The Parties to the Nauru Agreement (PNA) announced in February, following the 1st PNA Presidential Summit in Koror, Palau, that they intend to proceed with full assessment under the Marine Stewardship Council (MSC) Certification Scheme of purse seine vessels fishing in PNA EEZs which set on free schools of tuna and logs (i.e. without the use of artificial fish aggregating devices (FADs)). If successful, up to 50 percent of annual catch from PNA’s skipjack tuna fishery (currently around 560,000 metric tonnes) will be certified sustainable under the MSC eco-labelling scheme.

PNA members are pursuing MSC certification to help increase the value of the purse seine fishery and derive greater economic benefits by being able to promote the fishery as being sustainably managed. This will also enable them to take advantage of reported unmet market demand for certified sustainable tuna in Europe and North America. Given the high level of by-catch of juvenile bigeye and yellowfin, as well as other by-catch species from purse seine fishing on FADs, it is highly unlikely that a FAD fishery could be certified under the MSCs principles and criteria for sustainable fishing. Hence, PNA members have opted to seek MSC certification for purse seine fishing on free-swimming schools of skipjack.

PNA hopes the MSC certification process will be completed in 2011 and, if the outcome is positive, have indicated that they will also consider developing their own branding options to promote the fishery as being sustainable.

The PNA skipjack purse seine fishery entry into full assessment marks an historic occasion since this is the first tuna purse seine fishery in the world to seek MSC certification and MSC is aiming to provide certified sustainable choices for all key commercial fish species. Given the WCPO tuna fishery accounts for more than half of global tuna catch, MSC has indicated that it intends to significantly enhance its operations in outreach to tuna fisheries in the Pacific region, using donor funding recently received from a charity lottery, the Postcode Lottery, under a new ‘Project Oceans’ funding initiative.

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MSC intends to significantly enhance its tuna fisheries outreach in the Pacific region

Artisanal labeling schemes gain momentum

Artisanal fishers are implementing new labeling schemes to meet consumer demand for sustainable products and government and retail demand for traceable fish products. Such schemes will not only meet these growing demands, but also hold potential to increase economic returns to artisanal fishers in the process.

The Seychelles Hook and Line Fishermen organisation, in partnership with the Seychelles Fishing Authority and Seychelles Bureau of Standards, established a code of conduct for certifying sustainably caught fish that are fully traceable. Such fish will comply with EU traceability requirements. To guarantee the origin of the fish and strengthen links with consumers, the organisation tags each fish with a reference code that links the fish to the fishing boat on which it was captured. Consumers can enter the code on the organisation’s webpage to retrieve information about the fishers, the boat, fishing grounds and the fishing technique employed. Hotels, restaurants and retailers supporting the scheme commit to pricing and margin shares that ‘allow Seychellois fishermen to live with dignity and to support keeping the fishing industry sustainable’.

As of March 2010, Seychelles Hook and Line Fishermen Organisation partnered with Oceana Fisheries and Sea Harvest in Seychelles and Ocealliance in France. No details were available on quantities or aspirations of domestic sales and exports, although they are likely to be small, targeting niche markets in Western Europe.

Likewise, environmental non-governmental organisation WWF, government and the private sector are collaborating to export fresh and chilled tuna loins to the European Union caught on hand lines in Mindoro, Philippines by artisanal fishers. The tuna are exported with catch certificates verifying that they were caught by registered vessels operating in legal areas using highly selective fishing gear. The first consignment of product reached the European market in February 2010 and has been credited with combining economic opportunities and environmental sustainability.

Given that tuna is an important resource for other ACP countries in the Coral Triangle, such as Papua New Guinea and the Solomon Islands, there is potential for more such certification schemes.

In Senegal, small scale fisheries provide 60 percent of fishing exports, one of the country’s main sources of foreign exchange earnings. A recent study identified small scale yellowfin fisheries as having potential to offer more economic gains if they can fetch higher prices by appealing to European consumers with...
eco-friendliness, quality, catch method and packaging. The study identifies that fishers receive less than USD1 per kilo. However, exporters/canners receive approximately USD4.29 per kilo, wholesale prices of gourmet tuna may reach USD20 per kilo and retail at USD40 per kilo in importing countries. The study suggests that a gourmet branding strategy including the factors listed above could help the country raise its export income from canned yellowfin by 50 percent. Such a strategy would involve participation by the Senegalese inter-professional artisanal fishing-sector organisation, CONIPAS, and would not only act as a means to earn income, but to protect the long standing traditional fishing sector in the country. [9]

In sum, recent months have seen a proliferation of labels for artisanal caught fisheries products. These efforts apply new import traceability requirements to create opportunities for conservation and new niche markets. However, to succeed, artisanal label schemes must be able to comply with traceability requirements in major markets, have secure and stable access to these markets, and be able to offer sufficient and reliable supply.

FISHERIES-TRADE RELATED REGULATION

Bluefin tuna trade ban rejected at CITES, bluefin farming falters

As reported in the September and December 2009 issues of FFA Fisheries Trade News, [13] increasing concern over Atlantic and Mediterranean bluefin tuna decline brought a proposal for a complete bluefin tuna trade ban to the Convention on the International Trade of Endangered Species (CITES). In the lead up to the March 2010 CITES meeting that would determine if the bluefin trade ban would go into effect, a United Nations scientific review indicated that scientific documentation of stock depletion and the slow growth rates of the fish were sufficient to warrant the trade ban. [14] Most European states, including France, but excluding other bluefin fishing countries Greece, Malta and Spain, supported the ban. [15] The United States announced support for the ban late in the game, suggesting that the trade ban was the only way to protect the species in light of compliance problems and inflated catch quotas in the regional fishery management body governing Atlantic bluefin. [16]

Japan flatly opposed the ban, indicating that regional fisheries bodies were better suited to regulate marine species than
Japan argued that the ban would unfairly penalise the Japanese sushi industry while allowing American and European fisheries to continue catching bluefin.[17] Japan insisted that it would ignore a ban were one to go into effect, a significant threat to the efficacy of a trade ban since Japan imports 80 percent of the entire bluefin trade.[18] The Japanese government extensively lobbied other countries, including in the European Union, both before and at the CITES meeting in an effort to persuade them to reject the ban.[17]

Early in the meeting, Monaco, which spearheaded the CITES campaign, officially tabled its proposal for an immediate ban of bluefin trade. Shortly thereafter, the EU tabled what it called a compromise proposal that would have delayed implementation of a trade ban until May 2011 to provide time to conduct scientific testing that would confirm whether bluefin stock was indeed at dangerously low levels. Rather than opening the proposals to debate, Libya called for an immediate vote after accusing the FAO of serving political interests and suggesting that there was no scientific basis for the listing.[20] The Monaco proposal was voted down 20 to 68 with 30 abstentions, and the EU proposal fell by 43 to 72 with 14 abstentions. CITES proposals require a two-thirds majority to pass. There is no record of countries’ votes due to a request from Iceland that countries’ votes be kept secret.[21] CITES will next meet in three years.

Environmental groups have condemned the decision, announcing that short-term economic interests won out over the long-term health of the ocean and the rebuilding of the Atlantic bluefin populations and fishery.[22] Fishing interest groups have largely applauded the decision. However, there are some early indications that there is internal pressure for Japan to accept that bluefin tuna are in decline, to take the lead in working to maintain global tuna populations, and to make its bluefin policy consistent with national efforts to stress food self-sufficiency and consumption of locally grown food.[21]

In the meantime, concern about imminent bluefin decline has brought more attention to tuna aquaculture as a solution to the dwindling availability of the valuable delicacy. As recently as December, Clean Seas Tuna, the leader in the bluefin aquaculture game, was making headlines for its success in achieving captive breeding of Southern bluefin tuna.[24] However, in March 2010, Clean Seas Tuna shares plummeted 59 percent to a record low of USD0.09. Investors dumped the stock on the news of a USD14 million loss resulting from problems in the firm’s kingfish business as well as news that Southern bluefin tuna fingerlings bred in captivity failed to
survive past 38 days. The deaths have raised concerns about the firm’s ability to commercialise its technology. Clean Seas Tuna has not ruled out another capital raising as it considers radical restructuring of its business following the losses.

FISHERIES MANAGEMENT AND DEVELOPMENT

ISSF Study on Pole-and-Line Fishing in the Western Pacific

The International Seafood Sustainability Foundation (ISSF) recently commissioned a study which evaluates the amount of live baitfish required to support a large-scale revival of pole and line skipjack fishing to replace some, if not all, purse seineing in the Western and Central Pacific region.

Over the past year or so, Greenpeace has been strongly advocating the re-development of pole and line fisheries to replace industrial-scale purse seine fishing in the Pacific region (and elsewhere) on the grounds the pole and line fishing is a more sustainable and equitable fishing method. This move has been supported by several major UK-based retailers (Marks & Spencer, Pret a Manger) who have announced plans to source 100 percent pole and line caught skipjack tuna. In addition, European tuna buyers have signed a Greenpeace initiated pre-order petition for over 70 million cans of pole and line caught tuna from the Pacific region.

While pole and line fishing has obvious sustainability benefits in terms of low by-catch levels, it is heavily reliant on sustainable sources of live baitfish. ISSF’s study estimates that the baitfish requirements of a pole and line fishery annually producing one million metric tonnes of skipjack (to replace current WCPO purse seine catch levels) would be over 30,000 metric tonnes – 13 times the volume of baitfish used at the height of the Pacific pole and line fishery almost 30 years ago.

The study indicates that it is unlikely that the Pacific’s baitfish resources are adequate or currently well-managed enough to support the complete replacement of purse seine fishing with pole and line fishing. In addition, heavy utilisation of baitfish resources for industrial pole and line fisheries could have negative food security impacts on coastal communities. Further, since the region’s most abundant baitfish grounds are in the Western region, a large-scale switch from purse seine to pole and line fishing would likely result in displacement of fishing effort from the waters of more Eastern Pacific countries to those located in the Western region, potentially creating...
Revival of large-scale commercial pole and line fisheries will only be possible if canned-tuna consumers are willing to pay higher prices.

Besides the baitfish issue, it is unlikely that a revival of large-scale commercial pole and line operations in the Pacific to replace purse seining would be feasible due to economic factors. The very reason that pole and line fishing operations in the region have declined over the past 30 years to now be virtually non-existent is because high operating costs rendered them uneconomic compared to purse seine fishing operations. The bottom line is that tuna buyers and consumers must be willing to pay higher prices for pole and line caught tuna to make it economically attractive for large commercial fishing operators. How likely is this? In a media release concerning UK sandwich maker, Pret a Manger’s switch to pole and line caught skipjack, the company founder stated “Don’t ask me how, but we’ve negotiated contracts so prices shouldn’t go up”. This indicates that the company is still seeking to source pole and line caught-tuna for a similar price as purse seine-caught tuna.

Given the sizeable and growing demand in Europe for pole and line caught tuna, opportunities do potentially exist however, for the development of small-scale domestic pole and line fisheries in Pacific countries with adequate baitfish and labour resources, using smaller vessels with lower capital and operating costs. FFA is currently providing support to several Pacific Island countries (PNG, Solomon Islands, Marshall Islands and Vanuatu) to investigate the feasibility of establishing such operations.

TUNA MARKETS

Potential tuna processing investments in Solomon Islands

The Solomon Islands, along with its other PNA counterparts, is actively seeking to attract foreign investment in domestic tuna fishing and processing operations, as a means of deriving enhanced economic benefits from its tuna resources. The Solomon Islands Government is currently negotiating the establishment of two significant processing developments in Guadalcanal Province.

Negotiations are underway with a Korean global fishing company to establish a tuna canning facility expected to employ approximately 3,000 Solomon Islanders.

Philippines’ Frabelle Fishing also has plans to establish a tuna...
Frabelle currently operates purse seine fishing vessels and a tuna processing operation in Lae, Papua New Guinea and also has plans to establish an new 300 mt/day processing facility in Lae with joint venture partners, Thai Union and Century Canning.

Europe is the largest global market for canned tuna and it likely that any major foreign investor establishing a tuna processing facility in the Solomon Islands (or any other Pacific Island Country) would ideally like to export to this market.

At present, Solomon Islands utilizes a 24 per cent tariff preference on canned tuna and cooked loins through the EU’s Generalised System of Preferences (GSP) ‘Everything But Arms Agreement’ (EBA) which applies to Least-Developed Countries (LDCs). Under this agreement, strict Rules of Origin (RoO) apply and only tuna caught within Solomon Islands’ territorial waters by any vessel or by EU-flagged or domestically-flagged and owned vessels outside territorial waters is eligible to make use of this tariff preference. In contrast, considerably more flexible ‘global sourcing’ RoO are offered to Pacific Island signatories under the PACP-EU Interim Economic Partnership Agreement which deems any fish to be ‘wholly originating’ regardless of vessel ownership, provided it is substantially transformed by a PIC-based tuna processing facility.

To date, the Solomon Islands Government has not publically relayed an intention to sign the comprehensive PACP-EU EPA or an interim EPA. Hence, it is likely that foreign investors are lobbying in negotiations for the Government to sign the EPA.

Another market access-related issue for new tuna processing developments in the Solomon Islands relates to the Earth Island Institute’s ‘Dolphin-Safe’ accreditation. At present, the Solomon Islands allow 100 live dolphin exports per year, mostly from Guadalcanal Province. Despite there being no link between tuna processing facilities and the dolphin exports, Earth Island has indicated that until such time as the Solomon Islands Government bans live dolphin exports, exports from any Guadalcanal-based tuna processing facility will not be deemed to be ‘Dolphin-Safe’.

**US market update**

Each of the ‘big three’ US tuna brands, Bumble Bee, Chicken of the Sea and StarKist, has recently deployed new outreach and branding campaigns. Bumble Bee is rebranding its interactive health and wellness programme – called BeeWell for Life – to
more widely promote canned tuna as part of a healthy lifestyle. Participants in BeeWell log their exercise miles in exchange for Bumble Bee donating USD0.15 per mile to breast cancer research and the chance to win prizes. In addition, in April 2010, Bumble Bee announced that it completed a multi-year reduction of salt in some of its key products, cutting sodium by 44 percent in albacore production and 22 percent in light-meat products. The announcement came on the heels of an Institute of Medicine report urging the US federal government to limit salt in food.

Chicken of the Sea introduced the Chicken of the Sea SuperCook Contest in which the firm searches for consumers who can turn simple dishes into ‘super meals’. The contest will be paired with a ground tour of retail outlets in six cities, limited in-store promotions and market-specific radio spots. The firm is placing heavy emphasis on outreach through social media, including blogs, Twitter and Facebook, and The Mermaid Club, Chicken of the Sea’s online fan club.

Starkist, bought from DelMonte by Korean conglomerate Dongwon in 2008, maintained its home base in Pittsburg, Pennsylvania. Headquarters have grown from 35 to 70 people and are expected to expand to 115 by the end of 2010. The firm has invested US$20 million in marketing, which it credits for a six percent sales jump since the end of 2008. The firm reports improved profit margins and quality in value added products such as pouches and ‘sandwich ready’ tuna salads. The firm is launching another US$20 million marketing campaign called ‘have you been StarKist?’, which features actors and the firm’s mascot Charlie the Tuna puckering up in what the firm calls a ‘fish kiss’. StarKist is also testing out diversifying into whitefish fillet product lines. StarKist maintains a canning facility in American Samoa and is hoping that the US Congress will approve legislation offering incentives to keep the processing plant active in the face of mandatory minimum wage hikes. The plant employs 1,800 people, even after 1,000 jobs were trimmed from operations. Bumble Bee and Chicken of the Sea lobbied against the legislation, arguing that it would benefit only one company and cost US taxpayers millions.

As a group, the US canned tuna manufacturers are working together through the US Tuna Council (part of the National Fisheries Institute) and investing a combined US$60 million over three years to collectively rebrand canned tuna and other shelf-stable seafood as a convenient, affordable food that is part of a healthy lifestyle. The first year of funding has been approved and the companies and NFI are working on messaging.
Mercury levels in canned tuna remains a contentious issue as two government regulatory agencies – the Environmental Protection Agency (EPA) and the Food and Drug Administration (FDA) – continue to clash on their assessments of tuna safety. A study released in February 2010 revealed that half of samples of brand-named tuna contained more mercury than deemed safe by the EPA; only 5 percent of these samples exceed FDA safety standards. As consumer confusion over which recommendation to follow mounts, study authors recommend that consumers, particularly high-risk groups, should err on the side of caution. A representative from industry group National Fisheries Institute argues that no cases of mercury toxicity from normal consumption of commercial seafood have been documented in any peer reviewed study and that canned tuna continues to be a healthy source of lean protein and omega-3 fatty acids.

A second study relied on DNA testing to identify mercury levels in sushi-grade tuna. It highlighted that mercury levels found in Bigeye Tuna (Thunnus obesus) and bluefin tuna species (Thunnus maccyoyii, Thunnus orientalis, and Thunnus thynnus), exceed or approach levels permissible by Canada, the European Union, Japan, the US, and the World Health Organisation. The results also demonstrated that leaner fish meat was higher in mercury content and that larger fish are higher in mercury than smaller fish. The study authors suggest that government health agencies should consider adding bigeye and bluefin tuna to mercury advisories and that DNA testing can help to identify cryptic samples in the market place and holds potential for enabling regulatory agencies to more accurately measure the risk faced by fish consumers and enact policies that better safeguard their health. The National Fisheries Institute responded that the study ignores that recent peer-reviewed science on fish and nutrition shows that the overall effect of eating fish is a boost to heart and brain health. If mercury controversies did not raise enough red flags, the FDA has also warned that tuna can cause Scombroid, an illness caused by the toxins emitted when the temperature of perishable fish is not properly controlled.

In other US market news, total US seafood imports were 2.3 billion kilos in 2009, a 1.2 percent drop from 2008. The value of US seafood imports in 2009 was USD13.32 billion, the lowest level since 2006. The FDA has requested USD4 billion to promote and protect public health. This request includes USD318 million for the new ‘Transforming Food Safety Initiative’ that will see the FDA set standards for safety, expand laboratory capacity, pilot traceability technologies, strengthen its import safety
programme, improve data collection and risk analysis, and begin to establish an integrated national food safety system with strengthened inspection and response capacity.

**Update on seafood retail in the United Kingdom**

In the UK retail sector, John West, part of the MW Brands group, is advertising, innovating and restructuring to enhance its market leadership in canned fish. The brand launched its ‘biggest ever’ marking campaign to bring canned fish to more consumers’ attention, launched a ‘no drain’ canned tuna line (which now commands over 6 percent of standard tuna sales), and plans to introduce over 30 new product innovations through 2010. In 2009, the MW Brands group undertook an aggressive cost-reduction initiative across its entire business to improve its cost structure and competitive advantage. Reflecting the strength of MW Brands, an investor received a 14 percent return on the sale of MW Brand’s section subordinated debt. Since posting these results, Trilantic Capital Partners, the private equity firm that replaced previous MW Brands owner Lehman Brothers, has announced it is launching a sale process for MW Brands. The potential sale would mark a step in the recovery of a private equity industry hit by the credit crunch and recession.

Other UK firms are also on the move. Princes, the UK’s leading canned fish brand, launched ‘Princes Tuna Bites’, a square shaped snack product that, once opened, can be stored in the refrigerator for a few days. As of the summer of 2009, Young’s Seafood widened its leadership in frozen sales with USD287 million in sales for the year finishing 16 May 2009. In that year, Young’s controlled 31.8 percent of the value of the frozen seafood market. In general, frozen seafood sales are expected to expand because frozen seafood is a good budget item in the midst of the recent emergence from the recession and frozen product innovation is improving the attractiveness of frozen products. Further, environmental advocates suggest that frozen seafood is far more environmentally friendly than fresh seafood, the latter of which has a large carbon footprint because it is flown, rather that sea freighted, to market.

In UK sustainability news, working closely with the World Wildlife Fund, Marks and Spencer (M&S) has vowed not to launch another product using fish from non-certified sources, citing the pledge as an opportunity to differentiate itself from other retailers. By 2012, all M&S retailed wild-caught fish will be Marine Stewardship Council certified, or if an MSC certified fishery is not in place, product will be sourced from fisheries that
have strict (though not yet detailed) sustainable practices. M&S will take a similar stance with farmed species once WWF’s Aquaculture Certification Council is up and running. Sainsbury’s has teamed up with the MSC on the ‘largest ever’ consumer awareness campaign promoting the eco-label, the aim of which is to increase understanding of sustainable fishing among UK consumers.

Sustainability efforts have earned some UK retailers international recognition. Britain’s The Co-operative, the country’s fifth largest food retailer, was awarded the 2010 Seafood Champion Award at the Boston Seafood Show in recognition of its initiatives to source sustainable seafood. The Co-operative was also ranked the number one sustainable seafood retailer in the UK by the Marine Conservation Society. Despite these advances, UK industry body Seafish suggests that UK retailers’ knowledge of sustainable seafood issues remains shallow and that sustainability initiatives are being led by executives that lack experience with seafood. To address these problems, Seafish released a three year plan to work with suppliers and retailers to improve access to knowledge and information about sustainability issues.

In other UK seafood news, sandwich and take-away food chain Pret a Manager admitted that despite claims that its sushi fish were delivered ‘spankingly fresh’ daily, its salmon was frozen and farmed in Chile. Though the firm broke no regulations, the misinformation provoked advocacy groups to call for clearer labeling laws. In terms of public regulation, the UK Food Standards Agency guidelines set out ambitious targets for canned seafood salt reduction by 2012. The new standards are aimed at a large open category of canned fish that includes sardines, mackerel, pilchards in brine and oil, and canned fish with sauces. Standards also reach shellfish such as prawns, crab and mussels.
TUNA PRICE TRENDS

Bangkok canning-grade prices to March 2010

Japan frozen sashimi prices (ex-vessel, Japanese ports) to April 2010
Japan fresh sashimi prices (origin Oceania) to March 2010

US imported fresh sashimi prices to February 2010
Gasoil, canning-grade frozen skipjack (SKJ) and fresh sashimi yellowfin (YFT) price index to March 2010

Coming in the next issue (May 2010, Vol. 3: Issue 5)

- Update on seafood industry in Spain
- Labour standards, US trade agreements and the fishing sector
- Update on fisheries eco-labels
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Some of the analysis and observations in this article stem from the author’s direct experience in MSC certification of the Pacific Tuna Fisheries.


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