

IMPROVING THE AVAILABILITY OF MARITIME TRANSPORT COST DATA IN THE PACIFIC REGION

Solomon Islands Country Report



Pacific Maritime Technology Cooperation Centre (MTCC Pacific)

Acronyms

ASYCUDA	Automated System for Customs Data
СРІ	Consumer Price Index
IMF	International Monetary Fund
IMO	International Maritime Organization
GDP	Gross Domestic Product
GFS	Government Finance Statistics
GHG	Greenhouse Gases
LDCs	Least Developed Countries
MEPC	Marine Environment Protection Committee
MOFT	Ministry of Finance and Treasury
MTCC Pacific	Pacific Maritime Technology Cooperation Centre
NGPL	New Guinea Pacific Line
SICED	Solomon Islands Customs and Excise Division
SIDS	Small Island Developing States
SIMA	Solomon Islands Maritime Authority
SINSO	Solomon Islands National Statistics Office
SIPA	Solomon Islands Ports Authority
SOE	State-Owned Enterprise
SoN	Safety of Navigation project
SPC	The Pacific Community
SPREP	Secretariat of the Pacific Regional Environmental Program
ТС	Technical Co-Operation Committee
UNCTAD	United Nations Conference on Trade and Development

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BACKGROUND

In an ever interdependent and globalized world, countries share not only in growth and prosperity but also in crises and challenges. One such challenge is climate change, and its implications for economies and societies developed and developing alike. Like other economic sectors, maritime transport is at the forefront of the climate change challenge.

With climate change being a global challenge and maritime transport an inherently international industry, the International Maritime Organization (IMO) has led efforts to set clear goals, milestones, and regulations with a view to reducing Greenhouse-Gas (GHG) emissions in shipping.

The 2023 IMO GHG Strategy on reduction of GHG emissions from ships acknowledges that impacts on countries of candidate GHG reduction measures should be assessed and considered as appropriate before their adoption, paying particular attention to the needs of developing countries, especially Small Island Developing States (SIDS) and Least Developed Countries (LDCs).

The Comprehensive Impact Assessment of the IMO short-term GHG reduction measure (MEPC 76/7/13), adopted at the 76th session of the IMO's Marine Environment Protection Committee (MEPC 76) identified several data gaps on maritime transport costs and the economics of shipping, especially in the Pacific region. To this, the IMO has initiated a project on improving availability of maritime transport costs data in the Pacific region, funded through the IMO's GHG TC Trust Fund.

In line with discussions in both the IMO's MEPC and the Technical Co-Operation Committee (TC), the Pacific Maritime Transport Cost project is implemented by The Pacific Community (SPC) and the Secretariat of the Pacific Regional Environmental Program (SPREP), as hosts of the Pacific Maritime Technology Cooperation Centre (MTCC Pacific), building upon their presence in the region and established contacts with stakeholders throughout the Pacific region on matters related to the reduction of GHG emissions from ships.

The project focuses on nine Pacific countries, namely: Cook Islands, Fiji, Kiribati, Marshall Islands, Nauru, Solomon Islands, Tuvalu, Tonga, and Vanuatu, and aims to improve the availability of relevant maritime transport costs data in the Pacific region, including with the view to facilitating future assessments of impacts of candidate IMO GHG reduction measures in that region.

This country summary report results from desktop reviews and a fact-finding country mission by the MTCC Pacific team to Honiara, Solomon Islands between 19-23 August 2023. This report documents the stakeholders that were consulted and maps the agencies, entities, and processes currently in place that collect, use, and store maritime transport costs data, and maps the availability of relevant data in the Solomon Islands.

COUNTRY PROFILE

Solomon Islands is a geographically dispersed nation consisting of 9 provinces across 6 major islands and over 900 smaller islands, a third of which are inhabited. The Solomon Islands has a land area of 28,230 km² located in the Melanesia region of the Pacific, while its exclusive economic zone covers an oceanic area of approximately 1,340,000 km². The capital of Solomon Islands is Honiara located on the island of Guadalcanal, home to 13% of the country's total of 734,887 people.¹ About 85% of its population live in rural and often remote villages, relying heavily on multimodal transport for access to essential goods, services, and livelihood opportunities.

The latest population and housing census in the Solomon Islands was conducted in 2019. The provisional data on this census saw an increase in population growth rate from 2.3% to 2.7%², one of

Trade Summary

Solomon Islands had a total export of US\$569m and total imports of US\$601 leading to a negative trade balance of -US\$32m. The Effectively Applied Tariff Weighted Average (customs duty) for Solomon Islands is 30.28% and the Most Favoured Nation (MFN) Weighted Average tariff is 30.69%. The trade growth is 4.91% compared to a world growth of 4.83%. GDP of Solomon Islands is US\$1,580,303,517.17. Solomon Islands services export is US\$42,420,403.53, and services **import** is US\$151,004,523.43, Solomon Islands exports of goods and services as percentage of GDP is 26.18% and imports of goods and services as percentage of GDP is 39.21%.

World Bank's World Integrated Trade Solutions

the highest in the Pacific. The experiences high internal migration from rural to urban areas, particularly young people in search for employment or education. The increase in urbanisation puts pressure on the environment, resulting in a range of challenges including supply of potable water, sanitation, waste management services, and infrastructure.

Solomon Islands' gross domestic product (GDP) in 2021 was estimated at USD\$1.457 million (SBD11,703 million) or USD\$2,001 (SBD16,075) per capita. The country has promoted economic growth through investments in agriculture, fisheries, forestry, tourism, and mining sectors. The principal export commodities include round logs, fish, palm oil and cocoa. The country's top five export destinations account for more than three quarters of all goods exported, with China being the largest with 57%, and the European Union market second at 12%.³

The Solomon Islands economy is dependent on interisland transfers to support domestic trade and commodity exports. Maritime infrastructure in Solomon Islands consists of two international ports – Honiara and Noro, and 91 community jetties and boat ramps. The Ministry of Infrastructure Development is responsible for constructing, rehabilitating, and maintaining publicly owned assets. The Solomon Islands Ports Authority, a state-owned enterprise (SOE), is responsible for the operation of the ports in Honiara and Noro, whilst the Solomon Islands Maritime Authority (SIMA) oversees safety regulation, vessel inspection, and search & rescue coordination.

 ¹ Solomon Islands National Statistics Office (SINSO). (2023, 05 31). *Population Projections*. Retrieved from https://www.statistics.gov.sb/statistics/social-statistics/population
² Ditto.

³ World Trade Organisation. (2023, 05 31). *Impacts of LDC Graduation*. Retrieved from World Trade Organisation Website: <u>https://www.wto.org/english/tratop_e/devel_e/solomon_islands.pdf</u>



Figure 1: Map of Solomon Islands (Source: <u>https://www.spc.int/our-members/solomon-islands/details</u>, accessed 27 April 2023).

The following pages provide the United Nations Conference on Trade and Development's (UNCTAD) General statistics⁴ and Maritime profile⁵ for the Solomon Islands.

⁴ UNCTADstat. General Profile: Solomon Islands.

https://unctadstat.unctad.org/countryprofile/generalprofile/en-gb/090/index.html. accessed 14 September 2023.

⁵ UNCTADstat. *Maritime Profile: Cook Islands*.

https://unctadstat.unctad.org/countryprofile/MaritimeProfile/en-GB/090/index.html, accessed 14 September 2023.

General p	rofile	: So	lomo	on Isla	and	S
		6			OR 2022	
8 Poj 0.72	pulation 24 Millions		Exch 8.156	ange rate SBD/USs	UN 2022	GDP 1 677 Millions current US\$
Lar	nd area ¹		S CPI o	prowth		GDP growth
(4)	27 990 Kill*		5.51 7	•		-2.44 70
		INTE	RNATIONA	L MERCHANE	ISE TRAD	E C
Fotal merchandise trade (millions of US\$)	e	2005	2010	2015	2022	-9.8 %
Merchandise exports		103	224	400	335	Merchandise exports
Merchandise imports Merchandise trade balance		185	404	466	(e) 648 (e) -314	growth rate in 2022
Merchanoise trade balance		-02	-101	-00	(e) -514	
Export structure by proc	duct group in 2	022				Top 5 partners in 2022
(as % of total exports)						(exports, millions of US\$)
All food items	terials		60 %	-9 %		China 1 Italy 28 India 21
Other			31 %			Netherlands (Kingdom of the) 15 Australia 13
Total trade in services ² (millions of US\$)	2005	2010 RADE IN 58	2015	2022		Terms of trade index Purchasing power index of exports
Services exports	41	92	105	70		140
Services imports	58	188	183	218		120
Services trade balance	-17	-36	-/8	-148		100
Services exports by mai	n category ²					80
as % of total services)	2005	2010	2015	2022		60
Transport	19.2	35.0	25.2	39.7		
Travel Other services	3.7	47.2	48.5	7.5		40
	7710	1710	20.5	52.0		20 2000 2005 2010 2015 202
			ECON	OMIC TREND	S	ď
Economic indicators						2 4 0/2
millions of US\$ unless oth	erwise specified)	2005	2010	2015	2022	-2.4 %
GDP, current		553	898	1 308	1 677	Gross domestic produ
Real GDP growth, v-on-v, %		7.36	9.71	2 135	-2,44	growth rate in 2022
Current account balance, % of	f GDP	-16.31	-16.05	-2.76	-13.03	
Exchange rate (/US\$)		7.530	8.065	7.915	8.156	
SDP by expenditure in 2	2021					
as % of total GDP)						
	Household	Consumption				61.9
General governme	nt final consumptio	n expenditure			27.1	
	Gross Capi	tal Formation		19.8		
		Exports			25.4	
		Imports			33	3.8

Maritime profile: Solomon Islands



INSTITUTIONAL ARRANGEMENT FOR MARITIME TRANSPORT COST DATA

Maritime Administrations

The Solomon Islands Maritime Authority (SIMA) oversees safety regulation. The national parliament enacted the SIMA Act in 2018, with the aim of making SIMA a self-funded organization to provide better service to the shipping industry and fulfill mandatory obligations under the international maritime conventions. The Government of Australia provides assistance through physical and nonphysical investments in the maritime sector, including ongoing support to operationalize the SIMA Act, and pursues reforms for regulations and compliance to meet International Maritime Organization standards to improve the business enabling environment.

SIMA keeps an ongoing dataset of maritime accidents and investigations, plus a list of registered domestic vessels. Through the IMO GreenVoyage2050 project, SIMA has invested in the greening of the Solomon Islands domestic fleet that includes the data collection of fuel consumption, and training for crew on energy efficient ship operations. Data has been continuously collected for 2022 and includes vessel characteristics, domestic route details, and fuel consumption data.

National Statistics Office

The Solomon Islands National Statistics Office (SINSO), a government department within the Ministry of Finance and Treasury (MOFT) is mandated under the Statistics Act of 1970. to compile and disseminate official statistics of the Solomon Islands. SINSO is led by a Government Statistician and is organised across three sections, namely, Economic, Social and Demography.

Although the NSO is the official statistics agency, it currently does not have sufficient staff and resources to compile government statistics or balance of payments statistics. As a result, the Central Bank of the Solomon Islands compilation of Balance of Payments and Government Finance Statistics (GFS) are currently accepted as the official source. SINSO collects national accounts data to produce Consumer Price Index (CPI) and Gross Domestic Product (GDP).

Related to maritime transport cost data, SINSO receives raw customs data from the Solomon Islands Customs and Excise Division (SICED; also part of MOFT) as established under the powers of the Statistics Act. SINSO consolidates the detailed Customs data (excluding detailed transport costs) into its merchandise trade dataset. Unfortunately, this dataset does not detail transport costs such as freight and surcharges.

Customs Administrations

The SICED is the government agency tasked with ensuring compliance with border related laws, facilitating trade and protecting the border from the illegal movement of goods and people for the safety of the nation.

SICED's Customs officers use Automated System for Customs Data (ASYCUDA) system - a customs management system designed by UNCTAD, for customs declaration and processing. It has helped with simplifying trade procedures, information flows and documentation. This would ideally make tracking of maritime transport cost data easier however efforts by the project team to reach out to the SICED were unsuccessful.

SICED has an ongoing data sharing agreement with SINSO to share customs data that then gets tabulated into the country's merchandise dataset. According to a recent International Monetary Fund (IMF) mission, the country's customs administration has been hampered in the past by fragmented systems, and inadequate resourcing to advance reforms.⁶

Port Authorities

The Solomon Islands Ports Authority (SIPA) operates the country's two ports of entry, Port of Honiara and Port of Noro. In recent years, SIPA has arranged for the Port of Honiara to mainly handle international cargo and stop handling fish cargo transhipment, with fish transhipment largely diverted to the Port of Noro instead. In the past, cargo volume handling at the ports has had noticeable increases following the recovery in law and order after the ethnic tension ending in 2003 and rioting in 2021. According to SIPA's harbour master, one of the main attributable causes driving the increase in cargo handling volume was an increase in population and general trading volumes in both export and import.

An SPC team conducted a risk assessment in 2018 under the Safety of Navigation Project (SoN), which concluded that the Port of Honiara's short berth length was a risk hazard given the relative size of international ships that berthed along it, and there was a high risk of collision between international ships and domestic ships that berthed along the domestic wharf, adjacent to the international wharf.⁷ Discussions are underway between the Solomon Islands government and the Asian Development Bank to redevelop the Port in Honiara.⁸

Vessel movement is recorded by SIPA via their pilots. Upon entry into the harbour of every international vessel, the pilot responsible of navigating the vessel to berth will note ship details onto a physical logbook and a database suite installed in the pilot's office. There is one computer for the entire pilot team of five and at times the computer has become cumbersome to use. According to the harbour master, SIPA is seeking support from the government and development partners for more and newer laptops to be installed for the pilots' use.

Recording of cargo throughput is undertaken by a team in the Information Systems section of SIPA. The organisation has a port terminal management system called *Port Manager Terminal Operating System* that it uses to track vessel operations and revenue tracking. However, according to staff extraction of reports proved complex and more training was needed.

⁶ International Monetary Fund. (2023). *Solomon Islands - 2023 Article IV Consultation*. IMF Country Report No. 23/162.

⁷ Pradelli, F., Kumar, S., & Waqavonovono, E. (2019). *Pacific safety of navigation project: risk assessment for the Port of Honiara, Solomon Islands.* Pacific Community (SPC).

⁸ ADB: Solomon Islands : Land and Maritime Connectivity Project, <u>https://www.adb.org/projects/53421-</u> 001/main

Shipping Agents

There are ten international shipping agents in Solomon Islands, with five of the agents (in bold below) covering the seven international shipping lines that call at Honiara. These include:

- Tradco Shipping Lines:
 - Swire Shipping.
 - Sofrana/ANL (Owned by CGA-CGM).
 - Matson South Pacific no line for Matson but transhipped at Suva and carried on Neptune line.
 - Also operating as agents for fuel bunker vessels, bulk carriers as well as cruise liners.
- BJS-New Pac Shipping Lines:
 - New Guinea Pacific Line (NGPL)
- Carpenters Shipping Lines:
 - Kyowa Shipping
 - Carpenters Shipping has slots on NGPL vessels.
- Sullivans Shipping Agency:
 - Neptune Pacific Shipping Line.
 - Also operating as agents for Liquefied Gas Carriers, Log Ships and Fishing Vessels.
- Maersk Shipping Line
 - Maersk Shipping.
- GS Agency
 - Shipping agent mainly for yachts and private vessels.
- Express Freight Management
 - Freight forwarding and logistics company.
- James Shipping Agency
 - Freight forwarding and logistics company.
- Mako Fisheries Limited
 - Shipping Agents for fishing vessels and carriers.
- SI Shipping and Transport
 - Shipping Agents for fishing vessels and carriers.

STATUS OF DATA COLLECTION

Commodity Data

MTCC Pacific's attempts to reach out and engage the Customs Office, were unsuccessful.

SINSO was able to provide the top 10 imported and exported commodities classified by harmonised system codes (HS code) chapters for the years 2010-2020 (10 years). Data is available for the years 2014-2021 and may be accessed upon request through the IMO Secretariat. Some entries list corresponding 8-digit HS code.

Trade Data

International

Annual exports by item (HS Code), country, quanity (kg), & value Annual imports by item (HS Code), country, quanity (kg), & value Annual Re-exports by item (HS Code), country, quanity (kg), & value Importers - transport costs Exporters - transport costs

2022 2021 2020 2019 2018 2017 2016 2015 2014

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D	om	esti	C
_			-

Annual exports by item (HS Code), country, quanity (kg), & value

National Macroeconomic Data

SINSO collects national accounts data to produce CPI and GDP. However, it was only able to provide data for years 2003-2017. The ADB on the other hand has data records publicly available for years 2000-2020. No data on the labour breakdown of employment by sector is available – the project's country mission team was informed that this was due to SINSO having not carried out a labour survey in a long while. The last available labour force statistics is based on the Solomon Islands 2009 Census Report on Economic activity and Labour Force.⁹

Macro Economic Data

GDP - real, per capita, by sector Consumer price index, by month and year Employment statistics

2022	2021	2020	2019	2018	2017	2016	2015	2014

Trade Routes

Seven international shipping lines regularly call at the Port of Honiara. These routes and the sequence of ports called for each route include:

Swire:

Papua New Guinea Service: Melbourne -> Sydney -> Brisbane -> Motukea -> Lae -> Honiara

Sofrana/ANL:

Westpac line:

Tauranga -> Auckland -> Noumea -> Brisbane -> Motukea -> Lae -> Kimbe -> Rabaul -> Honiara -> Santo -> Port Vila

⁹ Solomon Islands National Statistics Office (SINSO). (2023, 05 31). *Labour Force Statistics*. Retrieved from https://www.statistics.gov.sb/statistics/social-statistics/labour-force

NGPL:

North Asia-Papua New Guinea-Solomon Islands: Shanghai -> Changshu -> Pusan -> Ningbo -> Nansha -> Hong Kong -> Lae -> Rabaul -> Motukea -> Honiara

South-East Asia- Papua New Guinea-Solomon Islands: Port Klang -> Singapore -> Motukea -> Lae -> Rabaul -> Honiara -> Madang

Kyowa:

South Pacific Service: Busan -> Kobe -> Nagoya -> Yokohama -> Tarawa -> Honiara -> Port Vila -> Santo -> Noumea -> Suva -> Lautoka -> Nukualofa -> Apia -> Pagopago -> Papeete -> Funafuti

Neptune Pacific Shipping Line:

New Zealand to Papua New Guinea & Solomon Islands: Tauranga -> Motukea -> Lae -> Kimbe -> Rabaul -> Honiara

Maersk:

PNG Express: Tanjung Pelepas -> Port Moresby -> Noro -> Lae -> Madang

Port Calls and Ship Characteristics

The Honaira Port Master was able to supply three years of port data for the Port of Honiara, these were for 2018-2019, 2019-2020, and 2020-2021. Data tabulated summarised vessels according to ship types. Container vessels make up the majority of calls into Honiara making up 40% of all annual calls, with fuel tankers and fishing vessels second with 15%.

Port Data

2022 2021 2020 2019 2018 2017 2016 2015 2014

Vessel call data by port, IMO, date, time, etc.
Fees & Charges, by type, unit of measure, rate
Ports' container throughput, by port, by type

Annex 1 provides a high-level data mapping illustration for Solomon Islands.

Trade Throughput

The project team contacted the Chief Information Officer, in charge of overlooking the port management system for information on the trade throughput. At the time of this report this information was not forthcoming although there were reassurances that it would be provided.

Freight Rates

The MTCC Pacific team met representatives from Tradeco Shipping, and BJS-New Pac Shipping Lines, however due to business sensitivity of data both shipping agents were reluctant to share any pricing data. However, the BJS manager gave an approximate figure of US\$5,000 as the rate for transporting a TEU between Shanghai and Honiara at the time of the field mission, while the same was around US\$7,000 between Brisbane and Honiara at the same period. Agents at Carpenters Shipping Lines and

Sullivans Shipping Agency mentioned that they aren't principal agents and as such unable to provide data instead referring the team to their counterpart in the Suva office.

ISSUES AND CHALLENGES

Limited data infrastructure: The Customs office (SICED) has an ongoing data sharing agreement with SINSO to share customs data that then gets tabulated into the country's merchandise trade dataset. According to a recent International Monetary Fund (IMF) mission, the country's customs administration has been hampered in the past by fragmented systems, and inadequate resourcing to advance reforms. Data governance is burdened with the lack of adequate resources and capacity.

Recording of cargo throughput is undertaken by a team in the Information Systems section of SIPA. The organisation has a port terminal management system called *Port Manager Terminal Operating System* that it uses to track vessel operations and revenue tracking. However, according to staff extraction of reports proved tricky and more training was needed. There is a need to improve the data systems that exist for recording and storing ship and port data.

Unsafe Port infrastructure: An SPC team conducted a Safety of Navigation risk assessment in 2018 under the SoN Project, which concluded that the Port of Honiara's short berth length was a risk hazard given the relative size of international ships that berthed along it, and there was a high risk of collision between international ships and domestic ships that berthed along the domestic wharf, adjacent to the international wharf. Discussions are underway between the Solomon Islands government and the Asian Development Bank to redevelop the port in Honiara. This is expected to safety of navigation in the Port of Honaira in the medium to long term.

Limited resources: Vessel movement is recorded by SIPA via their pilots. Upon entry into the harbour of every international vessel, the pilot responsible of navigating the vessel to berth will note ship details onto a physical logbook and a database suite installed in the pilot's office. There is one computer for the entire pilot team of five and at times the computer has become cumbersome to use. According to the harbour master, SIPA is seeking support from the government and development partners for more and newer laptops to be installed for the pilots' use.

SUMMARY AND CONCLUSIONS

The in-country mission provided the *Pacific Maritime Transport Cost Study* team with the opportunity to better understand country context regarding maritime data in Solomon Islands. It allowed for discussion with relevant stakeholders from the Ministry of Foreign Affairs and External Trade, Department of Climate Change, Solomon Islands Maritime Authority, Solomon Islands Ports Authority, and various shipping agents.

In general, the mission found data to be either sparsely collected or reported, as in the case of the national statistical office that could only provide commodity data without freight cost or country of origin. Attempts to get this data from the Customs and Excise Division were unsuccessful as no response was received. At the Port of Honiara, despite the port using a electronic management system to manage its operations, data was not provided. It is believed that their system would be capturing the data requested.

The Solomon Islands is part of several Pacific Island Countries that have been incorporating the AYSCUDA system into their customs and border operations, and this should allow for the capture of detailed maritime data such as freight costs and the country of origin. The national statistics office is expected to have access into the system and as such extract as much data that it would feasibly need for its own compilation.

A tracker (summary) of available data by data category and year is provided in Annex 2. Data may be made available for further analysis by contacting the IMO Secretariat but remains the property of relevant data providers. Additional information such as contact details of focal points in relevant organizations from the Solomon Islands can be provided upon request.

ANNEX 1: Data Mapping

The below graph maps where data may be situated amongst the various stakeholders the project team engaged with.



ANNEX 2: Data Collection Summary

Macro Economic Data

GDP - real, per capita, by sector Consumer price index, by month and year Employment statistics

Trade Data

International

Annual exports by item (HS Code), country, quanity (kg), & value Annual imports by item (HS Code), country, quanity (kg), & value Annual Re-exports by item (HS Code), country, quanity (kg), & value Importers - transport costs Exporters - transport costs

Annual exports by item (HS Code), country, quanity (kg), & value

2022 2021 2020 2019 2018 2017 2016 2015 2014

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2022 2021 2020 2019 2018 2017 2016 2015 2014



Fleet Data

Domestic

Vessel call data by port, IMO, date, time, etc. Vessel characteristics by name, by type

Port Data

Vessel call data by port, IMO, date, time, etc. Fees & Charges, by type, unit of measure, rate Ports' container throughput, by port, by type

Data Mapping

Data providers, organizations, positions, contact info, etc. Commodity/Essential Goods data mapping Commodity/Essential Goods economic data mapping Trade route mapping Data mapping

> Macro economic data Trade data Fleet data Port data

Notes

Port tonnage charts and tables 2012-2022; xlsx NSO data - imports CIF Values by HS Code 2015-2021; xlsx NSO data - GDP 2003-2017; xlsx ADB Solomon Islands Key Indicators 2023

2022 2021 2020 2019 2018 2017 2016 2015 2014

2022 2021 2020 2019 2018 2017 2016 2015 2014

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