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Tuna sector: Issues and challenges

1. Background and key issues

The EU is the largest world market for tuna products, which are sold mainly in canned form – only around 4% of EU tuna imports being sold fresh as a premium product – often coming from countries where EU companies have invested in processing facilities and where the EU has bilateral fishing agreements (see Agritrade article ‘[The EU remains the largest world market for fish](#)’, 19 November 2012).

The EU has a large tropical tuna fishing fleet comprising approximately 50 tropical tuna purse seiners, 260 surface longliners, and a dozen pole-and-liners. Altogether, the EU tropical tuna fleets represent more than 40% of EU external fleets’ fishing capacity. These vessels are fishing in the Atlantic, Indian and Pacific Oceans, where they operate both under international regulatory frame-

works – regional fisheries management organisations (RFMOs) – and in the exclusive economic zones (EEZs) of coastal nations, including ACP countries, under bilateral fisheries agreements and private licensing. The EU tuna fishing fleets are seeking access to new fishing grounds, including through new EU fisheries agreements (e.g. with Cook Islands and Tuvalu) or under private agreements (with Liberia, Sierra Leone, etc.).

“The EU tropical tuna fishing fleets are seeking access to new fishing grounds, through new EU agreements or under private agreements”

Most of the EU tuna catch is destined for the EU markets, and is processed in the EU (mainly in southern European member states), ACP and Generalised

System of Preference (GSP) beneficiary countries. This makes the rules of origin discussions in the Economic Partnership Agreement (EPA) negotiations particularly sensitive.

The EU tuna sector is vertically integrated, with international capital increasingly involved in the sector, particularly from Asia, which is an important element for ACP governments to consider in their efforts to promote local value-added processing.

Management measures in the five tropical tuna RFMOs are increasingly being harmonised through what is known as “the Kobe process”. This includes discussions on the measuring, management and allocation of the fishing capacity – an important element to consider for ACP governments wishing to promote the development of their own tuna fishing capacity.

“As part of the implementation of its reformed policy, the EU is developing regional fisheries strategies”

As part of the implementation of its reformed Common Fisheries Policy (CFP), the EU is taking steps to implement regional tuna fisheries strategies in the fishing areas where its fleets are active.

2. Latest developments

Main developments in global tuna markets

Main developments in global tuna markets

In 2012, the volume of world tuna catches was stable. This led to a sharp rise in tuna raw material prices.

Despite these increasing prices – the value of imported tuna increased by 20% – imports of canned tuna into the eurozone still rose 5% in volume terms, despite the financial crisis.

Ecuador has now become one of the main suppliers to the key EU tuna markets in Germany and the UK. Pacific ACP and African countries supplied lower amounts of canned tuna to these markets. In France, the main supplier has become Spain, thanks to the successful promotion of Spanish high-end canned tuna products.

High prices for tuna catches have benefited fishing fleets, which have been hard hit in recent years by the high cost of fuel. In contrast, tuna processors are increasingly concerned about the high cost of tuna raw material, given consumer reluctance to pay much more for their canned tuna.

According to Forum Fisheries Agency (FFA) Fisheries Trade News in the Pacific ACP, the mismatch between processing capacity and resource availability remains a concern. With new plants being built, processing capacity in emerging economies is increasing.

“For Pacific ACP states, the mismatch between low processing capacity and high availability of tuna resources is a concern”

At times this means that tuna from the Western and Central Pacific Ocean is being transported to the Eastern Pacific to stave off supply shortages in the Latin American processing facilities. This is undermining efforts to develop tuna processing in Pacific ACP (PACP) countries (see Agritrade article ‘[Tuna demand grows in crisis-stricken eurozone despite higher prices](#)’, 27 August 2012).

In 2012 in the Pacific, the first Pacific tuna fishery received the Marine Stewardship Council (MSC) eco-label. While interest in sustainably sourced tuna is growing in Europe, it remains to be seen whether consumers are ready to pay more for eco-labelled products, given current economic difficulties, or whether retailers will simply make eco-labelling a prerequisite for procurement (see Agritrade article ‘[Canned tuna: Eco-labelled products are increasingly popular in Europe](#)’, 2 July 2012). Some experts highlighted that despite the price of skipjack on the global market more than doubling in the last year, there could still be scope for securing price premiums for MSC-certified skipjack from sustainably managed fisheries in the Pacific (up to a 20% price premium) (see Agritrade article ‘[Pacific: Tuna fishing industry is not supplying MSC tuna](#)’, 19 November 2012).

Increasing ACP capacity to address the challenges of current EU SPS and IUU regulations

During 2012–13 it has become apparent that despite the challenges faced in meeting EU regulatory requirements on sanitary and phytosanitary (SPS) standards and illegal, unreported and unregulated (IUU) fishing, ACP tuna producing countries are increasingly complying with these requirements.

“ACP tuna producing countries are increasingly complying with existing EU SPS and IUU requirements”

This was the case for the Fiji Albacore Tuna Longline Fishery, the first Fiji fisheries to be certified by the MSC. However, in November 2012, Fiji was notified that it could face trade sanctions by the EU for non-cooperation in the fight against IUU fishing. In particular, shortcomings regarding the monitor-

ing, control and surveillance of fishing activities were identified. According to the European Commission, these are linked with a lack of proper legal instruments, particularly specific provisions in the national legal framework referring to measures to combat, deter and eliminate IUU fishing activities (see Agritrade article '[Fiji Albacore tuna to get MSC certification, but will it be allowed on the EU market](#)', 28 January 2013). In addition, from 2007, Fiji tuna products had already been banned from EU markets for lack of compliance with the EU SPS standards.

Authorities and the private sector from Fiji reacted to this situation and, in June 2013, the first consignment of MSC-labelled tuna left Fiji for Spain. In addition to gaining access to new markets, local tuna producers have also been able to add value to their tuna products to enhance their competitiveness and increase export earnings. The MSC-certified albacore loins are sold directly to Europe – either fresh or frozen to be served as steaks – rather than exported frozen whole for canning as before. This creates more jobs locally for loin processing, and the net return is higher (see Agritrade article '[First MSC-certified tuna from the Pacific enters EU market](#)', 22 July 2013).

Another example of the increasing capacity of ACP countries to address EU regulations applying to tuna imports is the regional cooperation initiated in 2013 in the context of the fight against IUU fishing. The EC informed importers in early 2013 about the risk of tuna imported from West Africa coming from IUU sources. This caused ACP coastal states to increase their level of cooperation in deterring IUU fishing. In December 2012, as information was received by Liberian authorities that an IUU fishing vessel was about to enter port in Mauritius, the West African country sent an official

request to the Mauritian government for assistance and inspection of the vessel. The inspection confirmed the suspicions that illegal fishing had been taking place in Liberian waters. During the inspection, authorities also found a forged Liberian fishing licence. Several countries in the Western Indian Ocean have since denied granting a fishing licence to this vessel or denied permission to offload its catches (see Agritrade article '[Concerns about IUU tuna from West Africa entering UK](#)', 7 April 2013)

EU sector lobbies to increase standards for tuna production

Concerning discussions on the reform of the EU Common Market Organisation for Fish and Aquaculture products (see Agritrade Executive brief: Update '[ACP–EU Fisheries: Market access and trade](#)', forthcoming 2013), during 2012–13, the EU tuna industry has been lobbying for the application of stricter standards to imports, particularly relating to negotiations of free trade agreements (FTAs).

“The EU tuna industry has been lobbying for the application of stricter environmental and social standards on imports”

In 2012, ANFACO, the Spanish-based National Association of Sea and Fish Canned Food Producers, commissioned a report on forced labour in the production chain of tuna in the Philippines. The findings highlight serious abuses in both the fishing and processing sector. Spanish importers, as well as purse seiners' organisations, strongly oppose products resulting from such operations having free access to the EU market. This is happening at a time when EU and ASEAN (including the Philippines)

are continuing to negotiate an FTA. ANFACO clarified that although they will not stop importing tuna from the Philippines, they will exercise “extreme controls of the raw material from Philippine companies that do not respect labour standards” set by the International Labour Organization (see Agritrade article '[Spanish processors are to examine labour conditions of tuna imports](#)', 16 December 2012).

In mid 2013, the EU started negotiations for a comprehensive FTA with Thailand, the latest in a series with ASEAN countries. Even in the absence of an FTA, Thailand has become a primary source of canned tuna. EUROTHON has therefore requested that the European tuna sector platform treat tuna products sensitively in the FTA negotiations with Thailand: that is, tuna products should either be excluded from the scope of tariff elimination commitments; or market access should be linked to “a high level of compliance with sound governance, human rights and global environmental protection”. At a minimum this would be consistent with the standards applied under the EU's GSP+ trade arrangement. It is maintained that this would ensure a 'level playing field' between EU and third country tuna sector enterprises (see Agritrade article '[FTA negotiations with Thailand to promote fish exports to the EU](#)', 3 June 2013).

The value of relaxing the rules of origin discussed in the Pacific

Through the negotiation of a comprehensive EPA, ACP Pacific island members are seeking access to European markets for their fresh and chilled tuna products, on the basis of the application of global sourcing rules of origin. According to some observers, it would give a boost to fresh/frozen longline tuna operations, creating a significant

number of jobs – mainly benefiting small island states that do not have canneries or processing facilities. Reports have suggested that the EU would positively consider this request, in the context of the comprehensive EPA, if it were linked to access for EU tuna fleets to PACP tuna resources. However, the Director of the Parties of the Nauru agreement (PNA) has questioned the benefits of such a deal, as the region may end up with an EPA that provides global sourcing for fresh/chilled fish products, but, on the other hand, will have to bear disproportionate costs of compliance with a variety of requirements, such as SPS standards, to access the EU market (see Agritrade article '[PNA director questions Pacific ACP approach of EPA negotiations on fisheries](#)', 28 January 2013).

In this context it should be noted that most Pacific island nations, while resource-rich, cannot support canneries, so they must look to smaller-scale processing of fresh and frozen fish – typically from longliners. However, such a development is strongly opposed by other fleets – such as purse seiners, including EU operators – who have already invested in joint ventures elsewhere (e.g. in Ecuador) and therefore want to continue sourcing their raw materials cheaply from the Pacific region (see Agritrade interview, '[If we achieve increased domestication of foreign longline fleets, we won't need global sourcing derogation](#)', 6 July 2013).

In this interview, the Commercial Advisor of the PNA further argued that if some of the fleets currently operating in Pacific island waters were fully domesticated in the Pacific islands, there would be enough originating tuna available to eradicate the need for a global sourcing derogation under the rules of origin. Currently, almost 85% of PACP tuna is caught by fleets

from USA, Japan, Taiwan, Korea, Philippines, China and Spain. Only a small amount of that tuna remains in the region for processing – Asian and Latin American canneries are heavily reliant upon tuna caught in PACP EEZs.

"Pacific ACP states need more foreign partners for onshore job creation, and more fishing joint venture operations, including with EU companies"

The Commercial Advisor stressed that the region needs more foreign partners' participation in onshore job creation and manufacturing, and more joint venture fishing operations between local and foreign fishing companies, including from the EU.

Main developments in tuna fisheries management

Within the tuna RFMOs

The Indian Ocean Tuna Commission (IOTC) members – including several ACP countries and the EU – have agreed to the principle of introducing fishing limits based on the precautionary approach. However, Greenpeace believes that the IOTC lacks the data needed to properly manage its fishing capacity and effort, since this requires all fishing vessels active in the IOTC fisheries to be identified, together with their fishing capacity characteristics. According to Greenpeace, as a consequence of this lack of data, several Indian Ocean coastal countries – including ACP countries – planning to expand their tuna fleets, are doing so without a clear understanding of how much fishing capacity is currently deployed in the region. Such a situation jeopardises the long-term sustainability and profitability of fisheries in the IOTC area as well as the aspirations of developing coastal states to ben-

efit more from the exploitation of tuna resources. Non-governmental organisations (NGOs) have also highlighted the increasing use of fish aggregating devices (FADs), which act as a capacity multiplier and ensure that the fishing effort deployed remains high even where the number of purse seiners has decreased (see Agritrade article '[Measuring fishing capacity in the Indian Ocean: "An essential step for sound management", says Greenpeace](#)', 1 July 2013).

Fishing with FADs has come under particular criticism over the last 12 months, not because it increases fishing capacity, but because it leads to large by-catches of sensitive species such as sharks or marine turtles.

"Fishing with FADs has come under particular criticism, as it increases fishing capacity and leads to large by-catches"

Some NGOs have campaigned and put pressure on EU retailers to shift their supply of tuna from purse seining using FADs to pole-and-line and FAD-free fishing operations.

During 2012–13 considerable effort has gone into increasing tuna supplies from pole-and-line fishing, which is considered the most sustainable catching method, although concerns have been expressed about the sustainability of associated bait fisheries. In 2012, the International Pole and Line Foundation (IPNLF) was launched with the objective of helping develop sustainable and equitable pole-and-line fisheries and of increasing the market share of sustainably and equitably caught pole-and-line tuna. IPNLF is active in the Maldives and Indonesia, but is seeking to expand its work to other countries including ACP tuna producing countries like Ghana, Mozambique, Senegal and the small island states in the

Pacific region. This expansion should help address a growing demand for pole-and-line tuna in Europe, particularly in the UK, the Netherlands, Germany, France, Austria and Nordic countries (see Agritrade article '[New foundation to support the global supply of pole-and-line caught tuna](#)', 28 May 2012).

However, a study highlighted that a total ban on FAD fishing might result in the purse seine fleet leaving the Indian Ocean altogether. This would carry major consequences for the economies of those coastal countries. Substituting pole-and-line production for purse seiners would actually result in a sixfold increase in the catch of non-target species, double the fuel used in the fishery, and would raise issues regarding the sustainable exploitation of bait fisheries. The study emphasised that landings by pole-and-line would never be able to supply the volume of raw material that purse seiners produce for the canning industry, and concluded that there was little chance of pole-and-line fishing developing in the region unless there were a huge differential in landed price for pole-and-line-caught tuna and purse seine-caught tuna (see Agritrade article '[Study examines EU and other tuna fleets' by-catch and discards in Indian Ocean](#)', 29 April 2013).

Main developments in Fisheries Partnerships Agreements

After 3 years without an agreement, Mauritius signed a new tuna Fisheries Partnership Agreement (FPA) and protocol in 2012. This led to local opposition by fishers and civil society, who demanded greater transparency in the negotiation process to guarantee that the full range of interests – fishers, processors, consumers, civil society – was properly taken into account. It was particularly considered that rules governing the by-catches of sharks by EU

tuna fleets should have been included in the agreement, as was the case in the Madagascar–EU FPA. This led to the Mauritian authorities recognising the need to improve stakeholder participation in the fisheries sector, with a proposal put forward to establish a Mauritian consultative committee on fisheries and maritime issues (see Agritrade interview '[A transparent, sustainable and equitable agreement with the EU will have repercussions for Asian fishing fleets active in Mauritian waters](#)', 10 March 2013).

"In the context of the FPA negotiations, Mauritius proposed the setting up of a Mauritian stakeholders' consultative committee on fisheries"

In 2013, the EU and Côte d'Ivoire agreed on a new 5-year tuna FPA protocol. Fisheries sector assistance has been increased to take into account the situation of the fishing administration in Côte d'Ivoire after the civil war and to help it to accept its international obligations in terms of port state control. The Côte d'Ivoire FPA evaluation highlights that the agreement with Côte d'Ivoire is of particular strategic importance, as it allows purse seine fishing to take place while en route to Abidjan, the chief landing port in the region for EU tuna vessels. EU vessels are the main suppliers for the three Abidjan tuna canneries, providing them with around 70% of their raw material. They also account for half of the transhipped quantities, providing about 11,000 tonnes of fish to the national market. The presence of EU vessels in the port of Abidjan generates significant economic benefits, with about 21,000 people depending on the EU fleet's presence (see Agritrade article '[New protocol to EU – Côte d'Ivoire Fisheries Partnership Agreement](#)', 24 February 2013).

At the same time, however, a deadline was finalised for the lapsing of market access regulation (MAR) 1528/2007, which provides transitional duty-free, quota-free access to the EU market for those ACP countries whose governments have initialled interim EPAs, pending the conclusion of the full EPA process and the entry into force of the full EPA agreement. This means that if by 1 October 2014 the full EPA process is not concluded (either nationally or regionally) and the agreement has not yet entered into force, then the duty-free access to the EU market will lapse and the appropriate GSP duties will be imposed on imports into the EU. This exclusively affects the non-least developed ACP countries that are not eligible for duty-free, quota-free access under the EU's 'Everything But Arms' (EBA) arrangement, including Côte d'Ivoire. Any withdrawal of Côte d'Ivoire's tariff preferences for the EU market would affect the whole equilibrium of the EU–Côte d'Ivoire FPA (see Agritrade article '[Deadline for ending free EU market access for Côte d'Ivoire, Ghana, Kenya and Namibia](#)', 13 June 2013).

"Any withdrawal of Côte d'Ivoire's tariff preferences for the EU market would affect the whole equilibrium of the EU–Côte d'Ivoire FPA"

In 2012, the EC initialled an access agreement with Kiribati that ignores the regional access allocation system – the Vessel Day Scheme (VDS). The European Parliament Development Committee pointed out that the agreement was causing significant tensions, both between the EU and some Pacific island countries, and between Kiribati and the other Pacific island countries, with the latter voicing concerns about the EU acting in bad faith and breaking regional solidarity. The Development Committee proposed the rejection of the FPA and called on the EC to

renegotiate the Protocol to incorporate the provisions of any regional and sub-regional agreement or arrangement binding on Kiribati, including the VDS scheme (see Agritrade article “[Global sourcing derogation in EPA should not be linked to access to resources considerations](#)”, say Pacific ACP ministers’, 13 June 2013).

Development of EU regional tuna fisheries strategies

In its communication on the future external dimension of the CFP, published in 2011, the EC highlighted its intention to develop regional fisheries strategies in the context of its relations with third countries.

In an interview, a representative of the EU tuna sector highlighted that such regional strategies are crucial for tuna fishing. It was maintained that such regional strategies should support efforts by the countries of a given region to harmonise their policies, particularly regarding conditions of access for distant-water fishing fleets, scientific cooperation and the fight against illegal fishing. Another proposal put forward by the tuna sector was that consideration should be given by partner countries (in particular those that have tuna FPAs with the EU) to developing “specialisation” within a region: processing units, regional training centres, etc. This would also need to involve a dialogue between the coastal states to determine how the various benefits of operations by distant-water fishing fleets should be shared. If the setting up of processing plants is indeed a key matter to examine within this framework, the payment of harmonised access costs, representing a fair share of the value of the catches, is another important element to be discussed at the regional level (see Agritrade interview ‘[EU regional](#)

[fisheries strategies should focus on supporting harmonisation and specialisation](#)’, 11 November 2012).

In mid 2013, the European Parliament Fisheries Committee took a step further, by tabling a first proposal for a comprehensive EU fishery strategy for the Pacific region. This could be a model for further proposals of EU strategies in other regions where EU tropical tuna fleets are active.

“A first proposal has been tabled to develop a comprehensive fisheries strategy for the Pacific region – this could be a model for other regions”

The EP Fisheries Committee proposal urges the Commission to ensure the coordination of EU policies affecting the Pacific region, such as fisheries, trade and development, with a view to maximising the benefits both for the Pacific states and the EU.

The proposal reiterates the point that no further derogation on rules of origin should be given in the EPA negotiations with the PACP countries without the granting of reciprocal benefits to the EU fishing industry, such as access to fisheries resources in those countries’ EEZs.

It calls on the Commission to provide for the establishment of a longer-term strategy on access for the EU fleet to the EEZs of the countries of the region, based on a regional framework agreement between the EU and the countries of the Western and Central Pacific, negotiated with the FFA, which would then be given concrete form in bilateral fisheries cooperation agreements with the countries concerned.

The proposal goes further and suggests this regional agreement should be based on the VDS scheme already

in place, although this would represent a U-turn compared to earlier EU positions. It would, however, require that measures were adopted to ensure the transparency of the VDS, its implementation by all the parties concerned and its compliance with the best available scientific advice.

Finally, the proposal suggests that the negotiation of this regional agreement should explore ways of channelling European Development Fund (EDF) assistance for the region through the FFA, since the PACP countries do not have the human and technical resources to adequately utilise available EDF funding (see Agritrade article ‘[European Parliament to propose a comprehensive fishery strategy in the Pacific region](#)’, 5 August 2013).

3. Implications for the ACP

Monitoring the development of EU comprehensive regional fisheries strategies

The development by the EU of proposals to develop comprehensive regional fisheries strategies could be a positive step if this were implemented in a manner consistent with the EU’s ‘Policy Coherence for Development’ commitments, since this would place ACP fisheries sector development aspirations at the heart of such strategies. It is, therefore, crucial that ACP countries monitor these developments and find appropriate ways to make their concerns heard by the EU institutions.

Current proposals to formally link fisheries access to EDF aid deployment are seen by several ACP countries as a particular cause for concern. They consider it to be contradictory to the

FAO Code of Conduct for Responsible Fisheries, which declares that states should not condition market access to the allocation of rights of access to fisheries resources (Art. 11.2.7).

“Current proposals to formally link fisheries access to the granting of trade concessions are seen by several ACP countries as a particular cause for concern, as they contradict the FAO Code of Conduct for Responsible Fisheries”

A central concern for ACP governments must be to ensure the long-term availability of fish resources and that fishing capacity is in line with the resources available. For highly migratory species like tuna, this requires a regional approach.

The FAO International Plan of Action for the Management of Fishing Capacity highlights that developing states must be assisted to ensure that their rights are respected and that they are in a position to fulfil their obligations. This includes flag states documenting and sharing data on their vessels’ operations and implies strong coordination among interested states to ensure sustainability.

Therefore, close consideration should be given on how ACP regional coordination and cooperation – including fisheries governance, research, monitoring control and surveillance (MCS), the fight against IUU, and management arrangements like the VDS scheme in the Pacific – will promote sustainable fishing, and how this could be supported by the EU. Up to now, the EU has supported several regional programmes focusing on these issues, such as the Indian Ocean regional programme against IUU fishing (involving automatic exchange of information, improved MCS, joint control opera-

tions, etc.). Similar programmes could be developed in other regions.

Increasing benefits/ returns from sustainable exploitation of ACP tuna resources

As tuna raw material becomes scarcer, either as a consequence of stricter management measures or, in some cases, due to over-exploitation of the resources, costs for tuna producers and processors, including from ACP countries, are likely to continue to increase.

“Ecological sustainability is likely to become a standard for all fish products sold on EU markets, independently of whether EU consumers are ready to pay more for such products”

On the other hand, ecological sustainability is likely to become a standard for all fish products sold on EU markets, independently of whether EU consumers are ready to pay more for such products. In this context it will be important to support fishers, canneries and loining plants located in ACP countries in developing their tuna production according to these standards in order to maintain or increase their shares of EU markets.

ACP governments will, therefore, have to invest more in fisheries management (e.g., research and MCS). Even if donors are supporting part of these efforts, ACP countries will have to find ways to ensure that such efforts are sustained and do not depend on specific aid projects. Looking at the OECD levels of fisheries management costs suggests a possibility for ACP countries to revise the price of access for foreign fleets.

ACP job creation concerns, however, also need to be addressed. This can be achieved either by developing an ACP fishing fleet employing local crew, and/or by developing onshore tuna processing. Clearly relevant choices will need to be made by ACP governments.

Although securing reforms to EU rules of origin to allow all fish caught in ACP EEZs to be granted originating status has been a long-standing ACP demand, it should be noted that this may not be conducive to the development or the protection of locally based fleets. ACP governments will therefore need to consider setting in place complementary measures to promote the development of existing local fishing fleets while ensuring that only sustainable levels of fishing effort are deployed, within any moves towards global sourcing.

Taking advantage of EU markets demand for sustainability

The increasing demand in EU countries for tuna coming from sustainable sources may provide ACP countries with more diversified markets to cater for both eco-labelled, pole-and-line-caught tuna, as well as for (FAD-free) purse seine-caught tuna. It should be noted, however, that challenges to be met by ACP producers, including small-scale producers of pole-and-line-caught tuna who want to access potentially lucrative EU markets, go beyond sustainability issues. Currently, the most significant challenges to be met remain SPS and IUU legislation requirements. A scheme to promote the trade of “sustainable tuna” that overlooks these aspects will run the risk that some products – otherwise caught in a sustainable manner – will be barred from EU markets.

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About this update

This brief was updated in October 2013 to reflect developments since September 2012. Other publications in this series and additional resources on ACP–EU agriculture and fisheries trade issues can be found online at <http://.cta.int/>



The Technical Centre for Agricultural and Rural Cooperation (CTA) is a joint ACP–EU institution active in agricultural and rural development in African, Caribbean and Pacific (ACP) countries. Its mission is to advance food and nutritional security, increase prosperity and encourage sound natural resource management.

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