FFA TRADE AND INDUSTRY NEWS

Volume 8: Issue 3 May-June 2015
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PREFERENTIAL TRADE

EU defers concluding Pacific EPA for three years

The European Union has proposed deferring by three years any negotiations to conclude a comprehensive Economic Partnership Agreement (EPA) with the Pacific ACP. This marks another setback in a chequered history of negotiations that have been ongoing since 2004. In contrast, the Pacific island parties' position has been to conclude the negotiations as quickly as possible.

EU positions on PACP tuna fisheries management and conservation policies have long been a stumbling block in discussions, especially the Vessel Day Scheme. ACP Secretary General Doctor Patrick Gomes referred to EU demands on Pacific island fisheries policy as 'nowhere realistic'.[2] And the ACP Trade Ministerial Declaration on EPAs in June 2015 emphasised concern that the EU and PACP have not met at the political level since 2007.[3]

The Fijian Prime Minister told a Joint ACP–EU Parliamentary Assembly in Suva in June that the EU should be more flexible and that the PACP must implement necessary reforms.[4] Stating that the ACP 'especially look to the EU and the rest of the developed world to give us a fairer trading environment', Bainimarama went on to praise the EU for its more forward looking policies on climate change. Fiji has yet to ratify the interim EPA, although it is a signatory and is implementing the agreement.

However, in early July, PNG announced that it was withdrawing from EPA negotiations. PNG's Minister of Trade, Commerce and Industry, Richard Maru, stated that this was motivated by not wanting to 'endanger the very fragile relationship we have with EU' because of the importance of the existing Interim EPA in 'underpin[ing] the fisheries industry in the country, among others'.[5]

PNG withdraws from EPA negotiations

FISHERIES REGULATION

Comment period opens for potential European Union-wide eco-label

The European Commission has opened a public comment period to solicit feedback on the possibility for a Union-wide fisheries and aquaculture eco-label.[6] The move follows from the regulation on a Common Market Organisation for fisheries and aquaculture production (CMO, Reg. EU 1379/2013) that commits the Commission to submit a feasibility report on options for a Union-wide eco-label. Notably, the regulation highlights that an eco-label for fishery and aquaculture products could be applied to products whether they originate inside or outside of the Union.

The comment period offers a questionnaire that asks participants to state opinions about the EU's role in eco-labelling and if governments should be involved in certification, as well as what the scope of an EU eco-label should be. For example, respondents can comment on whether such a scheme should apply only to products that originate in the EU, and if an EU label should address only environmental issues or also include social, food quality, health and safety and animal welfare concerns. Public comments will contribute to the feasibility study by drawing out opinion on the impacts and issues associated with fisheries and aquaculture ecolabels from a range of different stakeholder groups; the feasibility study is expected to be completed by the end of 2015.

The presence of eco-labels for fisheries products has been growing in recent years, and the EU is a major market for certified products. The dominant eco-label, the third-party MSC certification, has growing relevance in the tuna sector where the number of tuna fisheries undergoing certification has doubled in the past year.[7] However, recent years have yielded a surge in 'state-level' fisheries eco-labels that have been motivated in part by industry's desire to have alternatives to the costly and time consuming MSC process and by states' interests in demonstrating the rigour of their national fisheries and regulatory policies. Such state-level eco-labels can potentially meet market imperatives that producers demonstrate that their operations are sustainable. State-level schemes are currently operational or under consideration in Alaska in the US, Canada, Iceland, Japan and the United States.[8]

A public comment period on the potential for an EU-wide fisheries and aquaculture ecolabel is open.

Update on Thailand's 'yellow card' warning from EU

As reported in the last edition of FFA Trade and Industry News, in April 2015, Thailand was issued a 'yellow card' warning from the European Union (EU) for being potentially non-cooperative in the fight against illegal, unreported and unregulated (IUU) fishing. The Thai Government, together with the Thai tuna industry, are reportedly working hard to implement changes necessary to comply with the EU's IUU Fishing Regulation and are hopeful the yellow card warning will either be lifted or extended for a further six months following a review to be conducted by the EU in October, rather than receiving a 'red card' and facing EU market sanctions for fisheries and fishery products.[9]

In October, the EU will review Thailand's 'yellow card' warning.

On 1 May, Thailand's National Council for Peace and Order established the Combatting Illegal Fishing Unit, which reports directly to the Prime Minister. Thailand is also implementing a National Plan of Action to Combat, Deter and Eliminate IUU Fishing. The amended Fisheries Act was set for implementation on 27 June which improves port state measures and introduces harsher sanctions to deter IUU Fishing. Twenty-eight 'port in port out' controlling centres have also been established in coastal provinces throughout Thailand to improve monitoring, control and surveillance.[10]

At the same time, the Thai Government is also working to crack down on human trafficking and forced labour allegations in the fishing industry, after the US State Department downgraded Thailand to Tier 3 in its Trafficking in Persons (TIP) report in 2014. It is unclear if Thailand's status will improve in the 2015 TIP report which was due to be released in June, particularly in the wake of the recent discovery of mass grave sites in human trafficking camps on the Thailand and Malaysia border.[11]

The Thai Government has established a dedicated 'Combatting Illegal Fishing' Unit.

Many of the issues raised by the EU and US State Department relate to non-tuna seafood sectors (i.e. shrimp, fish meal), as Thailand does not have its own tuna fishing fleet. However, the consequences of losing EU market access for all fishery products, including tuna would be dire for Thailand's tuna processing industry. Hence, the Thai Tuna Industry Association (TTIA) is working closely with the Thai Government on these issues. Thailand's top tuna processors, Thai Union and Sea Value have joined together with other seafood companies to fight illegal fishing and human trafficking; they have vowed to use tuna by-products for fish meal production, rather than sourcing non-tuna by-catch from local vessels potentially engaged in IUU fishing or forced labour.[12]

FISHERIES DEVELOPMENT

FFA proposes a Regional Competent Authority Support Unit

Like all exporting countries, Pacific Island countries (PICs) are required to establish controls to ensure that fisheries products meet minimum requirements for food product safety. In the Pacific, PNG, Solomon Islands and Fiji have established national systems that are consistent with EU policies – known as 'Competent Authorities' – and thus enable these countries to export to the EU market. However, seven PICs with significant domestic tuna fleets – Cook Islands, FSM, Marshall Islands, Kiribati, Vanuatu, Tonga and Tuvalu – have so far been unable to address all of the legal, technical and resource challenges required to set up inspection systems for fishing vessels, shore-based facilities including processing plants and certification systems for their products. Specific challenges include, but are not limited to, a lack of inspectors and guidelines, insufficient operating budgets, limited access for testing facilities, limited sampling and insufficient traceability controls. As a result, these countries cannot access markets that require national Government certification of compliance with sanitary requirements. Lack of effective Competent Authorities also hinders PIC efforts to attract vessels to register under their flag and efforts to attract landings into shore based processing facilities.

To facilitate PIC fisheries exports, FFA has proposed to develop a Regional Competent Authority Support Unit

To contribute to improving these conditions, FFA has developed a proposal to establish a 'Regional Competent Authority Support Unit' – RECAS – that will provide specific technical services related to the implementation of official controls by PIC Competent Authorities, technical assistance and training. A recent RECAS feasibility study outlines the rationale and plans of actions for the Unit.[13] Primary responsibility for implementing export controls will remain in the hands of each state, as will the development of legal frameworks for controls, sanitary approval and listing of vessels and establishments, issues of sanitary certificates and legal action in case of breach of law. However, the RECAS will endeavour to help develop human resources with appropriate technical skills for food safety on the regional scale. The RECAS is envisioned as an independent regional body that will act as a third party on behalf of national Competent Authority in the performance of well-defined technical tasks. This would allow national CAs to better discharge functions in relation to food safety controls for fishery exports. The approach would focus on:

- Developing a concentration of scarce technical skills available to multiple countries
- Increasing efficiency of vessel inspections by a regional body on behalf of several national authorities
- Developing standard operating procedures that increase validity and reliability of inspections throughout the region
- Developing a regional environmental monitoring programme that improves sampling and testing monitoring efficiency and data sharing
- Improving data coordination and communication on topics such as sanitary history or re-flagged vessels
- Further developing mechanisms for delivering technical assistance to build national capacity

The proposed RECAS will begin by targeting product from freezer vessels

To achieve these goals, the RECAS might develop a range of regional capacities, such as: a regional management standard, voluntary inspection and certification of vessels to the published standard, sampling and submission of samples for testing, environmental monitoring, and/or technical assistance for strengthening national CAs. The recommended starting point for regional action is for fishery products derived from freezer vessels, with potential for future development to include shore-based establishments. It is estimated that RECAS will require an initial investment of

US$373,000 to launch and that annual operating costs will be US$424,000 thereafter. The proposal identifies potential sources of funding for development of national CAs, including the World Bank Pacific Islands Regional Oceanscape Programme – which has allocated US$1.8 million for development of sanitary CA functions in Marshall Islands, FSM and Tuvalu as well as a regional coordination mechanism under FFA – and potentially funds under the current Kiribati-EU Fisheries Partnership Agreement which runs through 2016 devoted to establishing a CA to develop and certify chain of custody processes.

MSC certification for Cook Islands' albacore fishery

The Cook Islands' South Pacific albacore longline fishery achieved MSC certification on 8 June 2015, following a contentious 20-month assessment conducted by MSC-accredited certifying body, McAllister, Elliott and Partners. The MSC certification covers 20 foreign-flagged longliners (19 China and one Federated States of Micronesia) owned by three subsidiary companies of Chinese-owned, Luen Thai Fishery Venture. The unit of certification covers the fleet's albacore catch within Cook Islands EEZ of around 2,300 mt annually. This fleet typically delivers the majority of its albacore catch to American Samoa.[14]

Following the release of the final report in November 2014, objections to the certification were lodged by environmental NGO, World Wildlife Fund (WWF) and the Fiji Tuna Boat Owners Association (FTBOA). One of the primary concerns raised by WWF was inadequate conditions set in relation to perverse incentives (subsidies) received by Chinese vessels which potentially increase fishing effort. They also raised objections about inadequate traceability systems for monitoring non-MSC high seas catches and overly generous scoring for three stock-status related performance indicators. Similarly, FTBOA was concerned that three management-related performance indicators were scored more highly than they should have been. Both WWF and FTBOA objected that the harvest strategy for albacore (WCPFC's CMM 2010-05) is not achieving its objectives, with vessel numbers exceeding limits set. As both WWF and FTBOA felt their objections were not adequately addressed by the certifying body during the objections process, the assessment proceeded to independent adjudication. After a seven-month long objections and adjudication period, MSC's independent adjudicator dismissed WWF and FTBOA's objections and approved the fishery for certification in early June.[15]

The Cook Islands albacore longline fishery's certification requires eight conditions to be met within the five year certification period. These conditions include the adoption of a harvest strategy for South Pacific albacore involving harvest control rules, limit and target reference points. A condition has also been set requiring stronger management to mitigate the harmful impact on fishing effort of perverse subsidies.[16]

Currently, MSC has 260 fisheries certified worldwide, with another 113 in assessment. The Cook Islands albacore longline fishery marks the ninth tuna fishery to be certified, while another eight tuna fisheries are under assessment; two of which are WCPO tuna fisheries (Solomon Islands purse seine and pole and line skipjack and yellowfin fisheries and the Tri Marine US free-school purse seine skipjack fishery).[17]

Albacore catches from Luen Thai's longline fleet in Cook Islands EEZ can now be marketed under MSC's eco-label

WWF and Fiji Tuna Boat Owners Association lodged objections to the Cook Islands longline albacore certification

New study on tuna-related technology and development FFA countries

In May FFA released the report, A Forward-Looking Study of Development Opportunities in FFA Member Countries in the Tuna Industry, authored by Mike A. McCoy, David G. Itano, and Stephen J. Pollard. It describes recent advances in fishing technology and catch handling in tuna purse seine and tuna longline fishing, tuna products and marketing, and the trends and impacts of these advances on potential development opportunities. It also summarises the status of implementation of electronic reporting and electronic monitoring as well as advances and trends in freezing, cold storage, processing, and transportation in the tuna industry. Some new tuna products and marketing of those products as well as aspects of traceability in the tuna trade are described. Other subjects covered include tuna ranching/tuna aquaculture and open ocean fertilisation. Two final sections of the report provide guidelines for attracting and assessing investment in the tuna fisheries of Pacific Island countries and a look at challenges for the future. The report was funded by Australian Aid with additional support from DevFish and can be found here: http://www.ffa.int/node/1509

Purse seine vessels reap benefits of echo sounder GPS buoys

The report notes that most large-scale purse seine vessels subscribe to services providing satellite-derived remote sensing oceanographic information that can be extremely useful in deploying drifting FADs. Echo sounder GPS buoys in combination with accumulating experience of fishing masters in interpreting the transmitted images is pegged as being the most significant improvement to drifting FAD and purse seine technology. This is particularly noteworthy in light of recent management efforts aimed at limiting or reducing the number of FADs in use. Such actions could well drive further advances in technology to make FADS and associated buoys even more effective. Competition in purse seining will continue to focus on employing the latest technologies, with vessels backed by large, vertically integrated companies having an edge over individual or small fleet operations.

The most significant technological shift observed in the longline fishery is an increase in ultra-low temperature (ULT) equipped albacore and bigeye targeting vessels based in the Pacific islands region, particularly those <100 GRT. This has required changes in existing supply chains from fresh to frozen products in order to reach appropriate markets. The processing of longline-caught ULT fish into customer-ready packs is unlikely to occur in most Pacific Island locations, owing to a lack of raw material volume and high shipping costs.

Ultra-low temperature equipped longliners expand in the WCPO

Refrigerated container ocean freight is playing a growing role in the transportation of longline-caught tuna. Its use is limited to ports with regular liner services and sufficient support facilities. This tends to increase the use of major ports by longliners, with exceptions being where large-scale onshore processing provides the necessary economies of scale (e.g. Noro, Solomon Islands and Pago Pago, American Samoa). Refrigerated fish carriers are likely to remain the most efficient mode of transport for transshipped purse seine-caught fish in Pacific island ports due to the large volumes of cargo involved, shifting fishing grounds and port limitations at the most active transshipment sites.

Low levels of longline observer coverage contribute to a general lack of knowledge of many technical aspects of the tuna longline fishery. Bycatch mitigation techniques have been successfully devised for turtles and seabirds, but less so for sharks where avoidance options are so far limited. There is limited knowledge of the degree to which such techniques are actually employed due to the aforementioned lack of observer coverage in the Pacific islands fishery. The report reviews the status of electronic monitoring trials in the longline fishery and notes that a region-wide program in conjunction with the Regional Observer Program has significant budgetary implications and trained manpower requirements, particularly to review and interpret video and record the data collected.

Tuna loins are almost universally hand-picked and cleaned primarily by women in facilities using a process that has not essentially changed in over 60 years. In spite of mechanisation elsewhere in the fish processing industry, the cleaning portion of loin processing in the Pacific islands is not expected to be highly automated in the foreseeable future. The main considerations are identified as the desire to maintain the social benefits of employment and to foster community good will. The changes in marketing strategies in mature markets such as North America have resulted in the diversification of products containing tuna, utilising fish that has traditionally gone into cans. It is unlikely that Pacific island countries will participate in the large scale production of such innovative products, other than as suppliers of raw material. Where opportunities do arise, they will be limited to the very few PICs with established food processing industries in other sectors and local sources of sufficient raw material.

The report emphasises the changing nature of the tuna business including consolidation through mergers and acquisitions, diversification of products, and the benefits or roadblocks conferred by the various trade regimes in place. In attracting and assessing investment in tuna fisheries, Pacific island countries are encouraged to first fully understand these and other aspects of the industry. It is also suggested that in seeking to maximise economic gain from their tuna industries, Pacific island countries undertake a careful assessment of the costs and benefits of potential concessions and incentives that may be offered, and give consideration to possible alternatives.

PIC governments recommended to carefully assess full costs and benefits of potential tuna development concessions and incentives

PNA Ministers note successes, plan future actions

At the PNA Ministerial Meeting held in early June, the group reported a successful year for the PNA in general and the VDS specifically, noting the now well-documented increase in revenues to members, including news of a record setting price of US$13,500 per fishing day, despite low skipjack prices.[18] The Ministers also agreed to several provisions.[19]

- Maintain the benchmark minimum price for a fishing day at US$8,000 fo rnon-domestic vessels.
- Charge a US$1,000 fee for every FAD set upon, effective 2016. The group identified the FAD fee as an incentive programme designed to encourage free school sets and catches, though other news outlets have referred to the fee as a penalty.[20] Though not made explicit, this move could help to generate supply for the Pacifical-MSC label. The PNA group will also begin a 12 month FAD tracking programme in 2016.
- Reduction of 700 fishing days from total allowable effort (TAE) under the VDS, dropping the TAE from 46,610 in 2015 to 45,881days in 2016.

PNA hold benchmark price, adding a US$1000/ day fee for FAD fishing

Ministers voiced support for several regional actions.[21] They noted an increase in sales of fishing days to individual companies, rather than under bilateral arrangements, which they credit with increasing the value of the VDS. Ministers expressed support for Palau's proposal to create a marine sanctuary in a large portion of its EEZ. They also welcomed the longline VDS which is schedule to go into effect January 2016.

Finally, given that domestic fleet advancement remains a priority among the PNA, the group raised concern over efforts to block new fleet growth in the region that are linked to capacity reduction efforts. The group explicitly identified that WCPFC members should live up to provisions that require policy space for SIDS to develop their tuna fisheries. In something of a face-off between two groups premised on generating change through collective action, the PNA group expressed concern that ISSF's capacity reduction initiative protects existing foreign fleets and obstructs PIC fleet development. The PNA group endorsed taking action against ISSF members to resolve this issue. It proposed requiring ISSF member foreign vessel owners to declare that they will not apply the ISSF capacity resolutions to PNA vessels as a condition of their vessel registration, refusing to license new foreign vessels with ISSF member ownership, and suspending technical cooperation with ISSF. Action on any of these proposals is subject to further discussion among the group.

PNA endorse action against ISSF capacity reduction efforts that hinder domestic fleet development

TUNA INDUSTRY

WTPO extends purse seiners' time in port to reduce tuna supply

On 15 May, the World Tuna Purse Seine Organisation (WTPO) implemented a port-turnaround measure to address the current oversupply crisis which has led to skipjack prices falling below US $1,000/mt. All WTPO members (and volunteering non-cooperating members) in the Western and Central Pacific, Indian and Atlantic oceans have extended their port turnaround time from several days to a minimum of 7-10 days until the end of 2015. By doing so, WTPO estimates fishing effort will reduce by 35 percent and reverse the downward spiralling fish price.[22]

WTPO members will meet once again in July to review the effectiveness of this measure and compliance with it (with the assistance of data from PNA's vessel monitoring system). Should the extended port turnaround measure not be effective, WTPO members will consider moving to a 30-day full fishing closure, in line with their original proposal to the PNA in March 2015. With the Bangkok skipjack price recovering from a low of US $950/mt to $1,150-$1,200mt in late June, this indicates that the WTPO measure may have already had some impact.[23] With the WCPO four-month FAD closure commencing on 1 July, prices are also expected to recover somewhat in the short-term, although there are some concerns about a price drop once again post-October following the end of the FAD closure.

Purse seiners globally are spending 7-10 days in port to reduce fishing effort and correct over-supply problems

TUNA MARKETS

Alternative canned tuna markets study released by FFA

The world's largest traditional canned tuna markets – Europe and the USA – are maturing. Consumption levels are stabilising in the EU and are declining in the US. However, Pacific Island processors continue to depend heavily on the European market for light meat canned tuna and pre-cooked loin exports due to duty free access, as well as the US market for pre-cooked albacore loins.

At the same time, access to the EU market is becoming increasing complex for Pacific Island processors due to strict regulatory requirements, particularly in relation to food safety and IUU fishing. Pacific Island processors are also facing increasing competition from other more cost-effective tuna processing sites in part due to the erosion of tariff preferences.

In this context, FFA commissioned a study Assessing Alternative Markets: Pacific

Islands Canned Tuna and Tuna Loins, which is available here: http://www.ffa.int/alternative_markets

Future demand for canned tuna will likely stem from the Middle East, Latin America and other emerging markets such as Eastern Europe. The study analyses opportunities for Pacific Island exporters of canned tuna and pre-cooked frozen loins to access alternative markets, taking into account five factors: dynamics of market demand, existing suppliers, tariffs and duty preferences available to PICs, non-tariff measures, and freight costs.

No clear alternative to the EU market was found for PIC canned tuna exporters

Based on the interplay of these five factors, no clear market opportunity was apparent for PIC exporters of canned tuna and only limited opportunities may exist for pre-cooked loins. Importantly, each alternative market considered is currently more cheaply supplied by competitors in terms of freight costs. This is of central importance because where a possibly significant tariff preference is apparent for PIC processors, it is probable that the freight costs alone outweigh the tariff advantage. In some cases, major competitors already have duty free access under existing trade agreements. Even if PICs can offer an advantage of cheaper fish due to their close proximity to fishing grounds, this appears to be countered by the other widely documented costs of doing business in island economies and lower levels of labour productivity.

Based on the research undertaken for this study, the following opportunities were identified:

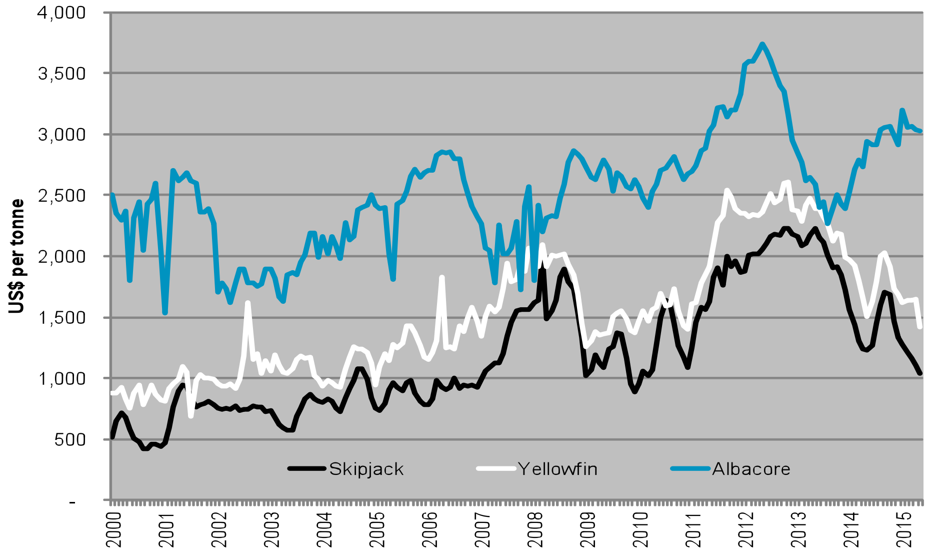
- Canned tuna – a significant tariff preference exists for Least-Developed Countries (i.e. Solomon Islands) in Russia (however, this may be offset by high freight costs and bureaucratic non-tariff requirements).
- Pouches – an increasing focus on pouch production might be more commercially viable than canned production as it solves the issue of 'importing air' in empty cans and pouches can be packed by hand which requires less expensive filling machinery.
- Pre-cooked loins – the Thai market may offer limited opportunities at times when fish prices are very high and raw material supply is scarce; a small potential market may exist in Turkey for good quality loins if Turkish branded-processors continue to expand into the Middle East and Central Asia; an opportunity may exist for small volumes of loins from Solomon Islands to Japan to replace imports from Philippines and Indonesia.

Tuna in pouches may be a more viable option for PICs than in cans, and small loin markets may exist in Japan and Turkey

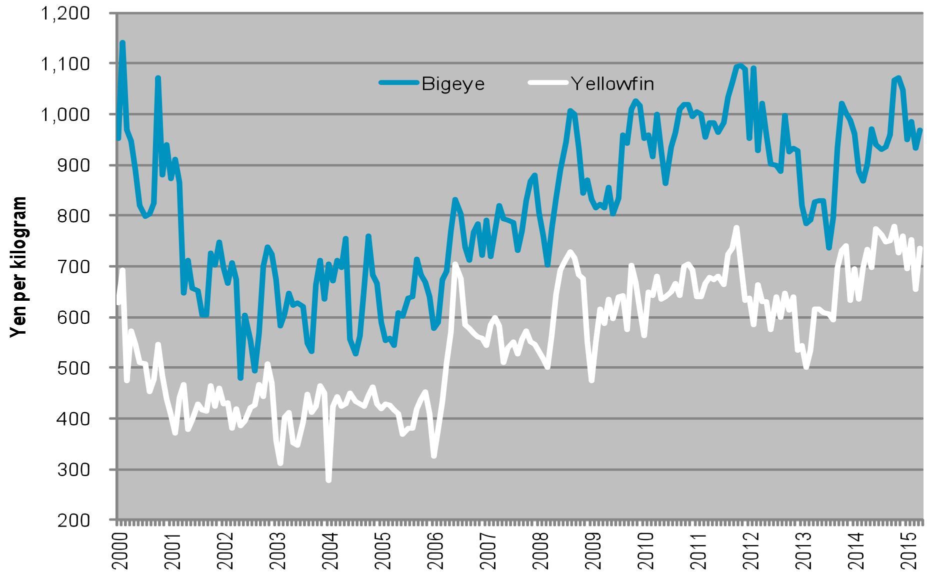
The critical importance of the EU market to PIC tuna processors cannot be underestimated – it appears to be the only real sizeable market with high demand and a high price/quality ratio that PIC processors can supply competitively. The major trade preferences provided by the EU to PIC processors (under the Interim Economic Partnership Agreement (IEPA) and Everything But Arms) continues to be the most commercially viable competitive advantage, especially given the relaxed rules of origin under the IEPA. Given the pivotal importance of the EU market to PIC processors, PIC governments need to ensure that adequate resources are dedicated to ensuring PICs can comply with the EU's strict regulatory requirements for market access on an ongoing basis.

TUNA PRICE TRENDS [24]

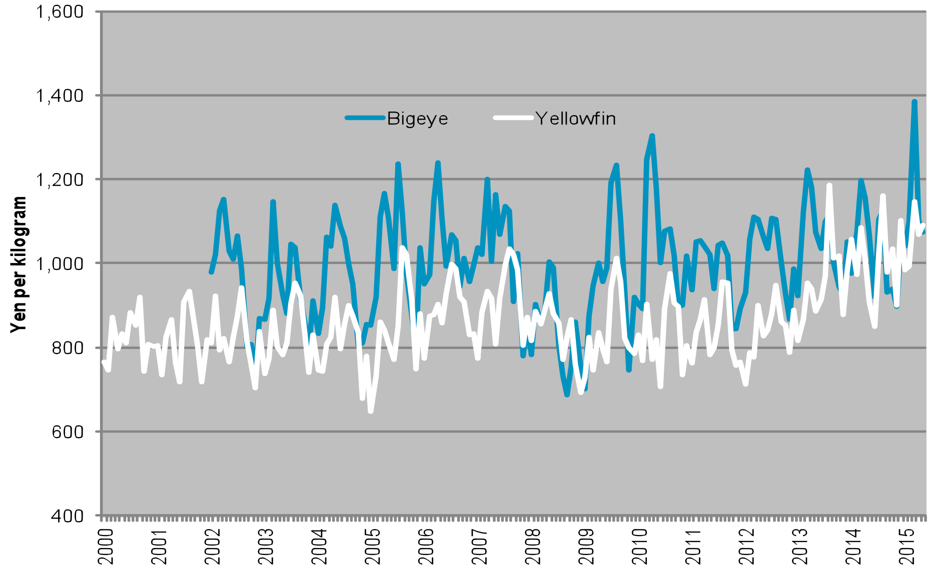
Bangkok canning-grade prices to May 2015 [25]



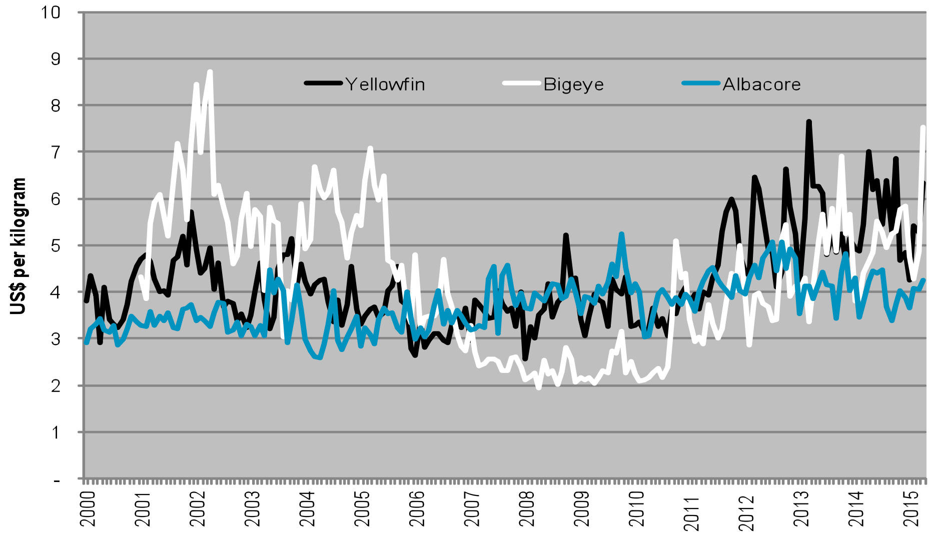
Japan frozen sashimi prices (ex-vessel, Japanese ports) to April 2015 [26]



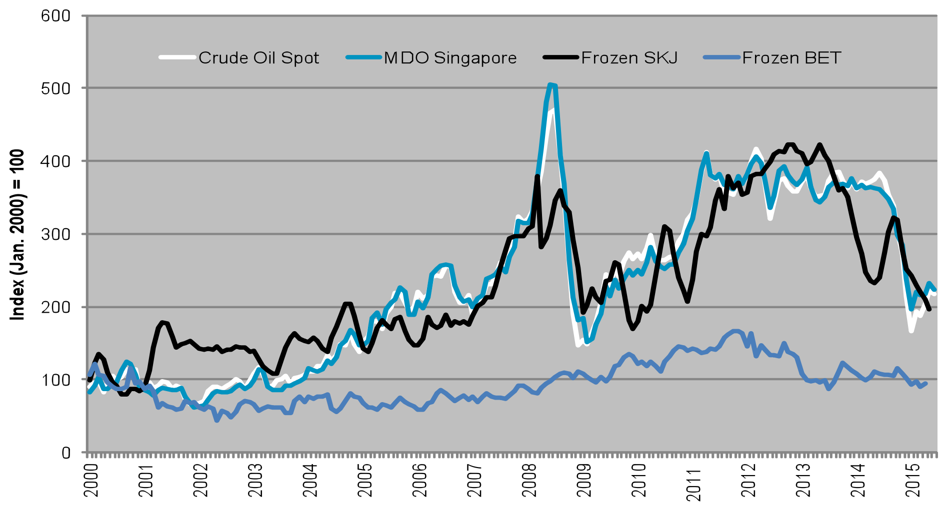
Japan fresh sashimi prices (origin Oceania) to May 2015 [27]



US imported fresh sashimi prices to April 2015 [28]



Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to May 2015 [29]



[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 Timothy Adams, Mike Batty and Wez Norris for their 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.

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