



FISHERIES TRADE

EU loins quota for 2015 exhausted on first day

For 2013-2015, 22,000mt of loins from third countries (i.e. non-EU countries) were eligible annually to enter the EU duty free annually on a 'first-come, first-served basis'. On 1 January 2015, almost 24,000 mt of pre-cooked frozen tuna loins were held in bonded cold storage facilities in Europe, awaiting the opening of the EU Single Duty Loins Quota for 2015.² Hence, the quota was fully utilised and over-subscribed on the first day the quota opened, which is the fastest uptake to date. Typically, the quota is fully utilised by the end of the first quarter, but in some years as early as January, with Thailand being the major beneficiary.

The 2013-2015 EU loins quota has now expired and industry sources anticipate the EU canning industry will once again negotiate the quota's continuation in 2016 and beyond, with an upwards revision on the existing 22,000mt. Since 2012, EU imports of cooked tuna loins have increased almost six percent from 102,088mt to approximately 108,000mt in 2014.³

FISHERIES REGULATION

Solomon Islands 'yellow carded' under EU-IUU Fishing Regulation

On 12 December 2014, the European Commission (EC) formally notified Solomon Islands of a 'yellow card' warning for what the EC considers to be failing its duty to cooperate in the fight against illegal, unreported and unregulated (IUU) fishing, as required by the EU-IUU Fishing Regulation (No. 1005/2008). This warning follows an in-country audit conducted by the EC in February 2014. Despite efforts on the part of Solomon Islands to address the auditors' observations, these actions were considered insufficient. Among the issues identified, some of the most serious include outdated fisheries legislation which is not in line with Solomon Islands' international obligations, inadequate sanctions to deter IUU fishing, weaknesses in traceability and implementation of the EU's catch certification scheme, and failure to apply compatible management measures to all waters, including archipelagic waters and territorial seas, as well as the EEZ.⁴

Solomon Islands has been given six months from the date of notification to develop an action plan and address the EU's concerns. If it fails to do so, the EU may impose a trade sanction banning fisheries exports to the EU market. This could have a potentially catastrophic impact on Solomon Islands' tuna processing industry, which centres on exporting to the EU market. Other market alternatives, especially for lightmeat, are unviable as Solomon Islands is subject to high import duties rendering it uncompetitive against lower cost Asian processors. Solomon Islands' processed tuna exports are only able to compete in the EU market due to duty free access under the Generalised System of Preferences – Everything But Arms scheme (GSP-EBA). Solomon Islands' purse seine and pole and line fishing fleets would also be adversely affected, as they supply Soltuna, Solomon Islands' tuna processing facility.⁵

The EU has demonstrated its seriousness in applying trade sanctions to non-cooperating third countries – in January 2015, following notification of a 'red card' in October 2014, Sri Lanka's fisheries imports to the EU have been banned.⁶ However, if Solomon Islands can demonstrate credible progress in addressing the outstanding issues, the EU may grant a six month extension on the deadline, as it has recently done for PNG, Philippines and Ghana (see story below), which were given 'yellow-card' warnings in mid-2014.⁷ Tuvalu was also 'yellow-carded' at the same time as Solomon Islands, but does not currently sell fish on the EU market.

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Six nations identified by US for IUU fishing

A biennial report has been released to US Congress identifying nations whose vessels have been engaged in IUU fishing activities in 2013-2014 or unsustainable fishing practices in 2014. IUU activities include catch of protected living marine resources and of sharks on the high seas without having management measures in place which are comparable in effectiveness to regulatory requirements established by the US. The Magnuson-Stevens Act 2006 requires the Department of Commerce to prepare this report.⁸

Colombia, Ecuador, Mexico, Nicaragua, Nigeria and Portugal have been identified in the latest report with offenses including interaction with NOAA's data buoys, fishing during closures, use of sealed holds, unauthorised transits, discarding tuna and by-catch, shark finning, discarding rubbish, and improper turtle rescue. These countries must now put in place corrective actions through such means as amendment of existing laws or adoption of new laws and regulations, applying sanctions to vessels and improving monitoring and enforcement. By doing so, the countries will be positively certified in the next biennial report (2017) and avoid having prohibitions placed on the importation of fisheries products into the US and/or denial of entry to US ports for the offending vessels. Ecuador, Mexico and Colombia were also among ten countries identified in the 2013 report, but were deemed to have effectively handled the infractions from 2012-2013. The infractions highlighted for these three countries in the 2015 report are new and relate to different vessels.⁹

The US government also set up a Presidential Taskforce in June 2014 to establish a comprehensive framework to combat IUU fishing and seafood fraud. The Taskforce was required to report the President within six months with recommendations for implementation of the framework, following a public engagement process.¹⁰ The recommendations fall under four general themes: combatting IUU fishing and seafood fraud at the international level; strengthening enforcement; creating partnerships with government, industry and NGOs; and developing a risk-based traceability system. Public comments were sought on implementation strategies and priorities for these recommendations by 20 January 2015.¹¹

The domestic politics of the EU IUU regulation in the Philippines

The Philippines is being touted by some as a potential tuna powerhouse following its graduation to GSP+ duty free access to EU canned tuna markets. But if it cannot comply with the EU's IUU regulation, preferential market access will become irrelevant. In February 2014, the European Commission extended the 'yellow card' status of Ghana, the Philippines and PNG, giving each country another 6 months to address identified shortcomings and to avoid a ban on fish and fish product exports to the EU.¹² In announcing the extension, European Commissioner for Environment, Maritime Affairs and Fisheries, Karmenu Vella, said that 'the Philippines and Papua New Guinea have taken their warnings seriously, ... shown political will and have made tangible progress in fighting illegal fishing'.

However, in trying to implement new regulations the Philippine government has encountered considerable domestic resistance. Representative of tuna fishers on the island of Mindoro claim that the red tape, delays and fees associated with vessel registration drives illegal fishing. The fishers' solution is for registration to be simplified, despite vessel registration being a major EU demand under the IUU regulation. At the national scale, despite support for fisheries reform from a wide coalition of interests, the Alliance of Fishing Federations is fighting for revisions to the bill, including what it sees as punitive fines for illegal fishing and the allocation

Solomon Islands has six months to address short-comings in implementing the EU-IUU Fishing Regulation or risk being 'red carded' with trade sanctions imposed

The US Government has established a Presidential Taskforce to combat IUU fishing and seafood fraud



of too much power over other government agencies to the Bureau of Fisheries and Aquatic Resources.¹³ Whichever way this domestic political dispute falls, we should know by July as to whether or not the Philippines' victory under the GSP+ will be defeated by the EU's very own IUU Regulation.

Indonesia strengthens fisheries regulation to combat IUU fishing

Indonesia's new government has taken a zero tolerance stance on illegal, unregulated and unreported fishing (IUU), with the introduction of a series of hard-hitting new fisheries regulations. President Joko Widodo has publicly announced there are 5,000 foreign fishing boats illegally fishing in Indonesian waters, resulting in annual losses in excess of USD 24 billion.¹⁴

A six month moratorium has been placed on licences for foreign-constructed fishing vessels, while the Ministry of Marine Affairs and Fisheries (MMAF) monitors the operations of existing fleets. The Indonesian government has also recently sunk three foreign vessels accused of illegal fishing to demonstrate the seriousness of its stance on IUU fishing. In line with RFMO requirements,¹⁵ transshipment at sea has been banned to enhance monitoring and ensure catches taken within Indonesian waters are landed locally, rather than illegally transhipped outside of Indonesia. An area closure has also been implemented, prohibiting fishing in tuna spawning grounds within the Banda Sea (Fishing Management Area 714). MMAF is also in the process of introducing a closure of the 0-4 nautical mile zone to commercial fishing, with only artisanal scale vessels less than 5 GT permitted to fish in near-shore waters. All trawl and seine net (excluding surface purse seine nets) fishing licences will expire this year and not be renewed.¹⁶

According to an Indonesian industry source, the new policies are deliberately heavy-handed to enable MMAF to take stock of its poorly managed fisheries and 'start again from scratch'. However, while the regulations are well-intentioned, there are loopholes, omissions and some provisions that are unclear, leaving some regulations open to interpretation. For example, there is some confusion as to whether or not the Banda Sea Fisheries Management Area closure applies all year round and for all species or just October-December for yellowfin. It is also uncertain if purse seine (ring nets) are intentionally still permitted or if this was an oversight by the Ministry when banning trawl and seine nets.

Various associations representing Indonesia's fishing industry have voiced concerns over the detrimental impact the new regulations will have on their operations. These include long delays in fishing while MMAF re-considers its licencing arrangements, increases in fuel costs as a result of new exclusion zones, and lost fishing time for vessels that have typically transhipped catches at sea.¹⁷

FISHERIES MANAGEMENT

PNA considering charging for FAD use

The Parties to the Nauru Agreement (PNA) will hold their annual meeting from 4 to 13 March 2015 in Yap, Federated States of Micronesia. One of the key agenda items will be the proposed introduction of a scheme for registration of fish aggregation devices (FADs) and implementation of a charge for FAD usage from 1 January 2016.¹⁸

PNG and the Philippines given another 6 months to comply with EU IUU Regulation

Philippine fisher organisations opposed to revised fisheries legislation



Currently, PNA manages FAD usage through a three-month FAD closure under the Third Implementing Arrangement (31A). Compatible measures are applied by WCPFC through CMM 2014-01 for high seas, as well as EEZs and currently also includes a fourth month FAD closure or alternative limit on total FAD sets. However, the effectiveness of these FAD measures in bigeye conservation is currently inadequate, with the number of FADs deployed increasing annually and FAD-related catches increasing through the use of sonar technology. The existing FAD measures also place a disproportionate conservation burden on PNA members' whose purse seine fisheries are largely FAD-dependent.¹⁹

PNA is considering implementing a FAD charge administered via the PNA's Vessel Day Scheme (VDS) through the 31A, whereby a vessel will be required to pay more for a fishing day when FADs are used versus a non-FAD fishing day. If set at the right level, this charge is intended to serve as a disincentive to vessels for FAD fishing and also partly compensate PNA members for lost access fee revenue due to the disproportionate burden accruing to PNA members from existing bigeye management measures.²⁰

To strengthen the PNA's FAD control and facilitate the implementation of the FAD charge system, PNA is also looking at implementing a system requiring FADs to be registered, tracked and monitored through the PNA's Fisheries Information Management System (FIMS).²¹

TUNA INDUSTRY

Lowest oil prices in five years – what implications for tuna?

Crude oil prices have fallen almost 50 per cent since the summer of 2014 and are at their lowest point for five years with Brent crude oil dropping below \$50 a barrel for the first time since May 2009.²²

The 'big drop', as the *Financial Times* puts it, has several implications for the tuna industry. For boat operators, there is the possibility of more productive fishing trips. For those already fishing on FADs the decision to steam further and faster for a larger catch is made easier. And for those choosing between fishing on free schools and FADs such as PNA MSC certified boats, the former becomes less expensive.²³ However, the parallel very low price of skipjack means that fuel savings do not necessarily translate into better margins (e.g. see the crude oil to frozen tuna price index below), not least because buyers use this information to drive down price. In the Bangkok skipjack market – the barometer of world canning-grade price – whole round tuna fell to its lowest level in four years in late February. As a result, several tuna fleets are reporting that they are operating at or below cost.²⁴ For purse seiners operating in PNA waters, there are indications that most foreign vessels (except the largest size class) are now operating at a loss at current tuna prices.²⁵ In contrast, for the longline fishery, in which fuel is a higher proportion of operating costs, fish prices seem to be holding up relatively well (see price figures for Japan and US markets below).

For processors that are not backward integrated into fishing this is a positive trend, at least compared to the seemingly ever-increasing price into July 2014.²⁶ But the instability is also risky. The decision now is whether to buy raw material at a possible trough in the market or hold off in case of further decline.

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In sum, despite the relationship between fuel and tuna price being an intimate one, it is difficult to establish linear causality. This is because of the influence of a range of other factors, including EEZ access fees (which are subject to subregional or bilateral negotiation), growing regulatory costs, overcapacity in fishing and continued vessel construction, and investment in new processing facilities despite the decline or relative stagnation of demand in higher price canned tuna markets like the EU, the USA and Japan.

New tuna factory opens in American Samoa

The giant tuna company Tri Marine opened a new canning factory on American Samoa in January. The firm reportedly invested US\$ 70 million in the facility – Samoa Tuna Processors – which will focus on the US market and, at full capacity, can employ 1,500 workers producing up to one million cans of tuna daily.²⁷ At present only 300 people are employed. Raw material supply will draw from the WCPO, including a fleet of 10 Tri Marine purse seiners based in Pago Pago. Finished product will mainly be sold in the United States, using a twice monthly schedule of container vessels to the West Coast.²⁸ On the marketing side, Tri Marine’s sales will almost certainly be buoyed in the US if it succeeds in obtaining MSC certification for its Pago Pago fleet (see below).

The survival of the new factory depends on the playing out of a number of ongoing risks. Crucially, it is dependent on the continuation of American Samoa’s preferential access to the US market. It is presently on firm ground given the slowdown of US FTA negotiations with major tuna processors players such as Thailand and the veritable collapse of a multilateral deal on trade liberalisation at the WTO. However, canned tuna production in American Samoa will remain vulnerable to future changes in the policy environment, including, for example, any possible changes in US government procurement policy because, as a US territory, Samoa Tuna Processors will in part rely on contracts to supply the US military and schools.

The factory is also vulnerable to competition for labour supply. Given that the majority of factory workers have traditionally come from Samoa, the stated plan of Bumble Bee to open a loining plant there may be a draw for Samoans wanting to remain on their own island.²⁹ However, plans for the loining plant are on hold due to US anti-trust investigations of Thai Union’s takeover of Bumble Bee. Besides, US minimum wage legislation applies in America Samoa, which suggests that workers will continue to migrate there from lower wages in Samoa. Finally, it is also worth noting that US brands have intermittently promised to invest in onshore tuna processing in Samoa for decades, but never progressed.

FISHERIES DEVELOPMENT

MSC gaining traction in Pacific purse seine fisheries?

The demand for Marine Stewardship Council (MSC) certification is growing in importance in WCPO purse seine fisheries. Following the certification of the Parties to the Nauru Agreement (PNA) FAD-free skipjack fishery in December 2011,³⁰ Tri Marine is seeking to certify fishing operations under their control and, based on a recent agreement with the PNA, so is the competing tuna trading firm FCF.

Tri Marine hopes to certify its American Samoan fleet of 10 purse seiners when fishing on free schools. It entered them into the MSC’s full assessment phase in January,

The cheapening of tuna is hitting some fishers harder than others

Tri Marine spends US\$ 70m on new plant

Samoa Tuna Processors relies on duty free access to the US market



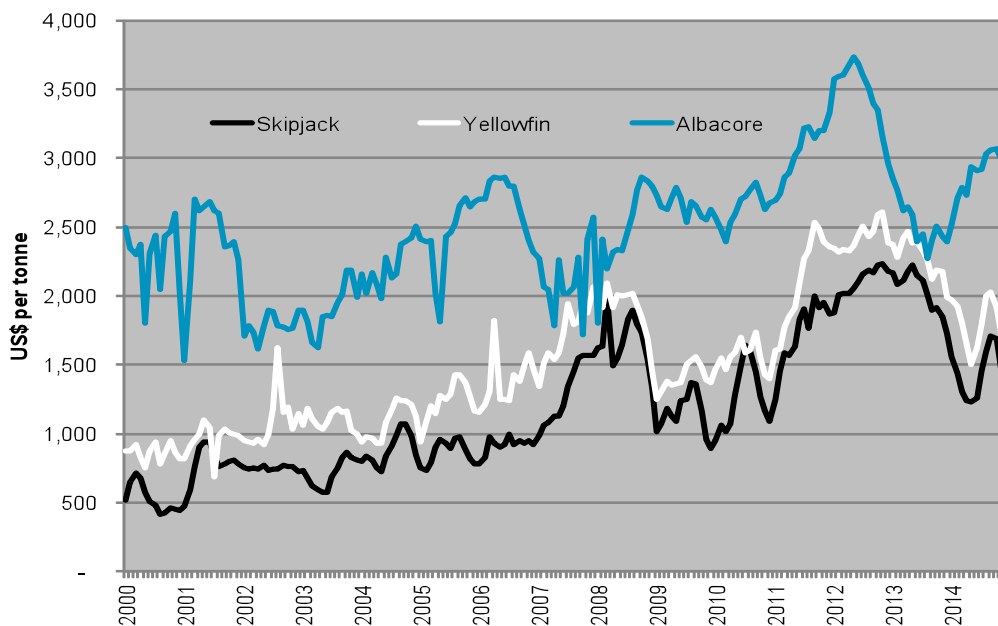
which is scheduled to be completed by March next year.³¹ This move indicates a high degree of confidence by this diversified tuna giant because full assessment is a public process and also quite costly. This certification will complement Tri Marine's US vessels' participation in PNA's MSC skipjack fishery. In the Solomon Islands, Tri Marine subsidiary National Fisheries Developments, is also set to soon announce MSC full assessments for its purse seine and pole and line fleets for skipjack and yellowfin tuna.

Building on its existing MSC-certified fishery Pacifical – the global marketing arm of the PNA – inked an agreement in January with the Taiwanese tuna trading firm FCF. This commits FCF to maintain MSC standards through the supply chain when dealing with skipjack from the PNA. This is a first step towards FCF's objective of applying for MSC certification for up to 60 vessels that it is associated with.³²

If all of these bids for MSC certification are successful, the WCPO will be the world's go-to location for sustainable canning-grade tuna. The obvious implication is that a major upward bump in supply might erode any price premium. But, in turn, if more boats' activities are governed by MSC processes there may be a lower overall volume of tuna because of the reduced productivity of non-FAD fishing, with positive implications for price. Alternatively, it is also possible that MSC certification does not necessarily change the behaviour of vessels. They could continue to operate in the exact same way of FAD reliance with opportunistic fishing on free-schools if it attracts a premium.

TUNA PRICE TRENDS³³

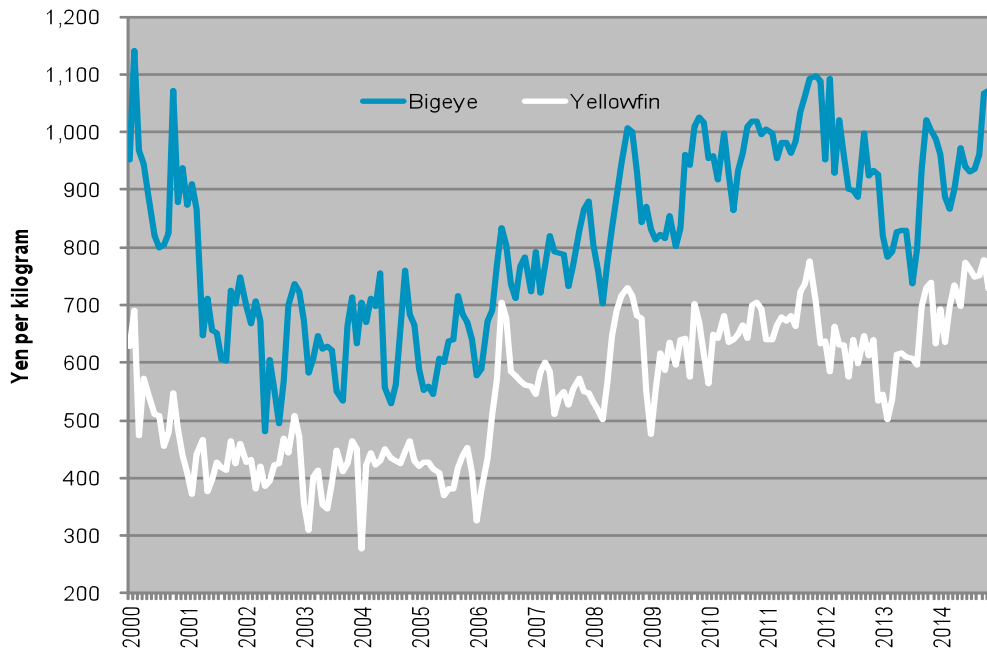
Bangkok canning-grade prices to December 2014³⁴



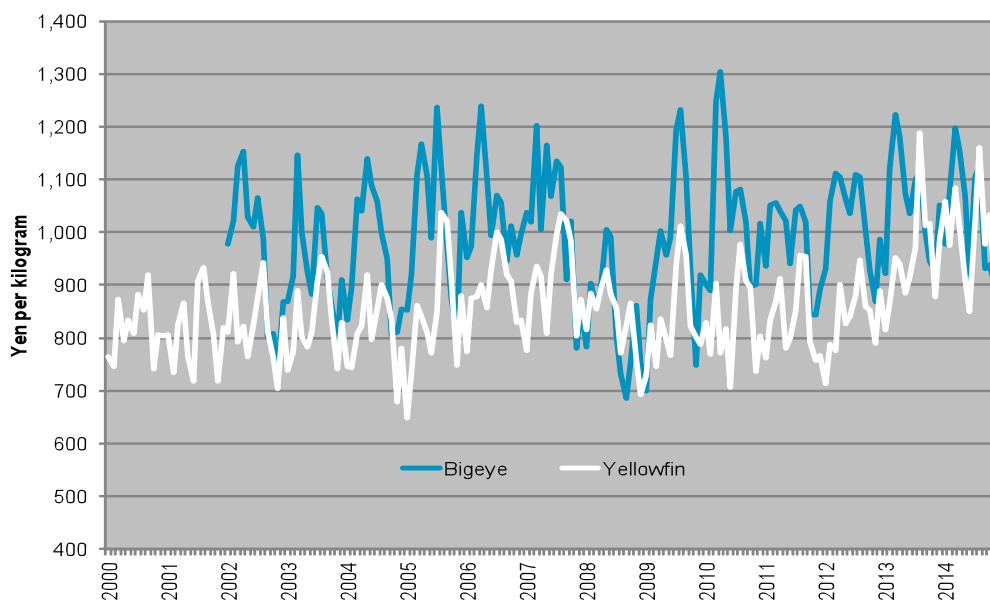
FCF and Tri Marine each move to expand the role of MSC in the WCPO

WCPO is set to be the go-to location for sustainable tuna

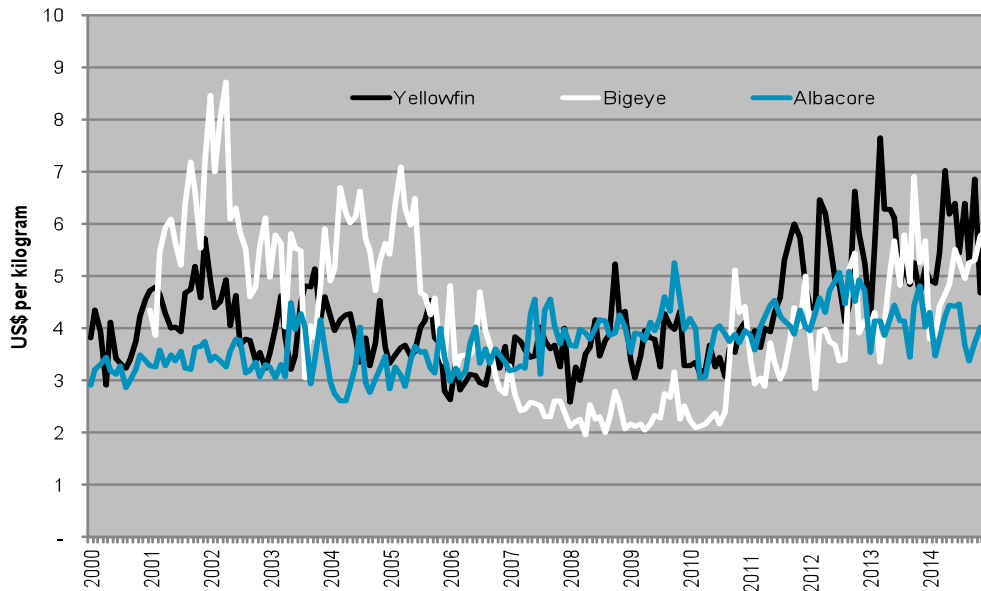
Japan frozen sashimi prices (ex-vessel, Japanese ports) to December 2014³⁵



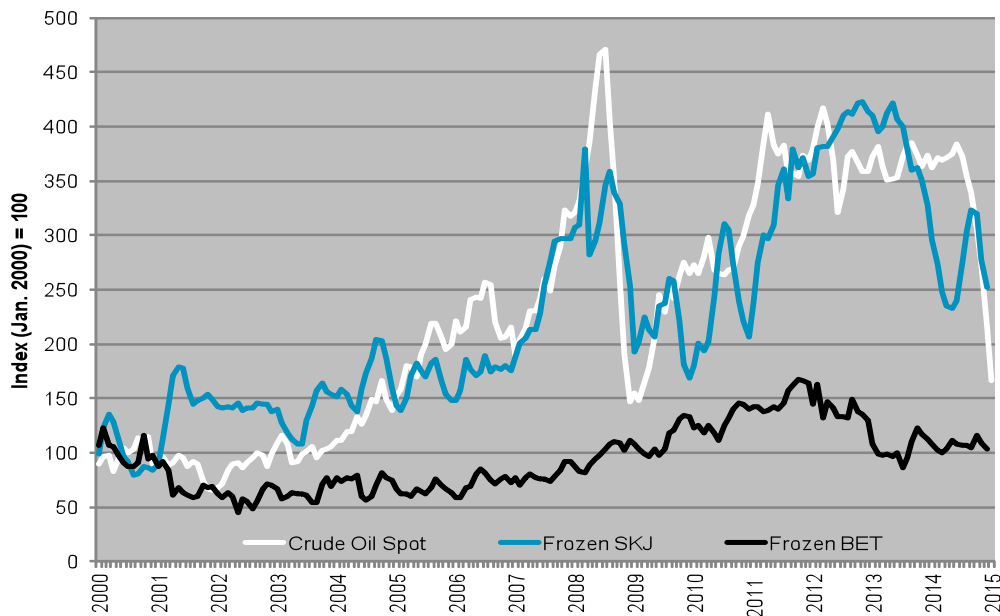
Japan fresh sashimi prices (origin Oceania) to December 2014³⁶



US imported fresh sashimi prices to December 2014³⁷



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to December 2014³⁸



¹ Prepared for the FFA Fisheries Development Division by Dr Liam Campling, School of Business and Management, Queen Mary, University of London and Dr Elizabeth Havice, University of North Carolina at Chapel Hill, both Consultant Fisheries Trade and Market Intelligence Analysts, Fisheries Development Division, FFA. Desktop publishing by Antony Price & Melanie Moon. The authors would like to thank Mike Batty 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 Pers.comm., industry sources; Atuna 2015, '2015 EU tuna loins quota depleted in no time', Atuna, 7 January 2014.

³ Eurostat 2015, External Trade Detailed Data. Available at: http://epp.eurostat.eu/portal/page/portal/statistics/search_database; 2014 data available on Eurostat to November 2014, escalated with estimated import volume for December 2104 from data from industry sources (pers.comm.).

⁴ EC 2015, Commission Decision of 12 December 2014 notifying a third country that the Commission considers as possible of being identified as non-cooperating third country pursuant to Council Regulation (EC) No 1005/2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing, (2014/C 447/09), European Commission. Available at: <http://eur-lex.europa.eu>

⁵ Solomon Islands industry representative; author's own analysis.

⁶ Neil Ramsden 2015, 'EU begins Sri Lanka import ban', Undercurrent News, 15 January 2015. Available at: www.undercurrentnews.com

⁷ Undercurrent News 2015, 'EC gives six month extensions to Philippines, PNG, Ghana to step up fight against illegal fishing', Undercurrent News, 13 February 2015. Available at: <http://www.undercurrentnews.com>

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⁹ US Department of Commerce 2015, Improving International Fisheries Management – February 2015 Report to Congress, NOAA Fisheries, February 2015. Available at: <http://www.nfms.noaa.gov>

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¹⁶ MMAF 2014-2015, various Indonesian ministerial regulations, translated by Indonesian industry sources.

¹⁷ 'Indo Ban on at Sea Transshipments hurts own tuna fleet', Atuna, 15 December 2014; 'Pole and line industry victim of new IUU laws', Atuna, 22 January 2015. Available at: <http://www.atuna.com>

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²⁰ Pers. comm. PNA industry source.

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²³ 'Low Fuel Prices = More Fad Free', Atuna, 13 January 2015. Available at: www.atuna.com

²⁴ 'High Fuel Forces Turn Around In Taiwanese Longline Fleet', Atuna, 8 September 2014; 'Skipjack Price Suffers Further Fall', Atuna, 19 February 2015; 'Japanese Seafood Player Hit Hard By Falling Skipjack Price', Atuna, 9 February 2015. Both available at: www.atuna.com

²⁵ Drawing on FFA modelling of purse seine operations.

²⁶ 'Bangkok Skipjack Breaks USD 1,800 Barrier', Atuna, 11 July 2014. Available at: www.atuna.com

²⁷ Tri Marine press release, 'Tri Marine Officially Opens State-of-the-Art Tuna Processing Facility in American Samoa', 30 January 2014. Available at: http://www.trimarinegroup.com/news/press/STP_Inauguration_012415.html

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³² Pacifical press release, 'FCF Signs MOU with Pacifical on MSC Certified Free School Skipjack Tuna', 19 January 2015. Available at: <http://www.pacifical.com/articles/00056.html>; 'FCF inks deal with Pacifical for MSC tuna', Undercurrent News, 19 January 2015. Available at: <http://www.undercurrentnews.com>; 'FCF, Largest Tuna Supplier in Western Pacific, Signs Agreement to Provide Marine Stewardship Council-certified Tuna', Business Wire, 16 January 2015. Available at: <http://www.businesswire.com/news/home/20150116005939/en/FCF-Largest-Tuna-Supplier-Western-Pacific-Signs#.VOzKGCypp8F>

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³⁵ FFA database

³⁶ Japan Customs. http://www.customs.go.jp/toukei/info/index_e.htm

³⁷ US National Marine Fisheries Service. <http://www.st.nmfs.gov/st1/trade/index.html>

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