WCPFC23 in 2026 as part of the harvest strategy development work. At present, stock status objectives for these two stocks relate to the objectives in the tropical tuna measure (WCPFC CMM 2023-01).

Target Species

The 'Majuro' plot on the right illustrates the relative status of each of the main tuna stocks against limit reference points (horizontal and vertical black lines) for relative fishing mortality and spawning biomass depletion. The traffic light colouring provides a rapid indication of the biological 'health' of each stock, with the overall intention to maintain stock status in the green and avoid the red and orange quadrants. All four main WCPO tuna stocks (South Pacific albacore, bigeye, skipjack and yellowfin) are assessed to be in the green area indicating that these stocks are "biologically healthy", **not overfished nor is overfishing occurring.** As described above, TRPs have been adopted for two of the four tuna stocks (skipjack and South Pacific albacore, indicated by the vertical lines in the figure).
The WCPO is one of two ocean regions globally where all four major stocks are in the green (eastern Pacific Ocean stocks were declared to be all in the green for the first time in 2024), being neither overfished nor experiencing overfishing. However, this is not reason for complacency with the biomass of most stocks showing historic declines, a need to address weaknesses and gaps in the management measures currently in place, and further improvements needed in the data required to reduce uncertainty in stock status estimation.

Majuro Plot



Note: Based on the most recently undertaken stock assessments in 2025

The latest stock assessments for **yellowfin and bigeye tuna** in the WCPO were conducted in 2023. Based on the uncertainty grid adopted by SC19, the spawning biomass of yellowfin tuna in the WCPO was determined to be above the biomass LRP and recent fishing mortality below F_{MSY}, hence the stock is neither overfished nor experiencing overfishing. Similar to yellowfin, based on the adopted uncertainty grid, the WCPO bigeye tuna spawning biomass is estimated to be above the biomass LRP and recent fishing mortality is below F_{MSY} for all models, hence the stock is not overfished and not experiencing overfishing. Yellowfin and bigeye are both currently above their stock status objectives in WCPFC CMM 2023-01. Under the status quo fishing conditions where effort and catch levels are maintained at the average 2019-2021 levels, the bigeye and yellowfin stocks are projected to have zero probability of dropping below LRP. New assessments will be conducted for both species in 2026.

The latest **South Pacific albacore tuna** assessment was undertaken in 2024, and it included the entire South Pacific region (south of the equator) incorporating both the WCPFC-CA and the IATTC-CA. That assessment revealed an ongoing depletion of spawning biomass throughout the model time-period (1954-2022). Based on the ensemble set of models accepted by SC20, the South Pacific albacore stock is not considered to be overfished nor experiencing overfishing, with recent spawning biomass slightly below the TRP of 50% depletion. Stock projections under status quo fishing conditions, where catch levels are maintained at the average for 2020–2022, indicate the stock could increase in the short term but stabilise over the long term near the adopted TRP, with a small (< 10%) risk of being below the LRP.

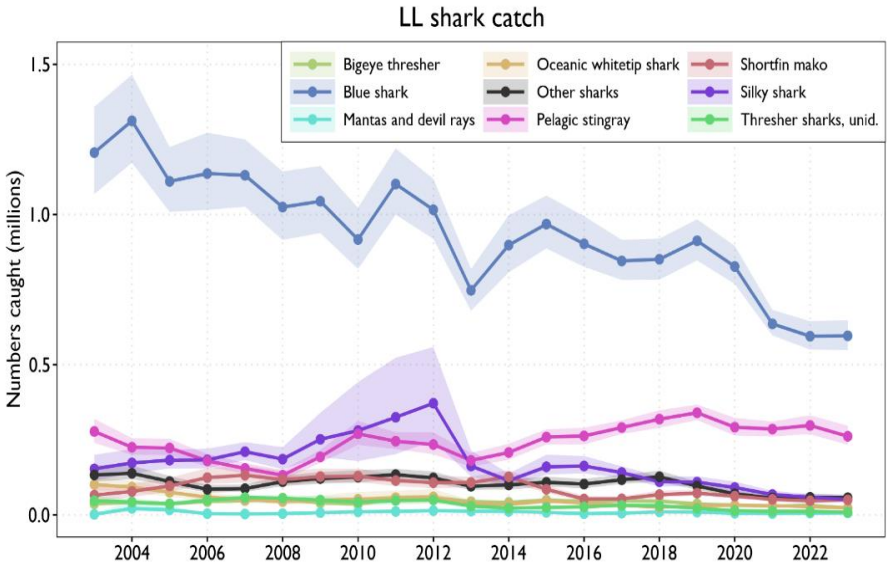
A new stock assessment was conducted for WCPO **skipjack tuna** in 2025, incorporating data from 1972 to 2024. The 2025 assessment estimates that spawning potential, depletion, and fishing mortality have been relatively stable since approximately 2010. The assessment was accepted by SC21 as the best available science and concluded that the skipjack stock is neither overfished nor experiencing overfishing. The recent spawning biomass is estimated to be slightly below the TRP of 52%. Under status quo fishing conditions, where catch and effort levels are maintained at the average 2021–2024 levels, the stock is projected to have zero probability of dropping below the LRP.

Other commercial species

Other commercial stocks that have been assessed as either overfished or undergoing overfishing, and that require management attention, include **southwest Pacific striped marlin** and **north Pacific striped marlin**. Conversely, several other species of billfish, including blue marlin and swordfish (both the North Pacific and Southwest Pacific stocks) are assessed to be in a healthy state, and sustainably harvested. This Report Card does not cover Pacific bluefin tuna as that stock is rarely caught by FFA fleets or in FFA EEZs. As such FFA Members have no real control over its exploitation and limited influence on the design of management measures for this stock.

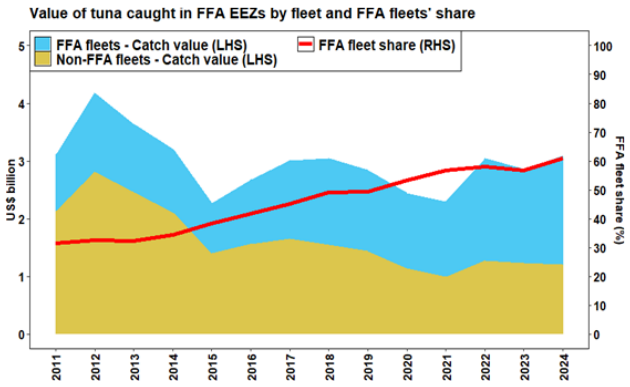
Bycatch

Median (average) longline bycatch levels of sharks in FFA Members' EEZs have demonstrated a continuing decline from 2003 through to 2023. The large decline has occurred in response to a several factors: a reduction in shallow set longline effort, mandated release (i.e., non-retention) of certain threatened species (e.g. oceanic whitetip and silky shark) and a prohibition on finning and carcass discarding (both requirements covered under WCPFC CMM 2024-05). Observed captures of marine mammals, seabirds and sea turtles are insufficient to explore temporal trends.



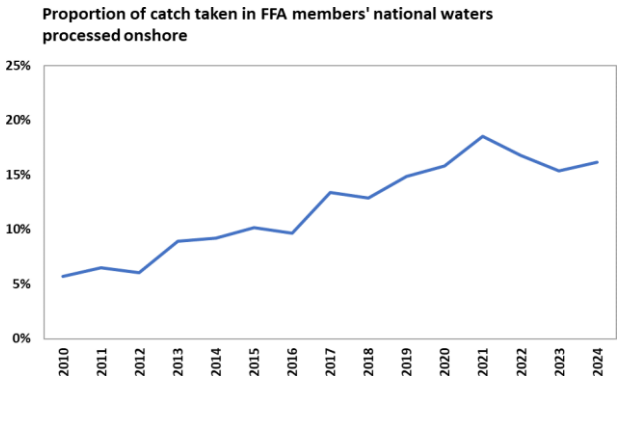
Goal 2 – Value[2]

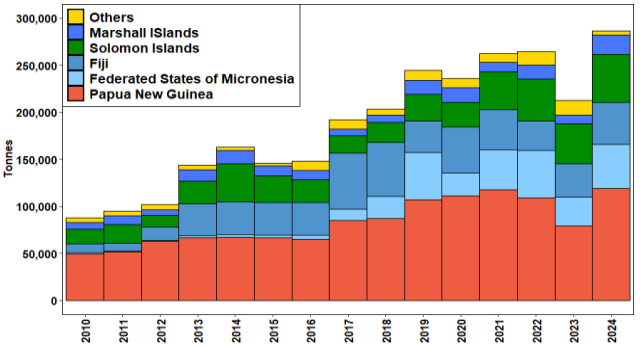
While the Roadmap initially called for a doubling of the value of the region's tuna catch by 2024 through increases in prices rather than volumes, the Taskforce specified three target areas: the value of foreign access; the value of fishing to GDP; and the proportion of catch value taken by FFA Island Member fleets. The target set in each of these areas was for a 25% increase over 5 years, with these indicators designed to reflect both increased economic returns and increases in coastal State control of the fishery.



The share of the catch value taken by FFA Members' fleets (includes both flagged and hartered vessels) within the waters of FFA Members has continue to increase in recent years as vessels reflagged to FFA Members. Since 2019, this share has consistently exceeded 50%. Between 2020 and 2023, it remained stable at around 53-58% before increasing to 61% in 2024, the highest level on record. In 2024 the catch value attributed to FFA fleets reached $1.9 billion, an increase of more than 100% since 2015. In the same year, FFA Members' fleets accounted for 62% of the catch value in the longline fishery, a marginal decline from the peak of 67% recorded in 2021, which marked the highest level since at least 1997. This growth in share was largely driven by a significant decrease in the catch taken by foreign longline fleets, despite an overall decline in catch levels. In the purse seine fishery, FFA Members' fleets captured 61% of the catch value within their waters in 2024- the highest on record with a catch value of $1.6 billion.

The **volume of tuna processed or handled onshore** (round weight) nearly doubled between 2015 and 2024, reaching a record high of approximately 286,000 mt in 2024. PNG consistently accounted for the largest share, underscoring its dominant role in regional tuna fisheries. Other key contributors – Fiji, Solomon Islands, FSM and the Marshall Islands also showed steady increases over time. This increase continues the upward trend in the percentage of tuna caught in FFA Member waters that is processed or handled onshore. In 2024, the volume of tuna processed or handled onshore in FFA member countries accounted for approximately 27% of the catch taken by national fleets within FFA waters, and 16% of the total catch within FFA national waters.





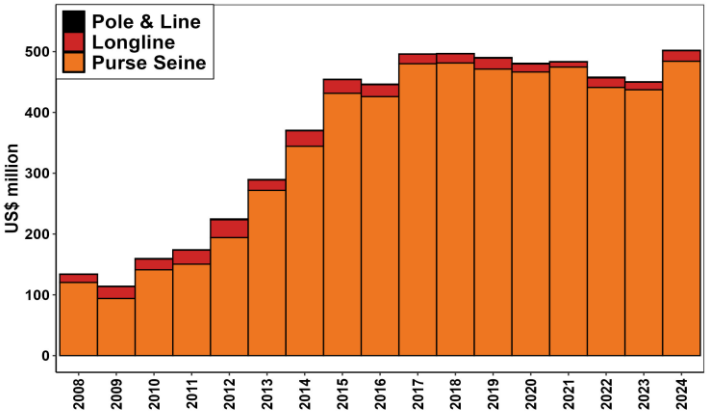
Volumes processed or handled onshore

***Sources**: FFA*

In recent years, a sharp 20% rise in 2019 was followed by a 4% decline in 2020, largely due to COVID-19 disruptions that affected supply chains and reduced processing operations. In 2021, volumes recovered with an 11% increase and remained stable through 2022 as restrictions eased. However, a significant drop occurred in 2023, primarily due to the closure of Papua New Guinea's Majestic Seafood Corporation Ltd, driven by financial challenges and limited tuna supply.

[2] In addition to the indicators presented in this section, the Taskforce also set a target of a "25% increase in value of fishing to GDP" over 5 years. Earlier editions of the Report Card have provided estimates of the contribution to tuna harvest sector to GDP (value added). However, the rapid growth of the fleet based in FFA Members and the difficulty in assessing the location of the economic center of interest of these vessels led to concerns about the accuracy of the approach previously employed and this has now been discontinued.

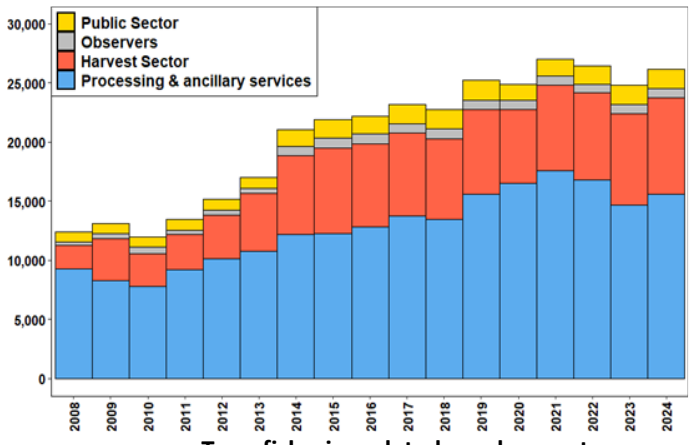
In 2024, **government revenues from license and access fee revenue** collected by FFA Member governments were estimated at approximately $502 million, representing a 12% increase from the previous year. This is comparable to the2018 peak of $497 million. After a decade of rapid growth, access fee revenue has remained relatively stable since 2017, fluctuating between $450 million and $497 million, despite a 5% decline observed in 2022. While the Taskforce's target of a 25% increase in government revenue from access and licensing fees was not achieved it is important to note that for the purse seine fishery, which generates the vast majority of these revenues, the rate of return (access and licensing fee revenue as a percentage of the value of the catch) exceeded 20% in 2015 and that a similar rate of return continues to be achieved. This rate of return compares favorably with those achieved in other global fisheries. It is also worth noting that several factors have likely exerted downward pressure on access fees in recent years. These include relatively low fish prices, significant operational and supply chain disruptions resulting from the implementation of COVID-19 mitigation measures and an increase in the proportion of fishing activity undertaken by national fleets which typically pay lower unit access fees than foreign fleets. Despite these challenges, the ability of FFA Members to maintain purse seine access fee revenues demonstrates the resilience of the PNA purse seine Vessel Day Scheme (VDS). Looking forward, climate-driven shifts in tuna distribution represent an additional structural factor relevant to the future access fee base, with bioeconomic modelling under the GCF Regional Tuna Programme examining these impacts.



Access fees by Gear

Goal 3 – Employment

Total employment related to tuna fisheries in FFA Members for 2024 was estimated at 26,176, up 19% from 2015 and 5% from the previous year. Since 2010, employment has increased steadily with the onshore processing sector contribution most to this increase and accounting for around 60–70% of all tuna related employment. In 2024, about 15,621 people were employed in the onshore processing sector, a 6% increase from the previous year. The harvest sector is the second largest contributor, employing an estimated 8,167 representing 31% of total employment. Observers and the public sector contribute around 3% and 6% of total employment respectively. Papua New Guinea remains the dominant employer in the processing sector, accounting for 70% of all processing jobs in 2024., followed by Solomon Islands with around 14% Fiji with 11% of onshore processing employment. The Taskforce report also noted the need to ensure decent working conditions for those employed in the fisheries sectors. The work on labour standards for vessel crew is continuing with FFA Members classing the national implementation of the HTMCs and the adoption of the CMM a high priority for the remainder of 2024. To date five Members have completed implementation through regulations or amendments to license conditions. Three Members have approved policies. All other Members have started the work to progress the implementation. The WCPFC CMM on labour standards and crew safety was adopted at WCPFC21 and will enter into force on 1 January 2028.

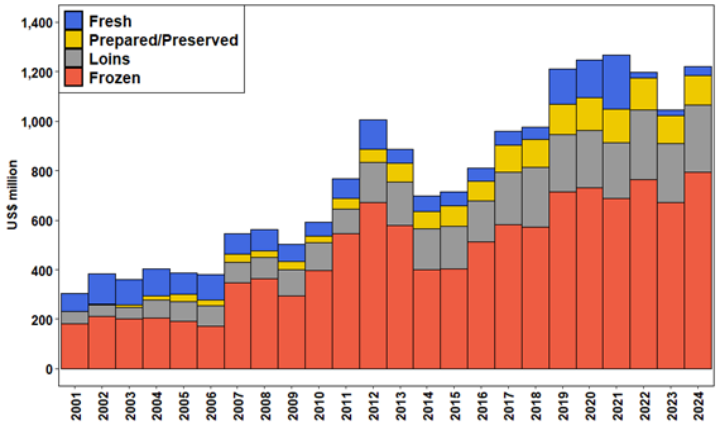


Tuna fisheries related employment

Note: *Employment figures represent workers associated within the tuna fisheries sector that include both governmental and industrial sectors*

Trade and Investment

The Taskforce recommended using growth in export values as an indicator of measuring progress in the area of **trade and investment** with a goal of a 25% increase over 5 years. Estimates of **export values** from FFA Members are based on import data from the region's major export destinations for tuna -Thailand, US, EU and Japan including other global markets. Between 2015 and 2024 the value of exports to the major and global markets increased by about70% reaching $1.2 billion and significantly exceeding the Taskforce's 25% increase target between 2015 and 2020, In 2024, export values stood at $1.2 billion, representing a 17% increase from 2023 but a 4% decline from 2021, which recorded the highest export value at around $1.3 billion. Export trends across different product categories reflect mixed performance. Fresh tuna exports (blue) have remained relatively stable over the past decade, with small fluctuations reflecting variations in demand. Meanwhile, exports of loins (grey) and prepared/preserved tuna (yellow) have shown steady growth, indicating increased investment in onshore processing facilities aimed at enhancing economic returns and employment opportunities within FFA member countries. Similarly, frozen tuna exports have followed an upward trajectory since 2014, reaching a record- high value of USD795 million in 2024. This surge is attributed to supply chain adjustments following the COVID-19 pandemic. Loins exports also peaked in 2022 at USD281 million, marking the highest value recorded for this product. Additionally, prepared/preserved tuna exports have consistently increased over the past decade, with export values reaching USD116 million in 2024.



FFA imports into markets by product

Sources: *EuroStats, NMFS,* Thai Customs, Japan Customs, Comtrade

Goal 4 – Food security

The Roadmap laid out a challenge to ensure an additional 40,000mt of tuna will be available for regional consumption in 10 years. However, due to a lack of baseline data, it is difficult to assess the degree to which this has been achieved. Given this, a number of studies have been conducted in recent years in order to assess how much tuna enters local markets for domestic consumption. These studies covered three areas:

a) Canned (mainly dark meat) tuna which is produced by local and overseas canneries and supplied to Pacific Island Countries. This study indicated the importance of canned tuna to local markets in some Members, with annual consumption in the region's three largest countries ranging from 2,600 tonnes (Fiji), through to 3,000 tonnes (Solomon Islands) and 3,300 tonnes (Papua New Guinea) – equivalent to 22,000 tonnes of whole tuna in total.

b) Landings from local and locally based purse seine, pole and line, and longline fishing vessels which are provided for local consumption, rather than being processed and/or exported; as well as fresh and frozen fish products supplied from processing plants. This study estimated that in 2016 around 29,000mt of the catch of locally based fleets in the region entered local markets, which is equivalent to only 0.8 % of the total catch taken by these vessels. However, for some FFA Members a significant proportion of the catch of locally based commercial fleets is supplied to local markets. For example, in 2016, this proportion was estimated at 95% for the Cook Islands, 33% for Samoa, 25% for Tonga, and 8% for Palau.

c) Purse seine and longline by-catch landed from foreign vessels during transshipment operations. This study estimated potential landing volumes from transshipment operations in 2016 of at least 10,000mt across the region, and possibly considerably more. However, it was noted that only a small proportion, around 3,300mt, of the potentially available resource was entering local markets. The study further noted that this potential food resource is temporally variable in each country, as transshipment location is significantly influenced by the El Niño Southern Oscillation (ENSO) cycle. It also found the high volumes associated with transshipment have the potential to overwhelm local supply chains and compete with artisanal and locally- based commercial fisheries if not well managed.

A report titled *Policy Options to Increase the Contribution of Tuna Fisheries to National Food Security Across FFA Members* was provided to Members in October 2022 and also presented at the Regional Meeting on Climate Change in the Context of Tuna Fisheries held in April 2023 and the FAD and Food Security Workshop held in November 2023. This report investigates options across three broad areas: increasing the availability of tuna, a livelihood approach to improving food security, and increasing consumption and equity. Funding to assist Members to implement national programs and policies with regard to increasing the contribution of tuna fisheries to food security is available through the Pacific Islands Regional Oceanscape Program for Economic Recovery and Resilience (PROPER), OFMPIII projects and the GCF Regional Tuna Programme.

National level economic and development indicators

The table below provides a summary of average annual outcomes over the period 2022-2024 of a number of key economic and development indicators for individual FFA Members, highlighting both the diverse nature of their tuna resource endowments and the benefits they derive from the fishery.

FFA member	Value in US$ million				Processed or handled onshore (mt)	Employment (no)
	Tuna catch in national waters	Tuna catch by national fleet	Tuna Exports[a]	Tuna fishery access and license fees		
Cook Is.	51	10	1	6	70	67
Fiji	35	48	117	2	37,021	3,083
FSM	374	318	174	70	42,651	1,476
Kiribati	678	442	81	125	1,013	1,243
Marshall Is.	110	162	64	30	14,841	1,352
Nauru	121	169	150	37	0	868
Niue	0.02	0.013	0	1	0	4
PNG	1,186	447	272	127	102,583	12,446
Palau	5	0.1	0	11	0	42
Samoa	4	8	1	1	7,593	321
Solomon Is.	259	126	85	23	46,212	3,772
Tokelau	16	0	0	8	0	7
Tonga	10	2	0.3	2	1,457	309
Tuvalu	106	77	53.9	26	0	306
Vanuatu	23	127	132.3	2	1,021	512
Total	2,977	1,936	1,131	470	254,464	25,806

Notes: **a**. Based on import data from the 4 major export destinations for tuna from the region (EU, Japan, Thailand and USA) and exports to other countries provided in the UN Comtrade database. Includes catch by nationally registered vessels that may not have been landed onshore.