



FISHERIES TRADE

Solomon Islands and Kiribati switch diplomatic recognition to China

As reported in a recent issue of *FFA Trade and Industry News*, China has been using international aid to court several Pacific Island Countries to sign on to its 'Belt and Road Initiative' and to sever formal diplomatic relations with Taiwan in favour of diplomatic relations with China.² In September 2019, the Solomon Islands and days later, Kiribati, switched diplomatic recognition from Taiwan to the People's Republic of China, leaving only four PICs formally allied with Taiwan.

In announcing the decision, Solomon Islands Prime Minister Hon. Manasseh Sogavare expressed gratitude for 36 years of support that it has received via its diplomatic ties with Taiwan, but indicated that the country's future stability, well-being and economic opportunity will be best served through relations with China.³

The Solomon Island convened a bi-partisan taskforce to inform the decision. Results from the Taskforce study reportedly included concern that Taiwan could not offer sufficient assistance to support infrastructure development and economic growth. By contrast, China promises trade, aid and investment, including in infrastructure, as part of its broader Belt and Road Initiative and the ability to build on existing trade relationships. China is the Solomon Islands' largest trading partner.⁴ The Taskforce reportedly emphasised the need for strategic engagement and learning from other PICs that are already in diplomatic relations with China and also maintaining relations with Western countries.⁵ The Solomon Islands Government was critiqued for relying primarily on this study and not including all available evidence in its assessment, including, for instance, a report that was prepared by the Central Bank of Solomon Islands that suggested that the risks included unsustainable debt, depressed fiscal revenue and potential for the US to freeze access to foreign reserves held in the US.⁶

In advance of the decision, the US Government reportedly expressed support for aid and an Embassy in Honiara. However, following the announcement, the members of the US Government publicly opposed the switch and US Vice President Mike Pence declined a request from Sogavare to meet to discuss the cooperation.⁷

For Kiribati's part, it maintained diplomatic ties with China until 2003, when it first established relations with Taiwan. Media reports are primarily attentive to the potential for China to re-establish its Space Tracking, Telemetry and Control Station, from which China tracked many launches, including the mission that carried the first Chinese astronaut into space in 2003.⁸ However, it is worth noting that Chinese interests have expanded in Kiribati: in 2014, nine Chinese purse seiners were first chartered to Kiribati and roughly 15 vessels have been since that time.⁹ The US also expressed concern at Kiribati's decision to switch ties and reports suggest that the moves are indicative of China gaining ground in a broad geopolitical race in the Pacific against the US and other historical Pacific Island partners from the 'West'.¹⁰

US-China trade war, and uncertainty, drags on

October saw a pause on further tariff increases in the ongoing US-China trade war. As the two countries engaged in what they called 'Phase One' of negotiations to end the standoff, the US froze a planned five per cent tariff increase on USD 250 billion of Chinese goods that would have otherwise moved effective tariff rates from 25 to 30 per cent.¹¹ The pause applies to Chinese tuna exports to the US, which have been facing tariff hikes as a casualty in the trade war. News reports suggest that while this

CONTENTS

Fisheries Trade

Solomon Islands and Kiribati switch diplomatic recognition to China

US-China trade war, and uncertainty, drags on

US suspends GSP seafood tariff preferences for Thailand

Fisheries Regulation

UN negotiations on Areas Beyond National Jurisdiction

Cook Islands ratifies Cape Town Agreement on fishing vessel safety

Fisheries Management

TCC15 progresses review of WCPFC transshipment measure

New research quantifies beaching of drifting FADs in the Pacific Islands

Tuna Industry

Recent Pew report shines spotlight on transshipment; recommends greater scrutiny

Industry-led Seafood Task Force Code of Conduct and Vessel Auditable Standards gather steam

Tuna Price Trends

Solomon Islands and Kiribati have switched diplomatic recognition from Taiwan to the People's Republic of China

pause is good news for the US processors that rely on Chinese loins, the 25 per cent tariff remains in place and has led to declines in the import of those products.¹²

The agreement does not address a separate round of tariff increases scheduled to come into effect in mid-December on about US\$ 300 billion in imports from China; the 15 December round targets goods not previously covered by US duties, especially consumer technologies. US Census Bureau data shows that both countries have suffered economically as a result of the trade war with China's exports to the US falling 21.9 per cent and US exports to China falling 15.7 per cent year over year in comparing September 2019 and 2018.¹³

Vietnam appears to have taken advantage of the trade war, with its September exports to the US market growing 39 per cent year-on-year. Across the board, the first nine months of 2019 have proven beneficial for Vietnamese exports. Frozen skipjack and yellowfin increased 184 per cent, canned tuna 32 per cent, and frozen loins 51 per cent compared to the first nine months of 2018, though Vietnam has historically been a relatively small supplier in comparison to leading exporter, Thailand. By contrast, Vietnamese exports to the EU and ASEAN countries have been decreasing, perhaps showing the ability of Vietnamese producers and suppliers to shift markets to take advantage of policy changes.¹⁴ While the October meeting provided some prospects of progress, resolution remains elusive.

US suspends GSP seafood tariff preferences for Thailand

The United States has announced that effective 25 April 2020, duty-free tariff preferences for 573 Thai products under its Generalized System of Preferences (GSP) will be suspended due to Thailand's failure to adequately address labour abuse and trafficking in its seafood and shipping industries. The suspended trade preferences represent around a third of Thailand's GSP products sold to the US, reportedly worth USD 1.3 billion. A wide range of seafood products, as well as products such as fruits, vegetables, garments and electrical appliances will be subject to tariffs up to 4.5 per cent.¹⁵ However, Thai tuna exports to the US will remain unaffected. Only one tuna product is included in the suspended list, which covers frozen cooked loins over 6.8kg (HS 1604.14.50). In the past five years, there have been zero exports to the US under this product code (all Thai cooked loins exported to the US are less than 6.8kg and covered under HS 1604.14.40, totalling 12,000 mt in 2018).¹⁶

This suspension comes despite the Thailand Government's efforts in the past several years to address labour abuse and trafficking in seafood supply chains. In June 2018 the US upgraded Thailand's rating in its 'Trafficking in Persons Report' from a Tier 2 watchlist to a Tier 2 rating. The report indicated that the Thai Government is making significant efforts to eliminate trafficking and bring itself in compliance with the *US Trafficking Victims Protection Act 2000*.¹⁷ In 2018, Thailand became the first Asian country to ratify the International Labour Organization's *Protocol of 2014 to the Forced Labour Convention 1930 (P29)* and in 2019 ratified the ILO's *Work in Fishing Convention (C188)*. In January 2019, the EU removed Thailand's 'yellow card' warning under its IUU Fishing Regulation. The Thai Government has also resisted lobbying from the National Fishing Association to roll back IUU fishing and human rights abuse reforms.¹⁸ Thai Officials will appeal to the US Government to reconsider its decision and are also supporting affected exporters to develop alternative markets in the Middle East, Eastern Europe, Africa, China and India.¹⁹

While the US cites Thailand's failure to provide internationally recognised workers' rights, such as protections for freedom of association and collective bargaining,

The US 'paused' on a new tariff hike, but existing hikes remain in place including a 25 per cent tariff on frozen cooked tuna loins from China

Thai tuna exports to the US will not be affected by suspended trade preferences under the US-GSP scheme

some reports indicate the move may stem from concerns about the US' soaring trade deficit, as well as a recent ban by Thailand on US imports of agricultural feed additives and pesticides.²⁰

While initial estimates indicate a minimal impact on Thai exports to the US given the suspended GSP products represent only one-third of all GSP products and a fraction of total Thai exports to the US (USD 31.9 billion in 2018), there is a risk of this situation generating growing geopolitical tension between Thailand and the US in future.²¹ The US is reportedly Thailand's second-largest export market overall and has grown since the US-China trade war began. It is also Thailand's largest single market for canned tuna (around 20% of total volume exported in 2018).²² This situation also demonstrates growing political will of market states to implement measures against exporting states with labour abuse and/or trafficking issues in their supply chains.

FISHERIES REGULATION

UN negotiations on Biodiversity Beyond National Jurisdiction

Negotiations are ongoing on an international legally binding instrument under UNCLOS on the conservation and sustainable use of marine biological diversity of areas beyond national jurisdiction (ABNJ).²³ ABNJ refers to the high seas and 'the Area' of seabed outside of the continental shelf, representing around two-thirds of the world's oceans that are outside of the sovereign rights of states.²⁴

The United Nations General Assembly convened an intergovernmental conference to negotiate an agreement on Biodiversity Beyond National Jurisdiction (BBNJ) in December 2017 and the third session took place in 19-30 August 2019.²⁵ A draft text of an agreement was released in June 2019.²⁶ It contains large sections of text in square brackets, but the overarching focus is on the conservation and sustainable use of marine biological diversity in ABNJ, especially in relation to:

- marine genetic resources, including the sharing of benefits
- measures such as area-based management tools, including marine protected areas
- environmental impact assessments and
- capacity-building and the transfer of marine technology

Ecosystems in the high seas are estimated to contribute almost 50 percent of the global ocean's total biological productivity and are a major sink for carbon.²⁷

The Group of 77 developing nations want mineral resource in the Area reasserted as the common heritage of humankind and the creation of a mechanism to share profits from deepsea mining.²⁸ From a fisheries perspective, over USD 16 billion in gross landed value of fish are caught in the high seas annually. However, reported pressure by major distant water fishing nations meant that fisheries were excluded.²⁹ Indeed, the draft agreement barely mentions fisheries at all.

The Pacific small island developing states (SIDS) have zeroed in on a number of priorities in the negotiations, including the equitable sharing of benefits, the special circumstances of SIDS, the traditional knowledge of indigenous peoples and local communities, and the recognition of the 'cumulative impacts' of adverse effects such as climate change and ocean acidification.³⁰ Negotiations are due to complete in 2020.

The US' action against Thailand may stem in part from a recent ban by Thailand on US imports of agricultural feed additives and pesticides

BBNJ agreement due to complete in 2020 with limited fisheries coverage beyond MPAs

PICs push for equitable sharing of BBNJ benefits and recognition of SIDS and traditional knowledge

Cook Islands ratifies Cape Town Agreement on fishing vessel safety

The 2012 Cape Town Agreement on fishing vessel safety – an international treaty adopted by the International Maritime Organisation (IMO) – includes mandatory safety measures for fishing vessels of 24m in length and greater. It covers vessel attributes such as stability, seaworthiness, machinery and electrical installations, life-saving appliances, communications and equipment, fire protection and fishing vessel construction. It will require vessel operators to invest in the safety and welfare of their crews and comply with regular inspections. For entry into force, at least 22 states with an aggregate of 3,600 fishing vessels of 24m in length or more must agree to be legally bound by it. Until the Agreement comes into force, there are no mandatory global safety regulations for fishing vessels, unlike cargo and passenger ships which have been covered by international treaties for safety of life at sea and environmental protection for many decades.³¹

In a recent Ministerial Conference in Torramolinos, Spain, 48 states signed public declarations of intent to bring the Cape Town Agreement into force by the 10th anniversary of its adoption (11 October 2022).³² The Ministerial Conference, held by the International Maritime Organisation and in conjunction with Spain, the UN Food and Agriculture Organization, and The Pew Charitable Trusts, was devoted to fishing vessel safety and illegal, unreported and unregulated Fishing.

Cook Islands led the way in this reaffirmation by submitting its Instrument of Accession to the Cape Town Agreement.³³ Cook Islands Ministry of Marine Resources Secretary Pamela Maru said, “The ratification of the Cape Town Agreement is affirmation of our commitment to ensuring the working conditions aboard fishing vessels is consistent with international best practices, operating within and beyond the Cook Islands Exclusive Economic Zone.”³⁴ This move complements Cook Islands’ and other FFA countries’ leadership in developing legally binding rules around working conditions on board vessels, for example by including them in FFA Minimum Terms and Conditions of licensing.³⁵ It is notable, however, that the Cook Islands has only a small fleet with few vessels over 24m. As such, the ratification, while still important and symbolic, will only make a minor dent in meeting the 3,600 vessel requirement for entry into force.

With Cook Islands and Sao Tome and Principe both acceding during the recent Ministerial Conference, there are now a total of 13 ratifying countries to the Cape Town Agreement. They are: Belgium, Congo, Cook Islands, Denmark, France, Germany, Iceland, Netherlands, Norway, St. Kitts and Nevis, Sao Tome and Principe, South Africa and Spain.

FISHERIES MANAGEMENT

TCC15 progresses review of WCPFC transshipment measure

The Fifteenth Regular Session of the Western and Central Pacific Fisheries Commission’s Technical and Compliance Committee (TCC15) met in Pohnpei, Federated States of Micronesia from 25 September – 1 October 2019.

Amongst the WCPFC membership, opinions vary on whether or not high seas transshipment by longliners should be permitted. FFA members support a total ban on high seas transshipment, while other members with distant water fishing interests reject a ban in favour for well-regulated high seas transshipment (also see below for a story on Pew Charitable Trusts’ position on transshipment). Under the existing

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measure (CMM 2009-06), high seas transshipment from fishing vessels other than purse seiners is not permitted, unless a Commission Member, Cooperating Non-Member or Participating Territory (CCM) has determined that it is 'impracticable' for a vessel to tranship in port due to significant economic hardship or if significant and substantial changes are required to its historical mode of operation. Exemptions are supposed to be applied for annually by flag state authorities on a vessel-by-vessel basis, accompanied by a plan detailing steps to be taken to encourage transshipment to occur in port in the future. However, some CMMs are providing a blanket notification of 'impracticability' for their entire fleets, without submitting the required plan to encourage in-port transshipment.

Given divergent views on high seas transshipment and inconsistent application of the 'impracticability' exemption, WCPFC15 (December 2018) agreed to conduct a review in 2019 of the existing conservation and management measure for transshipment via an electronic intersessional working group (IWG) co-chaired by the Marshall Islands and the United States. During TCC15, the IWG finalized and adopted terms of reference for reviewing CMM 2009-06. During 2019-2021, the IWG's review will assess the measure's scope and effectiveness in regulating and monitoring transshipment activity in accordance with the WCPFC Convention. The IWG will then recommend amendments or other actions for improvement potentially including *inter alia* the modification of minimum data standards under the Regional Observer Program and CCM reporting obligations, strengthening data sharing arrangements between neighbouring RFMOs and relevant port states, exploring other means to monitor at-sea transshipments (e.g. AIS, VMS, observers and electronic monitoring) and identifying mechanisms for addressing unreported transshipment events. The IWG will provide progress reports to TCC16 (2020) and if needed, TCC17 (2021), as well as recommended amendments to CMM 2009-06.³⁶

To support the review, the WCPFC Secretariat presented to TCC15 an analysis of transshipment information since CMM 2009-06 entered into force to the end of 2018. The analysis indicates the number of reported high seas transshipment events (including transshipments in IATTC waters of fish caught in WCPO waters) has increased significantly – in 2011, there were 680 transshipment events reported compared with 1,409 in 2018 (107% increase). The number of offloading fishing vessels increased from 288 to 514 (78% increase) and the number of receiving vessels increased from 22 to 29 (32% increase). The total volume transhipped in high seas increased from 47,204 mt in 2010 to 79,979 mt in 2018 (70% increase). Previously bigeye was the dominant tuna species transhipped at sea, but over time the volumes of albacore and yellowfin transhipped have increased. In 2018, Taiwanese fishing vessels accounted for 55% of high seas transshipments and Chinese, 25%; the remaining 25% were conducted by Korea, Japan and Vanuatu-flag vessels. In 2018, receiving vessels (carriers) operated under Panama, Taiwan, Korea, China, Vanuatu and Liberia flags. The Secretariat reports the timeliness of submission of pre-notification transshipments reports and declarations has improved to around 80% coverage in recent years. Since 2010, the location of high seas transshipment has expanded from mostly the eastern High seas within 20°N to 20°S, to include western high seas areas and waters south of 20°S.³⁷

New research quantifies beaching of drifting FADs in the Pacific Islands

Since the early 1990s, man-made drifting fish aggregation devices (FADs) have been increasingly used by tropical tuna purse seine vessels fishing in the Western and Central Pacific Ocean (WCPO) to increase fishing efficiency. However, many

An intersessional working group has been established to review WCPFC's transshipment measure (CMM 2009-06) and make recommendations for improvements

The number of reported WCPO high seas transshipment events has more than doubled from 680 in 2010 to 1,409 in 2018

FADs become lost or are abandoned at sea, contributing to marine pollution and damaging coral reefs when they beach.

Researchers from the South Pacific Community's Oceanic Fisheries Program (SPC) and Australia's Centre of Excellence for Climate Extremes are the first to have quantified the environmental impacts and distribution of drifting FADs in the WCPO. Regional satellite FAD tracking and fishing data were used by the research team, together with numerical ocean models and simulations of virtual FADs. The study indicated that an estimated 30,000-65,000 man-made FADs are deployed every year in the WCPO. A significant number of FADs deployed in the Eastern Pacific Ocean under separate RFMO management by IATTC also drift westwards under the prevailing currents and are then fished on in the WCPO. The research indicates between 1,500-2,200 of FADs deployed annually in the WCPO become lost or abandoned and then wash up on beaches and coral reefs of Pacific Island countries. However, this estimate may be lower than actual beaching events as the tracking devices on many FADs are deliberately deactivated remotely by fishing companies as they drift outside of fishing zones.³⁸

The research indicates the highest levels of beaching of FADs occurs in the Solomon Islands and Papua New Guinea, due to prevailing westward oceanic circulation of currents. Kiribati also has a high number of FADs moving through its waters and washing up on shores, as fishing vessels deploy large number of FADs in and around these productive equatorial fishing grounds. Large numbers of FADs accumulate and beach in Tuvalu regardless of where they were deployed due to ocean current movements.

The research findings indicate that reducing beaching events through changing FAD deployment locations may be difficult. Hence, alternative management measures should be considered including limits on the number of FADs that can be deployed, use of biodegradable FADs and recovery programs for FADs which have drifted near sensitive areas.

Currently, WCPFC limits the number of active instrumented drifting FADs at 350 per vessel and applies annual seasonal FAD closure periods in EEZs and high seas. Drifting FADs deployed in, or that drift into the WCPFC Convention Area must comply with non-entangling design specifications; the use of natural or biodegradable materials is encouraged, while research is ongoing into the most suitable materials and best-price guidelines. From 1 January 2020, PNA will implement a Fourth Implementing Arrangement (4IA) relating to FAD tracking and buoy registration to help better understand fishing behaviour on FADs, how many FADs are deployed in WCPO waters and the impact of FAD fishing on tuna stocks and the ecosystem. The 4IA will be applicable to all purse seine vessels licenced to fish in PNA and Tokelau waters. PNA will seek to have compatible FAD tracking and registration measures adopted by WCPFC.³⁹

TUNA INDUSTRY

Recent Pew report shines spotlight on transshipment; recommends greater scrutiny

In September 2019, the Pew Charitable Trusts released their report, *Transshipment in the Western and Central Pacific; Greater Understanding and Transparency of Carrier Vessel Fleet Dynamics Would Help Reform Management*.⁴⁰ The report analysed the movements of carrier vessels operating in the Western and Central Pacific Fisheries

Of the 30,000-65,000 drifting FADs deployed annually in the WCPO, 1,500-2,200 wash up on beaches and coral reefs



Commission (WCPFC) Convention Area in 2016, utilizing commercially available automatic identification system (AIS) data combined with machine learning technology.

AIS is an automatic tracking system that uses transponders on ships that automatically transmit information on a ship's identity, type, position, course, speed, navigational status and other safety-related information by radio or satellite to shore stations and other ships. The system was designed as a method of collision avoidance and was mandated by the International Maritime Organisation to be placed on all vessels of 300 gross tons and over on international voyages, vessels of 500 gross tonnage and over not engaged on international voyages, and all passenger ships irrespective of size. The requirement has been effective for all ships since 31 December 2004.⁴¹

Machine learning is a subset of artificial intelligence (AI) that provides systems with the ability to automatically learn and improve from experience without having to be explicitly programmed. According to the report, the authors used the services of OceanMind, a not-for-profit organisation that was initially formed through the collaboration of Pew and a UK-based satellite applications technology organization. OceanMind applied machine learning to an AIS database that contained movements of identified carrier vessels in the WCPO during 2016, and certain assumptions regarding the practice of transshipment.

In an appendix describing the methodology used in the study, the authors detail the difficulties in identifying carrier vessels from within the WCPFC Record of Fishing Vessels, as well as other hurdles that had to be overcome and certain assumptions that had to be made in the analyses. Researchers compared their results with publicly available information on transshipments and carrier vessels. The conclusion is that the combined analysis of AIS data enhanced by machine learning and available reports to WCPFC suggests a strong probability exists that there were more transshipments at sea than were reported to WCPFC, either by the carrier vessels themselves or by their flag state authorities.

As set out in the report, the key findings are:

- At least 140 carrier vessels operated in a manner consistent with taking on tuna and other catch from fishing vessels either in port or at sea, but only 25 vessels reported high seas transshipment. Very little information is available on the remaining vessels' activities.
- A strong likelihood exists that more at sea transshipment events occurred in 2016 than were reported to the WCPFC.
- Unauthorized carrier vessels operated in WCPFC waters in 2016 and potentially carried out transshipments at sea that included the transfer of WCPFC-managed species.
- Data gaps, anomalies and non-standardised responses by WCPFC members in their reports on transshipments impede accurate auditing, increasing the risk that transshipments go unreported and unverified.
- The lack of transshipment data-sharing agreements between the WCPFC and other regional fisheries management organizations (RFMOs) on transshipments in overlapping waters increases the likelihood that unreported transshipments occur. These unreported activities may cause RFMOs to miscount species caught in waters they manage, making stock assessments inaccurate.

AIS was designed as a method of collision avoidance and has been required onboard ships

Pew study indicates strong probability that more transshipments were conducted at sea than reported to WCPFC

Many of the recommendations contained in the report are useful and could assist WCPFC in moving forward to better understand and monitor at sea transshipment. The recommendations contain suggestions for best practices for transshipment reporting, monitoring and information sharing.

The report acknowledges a lack of availability of important information that would have improved the results of the analysis. The results are thus often qualified by terms such as “strong likelihood”, “potentially”, and “may”. Use of these qualifiers is understandable, in some cases because little explanation of the fisheries that are served by carrier vessels in the WCPO are described. For example, the fishing activity or fleets that are served by the high concentration of carriers near Japan could not be identified.

It would also help to explain the practice of some countries registering all their carrier vessels with WCPFC to ensure authorization in situations where vessels might operate in support of the WCPO tuna fishery rather than their habitual operations in other oceans or fisheries. An explanation of the clearly separate operations of carriers conducting in-port transshipment of purse seine-caught fish vs. those supporting the distant water frozen tuna longline fishery with at sea transshipments would also be of use in describing carrier activity.

The final paragraph of the conclusions section rightfully points out that “the report represents just a starting point for making vessel operations in the Convention Area more transparent. With continued research, analysis, and action the WCPFC could become a model for effective transshipment management for other regions.”

Industry-led Seafood Task Force Code of Conduct and Vessel Auditable Standards gather steam

Recent years have seen growing attention on labour conditions in seafood value chains, prompting the development of regulatory tools and experiments to address these concerns and associated economic and reputational ramifications for the seafood industry. In addition to regulatory instruments, private firms have also begun to innovate approaches to managing this problem. One such significant industry-led initiative is the Seafood Task Force (STF).

The STF was initially formed in the aftermath of 2014 media exposés pointing to labour abuses in Thailand’s shrimp industry. In July 2014, Chareon Pokphand Foods (CPF) and Costco – both of which were implicated in the investigations – established the Shrimp Sustainable Supply Chain Task Force. In 2016, its name changed to the Seafood Task Force (STF) to reflect an expansion in membership and mandate. Today, it is an industry-led coalition of prominent retailers, processors, fishers, governments and NGOs working to eliminate forced labour and illegal, unreported and unregulated fisheries production in seafood value chains. Key STF members with tuna interests include *inter alia* Thai Union, Tri Marine, FCF, Starkist, Bumble Bee, ISSF and Kingfisher Holdings, as well as retail giants, Costco, Walmart and Aldi.⁴²

Most broadly, the STF aims to address human rights and human trafficking concerns in the fishing industry by focusing on traceability and supply chain oversight, which it defines as the action of overseeing something that includes supervision, surveillance, inspection, charge, care, government, direction and control. The SFT consciously links social and environmental issues, seeing them as closely linked.

Many recommendations in Pew’s report could enhance understanding of at sea transshipment

The Seafood Task Force is an industry-led group focusing on eliminating forced labour and IUU fishing in seafood value chains

There are two core instruments through which the Seafood Task Force’s work functions: The Code of Conduct and associated Vessel Auditable Standards. In developing this work programme, the Seafood Task Force has drawn upon the principles of ILO 188 and existing MSC and International Seafood Sustainability Foundation’s traceability practices.⁴³ The group also relies on an External Stakeholder Advisory Group for verification and validation.

Member companies have adopted these procedures and are developing mechanisms to come into compliance with them and to extend them to their own suppliers and market outlets. Task Force members have indicated that 2019 will be devoted primarily to training and outreach, with self-assessment serving as a starting point for implementation. In 2020, members plan to validate compliance through audits for suppliers. In some cases, particular elements of the Code of Conduct or the Vessel Standards go beyond national laws, and as such, the Task Force has taken on a commitment to focus on ‘continuous improvement’, rather than perfection or passing or failing the audits.⁴⁴

The Code of Conduct is the overarching policy of the Seafood Task Force and is to be applied to all parts of the seafood supply chain of Task Force members. The Vessel Auditable Standards are coupled with the Code of Conduct and intended to determine compliance with the Code. The Code includes 15 components (Table 1), the auditable standards outline how an auditor would go about determining that elements of the code have been met.⁴⁵

Table 1: Seafood Task Force Code of Conduct components

Child labour prohibited	Worker retention of personal documents required	Freedom of association required	Worker rights and responsibilities awareness training required
Forced labour prohibited	Workers prohibited from paying recruitment/hiring fees	Grievance procedure without prejudice or retaliation required	Private employment agencies & recruiters used by employers
Employment contracts required	Humane treatment required	Wages and benefits paid in accordance with law	Safe and healthy work and living conditions required
Freedom of movement & personal freedom	Workplace equality required	Working hours comply with law and/or collective agreements	

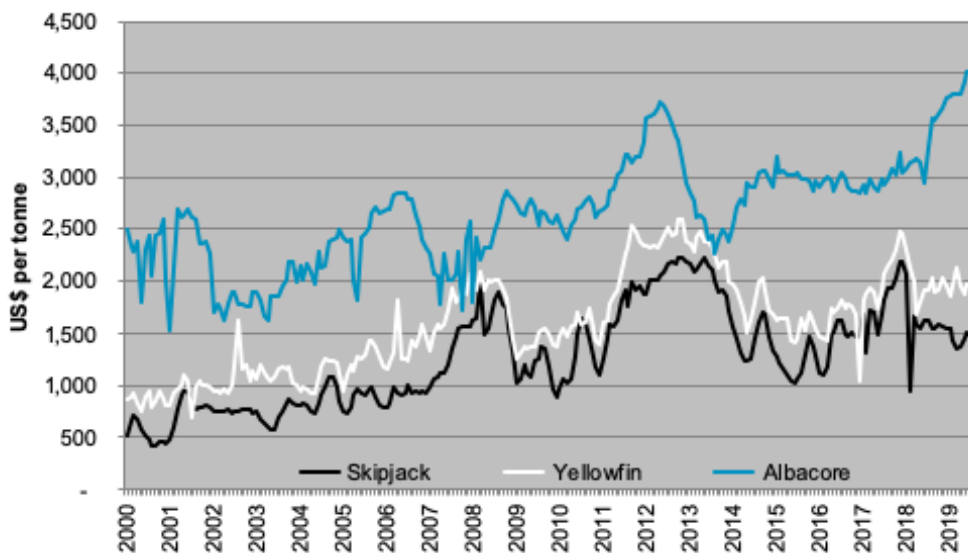
Seafood Task Force members are implementing a Code of Conduct coupled with Vessel Auditable Standards

In addition to these core instruments, the STF emphasises change on the water and an iterative, step by step process, as well as replicability and scalability. It identifies Fisheries Improvement Projects (FIPs) as important tools towards moving towards sustainability. The reference to FIPs is notable given that FIPs are increasingly common form of private governance in seafood supply chains, but are highly diverse and are not typified by any one set of governance principles or strategies.⁴⁶

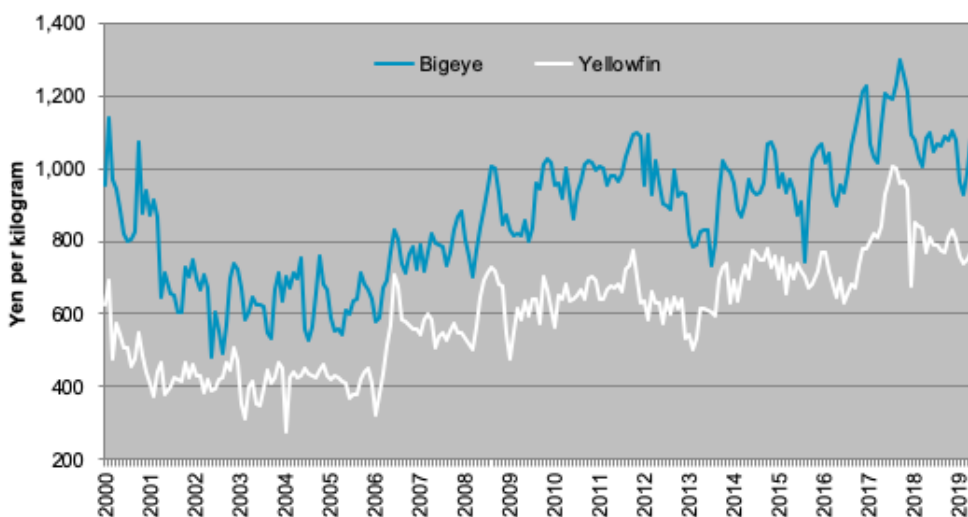
The SFT Code of Conduct and detailed audit procedures represents a major and sustained commitment by large firms and organisations, suggesting not only that labour concerns are firmly on the radar and becoming a fixed feature of the sector, but also that industry actors are now central actors in determining how labour concerns will be identified and addressed.

TUNA PRICE TRENDS⁴⁷

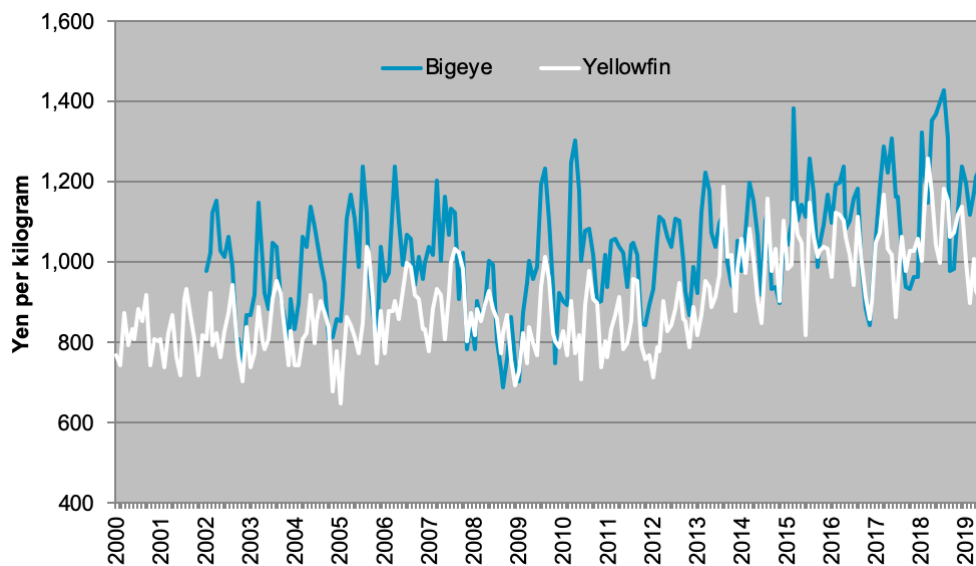
Bangkok canning-grade prices to July 2019⁴⁸



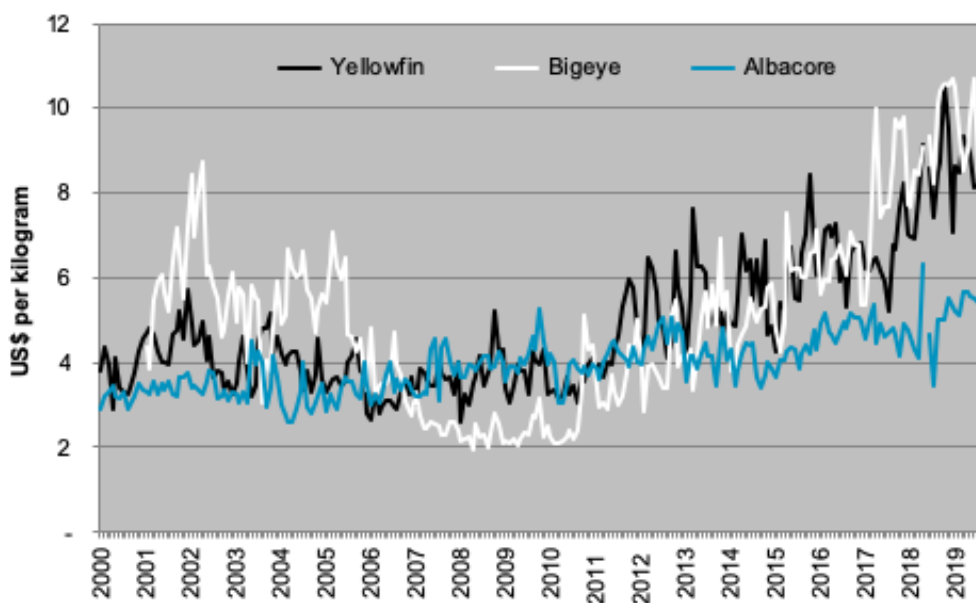
Japan frozen sashimi prices (ex-vessel, Japanese ports) to July 2019⁴⁹



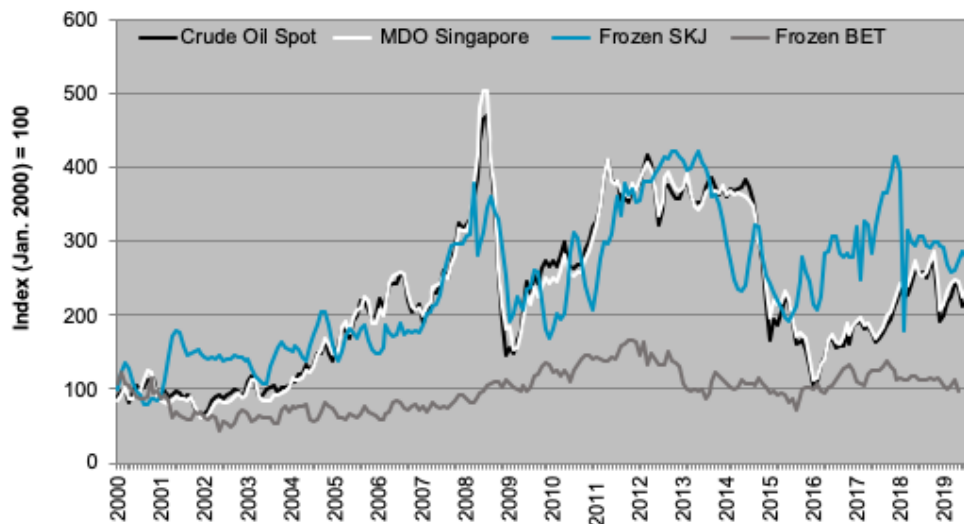
Japan fresh sashimi prices (origin Oceania) to July 2019⁵⁰



US imported fresh sashimi prices to July 2019⁵¹



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to October 2019⁵²



¹ Prepared for the FFA Fisheries Development Division by Dr Liam Campling, School of Business and Management, Queen Mary University of London, Dr Elizabeth Havice, University of North Carolina at Chapel Hill and Mike McCoy, independent consultant, all Consultant Fisheries Trade and Market Intelligence Analysts, Fisheries Development Division, FFA. Desktop publishing by Antony Price. The authors would like to thank Len Rodwell for his input on an earlier draft of this briefing. The contents of this briefing (including all analysis and opinions) are the responsibility of the authors and do not necessarily reflect the positions or thinking of the FFA Secretariat or its Members.

² Elizabeth Havice, Liam Campling and Mike McCoy, 2019. 'Growing Chinese influence in the Pacific sparks new interest in international aid', *FFA Trade and Industry News*, 12 (3): May-June. Available at: <http://www.ffa.int>

³ 'Statement by the Prime Minister Hon. Manasseh Sogavare on switch to China', *Solomon Times*, 20 September 2019. Available at: <http://www.solomontimes.com>

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⁸ E.g., Liu Zhen, 2019. 'Could ties with Kiribati be a boost to China's space ambitions?', *South China Morning Post*, 21 September. Available at: <http://www.scmp.com>

⁹ Elizabeth Havice, Mike McCoy and Antony Lewis, 2019. *Market and industry dynamics: Western and Central Pacific Ocean distant water tuna purse seine fishery*. Honiara: Pacific Islands Forum Fisheries Agency. August. Available at: <http://www.ffa.int>

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