

INTERNATIONAL MARKETS FOR POLE AND LINE TUNA: OPPORTUNITIES AND CHALLENGES

by Emily Howgate and Duncan Leadbitter

The authors, from the International Pole & Line Foundation (IPNLF), explain the social and economic benefits of supporting one-by-one fisheries, in particular the multiple gains that coastal communities can have from assuming increased control of their natural resources and introducing more robust food security.



Pole and line fishing, Maldives



Credit: IPNLF

Introduction

Pole and line fishing is essentially about one fisherman, one line and one fish at a time – something that requires great strength, skill and tenacity. Because of the extremely selective nature of this traditional fishing method, it is widely regarded as one of the most environmentally responsible and equitable methods of harvesting tuna. As a result, a fast-growing number of major retailers throughout the world have made commitments to procure tuna caught by pole and line for their canned products.

Broadly speaking, tuna confirmed as being sourced from pole and line fisheries now accounts for 10 percent or 386 000 tonnes of the total global supply. While 85 000 tonnes and 100 000 tonnes of this are provided by the Maldives and Indonesia respectively, pole and line and other

traditional one-by-one fisheries are developing widely from Ecuador to East Africa.

Despite a growing supply trend, these fisheries are not in a position to fully satisfy the huge international demand for tuna. Yet they can and should supply more than they currently do, so there is a pressing need to find ways to increase their overall supply whilst not adding to the broader problem of fishing overcapacity. One way to do this is to ensure that all the tuna available to the market that is the result of these selective fishing methods is traded as such.

There are many instances whereby pole and line caught tuna is not labelled accordingly in the marketplace. This can be due to convoluted issues covering aspects such as traceability, infrastructure and logistics. This is where the International Pole and Line Foundation (IPNLF) comes in: our

role helps to bridge the gap between demand and supply of sustainable one-by-one caught tuna.

To ensure fisheries reach a stage where they can credibly supply the growing consumer demand for these products, IPNLF is working with our members within the tuna supply chain to develop these fisheries further – growing the volumes where possible – and then supporting their sustainable progression. We focus on initiating practical fishery projects and then help facilitate stakeholder cooperation in ways that support and improve existing fisheries, and create possibilities for new and revived fisheries.

Our growing membership ranges from retailers such as Waitrose (UK) and Migros (Switzerland), to processors like PT Citraraja Ampat (Indonesia), to fisheries associations such as the Maldivian Fishermen's Association (MFA). Many of them take a proactive role in the development of one-by-one fisheries while in the background, our Scientific & Technical Advisory Committee (STAC) helps prioritise research needs and advises how best to engage with fisheries. The STAC comprises world-renowned experts in their field, many of whom are connected to other NGOs and academic institutions.

Retailer engagement

Industry insight suggests that the demand for pole and line tuna will continue to increase and will mainly be driven by leading, sustainability-minded markets, where retailers are progressively committing to switching seafood procurement to more responsible alternatives. It is therefore widely felt that retailers and brands operating in such regions have a key role to play in using their buying power to help develop burgeoning fisheries.

A growing number of international players are doing just that. The IPNLF has a number of retailer members who are engaged because they are involved with the supply chain of tuna caught by one-by-one methods and therefore want to ensure a trustworthy source of the product now and into the future, that also safeguards our seas and protects livelihoods.

Their commitments are increasingly being recognised. For example, Greenpeace's latest Canned Tuna Shopping Guide for the UK market ranked our members – Waitrose, Marks & Spencer and Sainsbury's – as the top three responsible retailers. In other markets, Frinsa del Noroeste SA (FRINSA) and Fish4Ever topped the Spanish and Australian leagues, respectively, while American Tuna was ranked second in the first-ever US table.

Some have also become involved in specific projects that have a strong resonance with their own operations. For example,

in 2014, Migros, Switzerland's largest supermarket chain, through the Migros Engagement Fund, embarked upon a two-year project supporting the Fishermen's Community and Training Centre (FCTC) run by the MFA. The FCTC training, approved by the Maldives Qualification Authority (MQA), focuses on responsible fishing practices in the Maldives' one-by-one tuna fisheries. It teaches a range of subjects to active fishermen and school leavers, from post-harvest handling to improved recording of catch and fishing effort, to safety at sea. Collectively, this education adds to the sustainability, quality, efficiency and safety of fishers' practices.

While retailers have traditionally led the sustainable seafood movement, foodservice and catering are never far behind. The IPNLF therefore anticipates considerably greater engagement from these sectors in the near future.

Fishery certification

Eco-labels such as the Marine Stewardship Council's (MSC's) internationally-recognised consumer-facing stamp continue to play a major part in guiding the sustainability agenda for the seafood industry. Indeed, gaining MSC accreditation is often vital to proving the fisheries' worth to seafood buyers and gaining access to market.

In 2012, Maldivian pole and line caught skipjack achieved MSC certification, confirming the responsible fishing practices that have long been in place in the fishery. Much more recently, the Indonesian Ministry of Marine Affairs and Fisheries (MMAF) announced its intention to enter its pole and line, and handline skipjack and yellowfin tuna fisheries into full MSC assessment with the Ministry on the basis that the eco-label would provide a solid foundation for the long-term viability of traditional fishing communities, and also lead to much improved market access for the country's tuna. To this end, the fisheries have been engaged in Fishery Improvement Projects (FIPs).

Over the past 10 years, the Government of Indonesia has pursued a strategy of "industrialisasi" – the rapid industrialisation of its fishing sector. This has included promoting considerable investment into the large-scale fishing sector. However, thanks to the progressive attitude of MMAF, the government is now focused on promoting and expanding its small-scale fisheries, including its pole and line and handline sectors.

The IPNLF fully expects these efforts, with realistic timescales, to bear significant fruit, both commercially and for the wellbeing of coastal communities. We are, therefore, investing heavily in assisting MMAF to improve fisheries governance in Indonesia, such as strengthening management systems, effort controls and enforcement strategies. These

are steps that in the long term will benefit not just the pole and line and handline sectors, but all of the country's tuna fisheries.

While it is a steep learning curve for many local producers, particularly with regards to the costs involved in certification, the long-term investment towards the marketing of these countries' tuna is unquestionably a positive strategy.

Social gains

Today, the environmental benefits of one-by-one fisheries are widely recognised and lauded by NGOs as a top tuna choice. The social benefits are becoming clearer too, in particular the multiple gains that coastal communities can have from assuming increased control of their natural resources and introducing more robust food security.

Illustrating what can be achieved, the first FairTrade tuna - handlined yellowfin from fisheries in Indonesia - was launched into the marketplace in February this year. IPNLF and other stakeholders hope this breakthrough will pave the way for many more similar ventures in the future.



Credit: Paul Hilton & FairTrade

Handline fishing

The social influence is, in all likelihood, the most important aspect of one-by-one fishing. Many of these fisheries are located in nations regarded as "least economically developed countries" and are extremely labour intensive. In fact, it is often the case that these fisheries are one of very few sources of local employment. In addition, most of the boats deployed in these fisheries are smaller, coastally-tied vessels that invariably embark on day trips.

The Maldives' skipjack fishery, for example, supports some 30 000 people, or 15 percent of the total Maldivian workforce. By comparison, a purse seine fishery catching similar volumes could employ as little as 200 people and because their catches are frequently taken to distant canneries, they are of minimal benefit to local society.

Furthermore, recent income and expenditure surveys have shown that the average monthly income in the Maldivian fisheries industry stands at about US\$900. This is almost four times the country's minimum wage of around US\$250. The bottom line is that pole and line tuna fishing is an activity that can give a decent standard of living to many families in coastal communities. Such livelihoods are vital in a world with a growing population and ongoing poverty challenges.

Raising traceability levels

Product integrity is essential for maintaining trust throughout the tuna supply chain. Because MSC has a dual element to its certification - sustainability of the fishery itself and Chain of Custody (supply chain traceability) - it has been recognised that by improving its traceability, Indonesia will move closer to achieving certification for its tuna fisheries.

A new measure aimed at helping the country fulfil this goal is the pilot of an online voluntary ProActive Vessel Register (PVR) - a collaboration between IPNLF, Asosiasi Perikanan Pole & Line dan Hand Line Indonesia (AP2HI), Masyarakat Perikanan Indonesia (MPDI) and the International Seafood Sustainability Foundation (ISSF). The project is funded by the Gordon and Betty Moore Foundation.

PVR-registered vessels receive a unique identification number, and a plaque featuring a barcode. This barcode enables fishery inspectors and enumerators to check an individual vessel's records in the field, simply by using a smartphone. It also provides the foundation for tracing tuna products through the supply chain back to the catching vessel. To ensure compliance, vessels are audited by an independent assessor.

Using the PVR tool will not only assist in creating a traceable, transparent and validated supply chain but will also support regional tuna management efforts, particularly in the Pacific Ocean, to increase the data collected from near-shore, artisanal and small-scale tuna vessels operating in Indonesia.

Increasing the accuracy of the data collected from these vessels should also help to improve the stock assessments and consequently the data on which management decisions are based. Moreover, the data collected across the fleet will enable a broader understanding of fishing capacity and practices' impact on stocks and help to address illegal, unreported and unregulated (IUU) fishing.

Improving baitfish sustainability

Pole and line fishing is a simple approach to catching tuna with (as its name suggests) a hooked line attached to a

pole. On locating a school of tuna, vessels scatter live bait into the sea in a process known as “chumming”. This creates the illusion of a large school of small fish near the surface, sending the target tuna into a feeding frenzy.

While the environmental and social benefits of pole and line are widely lauded, like any fishing method, it can be improved further. The supply of so-called “baitfish” has been critiqued somewhat in recent years with some speculation that unsustainable volumes of live bait are caught for use. However, on average the pole and line fisheries need a relatively modest 25 000 tonnes (combined total) of baitfish to catch more than 10 times as much tuna each year. Moreover, some of these bait fisheries are now being managed much more responsibly than previously and are also subject to frequent assessment.



Credit: Paul Hilton & IPNLF

Live baitfish, Indonesia

Still, a number of environmental and social issues associated with fishing for baitfish have been identified, in particular some use of juvenile fish and the complex interactions between live baitfish fisheries and local communities and tourism industries.

The sustainable use of live bait fisheries is in everyone’s best interest, so IPNLF and our partners have been developing best practice guidelines for baitfish management plans and providing skill sharing, training and capacity building to

improve community and coastal states’ ability to manage these fisheries on a long-term sustainable and equitable basis.

The future



Credit: Paul Hilton & IPNLF

Because carefully managed one-by-one tuna fisheries can be of invaluable benefit to so many coastal communities, particularly in disadvantaged regions, it is vital we do everything we can to support them today and in the long-term.

Currently, however, we are failing these fishers: only one quarter of the 386 000 tonnes of the global pole and line catch is available to buyers as fully-traceable products, which highlights that there are still severe supply chain failings that need to be addressed if we are to come anywhere close to satisfying the market demand.

That remains one of the IPNLF’s biggest aims moving forward: to bridge that gap by developing socially and environmentally responsible one-by-one fisheries and demonstrating their value for coastal communities. We therefore hope to see more regions and more companies actively engaged in developing and supporting these fisheries in the future. 🌱

Reader enquiry number 3



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