



SPECIAL FEATURE: EUROPEAN TUNA CONFERENCE 2015²

The bi-annual European Tuna Conference organised by Atuna took place on 20 April in Brussels. Pierre Commere, Conference Chair, set the tone of the event by emphasising that industry cannot focus on short-term prices and profitability alone or it will lose sight of sustainability.

Corporate consolidation in the tuna industry

Gorjan Nikolik of Rabobank (a world leader in the financing of agri-business) spoke on the incidence and impact of 'Mega Mergers' in the tuna industry. He made five observations. First, despite prior claims to the contrary by tuna scientists, tuna catch has continued to increase at an average of 100,000 tonnes per year over the last 10 years. This source of growth has been entirely from developing countries increasing in-EEZ catch and the subsidised Chinese fleet. Second, that the high level of raw material price volatility – at 100% over the last three years from USD 1,000/tonne to USD 2,000/tonne – is a major concern for those financing the industry. Third, rapid increases in PNG's processing capacity have not been matched by increased canned tuna production from the country. Nikolik queried when, how and if this capacity will start to be utilised and if raw material flows to Thailand will then be reduced as a result. Fourth, he pointed out that stagnant growth in the EU, the world's major market, and declining consumption in the US (from 3.5 pounds per capita in 2003 to 2.3 pounds in 2013) was matched by increased consumption in developing country markets, spurred by marketing efforts.

Finally, and of most interest, Nikolik emphasised that the current period is a 'unique' and 'peak time for consolidation' in the industry. He argued low raw material prices have inflated the profit margins by canned tuna brands, making companies look particularly healthy on paper making it a good time to sell. At the same time, because costs of capital are very low and equity markets are going well, it is also a good time to buy. This 'peak time' can be illustrated by Thai Union's purchase of Bumble Bee and the recent announcement by Bolton Group of its acquisition of a majority of the Spanish branded-processor Garavilla.³

Nikolik concluded that consolidation will reach its limits. In the context of limits to raw material supply and of growth in canned consumption, the major players in the industry 'will need to look for non-canned seafood targets'.

A focus on FADs

A study by Pew estimates that the number of drifting FADs put into the oceans each year ranges from 47,000–105,000.⁴ In this context and of the attacks on purse seine fishing on FADs by NGOs such as Greenpeace, the issue was a major topic of the conference. Gala Moreno of the AZTI Science Institute spoke on ISSF research on purse seine fishing on FADs, where the main bycatch species of concern were noted as juvenile bigeye tuna and sharks. Several methods were outlined that may allow for reduced impacts of FAD fisheries on by-catch and tuna stocks, including:

- Spatial methods such as time area closures and remote information on species at FADs using echo-sounder buoys
- Technical methods such as non-entangling FADs and spatio-acoustic discrimination
- Capacity methods, including the retention of bycatch and its full utilisation

Miguel Hereera of the Spanish purse seiner-owners association, OPAGAC, emphasised that FAD fishing is 'natural and necessary', that FAD-free fishing 'is not economically

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viable to meet market demands', and despite increases in FAD fishing since the 1990s, 'it has not induced any overfishing of skipjack'.

Both Maurice Brownjohn, Commercial Director of the PNA, and Henk Brus, CEO of Sustainable, placed major emphasis on the role of technological change in enhancing the extent and intensity of purse seine fisheries (e.g. satellite connected sonar buoys on FADs), which, to quote Brownjohn is moving purse seine fisheries "to a farming scenario". Brownjohn argued that FAD closures are "a blunt instrument", not least because "industry developed new techniques that negate the initiative", as illustrated by sharp catch increases post-closures. Emily Howgate of the International Pole & Line Foundation (IPNLF) recognised that pole and line fisheries cannot catch sufficient tuna to meet demand but that it should be a greater proportion of supply. She stressed the importance of distinguishing between drifting and anchored FADs, arguing that the latter – used in pole and line fisheries – are more manageable and sustainable.

Despite the EU applying an MFN import duty of 24%, around 75% of imports are duty free, around 50% from EPA and FTA countries and 25% from GSP+. The Philippines graduation to GSP+ status was a major focus of discussion. Brus pointed out that it is the first time that the EU market been duty free for Southeast Asian product and that the effect has been a reduced price for canned tuna in the EU. Nicolas Dross of DG Trade stressed that there has been no real increase in trade from the Philippines and that it may take years, perhaps because the Philippines is already supplying maximum volumes to its main EU markets – Germany and the UK – and it will take time to develop contacts in new markets.

Dross suggested that the Philippines is close to the limit of one of the EU's two vulnerability criterion for GSP+ – that measuring economic diversification – which might make it ineligible in future years. Perhaps of greater concern to PICs is that, after 12 rounds of negotiations, an EU-Vietnam FTA 'is in reach'.

Social accountability

Social issues are generally downplayed in most narratives of the tuna fishing in favour of environmental sustainability. And as Brus pointed out, 'the industry has never been exposed to social issues before'. Very rarely at industry or policy meetings is there consideration of those who work on the boats and in the factories. As such it was refreshing to see a panel on social accountability in Brussels. Javier Garat outlined collaborative work between EU fishing boat owners and the European Transport Workers Federation to get the EU to implement the International Labour Organisation (ILO) Work in Fishing Convention 2007.⁵ Otherwise known as ILO C188 it seeks to establish:

- Minimum requirements for working on board
- Conditions of service, accommodation and food
- Occupational safety and health protection
- Medical care
- Social security

Garat also noted the new social clause in EU Sustainable Fisheries Partnership Agreements (SFPAs) that provides for minimum rights and working conditions on EU vessels for crew from both the EU and third countries.

The Environmental Justice Foundation (EJF) followed by showing a short campaigning film on the incidence of forced labour onboard fishing vessels in Thai waters called

Industry uses techniques that negate PNA fishing closures on FADs

Philippines graduation to GSP+ has encouraged EU canned tuna buyers to put pressure on price, but GSP+ status may prove temporary

EU industry and trade unions push for ILO Work in Fishing Convention and EU SFPAs contain new social clause



Pirates and Slaves. The EIJ argues that the incidence of illegal fishing and poor treatment of crew very often goes hand in hand, and thus the environmental and social sustainability of fisheries should be addressed in unison. It was pointed out by the chair that the film did not implicate the tuna industry (and nor does the accompanying report).⁶

The question of social accountability went beyond the panel on the topic. It was also a major theme in presentations by Willem Huisman, ANOVA Seafood, and two representatives from Unil, the private label and import division of NorgesGruppen, Norway's largest retailer. ANOVA specialises in chilled and frozen albacore and yellowfin steaks and Huisman said that as a CEO he demanded product integrity, including 'social compliance on vessels and factories'.

Complementing this, market research for Unil showed that females in Norway place a very high emphasis on food producers meeting sustainability and human rights standards. Canned tuna is in Unil's top 10 risk assessment product list, alongside sugar and chocolate, which both have had prominent labour standards scandals in the recent past. They emphasised that 70% of Norwegian consumers want to eat more fish and that Unil is prepared to pay a price premium to procure environmentally and socially sustainable tuna and is willing to risk losing the most price sensitive consumers in doing so. This echoed an argument made by Brus in relation to EU consumers more generally becoming accustomed to pay a higher price for canned tuna in recent years, which offers the industry an opportunity to cost-in sustainability and social responsibility.

FISHERIES REGULATION

Thailand issued with a 'yellow card' warning by EU

Thailand is the latest country to receive a 'yellow card' warning and risks being deemed a non-cooperating third country in the fight against illegal, unreported and unregulated (IUU) fishing. On 24 April 2015, the EU notified Thailand of its warning. Thailand now has six months to rectify its shortcomings in implementing the EU's IUU Fishing Regulation or face a 'red card' which would block Thailand's fisheries products from the EU.⁷ Loss of EU market access would have a considerable impact on Thailand's canned tuna processing industry, which is the largest in the world (3,000 mt/day), processing 700,000-800,00 mt annually – the EU is one of Thailand's major markets. The European Commission has been working with Thai Authorities since 2011 to address issues in implementing the EU's IUU Regulation. In January 2015, Thailand's Ministry of Agriculture and Cooperatives announced a six-point IUU plan to combat IUU fishing. A new Fisheries Act is also due to come into force in July 2015 to address current regulatory deficiencies and impose harsher penalties for violations of fisheries regulations.⁸

At the same time, the EU announced that 'yellow cards' for two other significant players in the global tuna industry – Korea and Philippines – have been dropped, as both countries have sufficiently implemented action plans to address their shortcomings. Korea was notified of its 'yellow card' warning in November 2013 and Philippines in June 2014.⁹ This announcement would no doubt have come as a relief for both countries. The Philippines was granted duty free access for canned tuna to the EU from 24 December 2014 under the EU's GSP+ scheme, but risked losing market access for fisheries products, including tuna, if it were handed a 'red card' for failing to meet EU IUU Regulation requirements.

Two major European buyers of tuna products place price premium on social standards

Thailand has been issued a 'yellow card' warning for not implementing the EU's IUU Fishing Regulation; Philippines and Korea's 'yellow cards' have been lifted



US releases action plan on combatting IUU and seafood fraud

In mid-March, the Obama administration released an action plan articulating the steps that US federal agencies will take domestically and internationally to implement the recommendations made by the Task Force on IUU fishing and seafood fraud.¹⁰

Key actions include:¹¹

International:

- Working with Congress to enact implementing legislation for the Port State Measures Agreement;
- Work with international governments and RFMOs to advance best practices for monitoring, control and surveillance (MCS) of international fisheries, and implementation of Port State controls.

Enforcement:

- Implement a strategy for the collection, sharing and analysis of information and resources to prevent IUU or fraudulently labelled seafood from entering the US by September 2015;
- Implement recommended adjustments to the US tariff codes to identify seafood products in trade by December 2015.

Traceability:

- By October 2015, define types of information to be collected along the seafood supply chain from catch location or farm through to entry into the US and methods for collecting data;
- Identify species to which the system will first be applied based on how at risk of being an IUU product they are;
- Determine how information within the traceability system – including species, geographic origin and means of production – can be shared with consumers;
- By December 2016, identify steps for expanding the programme to all seafood entering US commerce.

It is notable that the Action Plan heavily references cooperating with international partners to develop environmental provisions in the Trans Pacific Partnership, a regional trade agreement that includes countries that together account for approximately 25 per cent of global marine catch and seafood exports.

At this early stage, it is difficult to assess the impact of the action plan on the tuna industry in the near or longer range. At the very least, producers selling in the US market can expect a ramping up of the paper trail to meet traceability requirements

TUNA ACCESS ARRANGEMENTS

No agreement, but frank discussion in US Treaty negotiations

Following a series of interim agreements between the Pacific Island Parties (PIPs) and the US that have incrementally extended the US Treaty, the Parties to the Agreement have again begun negotiations over what form, if any, the Treaty will take following the 2015 expiration of the current arrangement. As reported previously in *FFA Trade and Industry News*,¹² challenges have emerged around the application of the VDS to the Treaty, as well as the continued costs and logistics associated with the protracted

The US action plan on eliminating IUU fishing emphasises traceability



negotiations process. In the lead up to the most recent negotiations in New Zealand, US and New Zealand industry members criticised the VDS scheme and the PNA stressed that the VDS has tightly monitored fishing and empowered the island states to dictate the terms, conditions and price of fishing.¹³

Despite this tense lead up to negotiations, reports indicate a productive meeting of the Parties. Though no agreement was reached in New Zealand, all groups were able to address their concerns and begin to set out a new structure for the Treaty.¹⁴ Negotiations are scheduled to continue in May in Nadi, Fiji.

TUNA INDUSTRY

WCPO purse seine industry pushes for up to two months global closure

Some industry participants in the WCPO purse seine fishery have called for a 1-2 month closure of purse seine fisheries globally in a desperate attempt to correct the current oversupply situation which has depressed skipjack prices to dangerously low levels approaching US \$1,000/mt. Some members of the World Tuna Purse Seine Organisation (WTPO) appealed to PNA countries to make a decision during their recent Annual Meeting held in Yap, Federated States of Micronesia from 4-13 March to put in place an immediate two month purse seine fishing closure in PNA EEZs.¹⁵ However, PNA members rejected the notion of a two month closure, on the grounds that they lacked the bureaucratic authority to do so, and instead encouraged vessel owners to put in place a voluntary stop on purse seine fishing.¹⁶

There has been some disagreement amongst the purse seine industry on whether or not a closure is required and if so, whether it should be for one or two months. Some argue that while a 30 day closure would help the fish price to recover, this would only be temporary until fishing recommenced, when prices would once again spiral downwards; whereas a 60 day closure would run down inventory held in cold storage by processors to stabilise supply and demand and increase the skipjack price.¹⁷ On average, Bangkok processors purchase 60,000mt of raw material per month – a two month closure could amount to 120,000 mt and would have a sizeable impact on balancing the current over-supply situation.

Industry sources indicate that the break-even skipjack price for purse seiners is typically around US \$1,400-1,500/mt. With Bangkok skipjack prices well below this level this for much of 2014, and reaching a low of \$1,010 in March 2015, purse seiners are making significant losses, with some tying up vessels or sending them to dry-dock for maintenance. (Note that some vessels are also slowing down operations because they are running out of fishing days under the VDS.) If prices fall to US \$1,000 or lower, the industry basically comes to a standstill with vessels making huge losses and orders with processors dropping off as buyers hold out against making orders in case the price declines even lower – the only winners in this situation are buyers.¹⁸

Industry is concerned that without a PNA-mandated closure, that they won't get 100% agreement from every purse seiner operating in the fishery to tie up, which will reduce the effectiveness of a closure. Appeals have been made for a total global purse seine fishing closure, but fleets outside the WCPO, particularly the Spanish have expressed reluctance, blaming the WCPO for causing the current oversupply situation (even though they would also benefit from higher skipjack prices).¹⁹

Recent negotiations focused on discussing a new US Treaty structure

With the Bangkok skipjack price approaching US \$1,000 mt, purse seiners are making significant losses



Demand for social and labour sustainability in the seafood industry deepens

There is growing pressure on the tuna industry to ensure compliance with labour standards in both fishing and processing activities. The more progressive elements in industry itself are themselves starting to take the issues head-on (see story above in the report on the European Tuna Conference).

The Trafficking in Persons (TIP) report is the US government's principal diplomatic tool to engage foreign governments on human trafficking. As reported in FFA Trade and Industry News last year, in part due to slave and slave-like conditions on some Thai fishing boats Thailand was downgraded to 'Tier 3' in the 2014 TIP – a ranking shared by countries such as North Korea and Zimbabwe.²⁰ The NGO, the Environmental Justice Foundation (EJF) is arguing that Thailand should remain in Tier 3 in the TIP report for 2015.²¹ It cites evidence of further cases of trafficking, forced and bonded labour in Thai fisheries since the last TIP report and the failure to prosecute police or state officials alleged involved.

Countering these claims, the Thai government, together with the export-orientated seafood industry, have been pushing hard to demonstrate that problems identified by the TIP report are being cleaned up.²² Thailand's Ministry of Foreign Affairs highlights a series of arrests of human trafficking gangs, an amendment to anti-trafficking legislation, including harsher sentences and a tripling of fines, and a new Fisheries Act and labour regulation to enhance labour monitoring and surveillance. In parallel, tuna processing giant Thai Union has stated that there will be 'no compromise' if suppliers have slavery links and contracts will be immediately terminated.²³

Another area where social sustainability has been highlighted is EU trade policy, especially in relation to the GSP+. The Philippines graduation to GSP+ in December 2014 provides for duty free access to the EU market for a range of products including canned tuna, but was accompanied by questions regarding compliance with relevant ILO conventions on labour standards.²⁴ Abuses of labour standards in the Philippine canned tuna industry were brought back on the agenda at the Brussels Seafood Expo in April by the European Transport Workers Federation and the European Federation of Food, Agriculture and Tourism Trade Unions. The two trade union federations staged a demonstration outside the Expo calling for CitraMina/Philfresh – the Philippines second largest canned tuna exporter – to develop fair industrial relations and for the EU to 'not to allow products from contested origin to appear on the shelves of European supermarkets'.²⁵ In parallel, local trade unions in the Philippines are putting pressure on.

According to industry sources and an EU official, as of April 2015 the utilisation of GSP+ treatment by Philippine canned tuna exporters has been small, not least due to insufficient fish that complies with EU preferential rules of origin.²⁶

TUNA MARKETS

Turmoil in the Middle East shakes canned tuna industry

The canned tuna market in the Middle East and North Africa is valued at around USD 1 billion, with the major markets being Egypt, Saudi Arabia and Libya. United Arab Emirates (UAE) is emerging as a 'model market' with the introduction of new products and marketing techniques.²⁷

NGOs push for Thailand to stay in lowest US government ranking of people trafficking, while Thai government and industry argue that progress has been made

Trade unions demonstrate at Brussels Seafood Expo against CitraMina/Philfresh's treatment of tuna workers



The Middle East market as a whole is characterised as: primarily driven by price, rather than quality; traditionally a fragmented market with no dominant large brands; and, largely controlled by wholesalers who import directly from canneries.²⁸ In recent years, attempts have been made to better identify brands through advertising and promotional campaigns, which has resulted in consolidation of most of the markets in the Middle East region by a few large wholesalers. Brands that have invested more heavily in advertising and promotion are starting to gain market share in the Middle East's otherwise highly fragmented market, with some niche markets developing for a few higher end brands.²⁹

Based on UN trade data, the import of canned tuna in selected Middle East and North African countries decreased by 44% from 2010 to 2013 (i.e. from 152,000mt in 2010 to around 85,000mt in 2013). The decline has also been confirmed by industry sources. This could be attributed to a combination of factors, including: political instability and violent conflict in several countries; associated tight economic and financial conditions in key canned tuna markets, Egypt and Libya; and, traders trying to run-down high cost inventory in light of recent low raw material prices.³⁰

The largest supplier to the region is Thailand, followed after a considerable margin by Indonesia. The region went from being a fairly minor market for Thai firms 10 years ago to being perhaps the most important today. PIC processors do not supply the Middle East region, but they will have been impacted indirectly by declining consumption there because, with Thai firms having larger inventories, this puts downward pressure on the price of finished goods.

Fair Trade-certified tuna launched in North American Market

Fair Trade is a global non-profit organisation that has established independently audited standards to help small-scale developing country producers achieve better trading conditions and to protect workers' rights. Fair Trade standards also cover terms of trade, with products typically having a Fair Trade minimum price set that must be paid to the producers, and in addition, a Fair Trade premium to invest back into their communities or businesses.³¹

Fair Trade's efforts have largely centred on primary food commodities and other agricultural products. However, in 2014, after four years of development, Fair Trade USA launched Fair Trade's first standard for capture fisheries. This standard was developed to provide access to Fair Trade markets for small-scale fishers and communities through the establishment of fishers' cooperatives or partnerships with 'Market Access Partners' (e.g. an exporter, processor or supporting organisation). The standard centres on four principles – empowerment, economic development, social responsibility and environmental stewardship;³² it was the first wild capture fisheries certification program to include both social and environmental benchmarks.

In February 2015, US supermarket chain, Safeway and Fair Trade USA announced a new partnership to launch Fair Trade-certified tuna into the North American market. Anova Food, a recently acquired subsidiary of Bumble Bee, has imported Fair Trade-certified yellowfin tuna from four associations representing 120 small-scale fishermen in Indonesia's Moluccan (Maluku) Islands who fish with single handlines attached to handmade kites. Anova Food specialises in high-quality frozen tuna and was reportedly due to launch Fair Trade yellowfin products under their Natural Blue range through Safeway stores in Northern California, Portland and Seattle in March 2015. As additional supply becomes available, Anova Food has indicated plans to expand supply to other areas. For every Fair Trade-certified tuna sold, the fishermen

Egypt, Saudi Arabia and Libya are major canned tuna import markets

Declining imports in several Middle East markets puts downward pressure on canned tuna prices

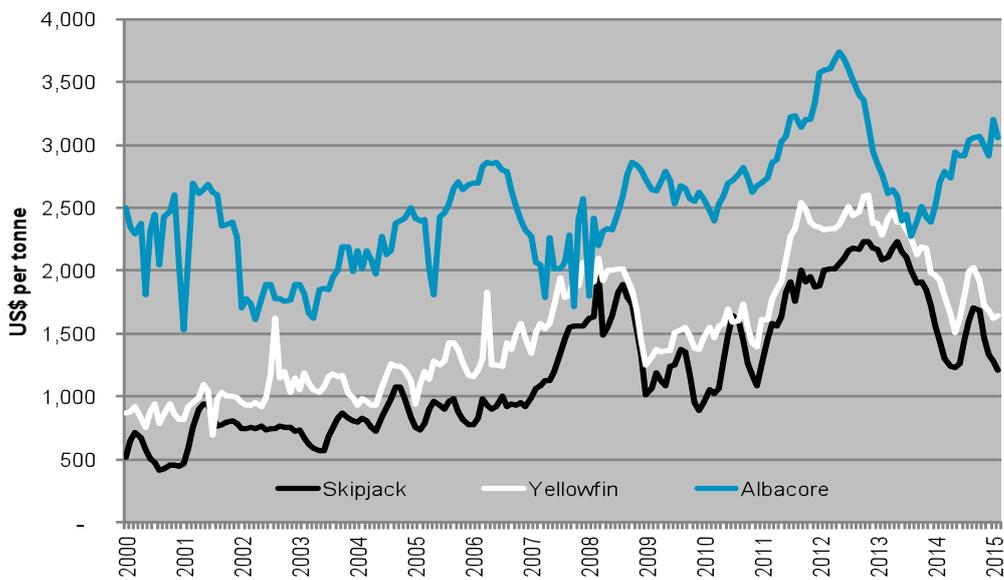
Anova Food will launch the world's first Fair Trade certified yellowfin tuna in the US market

receive a 10% premium on the dockside (ex-vessel) price that they can invest into community development programs.³³

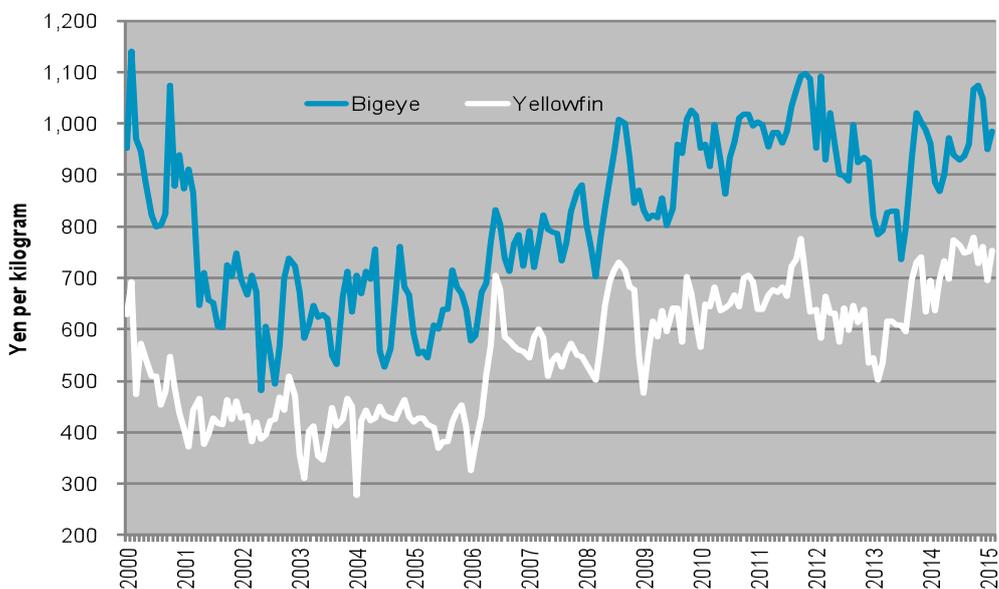
Fair Trade USA's fisheries certification may have some potential for artisanal-scale fisheries in the Pacific, such as the Samoa alia fishery.

TUNA PRICE TRENDS³⁴

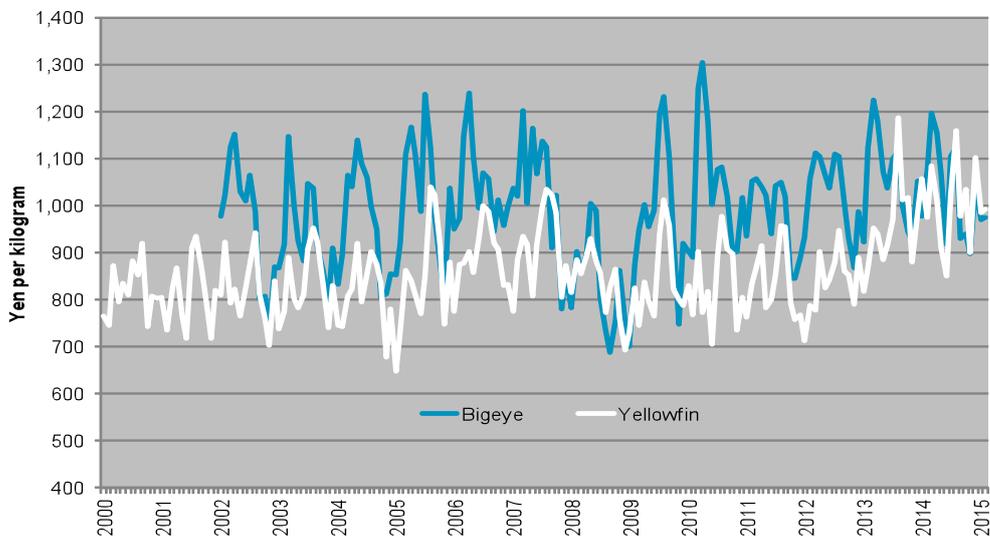
Bangkok canning-grade prices to February 2015³⁵



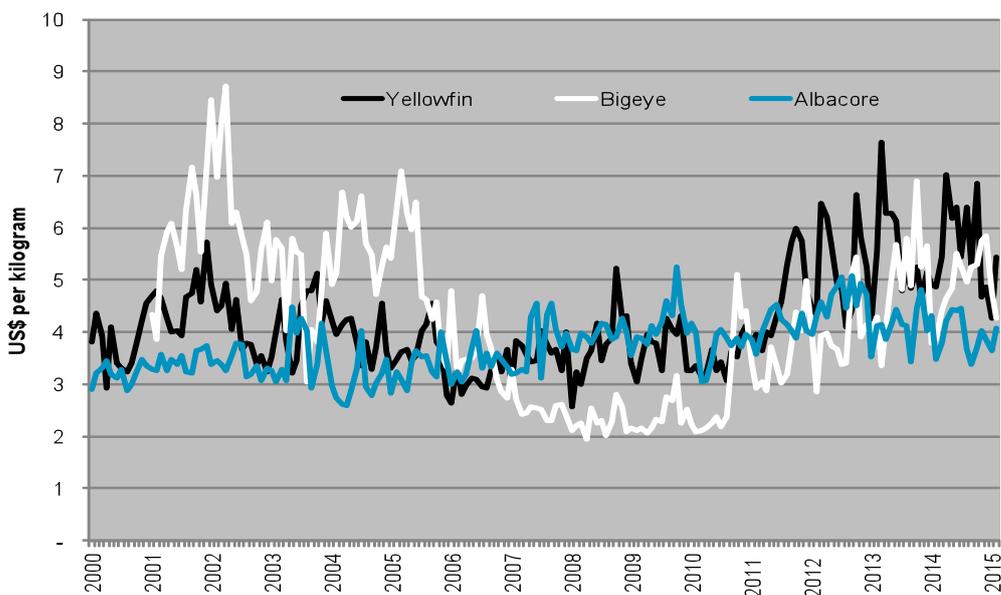
Japan frozen sashimi prices (ex-vessel, Japanese ports) to February 2015³⁶



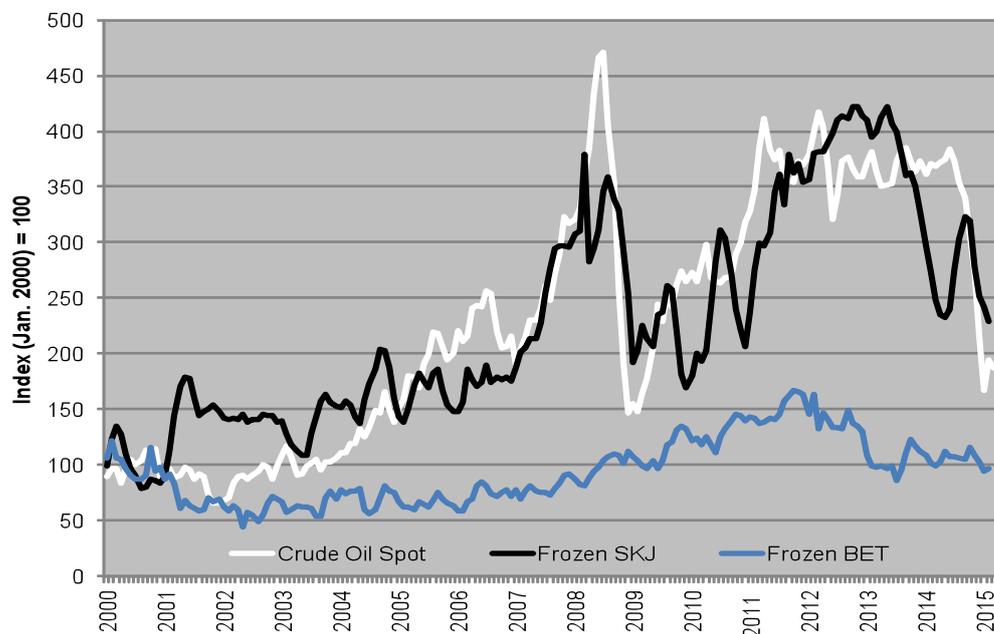
Japan fresh sashimi prices (origin Oceania) to February 2015³⁷



US imported fresh sashimi prices to February 2015³⁸



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to February 2015³⁹



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. 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 This article summarises key points from numerous presentations delivered during the European Tuna Conference 2015. The programme and list of presenters is available at: <http://www.europeantunaconference.com/program.html>

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⁴ Adam Baske, James Gibbon, Joanna Benn and Amanda Nickson 2012, Discussion Paper: Estimating the Use of Drifting Fish Aggregating Devices (FADs) Around the Globe, Pew Charitable Trusts. Available at: <http://www.pewtrusts.org/en/research-and-analysis/reports/2012/11/30/estimating-the-use-of-drifting-fish-aggregating-devices-fads-around-the-globe>

⁵ The full text of ILO Work in Fishing Convention is available here: http://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::P12100_ILO_CODE:C188

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⁷ EC 2015, 'EU acts on illegal fishing: Yellow card issued to Thailand while South Korea & Philippines are cleared'. Press Release, European Commission, 21 April 2015, Brussels.

⁸ Neil Ramsden 2015, 'Thailand yellow carded by EU', Undercurrent News, 21 April 2015.

⁹ *ibid.* EC 2015

¹⁰ Complete report available at: http://www.nmfs.noaa.gov/ia/iuu/noaa_taskforce_report_final.pdf

¹¹ 'Presidential Task Force releases action plan to combat illegal, unregulated and unreported fishing and seafood fraud', NOAA Press Release, 15 March 2015. Available at: www.noaa.gov

¹² Liam Campling and Elizabeth Havice, 2014. 'Agreement on US Treaty reached; FFA clarifies Kiribati's move', FFA Trade and Industry News, 7(5) September-October. Available at: <http://www.ffa.int>

¹³ PNAO 2015, 'PNA CEO: PNA not selling out sustainability for cash', PNA Press Release, 27 March. Available at: <http://www.pnatuna.com>

¹⁴ Atuna 2015, 'Treaty talks: Lots of chat but little action', Atuna, 26 March 2015. Available at: <http://www.atuna.com>

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¹⁷ *op.cit.*, Atuna 2015, 11 March 2015.

¹⁸ Industry source, pers. comm., April 2015.

¹⁹ Atuna 2015, 'The effect of two month bite out of Bangkok supply', Atuna, 19 March 2015. Available at: <http://www.atuna.com>

²⁰ See Liam Campling, Elizabeth Havice and Mike McCoy, 2014 'UK media and US government highlight slavery in Thai seafood industry', FFA Trade and Industry News, 7(3), May-June 2014. Available at: https://www.ffa.int/trade_industry

²¹ EJF 2015, Broken Promises: Why Thailand should stay on Tier 3 in the 2015 US Trafficking in Persons report. Available at: http://ejfoundation.org/sites/default/files/public/EJF_Thailand_TIP_Briefing.pdf

²² Petchanet Pratuangkrai, 2015 'Delegation to US works to upgrade Thailand's labour status', The Nation, 13 March 2015. Available at: <http://www.nationmultimedia.com/business/Delegation-to-US-works-to-upgrade-Thailands-labour-30255895.html>; see also: 'Putting Ex-Cons On Fishing Boats - After All Not Such A Great Idea', Atuna, 23 January 2015.

²³ Ministry of Foreign Affairs Kingdom of Thailand 2015, Press Release, 'Thailand's Trafficking In Persons Progress Report : January – March 2015', 31 March 2015. Available at: <http://www.mfa.go.th/main/en/media-center/14/55113-Thailand%E2%80%99s-Trafficking-In-Persons-Progress-Report.html>; Jeerawat Na Thalang, 'Caught in a net of lies and abuse', Bangkok Post, 1 March 2015. Available at: <http://www.bangkokpost.com/news/special-reports/485621/caught-in-a-net-of-lies-and-abuse>; 'Thai Union pledges 'no compromise' if suppliers have slavery links', Intrafish Media, 27 March 2015. Available at: <http://www.intrafish.com>

²⁴ See Liam Campling, Elizabeth Havice and Mike McCoy 2014, 'Can the Philippines meet EU GSP+ labour standards?', FFA Trade and Industry News, 7(3), May-June 2014. Available at: https://www.ffa.int/trade_industry

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²⁶ Person. comms., industry sources, April 2015.

²⁷ Sengupta 2014

²⁸ Campling, Liam 2015, Assessing Alternative Markets: Pacific Islands Canned Tuna and Tuna Loins, Honiara: FFA

²⁹ Hamilton, Lewis, McCoy, Havice and Campling 2011, Market and Industry Dynamics in the Global Tuna Supply Chain, FFA, June 2011; industry source, pers. comm., 2015

³⁰ Sengupta 2014

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³³ Undercurrent News 2015. 'Anova Food launches world's first Fair Trade-certified seafood through Safeway', Undercurrent News, 20 February 2015. Available at: <http://www.undercurrentnews.com>

³⁴ All databases are provided by the Fisheries Development Division at FFA.

³⁵ Customs Department, Thailand. <http://www.customs.go.th/Statistic/StatisticIndex.jsp>

³⁶ FFA database

³⁷ Japan Customs. http://www.customs.go.jp/toukei/info/index_e.htm

³⁸ US National Marine Fisheries Service. <http://www.st.nmfs.gov/st1/trade/index.html>

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