



FISHERIES TRADE

WTO members open 'second wave' Fisheries Subsidies negotiations

WTO members concluded the Agreement on Fisheries Subsidies (AFS) in June 2022 at the 12th Ministerial Conference (MC12).² Yet, this was only a partial agreement – a mini-AFS – covering the two less commercially significant and politically challenging pillars of subsidies to IUU fishing and fishing on overfished stocks, neither of which will limit current subsidies by DWFNs, including in Pacific waters.

The Pacific Island WTO members were integral in ensuring that the FSA did not end here and insisted that the AFS contains a commitment by WTO members to engage in a 'second wave' of negotiations to prohibit 'certain forms' of subsidies to overcapacity and overfishing (OCOF). The OCOF pillar was always the most important of the three because effective disciplines on subsidisation here are likely to have significant real-world effects (i.e. subsidising members will be required to take action to actually *reduce* their fisheries subsidies).

The ministerial decision at MC12 commits WTO members to 'continue negotiations ... with a view to making recommendations' to MC13 'for additional provisions that would achieve a *comprehensive* agreement on fisheries subsidies'.³ Given that MC13 is to be held in Abu Dhabi in the first quarter of 2024, there is very little time for negotiators to reach consensus on recommendations.

After losing several months wrangling over a new Chair of the Negotiating Group on Rules, WTO members agreed to appoint Ambassador Einar Gunnarsson (Iceland) in February 2023. A number of Fisheries Subsidies clusters – 'fish weeks' – have since been held. It is becoming clear that it is not likely that the current AFS will be reopened and there is consensus that second wave negotiations will focus on OCOF and appropriate provisions on special and differential treatment (S&DT). While there are different views on the relative weight placed on prior draft 'comprehensive' AFS texts,⁴ there is a working consensus of sorts that these two texts provide the main elements of any proposal to MC13 given the many years of work exerted to produce them; although at the same time, Members are careful to not be unnecessarily limited by them.

This means that there is some space for the Pacific Island Members to advance new consensus-generating proposals and to continue with the leadership role that it exhibited in MC12. Pacific Group statements have so far been welcomed by Ambassador Gunnarsson as they have focussed on a constructive, forward-looking agenda. This is a critical time for the Pacific as it will need to advance the terms of the debate sooner rather than later, otherwise the larger, more powerful members will circle once again around another status quo position.

FISHERIES REGULATION

South Korean refrigerated fish carrier penalized for illegal fishing

In early March 2023, a South Korean refrigerated fish carrier, *Sun Flower 7*, was ordered by Thai officials in Bangkok to leave the country after it had been prevented by those officials from unloading its cargo. The vessel had reportedly arrived in

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Bangkok on 24 January 2023 with an estimated 4,000 mt of tuna onboard worth USD 7.14 million that was intended for processing in Thai canneries. Police inspected the vessel's documents and its GPS history, as well as questioning the crew, before issuing the orders to not unload and depart from the country.⁵ Their investigations led to a determination that there had been unlicensed fishing by the vessel in Kiribati waters, as well as activities that contravened the WCPFC Convention that defines fishing. Specifically, it was charged that the vessel had been setting drifting FADs which is considered fishing by both WCPFC and the laws of the Republic of Kiribati.⁶

Recalling the imposition of a 'yellow card' by the EU on Thailand in 2015 for not taking sufficient measures in the international fight against illegal, unreported and unregulated fishing (IUU) and its eventual lifting in January 2019, National Fisheries Policy Committee Chair General Prawit Wongsuwan said that the Thai government had been motivated to take action in part to maintain its 'green flag status from the European Union'.⁷ As if to emphasize further its country's commitment to fighting IUU, on 3 March 2023 Thailand's Department of Fisheries' Acting Director General sent a formal letter to the WCPFC Secretariat exercising its responsibility as a party to the 2009 Agreement on Port State Measures and explaining the reasons for denying use of the port to the *Sun Flower 7* and its expulsion from Thai waters.

Several online news sources credited Thailand's Deputy National Police Chief, Surachet Hakparn, who also supervises a police task force on IUU fishing as the official 'who questioned the provenance of the cargo'.⁸ In actual fact, it is not the provenance of the cargo that is the issue but the actions of the carrier vessel in setting drifting FADs. According to a post online by the New Zealand company Starboard Marine Intelligence, the vessel's suspect behaviour first became evident through tracking by their firm and further investigation and interpretation by international MCS expert Francisco Blaha. Blaha was uniquely positioned to forward the information to Thai authorities, as he has worked in close collaboration with them on a variety of MCS issues, including the establishment in February 2019 of an MOU between the Marshall Islands Marine Resources Authority and Thailand's Department of Fisheries on 'cooperation and exchange of information of common interest to prevent IUU fishing practices'.

In the case of the *Sun Flower 7* and its banishment from Bangkok, the captain argued that he was retrieving drifting FADs, not setting them, and that his actions were actually helping the environment by collecting marine debris. This and other defences voiced by the captain were cleanly and thoroughly picked apart by Blaha in his communications with Thai authorities when he provided technical explanations and expertise that might otherwise not have been available to the Thai police.⁹

As a further exclamation point to this story, it was recently revealed by the Environmental Justice Foundation (EJF) on 10 May 2023 that South Korea's Ministry of Fisheries had fined the *Sun Flower 7* KRW 200 million (USD 150,000) for 'very serious' violations of the country's distant water fishing law.¹⁰

This case demonstrates the importance of collaborative approaches by flag, coastal and port states in monitoring, control and surveillance operations to identify IUU fishing.

A South Korean carrier vessel was deemed IUU for deploying drifting FADs in Kiribati waters

Shift from targeting vessel flags to firms for traceability and transparency in industrial fisheries¹¹

In December 2022, United States' Department of Treasury sanctioned two individuals along with the networks of entities they control, including Dalian Ocean Fishing Co., Ltd. and Pingtan Marine Enterprise, Ltd. and eight other entities.¹² As reported previously in *FFA TIN*, shark finning in Dalian Ocean Fishing's tuna fishing operations was found to be endemic and their operations were linked to extensive human rights abuses.¹³ Likewise, Pingtan Marine's fishing activities have been found to have widespread environmental violations, as well as allegations of fraud. In May 2023, with an aim to end Pingtan Marine's access to financial support from foreign markets, the Nasdaq Stock Market delisted the ordinary shares of the company.¹⁴

What was new about this case was that the targeting of the onshore networks signalled a shift in the focus of sanctions of the US government from individual vessels to their onshore beneficial owners.¹⁵ This shift to a focus on beneficial ownership has been growing within and outside the US. In June 2022, the Biden Administration released a National Security Memo on IUU fishing with the intention to impede the financial flows supporting IUU globally. This was accompanied by the *US Corporate Transparency Act 2022*, set to come into effect in 2024, which mandates enhanced and consistent reporting of beneficial ownership for US registered corporations.¹⁶

The installation of Automatic Identification Systems (AIS) transponders on fishing vessels has led to a spate of publications that draw on data sets that show GPS locations originating from AIS records. However, the use of AIS data to combat IUU has been limited given that AIS data does not provide complete vessel identity characteristics. A recent research paper has found that to effectively target fishing vessels involved in IUU, it is important to 'track changes in the identities, authorizations, and ownership of the commercial fleet'.¹⁷ In order to do this, it becomes imperative to combine AIS data with other data sets.

One such initiative is the newly launched Global Record of Fishing Vessels, Refrigerated Transport Vessels and Supply Vessels (Global Record).¹⁸ This Food and Agriculture Organisation (FAO) initiative provides certified data from government authorities about vessel and vessel-related activities with the primary aim to combat IUU fishing. The database combines information that involves vessel registration details, their physical properties, vessel authorizations, IUU listings in RFMOs, inspections and port surveillance.

These endeavours bring much needed intelligence to focus primarily on tracking individual vessels. While this is important, it misses the crucial role of beneficial owners of fishing vessels. A policy brief by C4ADS – a non-profit that uses data to target illicit networks that threaten global peace and security – shows that linking vessels to onshore networks, like the case of Dalian Ocean Fishing, can allow policymakers 'to make informed decisions on fishing quota distributions, estimate taxable profits leaving the country, and better track financial flows'.¹⁹ Greater transparency of ownership can assist in closing the regulatory loopholes that allow for these vessels to operate, such as through uncovering their labour supply chains and insurance companies. In turn, this can be a more effective strategy in targeting IUU fishing.

However, data on beneficial ownership remains scarce, making it difficult to identify who owns and ultimately benefits from the global fishing industry.²⁰ A brief search of FAO's Global Record shows that while vessel identity, operational information and flag-state are readily available, details of ownership, operator/manager, and beneficial ownership are rare.²¹

Biden administration targets IUU firms and their onshore financial flows, including delisting Pingtan from Nasdaq stock exchange

Databases do not yet allow for systematic, global monitoring of beneficial ownership of fishing vessels

A mapping of beneficial vessel ownership in four countries by C4ADS found three major limitations in making visible the onshore ownership networks of fishing vessels.²² The first is 'data variance' meaning that there is no universally agreed upon definition or standard for ownership reporting requirements. The second is 'data accessibility' meaning that data on ownership is not readily available and is spread across multiple databases. The third is 'regulatory loopholes' implying gaps in reporting in company registrations related to foreign investment in national fishing fleets. Even in countries such as Spain, which have signed the European Union's 5th Directive on Anti-Money Laundering aiming to increase public access to information on corporate beneficial ownership, the report found that information on individual owners is rarely provided in full, 'making it difficult to confirm and compare ownership between vessels'.²³ Likewise, a case-study of overseas fishing vessels operated by the Spanish company José Martí Peix S demonstrates that 'a beneficial owner in a major distant-water fishing nation [Spain] can operate vessels in overseas jurisdictions, subject to varying levels of oversight and flag State control'.²⁴

For the Pacific Island Countries whose EEZs are extensively accessed by foreign-flagged fishing vessels, the ability to track and monitor beneficial ownership and onshore networks would boost capacity to sustainably regulate and manage the tuna fisheries. For example, even while Pingtan Marine will no longer be able to access the funds of United States stock investors, investments from national and other sources will continue to be available to the company, highlighting the urgency to expand these initiatives globally. The focus on beneficial ownership from an IUU perspective finds coherence in a recent FAO publication on Fisheries Access Agreements which emphasises that it is vital to pay attention to the strategies of fishing firms since it is firms that fish across international boundaries, not states or flags.²⁵

FISHERIES MANAGEMENT

High Seas Treaty brings attention to conservation of ocean biodiversity²⁶

The 'High Seas Treaty' that was secured in March 2023 has brought global attention to the state of the oceans, particularly the High Seas, and provided avenues to enhance protection in the High Seas regions. For example, it puts in place mechanisms to designate Marine Protected Areas (MPAs) in the High Seas regions. By providing the legal framework to create MPAs via a new 'Conference of Parties', the treaty provides impetus to align with the Kunming-Montreal Global Biodiversity Framework's target of protecting 30% of the world's terrestrial, inland water and coastal and marine areas by 2030.²⁷ It also mandates Environmental Impact Assessments (EIAs) for commercial activities that could harm biodiversity including geo-engineering, high-seas aquaculture, and deep-sea mining.

At the same time, large scale existing industrial activities such as shipping for which the International Maritime Organisation is responsible, mining which is overseen by the International Seabed Authority and fishing in regions covered by a regional fisheries management organisation are exempted from the treaty. This implies that MPAs cannot be designated in areas covered by RFMO arrangements, even if the fishing is unsustainable and the stocks are depleting.²⁸ This exemption of the ability to establish MPAs in regions where fisheries management is covered by an RFMO has seen mixed reactions. Even as the treaty was being finalised, fishing industry representatives, such as the European industry body Europêche, issued reminders that fisheries knowledge and industry expertise had been left out from the treaty.²⁹ This had, in their opinion, created a biased view that one of the major ways to protect

*MPAs under
the High Seas
Treaty are
not covered
where fisheries
management
jurisdiction falls
under an RFMO*

biodiversity in the high seas was through a network of MPAs and the implementation of EIA guidelines for fishing vessels. On the other hand, conservation groups have contradicted the claim that industry is vital to regulate fisheries better by citing the lack of transparency in RFMO meetings and calling for a reform of processes which have become hostage to industry interests.³⁰

A widely read scientific paper made the claim that well managed MPAs can enhance fisheries populations through spillover effects.³¹ In their study of the Papahānāumokuākea marine national monument in Hawaii, the largest marine protected area (MPA) in the United States, the authors found 'clear evidence that the protections afforded to two migratory species, bigeye and yellowfin tuna, led to spillover effects'.³² Spillover here implies that due to protection, species became so abundant in the protected area that they spill over into the surrounding areas and in turn, benefit the entire population in the unprotected areas. As a counter to this however, an analysis of these claims found that spillover effects have been overstated and that the increase in tuna abundance could be explained because of different reasons, including El Niño effects.³³ A similar paper studying the conservation efficacy of large MPAs such as the Phoenix Islands Protected Area (PIPA) showed that fishing pressure is often displaced rather than reduced, in turn leading to an intensification of fishing pressure outside the MPAs.³⁴ Recently, the island nation of Kiribati has reopened fisheries in PIPA.

For the High Seas treaty to be ratified, 60 UN Member States need to sign it. For the moment, it remains clear that fisheries management of highly migratory species such as tuna will remain within the ambit of the RFMOs. With the economic and scientific evidence behind MPAs so far failing to show the positive benefits of large-scale MPAs to island nations, it is unlikely that there shall be a paradigm shift from fisheries-based resource extraction to MPA-modelled resource conservation in the Pacific region, the former acting as a major source of income for a majority of the Pacific Island nations. Thus, well-managed RFMOs remain key to protecting marine biodiversity, ensuring the long-term sustainability of marine resources, and the equitable sharing of the benefits of the fishery.

US proposes an expanded Pacific Remote Islands National Marine Sanctuary

The Biden Administration has announced plans to expand the marine sanctuaries around the United States' Pacific Remote islands by about 265,000 square miles to create a total 777,000 square miles of protected ocean area. President Biden announced his intentions to use the *National Marine Sanctuaries Act* in this way at the White House Conservation in Action Summit in March 2023. The move aligns with Biden's commitment to contribute to the global effort to conserve 30 per cent of the earth's land and waters by 2030 (known as the '30 by 30' plan). The full area would represent the largest sanctuary of its kind in the world and would include the existing Remote Island Marine National Monument.³⁵ This announcement follows from advocacy from the Pacific Remote Islands Coalition, a group calling to expand ocean protection, and was also supported by US Representative Ed Case of Hawaii. According to the US Secretary of Commerce, Gina Raimondo, the designation would enable the US National Oceanic and Atmospheric Administration (NOAA) to apply its expertise in research and management, maritime heritage and archaeology, and public education and outreach to protect unique ecological and cultural resources.³⁶

**Contested
evidence on the
effectiveness
of MPAs
suggests that
well-managed
RFMOs
remain key
to protecting
marine
biodiversity**



Several groups have opposed the proposal. American Samoan Congressional Representative Amata has publicly criticized the move, warning that closing large areas of the Pacific to fishing would both destroy American Samoa's fishing and processing industry and harm the broader US geopolitical effort in the region.³⁷ American Samoa Governor Lemanu Mauga pointed to a lack of consultation with American Samoa.³⁸ Likewise, the Western Pacific Regional Fishery Management Council has argued that marine sanctuaries that are closed to all fishing do not benefit the environment in meaningful ways and called for the US to engage the fishing sector – particular tuna fisheries – as a counterpoint to growing Chinese influence in the Pacific.³⁹ More broadly, critics have pointed to the potential for a large protected area to stand apart from the overarching US effort to reengage in the Pacific region. Multiple media reports indicate that the Pacific is carefully watching for the follow-through from the expansive promises that the US has made as part of its Pacific Partnership Strategy.⁴⁰

Meanwhile, the National Oceanic and Atmospheric Administration has started the process to potentially designate the new national marine sanctuary. It is accepting public comments on the proposal until 2 June and will also host in-person public meeting with options to join virtually.⁴¹

Climate change study estimates impact on tuna species; NZ funds Pacific tuna climate change adaptation

A team of scientists from Spain's AZTI – *Ciencia y tecnología marina y alimentaria* have recently published the results of a study which projects the impact of climate change and fishing pressure on the productivity and body size of major commercial tuna species.⁴² On average, analyzed stocks are projected to decrease their global potential productivity by 36% by 2050. The results indicate that climate change will have a greater impact on tuna species than fishing pressure, assuming current fishing pressure remains in line with Maximum Sustainably Yield (MSY). Overall, on average across all the species analyzed, a body size decrease of 15% has been projected due to climate change. Bigeye and albacore are estimated to decrease in biomass and size, whereas yellowfin and skipjack are projected to increase in size. The study highlights that given fish price and demand are driven in part by body size, that this may potentially reduce revenue for the fishing industry and recommends the fishing industry adopts adaptation measure to climate change, notably increasing the value of fish through sustainability certifications. However, given industry reports that premiums associated with certified sustainable tuna have now largely eroded due to a high-level of uptake by fishing companies, other options for increasing the value-proposition for tuna will likely need to be considered.⁴³ The study also recommends reducing fuel consumption and time at sea with higher digitalization to reduce costs and CO₂ emissions. Fishing industry contacts indicate that given increased fuel costs and carbon emission reduction commitments, some more progressive companies have started to implement measures to reduce fuel consumption such as: propeller modifications; use of silicone-based paint for the hull to reduce frictional resistance; and, the fitting of sensor systems to engines, compressors, fish wells and other locations to identify potential fuel efficiency gains.⁴⁴

In WCPO-related climate change news, the New Zealand government has granted NZD 25 million to establish a Pacific regional partnership led by the Pacific Community (SPC) to assist Pacific nations to adapt their tuna fisheries to the impacts of climate change. Already, tuna migration patterns are starting to change due to climate change impacts. SPC's *Climate Science for Ensuring Pacific Tuna Access Programme* will set the foundation for the development of a Pacific-owned advance

The Biden Administration is proposing 265,000 sq miles expansion of marine sanctuary area around Pacific Remote islands

AZTI predicts a body size decrease of 15% on average across tuna species due to climate change

warning system to accurately forecast where tuna will move due to global ocean warming. According to SPC's Simon Nicol, the new initiative will provide PICs with information on tuna migration changes within their Exclusive Economic Zones (EEZs) to assist with negotiations related to bilateral fishing access and onshore investment, actions associated with the WCPFC climate resolution and quantifying the impact of climate change on tuna-derived income to feed into the United Nations Framework Convention on Climate Change. The SPC-led project is scheduled to run for 3.5 years and will involve collaboration among Pacific Island governments, regional organisations and the Pacific tuna fishing industry.⁴⁵

TUNA INDUSTRY

RD operations in flux; PNG FIA emphasizes need for competitive business climate

Philippines-based firm RD, which is currently undergoing financial restructuring, is entangled with changes to its fishing and processing activities in the US and Papua New Guinea. First, the firm is looking for an investor in, or buyer for, a new processing plant that it has built in New Jersey. Plant construction started prior to the COVID-19 pandemic and was subsequently delayed; the plant is now scheduled to open in the coming months. While RD is a main supplier for the Subway sandwich chain in the US, the plant will supply other companies which have not yet been named. Second, RD's fleet of 12 purse seine vessels have ceased operating and RD has placed them up for sale. While firm-wide financial constraints shaped this decision, RD cited poor fishing in the WCPO, as well as high access fees in PNG as factors contributing to its decision to tie up boats. To date, two vessels have been purchased; RD has left open the possibility that some will return to operation based on the outcome of financial restructuring. On the processing front, RD's Philbest Canning Corporation plant in General Santos City and RD Tuna Cannery in Madang are still operating, but the Madang plant is struggling with supply with its vessels offline and its broader cash-flow challenge limiting its ability to purchase raw material.⁴⁶ In April, RD Tuna Cannery scaled down its operating activity and workforce.⁴⁷

Sylvester Pokajam, President and Chair of PNG's Fishing Industry Association (FIA) and former Managing Director of PNG's National Fisheries Authority, has responded to RD's moves by emphasizing the PNG fishing sectors' strengths. Countering RD's claim of poor fishing, he offered data illustrating that total catch in PNG has increased in both the EEZ and archipelagic waters since 2018. He also emphasized PNG's leadership in sustainability and social accountability initiatives, pointing to MSC certification as well as PNG FIA's role in developing the FISH Standard for Crew that aims to certify ethical hiring, treatment, pay and grievance processes for crew.⁴⁸ In March, the group of 33 tuna purse seiners in the association achieved the FISH labour certification.⁴⁹

By way of explanation for the divestment decision, Pokajam pointed to high access fees for domestically flagged vessels, asserting that the PNG National Fisheries Authority is charging domestically flagged vessels that are vertically integrated with processing plants US\$10,500 per day – the same rate as is charged for foreign flagged vessels. He suggested that PNG flagged vessels have reflagged to other Pacific Island countries that are offering lower daily fishing fees without having a requirement for domestic offloading or processing. He urged the National Fisheries Authority to revise their licensing policies to create an attractive environment for fishing and related domestic processing.⁵⁰ For its part, the National Fisheries Authority has long faced the dilemma and sought innovative policies to thread the needle between growth and sustainability with policies.⁵¹

SPC will lead a NZD 25 million programme to develop an advanced warning system for PICs to forecast changes in tuna migration patterns due to climate change

RD is undergoing financial restructuring and has put its purse seiners up for sale

More broadly, RD's recent actions and the responses to them point to challenges related to tuna-based development in Pacific Island countries, even as PNG continues to push forward a vision of a large-scale tuna-hub that is linked to an ecologically and socially sustainable sector. Domestication policies play a key role in this vision, but raise challenges around creating a competitive investment environment in a global industry while bringing meaningful returns to PICs. Higher access fees fund essential fisheries management and development functions, but stand to disincentivize fishing firms from registering locally and subsequently building domestic industry linkages, particularly if there are more economical flagging opportunities offered in other PIC waters.

Biodegradable FAD trials ramp up in the WCPO

Since the early 1990s, the use of man-made drifting fish aggregation devices (dFADs) has greatly improved the fishing efficiency of purse seiners targeting tropical tuna. Approximately half of global tuna catch is now caught on FADs; in the WCPO, an estimated 23,000-40,000 dFADs are deployed annually.⁵² However, there are a number of associated negative ecosystem impacts with dFAD use including entanglement of vulnerable non-target species (e.g. sharks, turtles) and potential ghost fishing, marine pollution and damage to coastal habitats from lost and abandoned FADs. To mitigate these risks, the fishing industry and fisheries scientists are researching and developing non-entangling FAD designs constructed with biodegradable materials. RFMOs, as well as the non-profit International Seafood Sustainability Foundation (ISSF), are starting to mandate the use of fully non-entangling FADs (i.e. strictly no mesh nets used in any component of FADs) and are currently encouraging the use of biodegradable materials with the view of introducing mandatory requirements in the coming years.

SPC, in collaboration with ISSF and partner purse seine fishing companies under WCPFC's Project 110, are in the process of trialling biodegradable dFADs (bioFADs) in the WCPO. A bioFAD design developed by ISSF and the *Institute de Ciències del Mar* in Barcelona called the 'jelly FAD', inspired by jelly fish in nature, is being deployed by fishing vessels engaged in the trial. Jelly FADs are constructed using mostly natural materials – bamboo canes, cotton canvas and ropes for the structure, together with sand or clay blocks inserted into bamboo canes for ballast; the only synthetic components are four plastic flotation buoys and the satellite beacon. It is anticipated that the FAD components will biodegrade after 9-12 months in the water, which should provide ample time for fish aggregation.⁵³

The jelly FAD presents a design paradigm shift from the conventional FADs used to date. There are concerns that when substituting traditionally used synthetic materials for biodegradable materials in existing two-dimensional conventional FADs, the FADs will not be able to withstand the structural stress from wind, waves and currents, resulting in a reduced lifetime. Also, conventional FADs are heavy, requiring plastic buoys to provide flotation. Jelly-FADs employ a three-dimensional design with neutral buoyancy, resulting in a smaller-sized and lighter FAD which requires less plastic flotation; they are designed to provide the necessary slow drift and shade effect required to attract tuna. Both the raft and cube-shaped tail are submerged below the water surface, unlike conventional FADs where the raft floats on the surface and the tail is submerged.⁵⁴

Project 110 will build on prior jelly-FAD trials conducted by ISSF in the WCPO during 2020-2022. The first round of jelly-FAD deployments took place in March 2023 under this new trial. SPC anticipates that a minimum of 200 trial jelly-FADs will be deployed and paired with conventional FADs to compare performance over an 8-10

**Biodegradable
'jelly FADs' are
being trialled in
WCPO during
2023**



month period. The final results will be delivered to WCPFC's Scientific Committee and FAD Management Options Intersessional Working Group (FAD-IWG), as well as industry partners, national fisheries agencies, NGOs and regional observer program representatives. Assuming positive results from the trial, these learnings will feed into initiatives to facilitate industry adoption.⁵⁵

Meanwhile, WCPFC's FAD-IWG is tasked in 2023 with considering potential timelines for the step-wise introduction of biodegradable FADs by WCPFC, based on five categories of FAD biodegradability originally developed by IATTC. The starting point is 'Category 5' which represents FADs where both the surface and sub-surface components contain non-biodegradable materials (i.e. current conventional designs widely used); the desired end point is 'Category 1' where FADs are constructed with 100% biodegradable materials, with the exception of the satellite buoy.⁵⁶ At this point in time, it is likely that FADs which are 100% degradable will be difficult to construct, as there are currently no viable alternatives identified for plastic-based flotation components. Also, given there is still much work to be done on developing feasible designs, assessing the suitability of biodegradable materials and then, identifying commercial-scale sources of materials, it is likely that it will take several years at a minimum before the majority of purse seine vessels in the WCPO (and other oceans) will be able to meet mandatory bioFAD requirements.

ISSF releases its new 2023-2027 Strategic Plan

The International Seafood Sustainability Foundation (ISSF) has released its new five-year strategic plan for 2023-2027, entitled: *Continuously Improving Global Tuna Fishery Sustainability*. Launched in 2009, ISSF is a global research and advocacy NGO established by tuna industry leaders, fisheries scientists and environmental NGOs which focusses on tuna sustainability. Since its establishment, ISSF has conducted collaborative scientific research and advocated for sustainability fishing best practices with RFMOs, vessel owners, fishers and participating seafood companies.⁵⁷ One of ISSF's most notable ongoing achievements is the adoption of conservation measures (CMs), some of which are stronger than those currently adopted by Regional Fisheries Management Organisations (RFMOs), which ISSF Participating Companies have committed to conform with. A number of measures also apply to fishing vessels registered on ISSF's Proactive Vessel Register (PVR). These CM cover eight categories – RFMO support; traceability and data collection; monitoring, control and surveillance; IUU fishing; capacity; PVR; and social and labours standards. Annually, ISSF Participating Companies and supplying vessels are third-party audited by MRAG Americas to assess their compliance with these measures. The most recent audit results indicate that 23 of 25 companies were fully compliant with ISSF's 33 conservation measures, achieving an overall 99.8 % conformance level.⁵⁸

ISSF's new strategic plan outlines the group's mission and approach to achieving sustainable tuna fisheries over the next five years. ISSF's mission is 'Continuously Improving Sustainability: To undertake and facilitate science-based initiatives to continuously improve the sustainability of global tuna fisheries and the health of the ecosystems that support them'. ISSF seeks to achieve this by: advancing tuna fisheries science; implementing direct industry improvements; providing scientific guidance and tools; working with, and advocating to, RFMOs; and partnering with support organizations and experts. These focal areas are encapsulated by ISSF's three strategic pillars – Science, Verification and Influence.⁵⁹

The Marine Stewardship Council (MSC) standard for sustainable fishing has been pivotal to ISSF's objectives since 2013 and remains so in the new strategic plan for

**WCPFC's FAD
Intersessional
Working Group
is considering
potential
timelines for
the step-wise
introduction of
bioFADs**

**ISSF
Participating
Companies
achieved
a 99.8%
conformance
level with 33
conservation
measures**



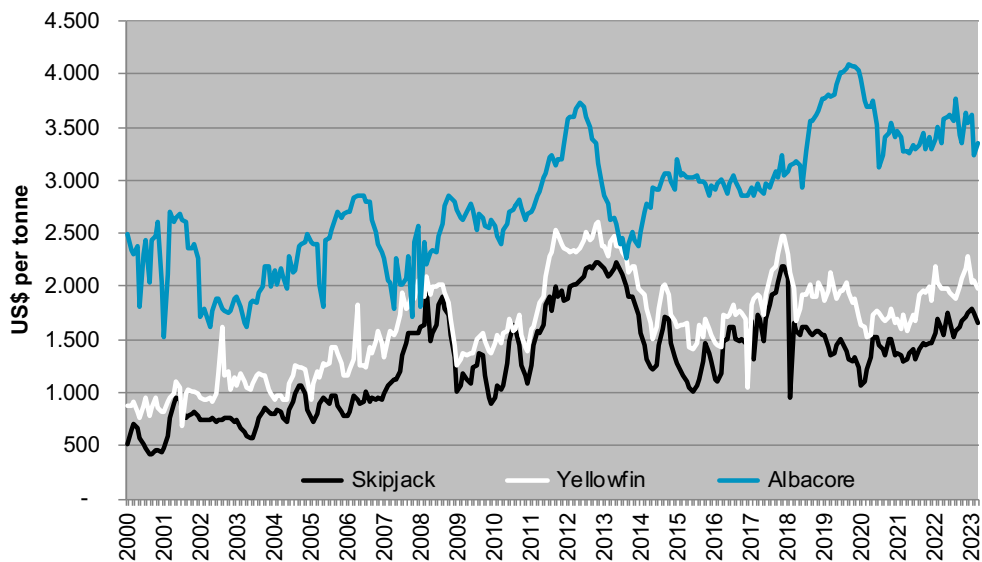
2023-2027. The NGO's new five-year objective now goes beyond helping global tuna fisheries *meet* the MSC certification standard, to helping them also *maintain* the standard. ISSF has acknowledged that that bar is constantly being raised to meet changing NGO and market expectations and to reflect the latest fisheries science, as evidenced by the new MSC Fisheries Standard 3.0 which has just been released. ISSF is committed to supporting global fisheries to continue to improve in line with strengthened requirements to ensure they are still able to meet MSC certification standards. Hence, ISSF's Five-Year Goal is that by the end of 2027, all tuna fisheries from which ISSF companies source can meet and maintain the MSC certification standard (i.e. pass with no conditions) or there is a clear roadmap and timeline in place to meet this standard underpinned by the best-available science. A new report released by ISSF in March 2023 indicates that currently, only eight of the 23 major commercial tuna stocks achieve a passing score for the MSC's Principle 1 requirement on sustainable fish stocks, largely due to failure of RFMOs to implement harvest control rules.⁶⁰ ISSF plans to continue to achieve its MSC-related objective through the development of verifiable, science-based practices, measurable commitments and conservation measures which are implemented by Participating Companies, as well as RFMO advocacy efforts.⁶¹

In an effort to improve the treatment of workers throughout the global tuna supply chain, ISSF has required Participating Companies to increase transparency and accountability regarding social and labour standards, by requiring Participating Companies to publish a public policy covering fishing and supply vessels and processing facilities since 1 January 2021. In conjunction with the launch of the new strategic plan, ISSF also announced the establishment of an Advisory Committee on Working Conditions for Fishing Vessels comprised of experts in tuna fisheries operations and international labour and social issues. The Committee will support ISSF to monitor third-party initiatives on labour and social standards for tuna fishing activities and explore ways for ISSF and its Participating Companies to support and implement these standards.⁶²

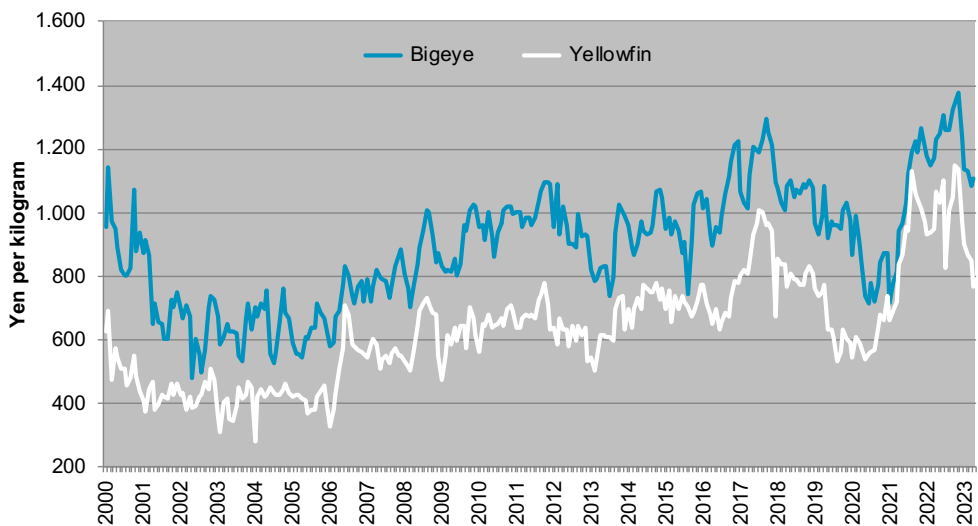
*ISSF is aiming
for all tuna
fisheries from
which ISSF
companies
source meeting
the MSC
certification
standard by the
end of 2027*

TUNA PRICE TRENDS⁶³

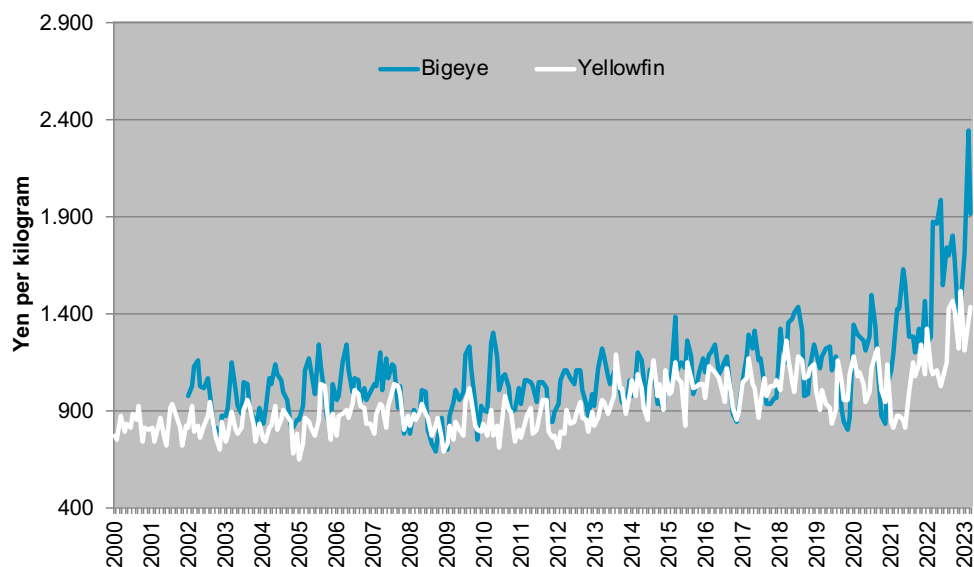
Bangkok canning-grade prices to April 2023⁶⁴



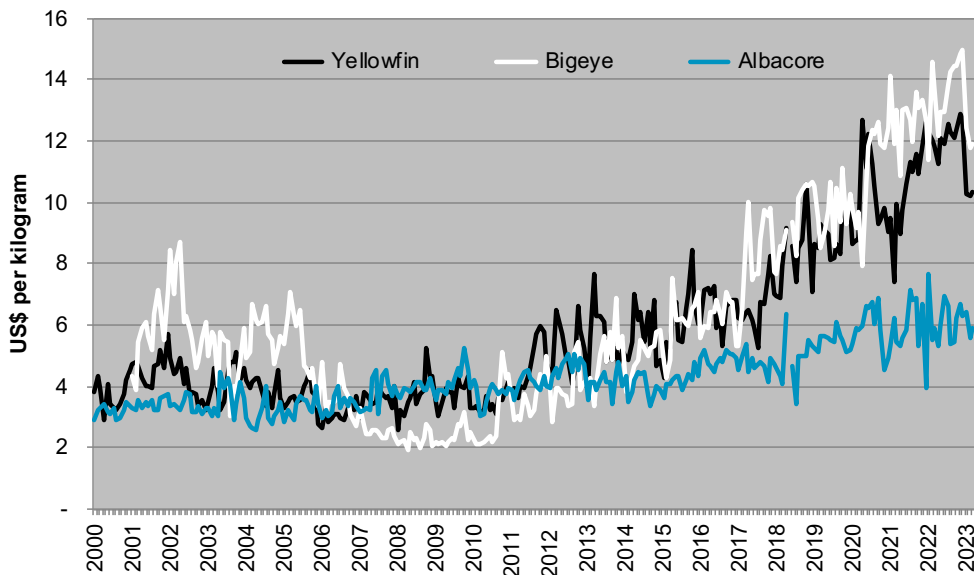
Japan frozen sashimi prices (ex-vessel, Japanese ports) to April 2023⁶⁵



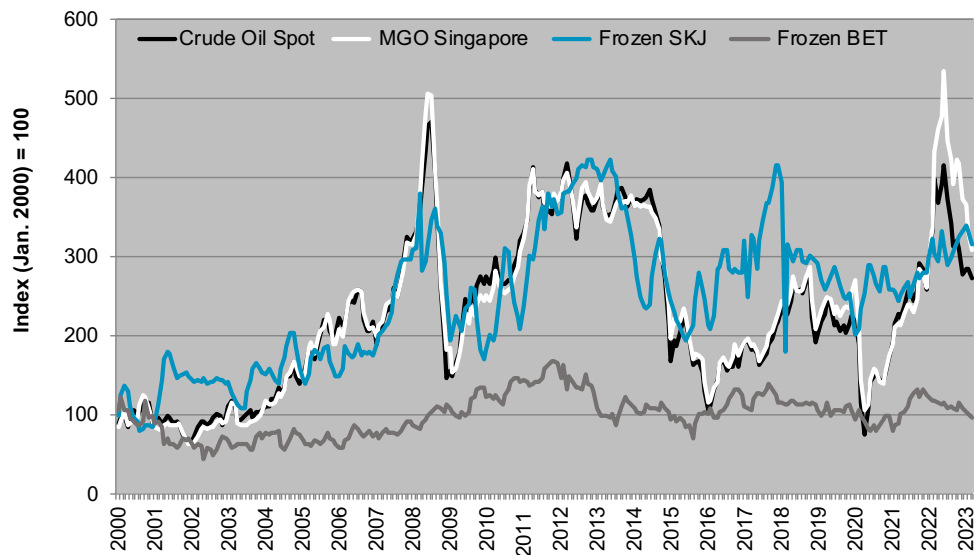
Japan fresh sashimi prices (origin Oceania) to April 2023⁶⁶



US imported fresh sashimi prices to March 2022⁶⁷



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to April 2023⁶⁸



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