



FISHERIES REGULATION

EU anti-IUU measures: Sri Lanka 'red carded' and new reports on regulatory effectiveness

On 14 October, the EU announced developments in the application of its IUU regulation. While several countries graduated out of 'yellow card' status (including Fiji and Vanuatu) and for others such as Ghana and South Korea the Commission has extended 'cooperation' until 2015, Sri Lanka has received a 'red card' – the highest sanction under the regulation. The bases for the ban include implementation weakness of control measures, insufficient deterrents for the Sri Lankan high seas fleet (which includes tuna longliners), and a lack of compliance with regional and international fisheries rules. As a result, the Commission will introduce a ban on the EU import of fish products caught by Sri Lankan vessels. This will be introduced in mid-January 2015 'to avoid disrupting ongoing commercial contracts'.²

This ban will seriously hurt the Sri Lankan tuna industry, which already temporarily lost duty free market access under the EU GSP+ in 2010 because of human rights abuses.³ But it also provides an opportunity for competing exporters, especially of fresh chilled, yellowfin loins and frozen tuna steaks for which Sri Lanka is the EU's leading supplier.⁴ EU buyers are expected to be frantically searching for new sources of supply, but the ban may only be short-term. For example, the import ban on fish caught by vessels from Belize imposed in March 2014 will be lifted in March 2015.

This action demonstrates once again that the EU IUU regulation has 'teeth' and that the Commission remains committed to fight IUU fishing. There are however, questions about the evenness of the application of the Regulation.⁵ Larger developing states with expansive distant water fleets suspected of engaging in IUU fishing do not seem to appear on the European Commission's radar, at least not publicly. This may in part be because of the technical difficulties and resource constraints of monitoring extremely complex supply chains (see below). Similarly, some countries where the EU distant water fleet is especially active have frequent reports of IUU fishing but have not been 'yellow carded' - at least not yet.

For its part, DG MARE published a review of state of play of the IUU Regulation in April.⁶ The consultants investigated a very wide range of aspects of the Regulation's implementation. Of particular interest to exporters is the finding that the highest number of refusals of import (i.e. sanctions) was reported by the UK, Spain, France and Poland. The main reasons for refusal were the lack of or an invalidated catch certificate or the identification of incorrect species.

Another review, commissioned by the Stop Illegal Fishing Program in 2013, examined the particular case of implementation of the EU IUU Regulation by China and Russia.⁷ It found areas of potential abuse such as chain of custody gaps, the splitting of consignments and batch integrity, where processors could launder IUU fish with that exported under legitimate catch certificates. The key policy point for PICs is that the implementation of the IUU Regulation may be more likely to target smaller, simpler supply chains compared to larger, complex ones involving a greater number of linkages.

Obama compromises on US Pacific Marine National Monuments

As reported in *FFA Trade and Industry News* in May/June and July/August 2014, President Obama proposed an expansion of the Remote Pacific Islands National Marine Monument in June which would close seven US Pacific Island territories and atolls to commercial tuna fishing.

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In response to strong appeals against the expansion from the US purse seine and longline fishing industries, Western Pacific Regional Fishery Management Council, the Governments of American Samoa, Guam and Northern Marianas, and marine science experts, amongst others, President Obama presented a compromise in an announcement on 25 September. The Pacific Remote Islands Marine National Monument expansion will include the waters and submerged lands of three areas covering 308,316 square nautical miles – Jarvis Island, Wake Island and Johnston Atoll – instead of the seven territories and atolls originally proposed, covering 782,000 square miles. Palmyra Atoll, Kingman Reef and Howland and Baker Islands will continue to remain open to commercial fishing.⁸

This announcement has bought partial relief to the Governments of Pacific Island territories, particularly American Samoa, as well as American Samoa based US purse seiners and the Samoa Tuna Processors and Starkist canneries who had protested at lost fishing grounds. While the US purse seine vessels will lose access to Jarvis Islands where they have fished in the past, Howland and Baker have been the most important fishing areas to date and remain open.⁹

TUNA ACCESS ARRANGEMENTS

PNG tightens fishing access arrangements to stimulate onshore development¹⁰

In a public notice on 3 October, PNG's National Fisheries Authority (NFA) announced changes to its fisheries access arrangements which are designed to strengthen its fisheries management system and generate significantly higher economic returns from domestic fishing and processing developments. The primary impetus over the past 15-20 years for the development of PNG's domestic tuna fishing and processing industries has been generous fishing access arrangements in the form of heavily discounted licences as well as favourable duty and tax exemptions. However, the level of legitimate domestic development has not been commensurate with that expected. This is a result of the fishing opportunities exceeding the processing capacity of the plants, plants not reaching agreed processing capacities and the associated fishing vessels exporting large volumes of unprocessed catches from PNG waters elsewhere.

Effective 1 January 2015, PNG's new National Tuna Fisheries Management and Development Plan (NTFMDP) will come into effect which confirms fishing effort limits in PNG's EEZ under the VDS, as well as imposing new reduced effort limits in archipelagic waters (AW). These limits will apply to all vessels licenced to fish in PNG's waters, with fishing days allocated giving first priority to domestic processors with legitimate onshore investments. Second priority will be given to vessels offloading domestically to local processing plants. Third priority will be given to domestic and/or FSMA vessels transshipping catches in the port of a PNA party. Any remaining days will then be sold to distant water fishing fleets under bilateral arrangements. It is anticipated that days available for foreign vessels in PNG's EEZ may be reduced to half of current levels, given foreign vessels will no longer be able to fish in AW and vessels associated with new onshore processing facilities will require EEZ access.

To date, domestic and some locally based foreign vessels have had fishing access within PNG's AW limited only by licence numbers. The new NTFMDP establishes compatible measures for both the EEZ and AW and sets a limit of 5,500 fishing days in AW for 2015, which is in line with 2010 effort levels. These 5,500 days will be allocated to vessels linked to onshore processing facilities based on actual tonnages

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processed, rather than proposed processing capacity or an agreed number of fishing vessels associated with the plant. The domestic industry will also have priority access in the EEZ, with a further 5,500 days available, however, these days will be priced higher than AW days. Concessional access fees enjoyed by PNG's domestic and locally based foreign vessels will continue to be offered for one more year in 2015. To justify concessions beyond 2015, fishing and processing operations will need to increase catch volumes processed locally and comply with other obligations (e.g. employment generation, community development projects, etc.).

In addition to enhanced conservation and greater domestic development, the changes implemented through the new NTFMDP will help to strengthen PNG's case in addressing EU's concerns about PNG being a potentially non-cooperating third party under the EU IUU regulation and help to avoid being issued a 'red-card'.

Agreement on US Treaty reached; FFA clarifies Kiribati's move

After a long and tumultuous renegotiation process, the US government and its tuna industry has agreed to pay a combined US\$90 million for access to Pacific Islands Nations' waters. The sum, which includes \$21 million paid by the US Government, will grant US vessels 8,300 fishing days in 2015. Three hundred days will be provided for fishing in the Kiribati EEZ, 4,964 days from other VDS participating Pacific Island EEZs (that can be fished in the EEZ of any Palau Arrangement member except Kiribati), 300 days in non-PA EEZs, and 2,737 pooled days that can be fished in the EEZs of the PA countries other than Kiribati and Palau. Additional days in any EEZ are subject to availability and will be sold at a negotiated rate.

FFA Director General, James Movick, has cited the terms of the agreement as a victory for PICs, pointing out the dramatic increase in the value of the Treaty over the past rounds of renegotiation. In 2009, the Treaty was valued at US\$21 million. In 2011, this figure jumped to US\$42 million, and to US\$63 million in 2012.¹¹ Movick attributed these increases to the collective bargaining of the Island States and to the Vessel Day Scheme. The dramatic increase for this round of negotiations is further notable because skipjack prices plummeted to US\$1,350 by the end of September and have since dropped further.¹²

Despite the 2015 agreement, the future of the Treaty remains uncertain. Several issues are in play. For example, the Treaty has always had a benefits sharing component in which all Pacific Island FFA members, including those with little tuna catch, are financial beneficiaries. Those countries with very tuna rich waters perceive that they are forgoing income to support this arrangement. Further, in recent years, incorporating the structure of the VDS into the Treaty deal, and broader debates over allocation of days and revenue have proven increasingly time consuming and complex.

Illustrating these challenges, in Treaty negotiations, Kiribati allocated only 300 fishing days to the 40 vessels associated with the Treaty, only around 10% of the allocation that had been expected. (In earlier rounds of negotiations Kiribati suggested that it would walk away entirely from the Treaty in favour of a bilateral approach to access.¹³) Reportedly, Kiribati is instead in bilateral talks with Japan, South Korea and the EU to sell its fishing days and is willing to negotiate bilaterally with the US for additional days.¹⁴ FFA Deputy Director Wez Norris emphasised that the new Treaty terms are evidence of a strong balance between national sovereignty and regional cooperation: the rest of the Pacific Island Parties accepted Kiribati's decision and used the negotiating session to identify and provide a valuable offer to the US.

PNG's new National Tuna Fisheries Management and Development Plan will help to address issues resulting in a 'yellow card' warning from the EU

The new US Treaty deal is valued at US\$ 90 million, a marked increase from US\$ 21 million in 2009



'The ability to work together to deliver this package reflects the strength of regional collaboration and solidarity that has been the basis of Pacific fisheries management and development for the last 35+ years and bodes well for the future', he said.¹⁵

This move has sparked broader discussions about the forms that the Treaty, or relationships with US fishing vessels, will take in the future. Chief Executive of the PNA, Dr. Transform Aqorau has indicated that the dynamics of access negotiations in the Pacific are changing, and that as the VDS has pushed prices up, Pacific Island countries will be interested in making arrangements more flexible than what is offered by the US Treaty.¹⁶ One such example is a recent move by the Cook Islands to sell days to US fleet vessels bilaterally. Movick also has indicated that the international negotiations associated with the Treaty have stressed regional cooperative mechanisms and relationships and has pointed to the potential to consider different approaches to the Treaty.¹⁷

It is not clear what new form such a deal with the US could take, not least because the US Treaty is more than a fisheries access agreement. It has been a major diplomatic tool between the US and the Pacific Island governments, and the primary form of cooperation between the two regions since the 1980s. The secure access that it offers has also been important in the rebuilding of the US fleet.

FISHERIES DEVELOPMENT

MSC revises standards, adds labour component

In October, the Marine Stewardship Council launched updates to its sustainable fishing standards. The revisions were developed over two years and through consultation with fishing industry experts, scientists, NGOs and other partners.¹⁸ Any new fishery assessment will have to be assessed against the updated standard after 1 April 2015. Fisheries already certified will have to apply their updated standards at the first re-assessment after 1 October 2017. The updated standard includes several key additions and changes, including:

- Special considerations and new safeguard for the protection of Vulnerable Marine Ecosystems such as coral gardens, sponge grounds, seagrass beds, biogenic reefs and sea mounts;
- Bycatch mitigation designed to eliminate the risk of fisheries generating cumulative negative impacts;
- Strengthened requirements to ensure no shark finning in MSC fisheries;
- A new risk-based framework assessment method for habitats in data limited fisheries;
- Revised surveillance audit and re-assessment requirements aimed at minimizing assessment costs for clients;
- Establishment of an Independent Peer Review College to improve the standardisation and effectiveness of the peer review process;
- New forced labour prohibition: companies successfully prosecuted for forced labour violations will be ineligible for MSC certification.

*The Treaty's
future is
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because of
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changes in
access dynamics*



Of these, the forced labour provision has drawn attention in part because of the very contentious recent reports of slave and forced labour in fisheries that have been reported on in previous issues of *FFA Trade and Industry News*.¹⁹ The MSC standard still does not include a requirement for any assessment of social and employment conditions of fisheries and their supply chains. Rather than incorporate social assessments explicitly into its standard, MSC indicated that it will engage with other standard setting organisations wishing to develop social standards for fisheries and seafood supply chains.²⁰ In its own standard, it will ban firms that have been 'successfully prosecuted for forced labour violations'. MSC defines forced labour as all work or service which is exacted from any person under the menace of any penalty and for which the said person has not offered himself voluntarily. This is in accordance with the Forced Labour Convention (1930) of the International Labor Organisation, which includes all unethical labour practices recognised as forced labor, including debt bondage, trafficking and other forms of modern slavery.²¹

WWF – the NGO that originally co-sponsored the formation of the now-independent MSC – publically announced its support for the updates. According to Marcho Lanertinit, the Director General of WWF International, 'We are delighted that the new MSC standard meets WWF's sustainability criteria and we strongly stand behind it.' Though the organisation has been a champion for market based approaches to environmental improvement, in its statement it emphasised that commitments and actions by industry and consumer pressure alone are not sufficient to deliver healthy oceans, pointing to governments and fisheries management organisations to raise their game.²²

Fisheries as 'investable proposition' or corporate 'ocean grabbing'?

There is increasingly polarised debate over whether profit-seeking private investors can solve the global fisheries crisis or if this is part of a corporate 'ocean grab' that rides over the interests of coastal communities. The last issue of *FFA Trade and Industry News* covered in some detail the proposals of the pro-private investor argument,²³ which is being promoted by a powerful coalition of interests. Less well heard are the voices of the critics.

The claim that sustainable fisheries can be promoted by making them 'investable propositions' is being pushed across a plethora of initiatives, teaming up influential NGOs such as WWF, The Nature Conservancy and Environmental Justice Foundation, with agencies including the World Bank and The Prince of Wales' International Sustainability Unit, and private philanthropic foundations (including one established by the family behind Wal-Mart).²⁴ They claim that if property rights in the oceans are secured then the 'tragedy of the commons' can be overcome because withholding fishing today is an investment that can only pay off if the fisher has some form of right that excludes others and is related to future fishing effort (e.g. an individual transferable quota or ITQ). This well-known argument is being promoted in the public sphere as never before – spurred in part by the World Bank's estimate that US\$ 50 billion in fisheries rent is lost every year to poor management.²⁵ The claim is that the initial costs of transitioning to secure tenure and well managed stocks will be 'offset by the profits that are generated through more efficient and productive fisheries with higher harvests and lower costs'.²⁶ The primary focal point is financial capital – both traditional and 'responsible' investors – and several packages are suggested such as aggregating bonded projects to allow the debt to be securitised.

Countering this perspective is a series of organisations that represent the perspective

**Companies
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**Debate
polarises on
property rights
and investment
in fisheries**



of small scale fishers and their communities, including the World Forum of Fisher Peoples, the International Collective in Support of Fishworkers, and the Brussels-based Coalition for Fair Fisheries Arrangements (CFFA). They are not opposed to catch shares or effort allotments per se, but argue that the privatisation of tenure (e.g. ITQs) has resulted in the concentration of ownership of resource access rights. So while there *may* be increased profit from fisheries as the pro-investment argument claims, this is often captured by a tiny number of interests who often have no connection to the fishing community.²⁷ Seth Macinko summarised a major concern in a recent *Marine Policy* article: 'The movement to privatize what is currently a public asset—not the fish, but the right of fishing and the fishery—usually engenders concerns for the distributional effects of such a policy shift.'²⁸ It is precisely the question of distribution that the pro-investors seem to ignore. In a blog for the CFFA, André Standing argues that their approach 'can drive inequalities and create the classic *winner takes all* scenario'.²⁹

Pacific Island members of FFA have tended to take a cautious approach to any system that threatens to remove the ownership of property rights in the tuna fishery from the government – their emphasis has been on securing national rights in an international fishery. However, there is recognition of the advantages of providing rights to the private sector in order to secure investment, and an understanding that these may require longer duration and greater flexibility than annual access arrangements. Members will no doubt follow this ongoing debate with interest.

FISHERIES MANAGEMENT

Outcomes from WCPFC's Tenth Technical and Compliance Committee Meeting³⁰

The WCPFC's Tenth Technical and Compliance Committee (TCC10) meeting was held in Pohnpei, Federated States of Micronesia on 25-30 September. During a three day closed session, TCC10 assessed Commission Members', Cooperating Non-Members' and Participating Territories' (CCMs) implementation of and compliance with WCPFC's Conservation and Management Measures (CMM) and other obligations for 2013. The outcomes of this process will be presented to WCPFC11 as a preliminary Compliance Monitoring Report. This was the fourth year of implementation of WCPFC's Compliance Monitoring Scheme under which the compliance review is conducted on an obligation by obligation basis for each CCM. CCMs are currently required to comply with over 130 obligations which makes this a somewhat complicated and time consuming process.

Continual improvements are being made to the scheme – for the 2013 review a 'priority non-compliant' rating category was introduced for CCMs who have failed to comply with an obligation for two or more years. CCMs now have until 1 November to address their respective non-compliance ratings. The Compliance Monitoring Scheme is yet to specify punitive responses to cases of non-compliance, but TCC is expected to commence work on this soon.

One of the key concerns raised by FFA members during TCC10 was continued failure of South Korea, Japan, Taiwan and China to provide operational level data, which compromises the ability of the Commission to carry out its compliance functions, as well as reducing the robustness of stock assessments. FFA members will submit a new CMM proposal to WCPFC11 which is intended to establish a clearer legal basis for operational data provision to address domestic legal constraints cited by these members, and introduce penalties for non-provision of data.

*Small
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from private
investment*

*TCC10 reviewed
WCPFC
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compliance
with over 130
conservation
and
management
obligations*



In light of ongoing compliance issues with entry/exit and catch reporting for vessels operating in the EHSP SMA, Cook Islands introduced proposed amendments to CMM 2010-02 including strengthened reporting and VMS requirements, prohibition of transshipment activities and the introduction of penalties for non-compliance. Despite this being a compromise position on Cook Islands' part, who tabled a proposal at WCPFC10 to completely ban fishing in the EHSP, TCC10 was not ready to adopt this proposal for recommendation to WCPFC11. Cook Islands indicated that FFA Fisheries Ministers have agreed to implement the EHSP closure through the Harmonised Minimum Terms and Conditions of licencing and FFA members will then push for compatible measures at WCPFC.

FFA members signalled an intention to submit a new proposal to WCPFC11 for South Pacific albacore. The new proposed CMM will set overall catch limits for EEZs and high seas, as well as introduce transitional arrangements for restructuring the fleet to make way for further development of Pacific Island fleets. Irrespective of whether the proposal is adopted by WCPFC11, FFA members will proceed with applying zone-based limits within their EEZs under the Tokelau Arrangement which is currently being developed for implementation in 2015.

A number of outstanding issues on the existing CMM for skipjack, bigeye and yellowfin (CMM 2013-01) were highlighted during TCC10 for consideration at WCPFC11. At WCPFC10, purse seine EEZ FAD measures were only agreed for 2014. Additional EEZ FAD measures beyond the agreed fourth month FAD closure for 2015-2017 are contingent upon the disproportionate conservation burden to small island developing states being addressed. A one-day workshop will be held prior to WCPFC11 to attempt to progress the issue of disproportionate burden more generally. CMM 2013-01 also establishes capacity limits for developed members' purse seine (and longline) fleets and tasks non-SIDS (developed) CCMs to jointly develop a scheme to reduce the capacity of large-scale purse seine vessels to the 2012 level for submission to WCPFC11. However, developed members are yet to propose options. PNA members indicated that they plan to submit a revised tropical tuna measure which includes a ban on at-sea transshipment of longline-caught frozen bigeye, a ban on manual reporting for longliners, reduced bigeye allocations for CCMs not submitting operational-level data, a ban on tender vessel use and pre-dawn net sets during the FAD closure, and registration and tracking of FADs. PNA members are also considering applying charges for FAD use as a means of addressing the disproportionate conservation burden. PNA (and Tokelau) will also propose a new CMM to establish a target reference point for skipjack (at 50% of unfished spawning biomass) which compliments a proposal from Australia to develop a harvest strategy for key tuna species.

Attention turns to electronic reporting and monitoring in the WCPO

Both government agencies and firms are looking for effective ways to improve catch reporting and monitoring through the use of new technologies, and was the focus of discussions in a WCPFC workshop on e-monitoring and e-reporting held in March this year. FFA members are keen to see the development of standards, specifications and procedures for the use of electronic technologies in WCPFC managed fisheries as discussed at TCC10. Key challenges highlighted include costs of installation, management and technologies, as well as the logistics of data transmission, storage and the need for capacity building and training to facilitate the use of technologies and data analysis.³¹

Attention is turning to this topic as national and regional organisations in the tuna

FFA members will propose a new measure establishing catch limits within EEZs and high seas for South Pacific albacore

Unless the disproportionate conservation burden to SIDS is addressed, additional EEZ FAD measures for 2015-2017 will not come into effect



industry are increasing mandates on reporting and observer coverage, and industry are interested in ensuring – and demonstrating – traceability and promoting and verifying ‘sustainable’ fishing practices. With respect to monitoring, historically, observers have been the primary way to achieve these objectives. A joint pilot project initiated by Tri Marine, NFD, Yi Man Fishing Company, Solomon Islands’ MFMR, FFA and SPC has sought to test early application of e-monitoring in the longline sector. In the WCPO, several difficulties have arisen for observer programmes in the longline sector, which has over 3,000 registered vessels in the region. Currently, the WCPFC requires five percent observer coverage onboard longline vessels operating in the region, but limited space onboard smaller vessels, logistics, and high costs have limited coverage to around two percent. The pilot project tested an on-board SATLINK electronic video based monitoring technology as an innovation in observer coverage. Following four tests, the collaborators reported on their findings at recent WCPFC meetings.³²

To conduct the tests, video ‘e-monitoring’ systems with high-definition video cameras, GPS and a central computer to report all events and footage were installed onboard vessels. Experienced longline fisheries observers were recruited to analyse data collected by video. These so-called ‘dry observers’ recorded all aspects of fishing activity, including identifying fishing locations, catch composition and the fate of bycatch taken. Independent fisheries observers were also assigned to each vessel to carry out the regular tasks of observing and recording catch on board for comparative purposes.

The test ran from March – October 2014 on two freezer longline vessels fishing for about 80 days in Solomon Islands waters. While both on-board and dry-observers have their strengths and weakness, preliminary data analysis from the trials revealed that the dry-observer can observe a high number of sets and with very similar accuracy to that of the on-board observer. The study emphasised the importance of having experienced and well trained observers for both the dry and wet portions of the project. Notably, from a labour perspective, dry observers would be able to avoid time away from home, and also observe sets in a shorter amount of time than if they were on board because of the ability to work with the video. These changes could also save costs in terms of travel and lodging for observers, though it is not clear if these would offset the costs of the new technologies needed to support e-monitoring. A more comprehensive assessment of the comparative data and the strengths and weakness of each approach will be undertaken and results presented in the coming months. In the early phase of assessment, there are indications that e-monitoring can be effectively applied to monitoring the operations of tuna longline vessels operating in the WCPO.

TUNA MARKETS

French canned tuna sales are strong but brands in the public spotlight

France closely follows the UK’s lead as the EU’s principal import market for canned tuna in the EU. There is however, considerably less attention paid to market dynamics in English-language media. Despite this, canned seafood is extremely popular with 9 of 10 French households buying it, 53 percent of which is tuna valued at €558 million in 2012.³³ The canned seafood market has grown by five percent over the last five years which may contribute to explaining Princes’ (owned by Mitsubishi) sudden move to take on the two leading brands Petit Navire (Thai Union) and Saupiquet (Bolton Group), which respectively have a 27.8 and 14.4 percent market share.³⁴

WCPO groups are turning attention to electronic reporting and monitoring technologies

Pilot study finds e-monitoring likely to be a viable technology in tuna longline vessels

Will Princes shake up competitive dynamics in France’s canned tuna market?



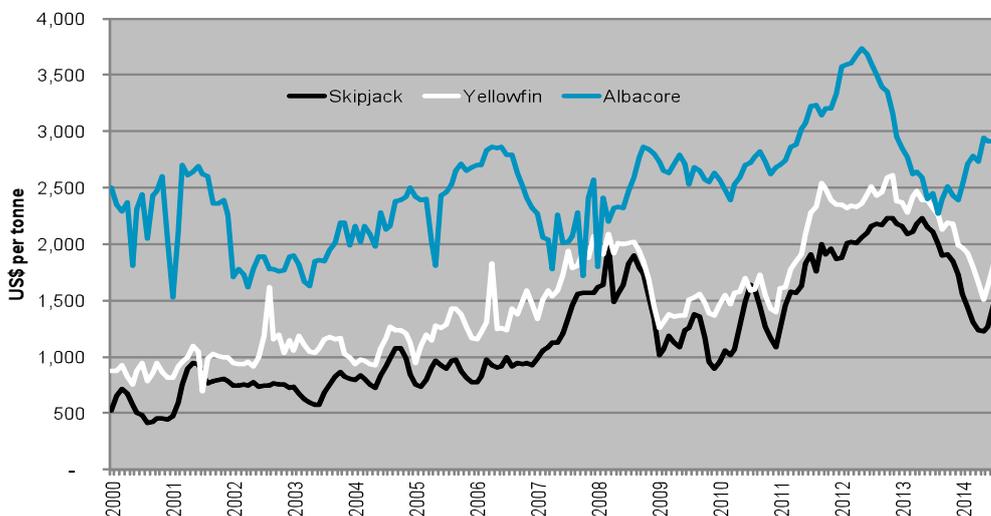
Greenpeace identifies top French brands as poor players in canned tuna sustainability ranking

Given that the remainder of sales are largely private label product (except for a few high quality, small volume brands), supermarket buyers may be tempted to delist one of the big players to stick with the French and UK canned food retail model of working with two main brands – a category leader and a follower. What is sure is that Princes' promotional offers will sharpen competition in a market that has not seen a major new entrant for decades.

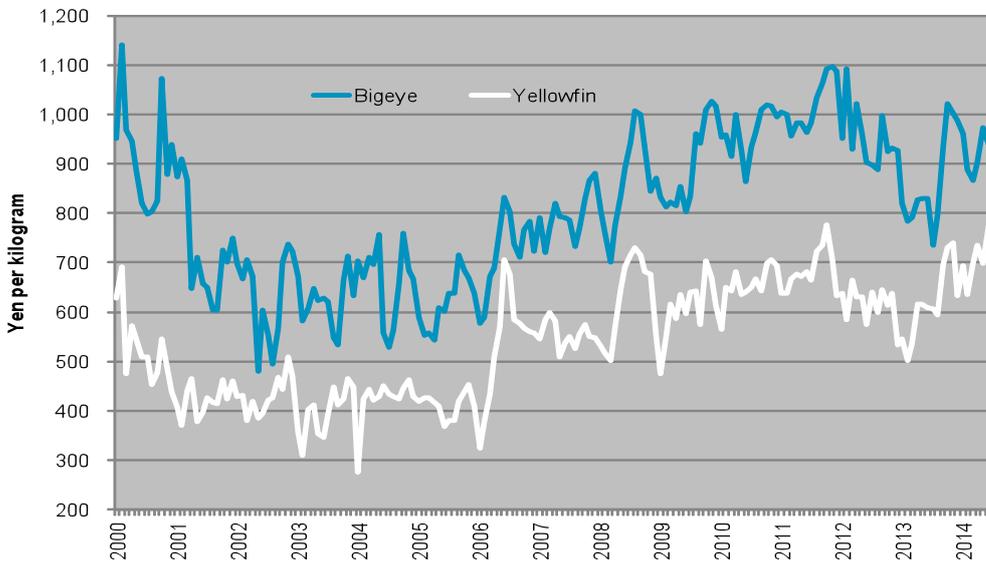
In this context, the negative publicity generated by Greenpeace's very low ranking of both Petit Navire and Saupiquet in September, will not be welcomed. Thai Union/MW Brands responded that 35 percent of its supply is caught using pole-and-line or FAD-free fisheries, precisely the techniques that the environmental NGO advocates. But Greenpeace responded that there is an insufficient traceability system for FAD-caught and non-FAD caught onboard purse seiners.³⁵ This follows on the heels of a French consumer rights group which found that all French seafood brands need to improve traceability in their supply chains.³⁶ In general, while French consumers are very conscious of the health benefits (and risks) of food, they have been less driven by seafood sustainability concerns. Nonetheless, it is too early to tell whether Greenpeace's canned tuna ranking campaign will have as much of an effect on buying practices in France as it has in the UK.

TUNA PRICE TRENDS³⁷

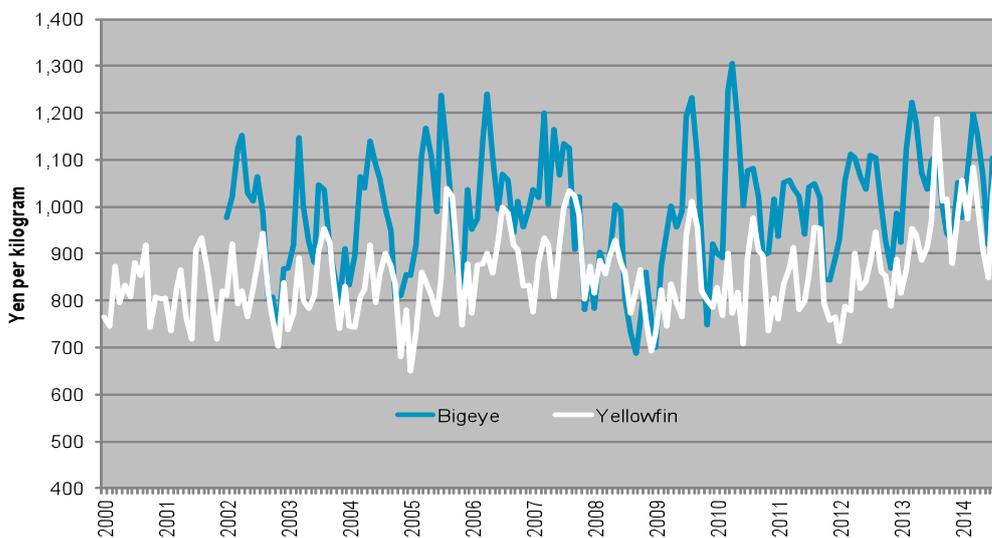
Bangkok canning-grade prices to August 2014³⁸



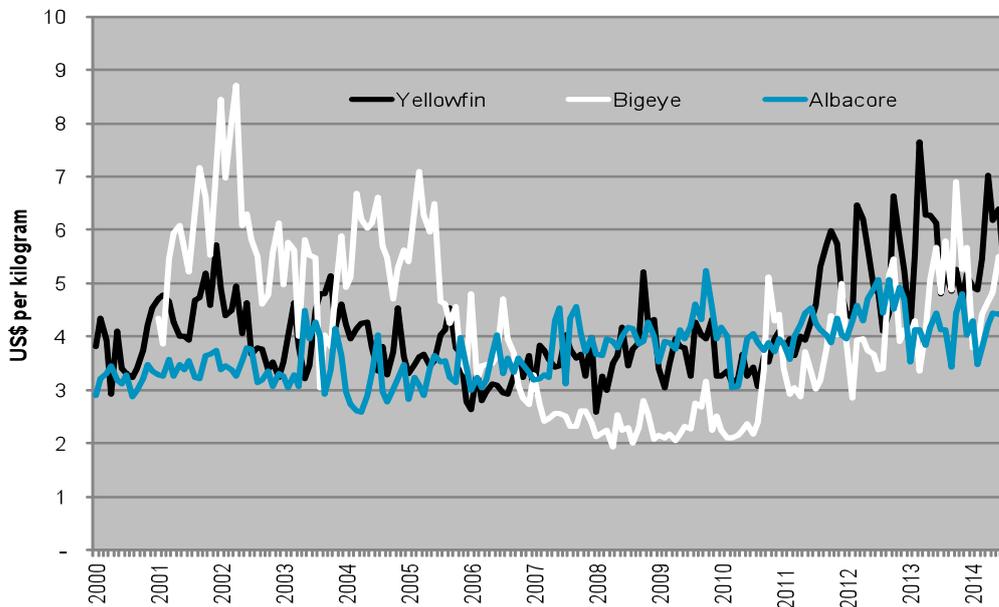
Japan frozen sashimi prices (ex-vessel, Japanese ports) to July 2014³⁹



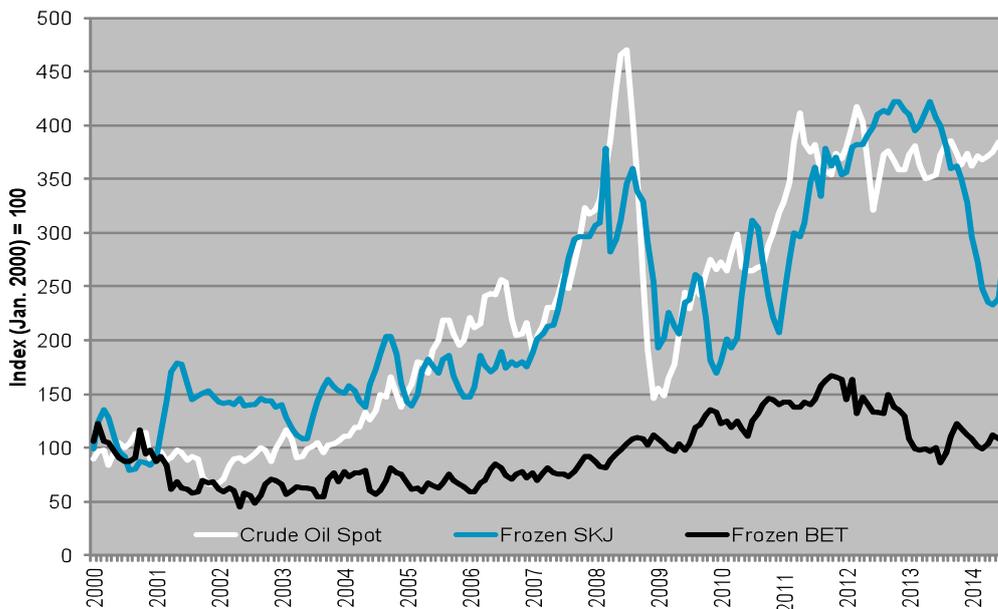
Japan fresh sashimi prices (origin Oceania) to August 2014⁴⁰



US imported fresh sashimi prices to July 2014⁴¹



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to July 2014⁴²





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² European Commission press release, 'Illegal fisheries: green cards for five countries, but red card for Sri Lanka', Brussels, 14 October 2014. Available at: http://europa.eu/rapid/press-release_IP-14-1132_en.htm

³ Hampson, Françoise, Leif Sevón and Roman Wieruszewski 2009, The Implementation of certain Human Rights Conventions in Sri Lanka, Final Report, 30 September. Prepared for the European Commission; EC 2010, Press release: EU temporarily withdraws GSP+ trade benefits from Sri Lanka Brussels, 15 February 2010.

⁴ Campling, Liam with Amanda Hamilton and Mike Batty 2008, 'An Assessment of the Potential Benefits to PACP States of a Revision of the Rules of Origin for Fisheries Products of HS Chapters 0304 and 0305'. Report Prepared for the Pacific Islands Forum Secretariat; Gillett, Robert and Garry Preston 2012, 'Feasibility Assessment of Exporting Products of HS Headings 0304/ 0305 to the European Union'. Report Prepared for the Pacific Islands Forum Secretariat (February).

⁵ 'EU Selectivity On IUU Tuna: A Trade Barrier', Atuna, 6 October 2014.

⁶ MRAG et al. 2014, Study on the State of Play Regarding Application and Implementation of Council Regulation (EC) No 1005/2008 of 29 September 2008, Establishing a Community System to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing (IUU Regulation) Specific Contract No. 3. Lot 2: Retrospective and prospective evaluation on the common fisheries policy, excluding its international dimension. DG MARE, European Commission. April. Available at: http://ec.europa.eu/fisheries/documentation/studies/iuu-regulation-application/doc/final-report_en.pdf

⁷ Shelley Clarke and Gilles Hosch 2013, Traceability, legal provenance and the EU IUU Regulation: Russian whitefish and salmon imported into the EU from Russia via China, Stop Illegal Fishing Program. Available at: http://sasama.info/en/pdf/reports_17.pdf

⁸ The White House 2014, Presidential Proclamation – Pacific Remote Islands Marine National Monument Expansion, 25 September 2014. Available at: <http://www.whitehouse.gov/the-press-office/2014/09/25/presidential-proclamation-pacific-remote-islands-marine-national-monument>

⁹ Fili Sagapolutele 2014, 'Mixed reactions to revised Monument expansion', Samoa News, 26 September 2014. Available at: <http://www.samoanews.com>

¹⁰ Post Courier 2014, Public Notice, National Fisheries Authority, 3 October 2014; author's own analysis.

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