


FFA
**FORUM FISHERIES COMMITTEE
ONE HUNDRED AND EIGHTEENTH MEETING**
Virtual
11 - 14 May 2021

Agenda Item:	x
Paper Number:	FFC118-INFO.10
Title:	Maintaining and Enhancing Market Access

Summary:

This paper provides a brief summary of ongoing market access facilitation work undertaken by FFA in support of member countries. The support provided addresses EU and other market (non EU) access requirements. For the EU, the support centred around the maintenance and development of the sanitary Competent Authority (CAs) and the support in complying with the EU IUU Catch Certification regulations.

The paper notes the continued demand for FFA support to members in developing CAs and maintaining market access to overseas tuna markets continues to grow and the challenges of continuing to provide these services given COVID19.

Recommendations

The Committee is invited to:

- i. Note the importance of market access and its role in the development of fisheries in the region;
- ii. Note the collective efforts of each company, FFA member country and your FFA Market Access team to address the challenges associated with accessing markets; and
- iii. Note the increasing obligations that have been put on exporting countries' government and industry by market states including recent examples such as the Marine Mammal Bycatch Comparability Rule and the U.S. High Seas Driftnet Fishing Moratorium Protection Act (Moratorium Protection Act).

Maintaining and Enhancing Market Access

Introduction:

1. Supporting members to attain and maintain access to the export markets, in particular the EU market, remains a vital area of work for the Fisheries Development Division. This paper affords a brief synopsis of current developments and challenges encountered by members in relation to sustaining and accessing export markets and those faced by FFA in providing support services to members.
2. The four FFA member countries that are EU approved and listed continued to rely on FFA for technical support with an increase in the number of establishments that have obtained CA approval and EU listing.
3. The number of FFA members interested in establishing an EU approved CA has increased. There is also ongoing work in establishing and realigning inspection and certification processes responding to the requirements being put in place by other countries including the US, Australia, China, Taiwan, Vietnam, Morocco and other countries within the region and also in relation to eco labelling and or private certification, such as, MSC.
4. Despite the COVID19 pandemic and associated impacts, demand for support from the FFA Market Access team continued and best endeavours to respond to this demand were made.

Support for established National Competent Authorities for Food Safety (Sanitary and Phyto Sanitary):

5. The FFA Market Access team (consisting of both FFA staff and consultants) continues to support the four established CAs in Fiji, Solomon Islands, PNG and Kiribati. Work undertaken by the FFA Market Access team in the past year includes:
 - i. Review of the competent authority structure and governance for the Solomon Island Competent Authority completed and presented to the Ministry of Health. A summary was also prepared on behalf of the MOH as the report is progressing through the SIG executive forum.
 - ii. Review and update of the National Control Plan and Industry Standard so that it is in line with the latest EU standards and regulations.
 - iii. First version of the Fiji Industry Standard developed and endorsed by the Honourable Minister responsible. The document was appreciated by both the CA and industry.
 - iv. Support to NFA (PNG) on the implementation of the revised National Standards for Fish and Fishery Products. That also includes technical support and assistance to both the CA and the Industry. FFA is working on the continuation of engagement of the in-country consultant for PNG.
 - v. Series of virtual training and meetings for Kiribati, PNG, Solomon and Fiji Competent Authorities conducted on various training as requested by them.
 - vi. Ongoing in country technical support to the Fiji CA and Industry (EU approved) covering area of capacity and competency development with regard to key market access areas including: health certification processes and procedures; the New TRACES NT (the EU DG TRACE certification platform); and traceability which also covers MCS and accountancy. This support also included a joint thermal processing training involving the Fiji and Kiribati CAs.
 - vii. Ongoing mentoring and support to both the Fiji CA, Fiji Fisheries Officials and PAFCO to ensure that they understand the landing process and supply chain from

the vessel onwards for purse seine catch with a focus on traceability and accountancy.

- viii. Specific support to Kiribati Fish Limited on the review of the structural design and layout of the proposed processing plant planned for Kiritimati.
- ix. Support was also extended to the SI CA, Soltuna and National Fisheries Development on challenges faced by the Industry in addressing emerging markets standards and meeting supply demand.
- x. The FFA Market Access team is working with the FFA Training Advisor and IT team on the final improvements needed for the e-learning materials that will be made available on the FFA Website.
- xi. Assistance and support to improve CA visibility in the country.
- xii. FFA support has led to an increase in the numbers of establishments approved in Fiji and Solomon Islands. That includes the government owned Pacific Fishing Company in Fiji (PAFCO) and a small loining plant at Noro, Solomon Islands.
- xiii. The FFA market access team has been working with the Kiribati Competent Authority on their desktop audit by DG SANTE.

Support for the Development of Competent Authorities (SPS) for FFA members interested in EU markets

6. The FFA Market Access team provided support to the Federated States of Micronesia, Republic of Marshall Island (RMI), Samoa and Nauru in the following areas:

Federated States of Micronesia

- i. Review and update of the Draft Seafood regulation, National Control Plan and Industry Standard completed and submitted to the FSM CA.
- ii. Technical support provided to the FSM CA on the development of their national budget.
- iii. Review and update of the FSM CA development plan.
- iv. FFA supported the development of the HACCP Plan for DaYang Fisheries vessels in supporting their application to have their vessel approved and listed for the EU. Part of the support was the training of the CA on assessing HACCP plans.
- v. Series of virtual training programs with the CA has begun and will continue in 2021.

Republic of Marshall Islands

- i. Review and finalisation of the National Control Plan and Industry for RMI CA including draft regulations.
- ii. Foundational training for the CA has been conducted virtually and will continue in 2021.

Samoa

- i. Support provided in the drafting of position description and structure of the proposed CA.
- ii. Commenced review of the draft regulations work on the Samoa National Control Plan and Industry Standard.
- iii. Facilitation of CA development training after all recruitment completed.

Nauru

- i. Preliminary discussions between FFA and the Nauru Fisheries and Marine Resources Authority undertaken with further discussions to follow.

Support to FFA members on access requirements for non-EU markets

7. The non-EU markets remain a very important market for most if not all of FFA members. In particular Fiji, Solomon, Kiribati, Federated States of Micronesia, Marshall, Cook Island and Vanuatu. These markets are beginning to tighten their standards and can be expected to further do so. Key Non EU markets include:
 - a. People's Republic of China: PRC has a standard that is equivalent to the EU which requires countries to have in place a listing and approval system, sampling and analysis and certification system for exports. China is a key market to most of the Longline fisheries in the Pacific.
 - b. US: The US requires registration of establishments including HACCP approval specific certification of any consignment. A key market to Fiji, Samoa, Tonga and Micronesia. This includes traceability.
 - c. Taiwan: A common destination for a lot of the fish from FFA members. Taiwan has started to change their requirements to address information that addresses IUU.
 - d. Other markets include Vietnam, Indonesia, Australia and New Zealand and Japan.
 - e. FFA Members have begun requesting certificates for consignments imported from other countries including FFA members.
8. Support for the Vanuatu Seafood Verification Agency (CA) continues, including the training of the CA team, review and update of their National Control Plan and Industry Standard, and a review of the development plan.
9. Support to the Fiji CA and Industry, Kiribati CA and Industry, Solomon CA and Industry in addressing key non-EU market challenges such as, health certification and traceability.
10. Development of an overseas Market Access Standard (non-EU Markets) by the FFA Market Access team as support to members. The Standard addresses minimum market access requirements for all key markets like China, US, Australia, Taiwan etc that is user friendly to all member countries.

Compliance with EU IUU Regulations

11. FFA provided continuous support to all FFA members remotely on any EU IUU Regulation related challenges and this support has been widely utilised by members.
12. FFA market access team conducted a 2 weeks virtual training on IUU Catch Certifications for all member countries.
13. Kiribati had been successful in having yellow card status removed by the DG MARE of the EU.

New Market Challenges

14. The EU has made changes into their import Health Certificates and that will require updating the National Control Plan and Industry Standard for Fiji, Kiribati, Solomon Islands and Papua New Guinea.
15. The EU is making progress in the development and voluntary roll out (for EU member countries only) of an online catch certification portal "CATCH" which uses the TRACES.NT platform. This is expected to be fully functioning in 2022 and extended to all countries.
16. There has been a growing increase in importing countries requiring better traceability on their import documents, in particular certifications.

17. The global demand has brought in new market opportunities to some of the members. These are markets like Morocco and Turkey.
18. A concern for Pacific Island countries is the growing use of legislation by market states using fisheries management issues, to regulate market access. An early example is the EU IUU Regulation, but recent initiatives by the US include:
 - i. The Marine Mammal Bycatch Comparability Rule. The import provisions implement aspects of the Marine Mammal Protection Act that aim to reduce marine mammal bycatch associated with international commercial fishing operations, by requiring nations exporting fish and fish products to the United States to be held to the same standards as U.S. commercial fishing operations.
 - ii. The U.S. High Seas Driftnet Fishing Moratorium Protection Act (Moratorium Protection Act) which requires the United States to identify nations whose vessels have engaged in fishing activities or practices that result in bycatch of protected living marine resources beyond the U.S. Exclusive Economic Zone (EEZ) and do not have a regulatory program comparable to that of the United States, taking into account different conditions among the fisheries.
19. Given that these and similar initiatives can potentially affect all Pacific Island exporters, a joint approach from FFA might help others in responding to these sorts of measures.

Impact of Covid-19

20. The Market Access team has had to reorientate its service to members taking into account travel restrictions. Aside from Fiji and PNG no other in-country visits were conducted.
21. Services have been effectively delivered virtually and the amount of virtual meetings and training has increased significantly.
22. The Fijian companies that focus on chill fresh tuna products continue to struggle to recover while those that focus on frozen products continue as normal or are getting back to normal.
23. Solomon Islands and PNG continue to export to the EU as before Covid.
24. Kiribati Fish Limited did not send any exports to the EU in 2020, however, the company continues to be fully operational. In Fiji, only Golden Ocean has continued to export frozen loins to the EU.
25. Some monitoring work, access to laboratories, boarding and inspections, which include landing and transshipment, have been affected due to Covid restrictions.
26. The FFA market access team has been in constant discussion with the CAs and industry on how best to mitigate problems and maintain compliance.

Key issues and challenges

27. The impact of COVID 19 has affected the way the Pacific tuna industry operates and will continue to affect what and how we deliver our work both nationally and regionally.
28. The supply chain, in particular for FFA Members producing chill fresh products, will continue to be affected for some time.
29. FFA member governments and industry participants need to be fully aware and committed to adhering to the obligations related to maintaining market access.
30. DG SANTE of the EU has now resorted to desktop audits of our CAs, as reflected in the audit they are now undertaking for Kiribati.