



## FISHERIES TRADE

### WTO Fisheries Subsidies Agreement is finally reached, but is missing the main discipline

At the eleventh hour of an extended day into Ministerial Conference 12 (MC12), WTO members finally reached agreement on a Fisheries Subsidies Agreement (FSA) on 9 June 2022. There was considerable external and internal pressure to do so. External to the WTO, UN Sustainable Development Goal (SDG) 14.6 was the very first SDG scheduled to be completed in 2020, but was delayed due to COVID-19. Internally, the new WTO Director General Dr Ngozi Okonjo-Iweala wanted a win, and moreover, WTO members needed to show that they could complete a negotiation after decades of stalemate.

Unfortunately, a combination of poor political judgement by some members and brinkmanship by others (see the following story on Negotiation dynamics) meant that the FSA is missing its most important discipline on overcapacity and overfishing, making it a 'mini-FSA'. Aside from a few important technical issues, Members had agreed for over three years to the main contours of disciplines banning subsidies to IUU fishing and to fishing on overfished stocks.<sup>2</sup> Otherwise, the most striking feature of the mini-FSA is that it's a one-sided agreement: coastal members will have extra fisheries management burdens, and there are very limited obligations on distant water fishing nations to discipline their massive subsidies.

The meat of negotiations has always been on the ban on certain subsidies to overcapacity and overfishing, and attendant special and differential treatment (SDT), because this rule had the scope to significantly effect commercial operations on a global scale. But this was parked at MC12 and a sunset clause agreed where Members commit to completing the deal four years after the mini-FSA comes into force, which will take 164 Members at least three years to deposit into domestic law.

So, what does the mini-FSA cover? On **IUU** (Article 3), subsidies to IUU fishing are – unsurprisingly – banned, albeit with a number of elements that shift the balance from coastal states to distant water fishing nations. These include that subsidising members have some discretion to determine the duration of any prohibition of subsidies to fishing where IUU took place (which they may be likely to minimise), and subsidising members must be given an opportunity to exchange information prior to any FSA determination. (This does *not* directly restrict the IUU enforcement actions of coastal states, these will carry on as before, regardless of the WTO.)

On **Overfished Stocks** (Article 4), the mini-FSA bans subsidies to fishing activities that target a fishery defined as overfished, as defined by the relevant coastal state or RFMO. However, subsidies are still permitted if 'subsidies or other measures are implemented to rebuild the stock', which is both open and ambiguous because no limit is placed on the speed or time period for rebuilding, 'other measures' would seem to include any fisheries management regime designed to restrict fishing activity, and the measures need to be implemented without any proof that they are *effective*.

The draft FSA text covering 'Subsidies contributing to overcapacity and overfishing' was replaced with a new title '**Other subsidies**' (Article 5). This covers two areas: a substantive ban on subsidies for unregulated fishing in the high seas (i.e. fishing outside of an RFMO's species competence); and a softer requirement on a subsidising member to use 'special care' when granting subsidies to a vessel flying another country's flag.

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*In missing the most important article covering subsidies where overfishing is occurring, the FSA is only part of an agreement*

Some **technical assistance** will be made available to implement the mini-FSA. While there are no binding obligations, funding is likely. This will be of particular importance to developing members such as the Pacific Group seeking to comply with the **notification and transparency** provisions. The first notification, in particular, will require information on the subsidies granted or maintained and a compilation of the related fisheries management measures and fisheries data.

While there is no rush as it is likely to be seven years before the mini-FSA is in effect, there are a number of **initial implications for the Pacific Group**, including:

- the need to identify IUU and other fisheries management laws and regulations that need to be notified;
- review the legal requirements and procedures relating to fisheries law enforcement to ensure compliance with Article 3;
- enact laws to give effect to Article 3 so that prohibited subsidies are not provided;
- review which species are overfished and analyse whether subsidies are provided, and if they are, consider the redesign of programmes to focus on rebuilding; and,
- prepare a regional approach to notification and transparency provisions with the aim of reducing costs, time and risks.

Further, it is likely that the WTO will recommence negotiations on a 'full FSA' in September 2022. The Pacific Group will need to develop a strategy of comprehensive engagement in the negotiation of the discipline on certain forms of subsidies to overcapacity and overfishing and effective SDT. This rule could genuinely impact the business of marine fisheries and if properly crafted could benefit fisheries development in the Pacific islands for generations to come.

## Negotiation dynamics at WTO Ministerial Conference 12

The final FSA falls short in terms of achieving the outcomes sought by the Pacific, some strong positives may be drawn from the negotiations. Through cooperation, leadership of broad groups of developing countries, and determination, the Pacific Group ensured its voice was heard on fisheries subsidies and significantly affected the negotiations. The outcome and implications of a decision on the FSA taken at MC12 cannot be understood without an awareness of how the decision came about.

The lead up to the December 2021 MC12 produced, for the first time, something close to a consolidated text that had broad consensus support on most issues. One of the principal reasons for this consensus is that almost all WTO members with major fisheries interests (with the main exception of India) had successfully achieved their major defensive interests in the text. The outcome of this is that the pre-final FSA text presented to Ministers at MC12 when they finally met in Geneva in June 2022 was low ambition and reproduces the status quo, rather than actively requiring Members to reduce their existing subsidy programmes.

However, even this was not possible to get through MC12 because the text did not contain any concessions to India. India was popularly seen as using its relative geopolitical weight to engage in brinkmanship at MC12, and it certainly did use its position to block the FSA text that was on the table, but this came from a position of it long making clear that it needed to see more flexibility on SDT for subsidies where overfishing or overcapacity is occurring, not least because of the millions of small

*WTO agrees to ban subsidies to IUU, on overfished stocks and on unregulated high seas stocks*

*The Pacific will need to review law and subsidies arrangements, start notifying subsidies and engage fully in negotiations when they restart*

scale fishers who punch well above their economic weight politically. The text that almost did get through was a compromise in the infamous 'Green Room' among the big powers (including India) which removed the most important pillar of FSA (i.e. that which sought to ban certain types of subsidies that contribute to overcapacity or overfishing). This is why the text is referred to as a 'mini-FSA'.

Not only was the process bad, but the new text was unbalanced in favour of the advanced fishing nations and focused on fisheries management rather than subsidies. The major powers had addressed their interests at the expense of other Members. The Green Room mini-FSA left most of the costs, but none of the benefits of a FSA for small coastal states. Pacific Ministers and Officials agreed to oppose the Green Room text and was able to do so because of the WTO practice of making decisions by consensus. It was also recognised in the WTO that the FSA is a profoundly important issue for the Pacific, which contributed to the legitimacy of the Pacific blocking the Green Room mini-FSA. The Pacific Group was the mouse that roared.

The ACP then worked together in the Green Room to produce a good faith counterproposal to the Green Room mini-FSA, so that the Pacific and ACP Groups would not be blamed for the failure of MC12. The outcome was that the more onerous aspects of the Green Room mini-FSA were removed and a sunset clause was introduced committing WTO members to negotiate the rest of the FSA as per SDG 14.6 – a prohibition on certain forms of fisheries subsidies which contribute to overcapacity and overfishing and recognizing as integral appropriate and effective special and differential treatment – four years after the date of the entry into force of the mini-FSA.

The main lessons from this experience are two-fold. Powerful countries will sell out less powerful ones to reach a deal, even if they deal has limited real-world implications for powerful countries' commercial interests. Yet the Pacific islands, when working in unity and combining in alliances with other countries, can have an effect on the rules that shape us. Once again, the power and importance of regional cooperation was made apparent, and going forward the Pacific may even consider taking a more muscular role in areas where it has profound interests such as fisheries in the lead up to MC13.

### China and US aim to bolster ties in the Pacific

As widely reported,<sup>3</sup> China has been expanding its influence in the Pacific region by combining economic, diplomatic, military and technological investments in the region. In early June, Chinese foreign minister Wang Yi visited the region, aiming for endorsement of a pre-written multilateral trade agreement with ten Pacific Island countries. The deal would have involved the joint development of a marine plan for fisheries and exploring options for a free-trade area with Pacific nations, but was not collectively endorsed by PIC governments. Some PIC leaders expressed concern that the deal was too wide ranging and could have unintended consequences, and/or that it would needlessly heighten geopolitical tension and threaten regional stability. Pacific nations are reported to have been united in their approach and response to the deal, and several countries signed, or expressed interest in bilateral arrangements and continued diplomatic and economic engagements.<sup>4</sup> For instance, Kiribati and China agreed to increase cooperation on COVID-19 and expand Belt and Road Initiative development; though details were not released. Samoa signed a bilateral agreement; details were also not public, however, a Samoan press release indicated that China would continue to provide infrastructural development support and a framework for future projects remained to be determined and mutually agreed.<sup>5</sup>

*After India threatened to collapse agreement at MC12, the major powers pushed a mini-Fisheries Subsidies Agreement, which the Pacific and allies successfully demanded changes to*

*The Pacific's approach to regionalism was a success story of MC12*



Meanwhile, the Pacific's historical political partners have taken note, and are now also taking concrete steps to reaffirm and expand their commitments in the region. In late May, 'The Quad' (Japan-US-Australia-India) launched a major new initiative to allow partner countries to monitor their waters in the interest of peace and security. The Indo-Pacific Maritime Domain Awareness (IPMDA) rollout will support and work in consultation with the Indo-Pacific nations and regional information centres by providing technology and training to support shared maritime domain awareness. Other initiatives focus on humanitarian assistance and disaster relief. The Quad reaffirmed their commitment to a free and open Indo-Pacific.<sup>6</sup>

The US, in particular, has begun to commit to high-level engagements in the Pacific, with several forms of collaboration being bolstered, including around tuna fisheries.<sup>7</sup> These commitments were most recently outlined by US Vice President Kamala Harris to the Pacific Island Forum. In comments to the Forum she stated, 'We recognize that in recent years, the Pacific islands may not have received the diplomatic attention and support that you deserve. So today I am here to tell you directly: We are going to change that.'<sup>8</sup> Commitments include plans to establish new embassies in Tonga and Kiribati, appoint the first-ever US Envoy to the Pacific Islands Forum, return Peace Corps volunteers to the region and expand the USAID footprint, including with a regional mission in Suva. In addition, US negotiations with FSM, RMI and Palau over certain elements of the Compacts of Free Association are also underway and have picked up steam with Biden's appointment of Special Envoy Ambassador Joe Yun.<sup>9</sup>

Meanwhile, the US Tuna Treaty, which is set to expire at the end of 2022, has seen renewed interest after slow progress in negotiations in 2021 and into 2022. Harris announced that the US plans to triple US funding for economic development and ocean resilience for the Pacific Islands and will request from the US Congress an increase from US\$ 21 million per year to US\$60 million per year for the next ten years. These funds, which are a separate legal agreement from the fishing access agreement that US flagged vessels negotiate with FFA member countries, would be used towards climate resilience, marine planning and conservation, combatting IUU fishing and enhancing marine security.<sup>10</sup> Negotiations will follow from this announcement. However, it is a strong signal to FFA member countries that fisheries are an important part of the US-Pacific relationship.

For its part and across multiple negotiations, Pacific Island countries have expressed interest in developing meaningful and lasting geopolitical relationships and partnerships, rather than being pieces on a gameboard of a shifting geopolitical order.<sup>11</sup>

## FISHERIES MANAGEMENT

### IOTC misses the mark again on yellowfin stock re-building

The 26<sup>th</sup> Annual Session of the Indian Ocean Tuna Commission (IOTC) was held from 16-20 May in Victoria, Seychelles in a hybrid format, with two delegates from Contracting Parties and Cooperating Non-Contracting Parties (CPCs) able to attend the meeting in-person and other delegation members joining virtually. This marks the first RFMO meeting with a return to a full five-day meeting program and at least partial in-person attendance since the COVID-19 pandemic.

The most pressing and contentious agenda item for this meeting was once again the yellowfin tuna rebuilding plan, given the conservation and management measure agreed in 2021 (Resolution 21/01) fell short on catch reductions in line with

*China's efforts  
on a multilateral  
trade deal  
failed, but  
bilateral  
relations  
progressed*

*The US is  
pledging to  
triple the US  
funding for  
economic  
development  
and ocean  
resilience via  
the US Tuna  
Treaty*

scientifically recommended levels and a number of members filed objections to apply this measure. Meanwhile, the Indian Ocean's yellowfin stock remains overfished, with overfishing occurring.

Three proposals were tabled on yellowfin rebuilding – the Seychelles called for textural revisions to clarify the payback clause when CPCs exceed their yellowfin catch quotas; the EU proposed a roll-over of Resolution 21/01 and the establishment of a sub-commission on yellowfin tuna to facilitate preparations for the upcoming 2023 review of the current measure; and, the Maldives proposed double-reductions from existing yellowfin catch reduction levels and the introduction of a FAD closure period. A number of CPCs expressed strong concerns over a disproportionate conservation burden placed on SIDS and a lack of disregard for SIDS development aspirations and food security. Concerns were also raised about the FAD closure creating a disproportionate burden for the purse seine fishery and potentially creating raw material supply shortages to coastal state processing plants. Unfortunately, no agreement could be reached on a revised rebuilding measure, resulting in the Maldives and Seychelles withdrawing their proposals. The Commission agreed to engage the objecting parties - India, Indonesia, Iran, Madagascar, Oman and Somalia (the same CPCs who lodged objections in 2021) - to try to address their concerns, before scheduling a special session dedicated to yellowfin stock rebuilding in latest end of the first quarter of 2023.<sup>12</sup>

The Indian Ocean yellowfin issue continues to attract substantial attention from retailers, brand owners and NGOs, resulting in concrete public commitments to voluntarily reduce yellowfin sourcing to help bring fishing mortality back to long-term sustainable levels. For example, International Sustainable Seafood Foundation (ISSF) Participating Companies voluntarily agreed to reduce their Indian Ocean yellowfin annual sourcing volumes by 11% of 2017-2019 average levels, effective 31 July 2021.<sup>13</sup> This marked the first time a considerable number of key tuna supply chain actors publicly agreed to implement transparent and auditable company-level sourcing reductions in response to an RFMO failure to adopt critical conservation and management measures.

## FISHERIES DEVELOPMENT

### Spotlight on gender equity in tuna value chains as first all-female crew sets off on PIC longliner

Government, industry and community members in the tuna industry are turning their attention to promoting gender equity in the Pacific tuna industry. For instance, The Pacific Community has released *The Pacific Handbook for Gender Equity and Social Inclusion in Coastal Fisheries and Aquaculture* which was designed to give practical guidance for staff working in PICTs.<sup>14</sup> The first of its type in the region, the Handbook provides a basis for general understanding of gender and social inclusion, key commitments of Pacific Island leaders, and basic analysis tools. Handbook modules focus on government work that can address gender and social equity, including: planning and implementation of projects; social analysis, monitoring and evaluation, and policy development; and fieldwork on regional priorities of coastal fisheries management and livelihoods. The Handbook emphasizes that community engagement processes are a prerequisite for inclusiveness and people-centered consultation.

Other projects build from this work identify ways that women can become more equal participants in decision-making about, and control of, fisheries resources.<sup>15</sup>

**A number of IOTC CPCs have once again objected to adoption of a strengthened yellowfin measure resulting in fishing mortality which exceeds scientific advice**

**An SPC Handbook and related studies outline tools for promoting gender equity in tuna fisheries**

While many focus on coastal fisheries and aquaculture, new attention is turning specifically to opportunities in tuna value chains in regional and national policies. A recent study outlines the gender division of labour in tuna fishing, processing, trading and in national and regional organizational policies relevant to tuna fisheries and women/gender in four case study sites: Suva, Fiji; Bitung, Indonesia; General Santos, Philippines; and, Western Province, Solomon Islands.<sup>16</sup> Findings reveals that at case study sites, women typically work in roles and own assets that differ from those of men. Across case studies, women make up the bulk of the workforce in industrial processing and in smaller firms dealing with local markets. In contrast, men cluster around the more senior and higher paid roles in processing and trading enterprises and in fisheries management. Further, women are little recognized in fisheries management or policies that affect value chains, but there is evidence that this is beginning to change, including in the Solomon Islands where there have been gender mainstreaming moves across the government including in the Ministry of Fisheries and Marine Resources. Study authors suggest action in three key areas for progress on gender issues: in industrial scale operations (factories, offices, value chain companies and fishing vessels); in national fisheries policy and support for small and medium scale tuna value chains; and in monitoring evaluation and research to better understand gender equity in the tuna industries. In addition, study authors emphasise the importance of workers and their representatives being given legitimate voices in governance to balance power in industrial operations, and the overlaps with national gender commitments such as the UN Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and UN Sustainable Development Goal 5 (Gender Equality). They identify a role of development assistance donors and for the WCPFC to strengthen the agenda on social issues, including gender equity.

Along these lines, in mid-June, eight women set out to sea as the first full-female deck crew to set off on a two-week fishing journey on board the tuna longline vessel *Seaka II*, the first trip in a six-month project to demonstrate commercial viability.<sup>17</sup> Their work was the result of a collaboration between Fijian-owned SeaQuest Fiji and the Pacific Islands Forum Fisheries Agency. Training an entire crew counters the risk of the difficulties that a single person might face entering a strongly segregated workforce, as has been the case for women observers on tuna vessels.<sup>18</sup> The Fiji Maritime Academy is playing a key role in training more women into the work force, creating scholarship opportunities for women to train to work on deck and to become officers and skippers.

## TUNA INDUSTRY

### New MSC fisheries standard gives 5-years' flexibility for RFMO harvest strategy adoption

On the 24 June 2022, MSC's new Fisheries Standard (Version 3.0) was unanimously adopted by MSC's Board of Trustees; this standard is expected to come into effect once published at the end of October after final textual revisions are completed. This concludes a four-year long review period which involved consultations with over 1,000 stakeholders.

As reported previously in *FFA Trade and Industry News*, one of the elements of the review of greatest interest to WCPO tuna fisheries was potential revisions to requirements around timeframes for the adoption of harvest strategies and harvest control rules for RFMO-managed fisheries. Under the existing standard (v2.2), MSC certifications on key tuna stocks – skipjack, yellowfin, bigeye and albacore – would be suspended in June 2023, if harvest strategies aren't adopted by WCPFC in

*Eight women in Fiji on the Seaka II became the first all-female deck crew on a longline vessel*

*MSC has provided five-years' flexibility on harvest strategy adoption for RFMO-managed tuna stocks under its new fisheries standard*

December 2022. Under the new standard (v3.0), fisheries certified under v2.2 will be able to apply for a 5-year extension for adoption of harvest strategies and harvest control rules under Annex SE. This likely comes as a relief to WCPO MSC fisheries certification holders, as the draft new standard released in February 2022 provided only two year's flexibility. Since the release of the draft text, it is understood that MSC's Standards Team received a barrage of feedback from industry that a two year extension was too short when taking into reality the level of complexity of harvest strategy development and the length in time typically taken for RFMO-adoption by consensus. The trade-off for making use of the Annex SE exemption is that at the end of the 5-year extension period a perfect score (SG100) needs to be obtained for harvest strategies and an unconditional pass (SG80) for harvest control rules. Fisheries must also re-certify under v3.0 when their current 5-year certification period ends (i.e. there is no option to re-certify under v2.2), which has strengthened requirements in a number of areas including shark-finning, ghost gear, interactions with endangered, threatened and protected (ETP species) and independent at-sea monitoring. In addition, in order to be able to trigger the 5-year extension, the majority of Units of Certifications (UoCs) for a particular RFMO stock (i.e. 50% + 1) must agree to proceed. According to an industry source, is it probable that this majority requirement will be reached in the WCPO, give a large number of MSC fisheries certification holders are engaged in supply chains with sustainable sourcing policies linked to MSC-certification. Any UoCs that do not opt to trigger Annex SE will still risk facing suspension at the end of June 2023.<sup>19</sup>

MSC has had the challenge of trying to balance quite polar positions between industry and the NGO-community on expectations about the new standard, indicating that it was striving to "create a standard rigorous enough to push companies toward more sustainable practices, but one that is not so rigorous that it is out of reach for those interested in pursuing certification".<sup>20</sup> In addition to a submission from eight NGOs expressing concern that the new standard has significant weaknesses that will tarnish MSC's reputation, the UK's "On the Hook" campaign has launched an external review of MSC.<sup>21</sup> "On the Hook" is largely driven by pole-and-line industry interests which has long criticised the MSC certification of PNA's purse seine fishery. Regardless of NGO criticism, MSC remains the most rigorous third-party standard for sustainable wild-capture fisheries in the world.

### Fiji looking to expand supply sources for PAFCO

Fiji's PAFCO plant in Levuka is owned by the Fijian government and managed by Bumble Bee (parent company FCF). PAFCO primarily supplies albacore loins to the US to be canned in Bumble Bee's Santa Fe Springs, California, plant, though the plant has faced on and off supply challenges in recent years: in 2018, PAFCO processed only 19,000mt, though its processing capacity is 30,000mt.<sup>22</sup>

The Fijian government is looking for innovative mechanisms to securing supply for the plant. Reports indicate that several options are under consideration, though specifics of each effort have not yet been publicly elaborated.<sup>23</sup> First, the government is working on the details of its relationship with FCF since FCF's acquisition of Bumble Bee. FCF – as a large company with strengths in tuna trading holds potential to improve supply constraints at the plant. Second, the government is working to attract more vessels to offload in Fiji by creating enabling conditions, including, for instance, via the development of a multipurpose fishing port. Third, the Fijian government is reviving efforts to collaborate with the PNA countries and its own Ministry of Foreign affairs on negotiations that could secure more tuna from outside of Fiji's waters. Though the details of such negotiations have not been made public, some reports mention attracting supply from purse seine vessels: this would indicate that

*The Fijian government is exploring options for securing supply for PAFCO*

PAFCO was broadening beyond its core strength in albacore loins to include light meat loins. The Fijian government has been interested in engaging PNA countries to help supply PAFCO since at least 2010 with the aim of generating a win-win situation in which PAFCO would benefit from stable supply and PNA countries would benefit from connecting to the next value-added stop in the tuna value chain. Reportedly, at one point in time, PAFCO was importing skipjack from the Marshall Islands on this model.<sup>24</sup>

## Longline captain's sentence for ordering shooting of suspected pirates cut in half

The final chapter in a decade-long saga involving Wang Fengyu, the Chinese captain of a Taiwanese tuna longliner, and the shooting and killing of several men purported to be pirates off the Somali coast in 2012 may have been written on 17 June 2022 by the Kaohsiung Branch of the Taiwan High Court. In its decision, the High Court reduced the period of Wang's jail sentence from 26 years to 13 years for ordering the killing of suspected pirates while he was captain of a Taiwan-flagged longliner while it was operating in the Indian Ocean.<sup>25</sup>

The story began on 29 September 2012 when armed security guards onboard the *Ping Shin No. 101* fired on and killed the suspected pirates on the order of the captain. A small boat carrying at least four men had approached the fishing vessel but was rammed with the men thrown into the water and subsequently shot and killed. The incident only came to light nearly two years later in August 2014 when a cell phone containing a 10-minute video of the killing was left in a taxi in Suva, Fiji and uploaded anonymously to Youtube.<sup>26</sup> In that video a person believed to be the captain is heard giving instructions to fire on the men in the water. After at least 40 rounds are fired, the video then shows the victims floating face down in the bloody water next to pieces of their small boat.<sup>27</sup>

Investigations to identify the vessel and captain took several years but finally Taiwanese authorities issued an arrest warrant for Wang in December 2018, but were unable to locate him. On 22 August 2020, Wang arrived in Kaohsiung as the captain of the *India Star*, a Taiwanese-owned longliner flagged to Seychelles and was arrested. Although the 2012 incident took place on the high seas outside of Taiwan's waters, as captain of a Taiwan-flagged vessel at the time of the incident he was charged with homicide and various contraventions of Taiwan's domestic weapons laws.

In January 2021 Wang was found guilty in the Kaohsiung District Court and sentenced to 26 years' imprisonment.<sup>28</sup> He appealed his case in May 2021, but the Kaohsiung branch of the High Court upheld the sentence. A second appeal to the Supreme court resulted in that court determining there were discrepancies in the evidence presented, and it ordered the High Court to re-examine the case for a retrial. In cutting the sentence in half from 26 to 13 years, the High Court ruled that the evidence showed that Wang had ordered the killing of only one of the suspected pirates, not four. In its ruling the High Court also noted that it had considered "the serious security issues related to the incident taking place at sea". According to one media source, even this ruling can still be appealed.<sup>29</sup>

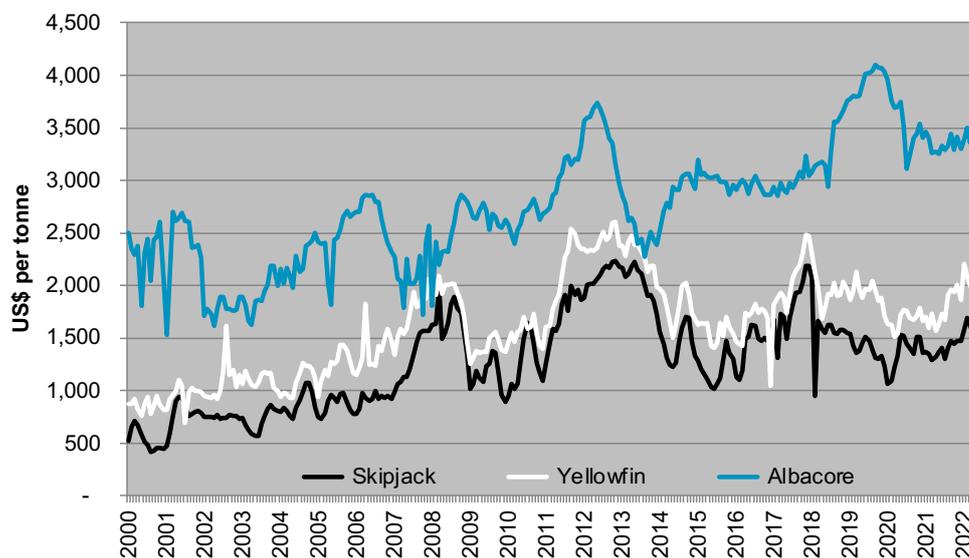
A post-script involving the *Ping Shin 101* is that Wang was still the captain when it sunk on 7 July 2014, less than two years after the shootings depicted in the video.<sup>30</sup>

**Security guards  
onboard  
Taiwanese-  
longliner were  
ordered to fire  
on suspected  
pirates by  
Captain**

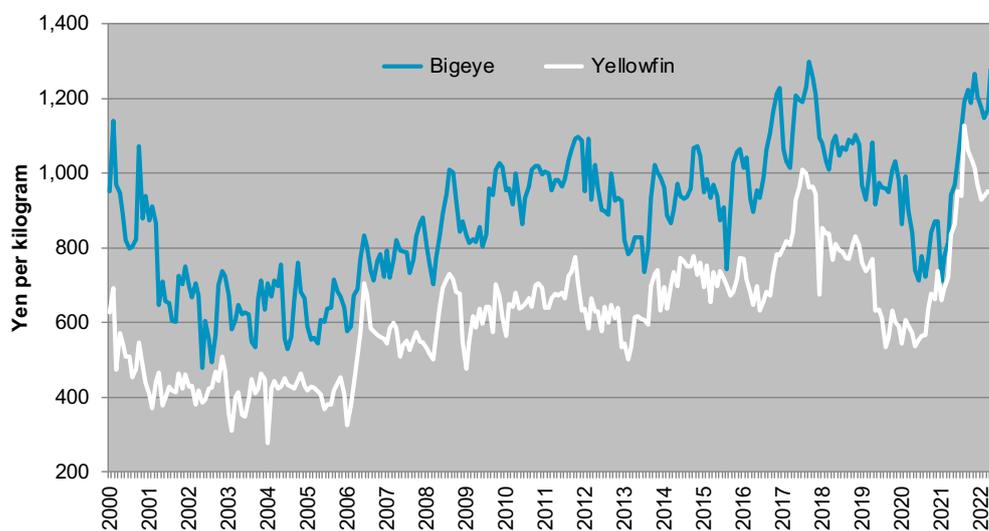
**A High Court  
review of the  
case resulted  
in the captain's  
sentence being  
cut in half**

## TUNA PRICE TRENDS<sup>31</sup>

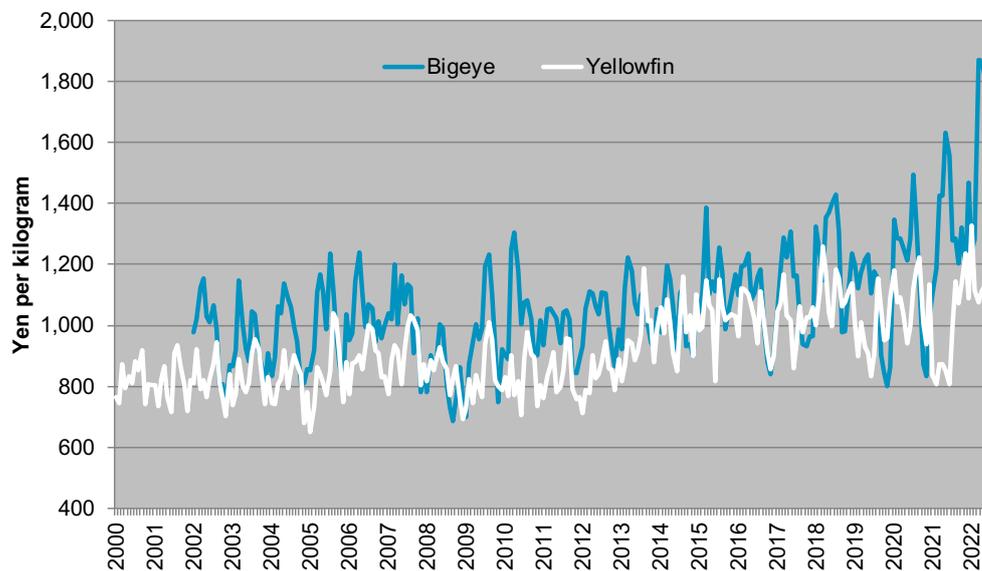
### Bangkok canning-grade prices to May 2022<sup>32</sup>



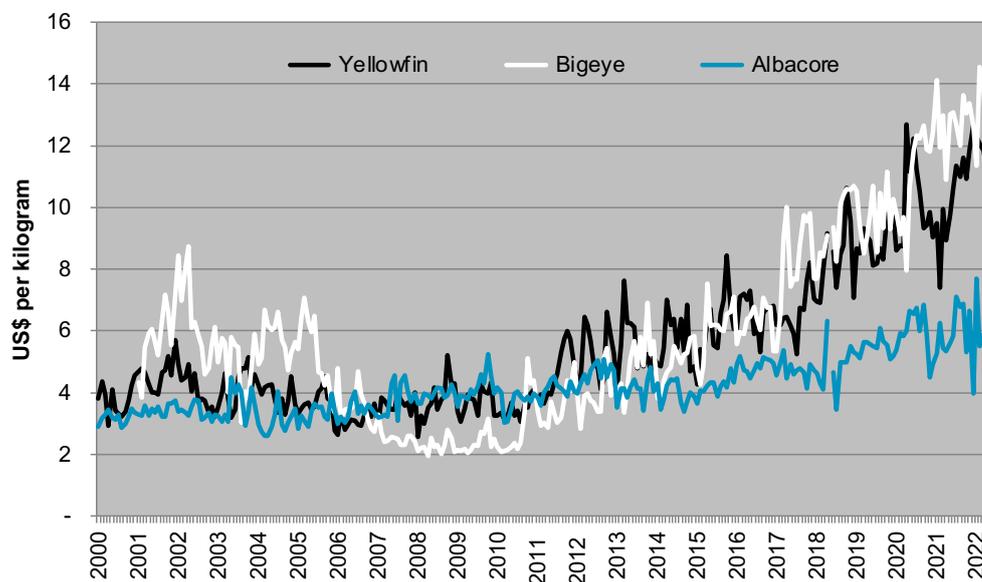
### Japan frozen sashimi prices (ex-vessel, Japanese ports) to May 2022<sup>33</sup>



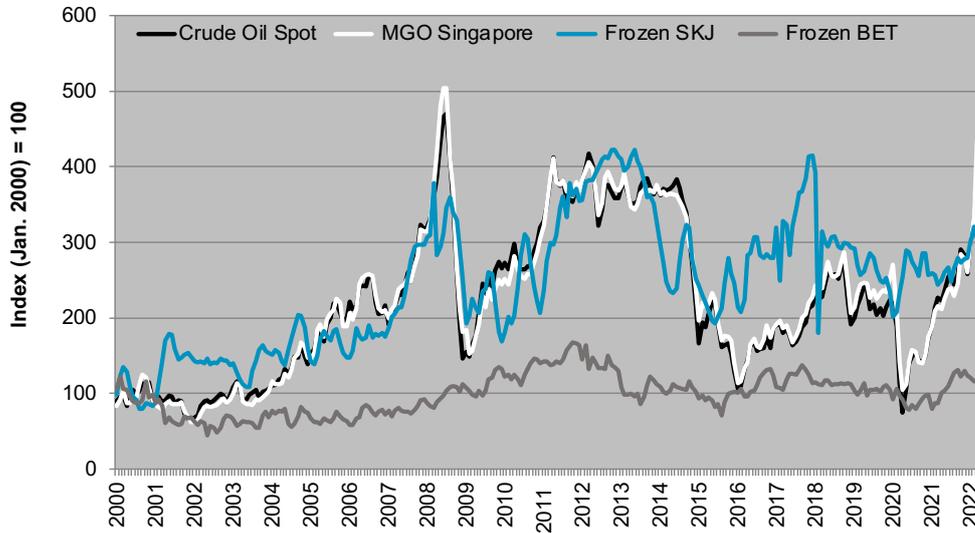
### Japan fresh sashimi prices (origin Oceania) to May 2022<sup>34</sup>



### US imported fresh sashimi prices to May 2022<sup>35</sup>



## Crude oil, canning-grade frozen skipjack (SKJ) and frozen bigeye (BET) price index to June 2022<sup>36</sup>



<sup>1</sup> Prepared for the FFA Fisheries Development Division by Professor 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 FFA 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.

<sup>2</sup> WT/MIN(22)/W/22, 17 June 2022 Agreement On Fisheries Subsidies, Ministerial Conference, Twelfth Session, Geneva, 12-15 June 2022

<sup>3</sup> Liam Campling, Elizabeth Havice and Mike McCoy 2022. 'US signals renewed geopolitical engagement in Pacific, regional negotiations in flux', *FFA Trade and Industry News* 15(1): Jan-Feb.

<sup>4</sup> 'Chinese minister wraps up 10 Pacific nation tour without big fishery agreement', *Undercurrent News*, 1 June 2022. Available at: <https://www.undercurrentnews.com>. 'Pacific Nations walk away from trade and security deal with China', *Solomon Times*, 2 June 2022. Available at: <https://www.solomontimes.com/>. 'China's whirlwind Pacific tour a slight success with several bilateral agreements signed', *Radio New Zealand*, 4 June 2022. Available at: <https://www.rnz.co.nz/>

<sup>5</sup> Helen Davidson 2022. 'Samoa signs China bilateral agreement during Pacific push by Beijing', *The Guardian*, 28 May. Available at: <https://www.theguardian.com>

<sup>6</sup> 'Quad leaders roll out major initiative to improve monitoring maritime activities across Indo-Pacific', *The Economic Times*, 24 May 2022. Available at: <https://www.economictimes.com>

<sup>7</sup> 'US vows more high-level engagement with Pacific islands amid China push', *Radio New Zealand*, 24 June 2022. <https://www.rnz.co.nz>

<sup>8</sup> 'Remarks by Vice President Harris at the Pacific Islands Forum', 12 July 2022. Available at: <https://www.whitehouse.gov>

<sup>9</sup> Emil Friberg 2022. 'No time to lose: renew the Compacts of Free Association', *Asia Pacific Bulletin*, No. 595. 29 June. Available at: <https://www.eastwestcenter.org>; 'Announcing the new Special Presidential Envoy for Compact Negotiations', *Press Statement*, Antony J. Blinken, Secretary of State, 22 March 2022. Available at: <https://www.state.gov>

<sup>10</sup> 'Remarks by Vice President Harris at the Pacific Islands Forum', 12 July 2022. Available at: <https://www.whitehouse.gov>

<sup>11</sup> Robbie Gramer, Mary Yang and Jack Detsch 2022, 'US raises the ante in Pacific islands after Chinese Swoop', *Foreign Policy*, 14 July. Available at: <https://foreignpolicy.com/2022/07/14/pacific-islands-us-china-biden-harris-fiji-solomon-kiribati/>

<sup>12</sup> IOTC attendee, pers.com., June 2022.

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