



FAO Regional Workshop on **understanding fisheries support measures in the Asian context**

Venue : *Bangkok, Thailand*
Dates : *17 to 19 October, 2023*

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Institutional framework for fisheries

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Institutional framework for capture fisheries in Papua New Guinea

Policy making mandate

- National Fisheries Authority (NFA) is the only mandated government agency empowered by the Fisheries Management Act 1998 enacted by the country's National Parliament to set policies and regulations to govern the entire fisheries sector and industry in the country.

Fisheries development mandate

- The Act also empowers NFA to implement public investment projects, and initiate other fisheries development projects such as commercial fisheries investment projects, trade and marketing. NFA works closely with relevant govt agencies such as the Departments of Commerce & Industry (*commercial investments*); International Trade & Investments (*trade, marketing*); National Economic Planning (*policy alignment*)

Fisheries management (research) mandate

- Fisheries Management Act 1998 empowers the NFA as the only entity to carry out fisheries management, such as stock assessment, all other fisheries scientific research. In terms of resource conservation, NFA collaborates with the Environment and Conservation Authority.

Fisheries management (MCS & Competent Authority) mandate

- NFA through the Board, issues all licenses, coordinates monitoring, control and surveillance (MCS) in partnership with the PNG Defence Force, Police, and Customs. NFA also undertakes competent authority functions by ensuring high compliance to the stringent EU market requirements of PNG fish and fishery exports. CA function is undertaken in partnership with the Department of Health, Customs and National Quarantine & Biosecurity.



Economic relevance of fisheries sector

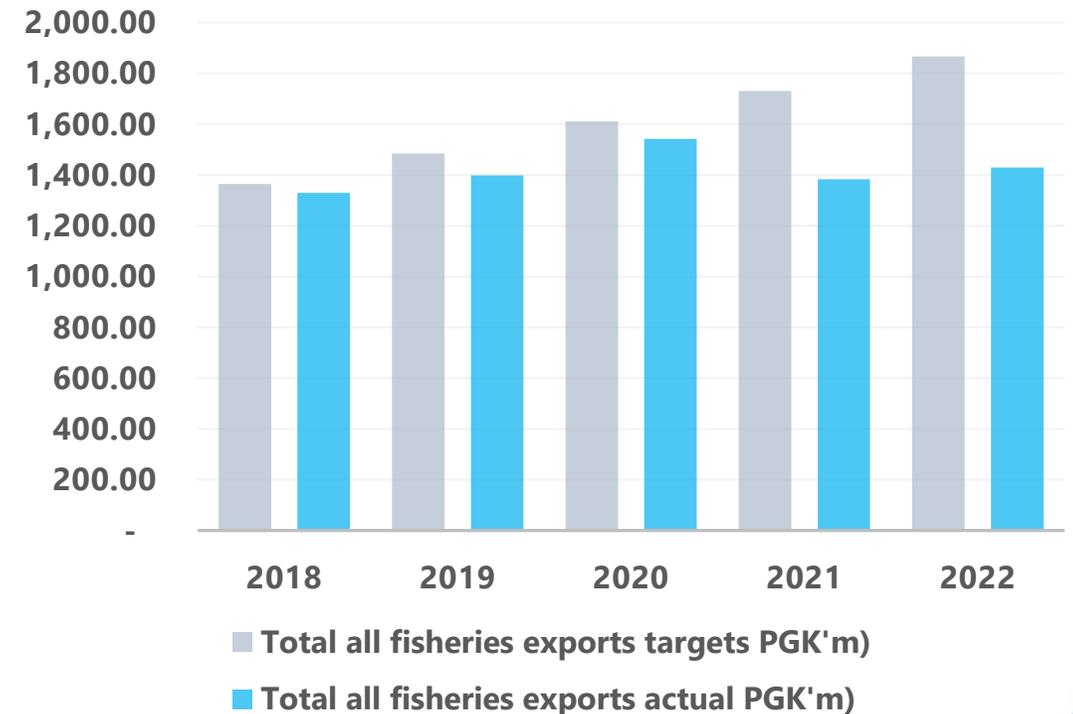
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Overall fisheries exports

Year	Target: Total all fisheries exports (PGK'm)	Actual: Total all fisheries exports (PGK'm)	Actual: Total all fisheries exports (US\$m)
2018	1,364.57	1,330.13	409.3
2019	1,484.35	1,398.00	405.2
2020	1,609.94	1,542.00	439.3
2021	1,729.87	1,383.00	394.0
2022	1,866.17	1,383.00	392.9

Exchange rates	2018	2019	2020	2021	2022
	3.25	3.41	3.51	3.51	3.52

Govt Targets versus Actuals



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Overview of the economic importance of fisheries sector in PNG

Tuna production volume

Key Performance Indicators	2017	2018	2019	2020	2021	2022
Tuna production volume (mt)	85,160	87,264	107,250	111,094	117,483	xx
No. of onshore tuna processing plant	6	6	6	6	6	6
Tuna exports (mt)	135,064	146,548	231,158	220,349	198,894	XX
Tuna export value in USD million	317	498	442	448	416	xx

- PNG fishing industry is export-oriented
- Total volume of commercial production is dominated by tuna industry
- Production consistently increases over the last 5 years
- The production volume above excludes DWFNs bilateral fishing access fleets

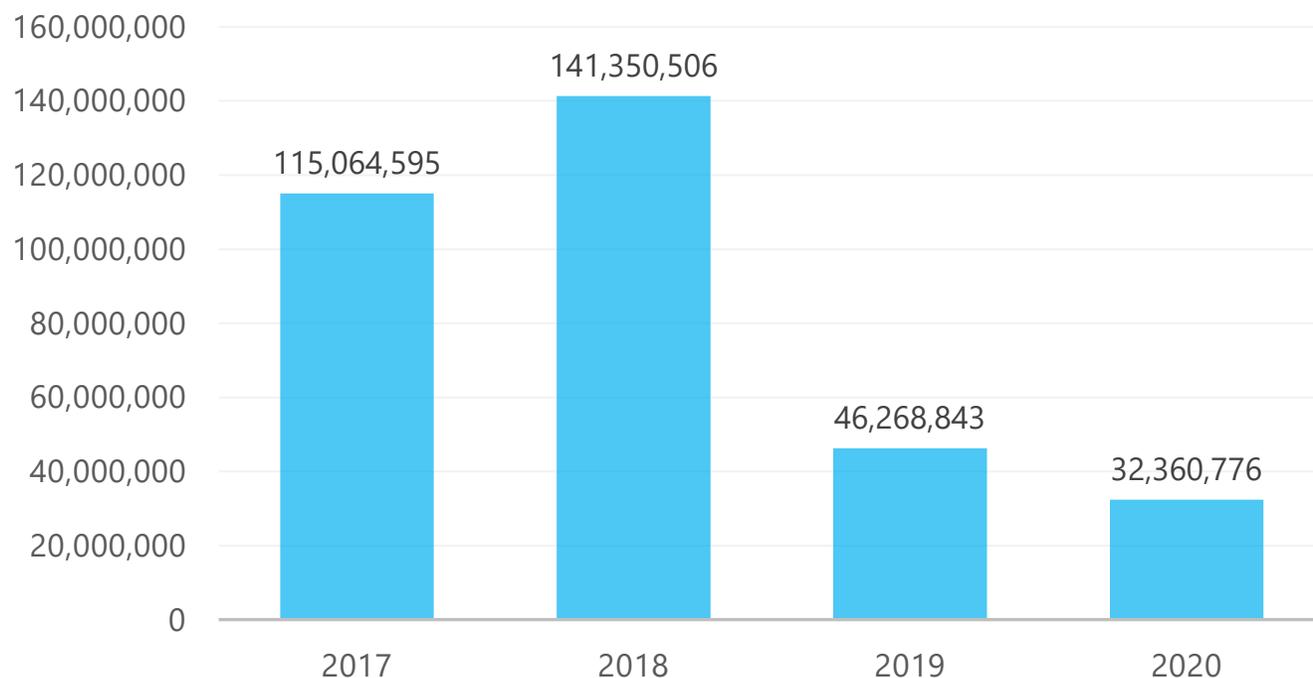


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Coastal and aquaculture fisheries

All coastal fisheries products exports (kg)



- General fishing operators are SMEs and dominated by PNG companies.
- Some coastal fisheries are subject to closures such as sea cucumber thus contributing to the fluctuations in the total volume of exports.
- Key coastal fisheries driving export markets are beche-de-mer, prawns, lobsters, crabs
- Major market for coastal fisheries products is Asia – Singapore, Hong Kong, China, Japan



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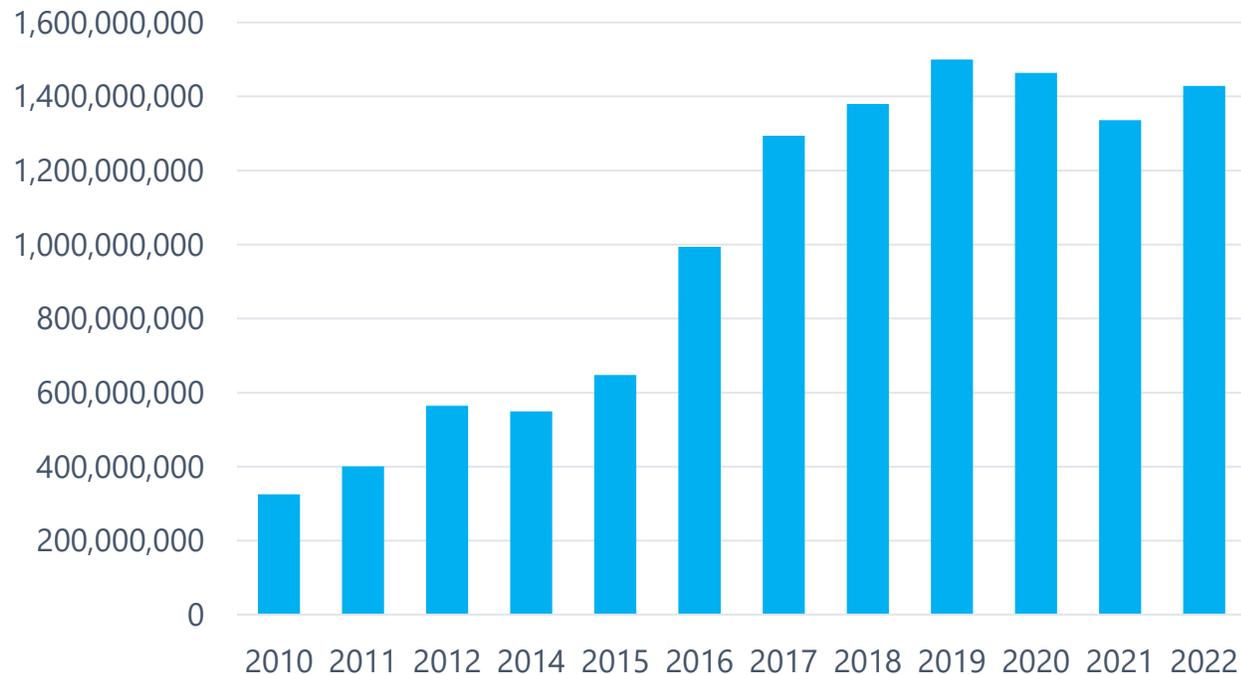


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Offshore (tuna) fisheries exports

Tuna Export in Kina



- Exports from 2019 – 2021 were severely affected by the COVID 19 pandemic.
- The 3-year decline was a result of COVID disruptions which affected the upward trend in exports.
- Aftermath of COVID, export picked up and is on the upward trend.
- Export earnings from tuna slightly declined as a result of COVID induced restrictions from major importing countries from 2019 -2021.
- The EU duty free quota market has been the driving force for the growth of the tuna processing sector.

Exchange rates	2018	2019	2020	2021	2022
	3.25	3.41	3.51	3.51	3.52



Overview of the economic importance of fisheries sector in PNG

Important to note:

- In 2020 all exports of PNG were valued at K35.1 billion (www.nso.gov.pg/statistics). In 2020 fishery exports of the country therefore equated to 1.27% of all exports.
- The fishery exports in 2020 do not appear to be greatly affected by Covid.
- During the years covered by the table, the non-tuna exports ranged from 3.4% to 8.8% of the value of tuna exports. It was 8.8% when there was no moratorium for the whole year on the beche-de-mer fishery (2018). During that year, beche-de-mer represented 74.3% of all non-tuna exports and 6.0% of all fishery exports.

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Overview of the economic importance of fisheries sector in PNG

- Contribution of all capture fisheries to PNG's gross domestic product (GDP)
 - The official contribution of fishing to PNG's GDP is given for 2020 at 1.5%

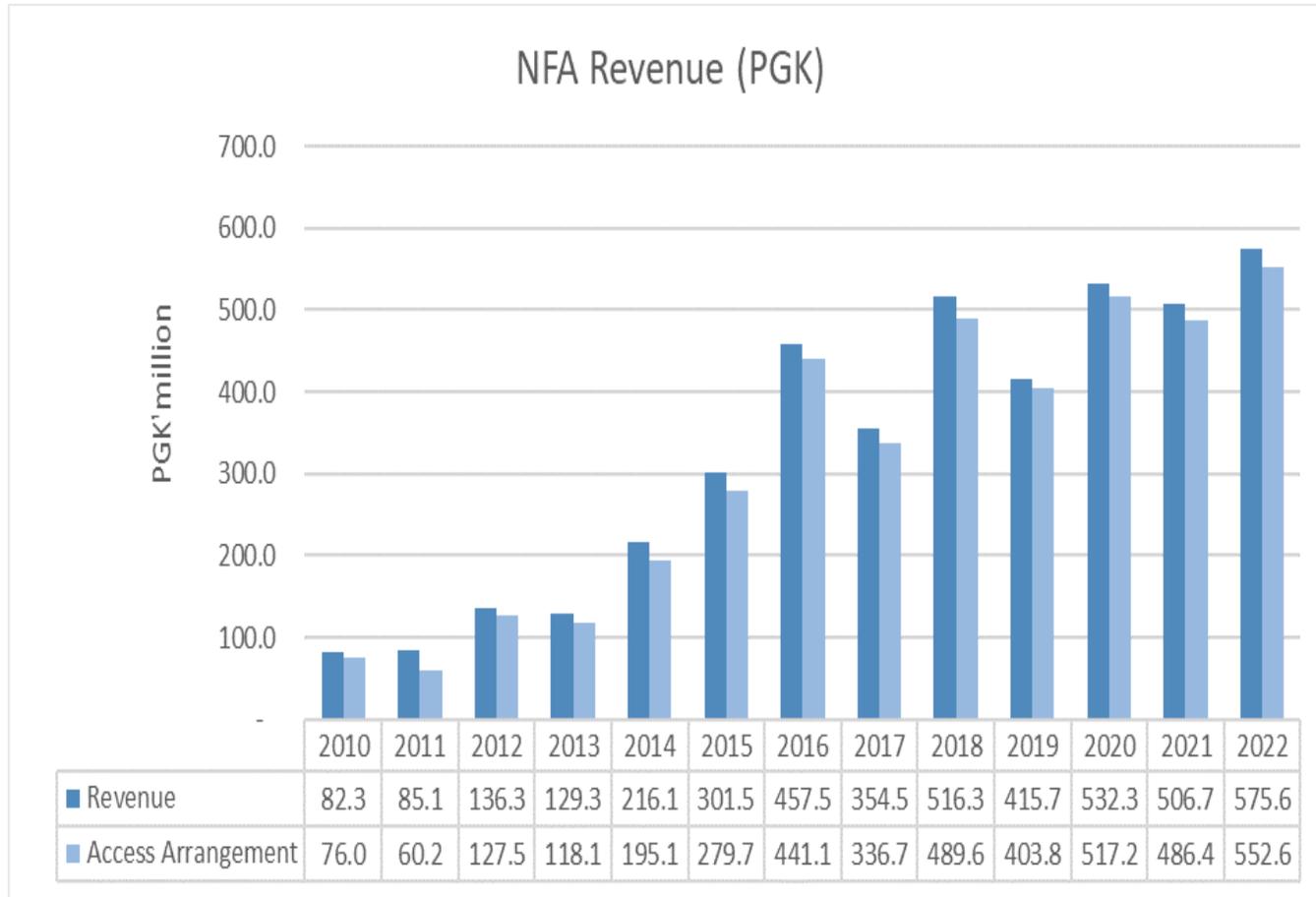
	2013	2014	2015	2016	2017	2018	2019	2020
Gross output fishing	846	1042	1,194	1,795	2,103	2,287	2,327	n/a
Value added fishing	540	625	717	944	1,072	1,157	1,196	1,264
Formal fishing	93	140	199	389	468	507	500	511
Informal fishing	447	485	518	555	604	651	696	753
PNG GDP	47,721	57,131	60,139	65,038	72,522	79,405	83,845	82,500
Value added fishing as % of PNG GDP	1.1%	1.1%	1.2%	1.5%	1.5%	1.5%	1.4%	1.5%

Current prices; Units = Kina millions



Economic relevance of fisheries sector

Government revenue contribution



- Main revenue source for NFA is the fishing access fees (94%)
- Other sources consists of license fees (3%), prosecution fees and statutory fees make up 2%.
- This shift in increased Revenue was driven by the increase in the Pricing of the Vessel Days Scheme (VDS).
- Since 2010, NFA has generated ~ K4.3 billion (US\$1.2 billion) and of that revenue 96% of that is generated through Bilateral Fishing Access Arrangement.
- NFA has generated over K500 million on average per annum over the period 2020–2022.
- Revenue from fisheries represent about 3.1% of the total government revenue in 2021.

	2015	2016	2017	2018	2019	2020	2021	2022
	2.98	3.25	3.25	3.25	3.41	3.51	3.51	3.52



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Overall employment in fisheries

Employment structure (including proportion of women, fisheries subsectors, etc.)

- In 2021 the PNG national domestic fishing and processing industries supported around 12,652 people in direct employment and of this 96% are PNG nationals.
- Overall, the sector directly employed around 68% PNG females, 28% PNG males and 4% foreigners (both males and females) in 2021.
- Somewhere between 250,000 and 500,000, participate in the coastal subsistence fishery



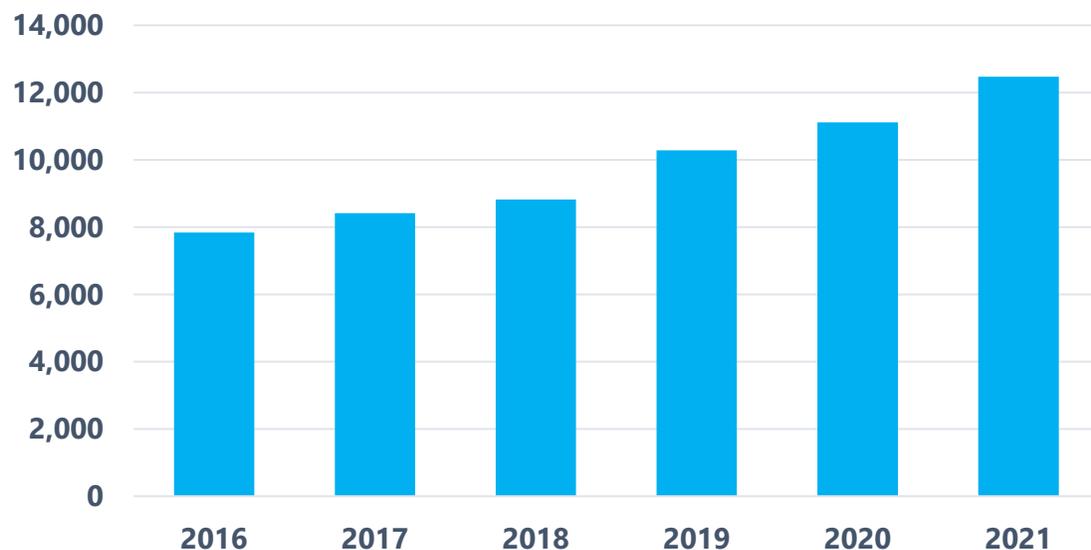
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Employment (domestic tuna fishery)

Employment in the tuna processing



2017	2018	2019	2020	2021	2022
8,415	8,818	10,282	11,114	12,469	

- Consistent increase in total employment despite COVID disruptions.
- Rebate scheme directly supports employment in processing sector.
- Tuna sector continued to provide employment, particularly 70% of the women workforce during the entire COVID pandemic period.
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Types of support provided by government agencies to fisheries

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- **Government agencies supporting the fisheries sector (capture fisheries) and type of support provide**
 - Include agencies providing “typical” fisheries support in your country
 - E.g. vessel construction, acquisition, or modernization, marketing and promotion of fisheries products, infrastructure, education, training, capacity development, resource management, and price support, construction, acquisition or modernization of fishing gear, fishing infrastructure (port construction, modernization and operation),etc.
 - Include other agencies also involved in the provision of support in your country
 - E.g. poverty alleviation, welfare programmes, insurance and income support, disaster risk mitigation, etc.



Types of support provided by government agencies to fisheries

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Government agencies supporting fisheries sector (capture fisheries) and type of support provided

Agencies directly providing “typical” fisheries support in PNG:

Agency	Typical support
Department of Commerce and Industry	
National Development Bank	
Provincial Government Administrations	
PNG Customs	
PNG Ports	
National Maritime Safety Authority	

Other agencies also involved in the provision of support in PNG

Agency	Support

Beneficiaries of the support provided to fisheries

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Intended recipients/beneficiaries for each of the support indicated in the previous slide:

	Type of support	Beneficiary
	Provincial support	Provinces (Districts)
	Industry Facilitation-Mkt	Industrial operators
	Industry Facilitation	SME development

	Type of support	Beneficiary

Challenges delivering government support

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Key challenges the government encounters when delivering the support to beneficiaries

- Budget constraints –provincial support
- Industrial development-conflicting Government Policy
- General economic situation –both Government & industry growth



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