



# Pacific Tuna 2050: Resilience, Innovation, Equity and Sustainable Trade for a Prosperous Future

9th Pacific Tuna Forum (PTF 2025) 14–15 October 2025 | Sofitel Fiji Resort & Spa, Denarau, Nadi, Fiji

The Pacific tuna story is, at its heart, a story about stewardship: of people, of resources, and of an ocean whose productivity sustains communities far beyond the Blue Pacific Continent. That ethos was unmistakable at the **9th Pacific Tuna Forum (PTF 2025)**, where senior officials, scientists, industry leaders, and civil society gathered to take stock of progress and chart a course to 2050. Framed by the theme **“Pacific Tuna 2050: Resilience, Innovation, Equity and Sustainable Trade for a Prosperous Future,”** the two-day programme in Nadi, Fiji, combined hard science with policy, market intelligence with social responsibility, and regional vision with practical investment pathways.

Hosted by the **Government of Fiji**, in partnership with **Papua New Guinea National Fisheries Authority (PNG NFA)** and **INFOFISH**; and co-organised with the **Pacific Islands Forum Fisheries Agency (FFA)**, the **Pacific Community (SPC)**, the **Parties to the Nauru Agreement Office (PNAO)**, the **Western and Central Pacific Fisheries Commission (WCPFC)**, the **Pacific Islands Forum Secretariat (PIFS)**, and **FAO GLOBEFISH**, the Forum reaffirmed the Pacific’s leadership of a fishery that supplies the majority of the world’s tuna. It also underscored a broader truth: tuna is not only an export commodity but a pillar of food security, livelihoods, culture, and trade across the region.

## A setting steeped in culture, a programme rooted in purpose

The Opening Ceremony unfolded with traditional Fijian protocol—*Qaloqalo*, *Vakamamaca*, *Sevusevu*, *Wase ni Yaqona*, and *Ulivi ni Vosa*—a moving acknowledgement of the *vanua* and the custodians of land and sea. The tone was dignified and deliberate; this would be a Forum that honoured tradition while advancing forward-looking policy and practice.

The Welcome Address and Official Opening by **Hon. Viliame Gavoka**, Fiji’s Deputy Prime Minister and Minister for Tourism and Civil Aviation, situated tuna as central to national prosperity and regional cooperation. The message was crisp: the Pacific’s comparative advantage rests on healthy stocks, credible governance, and regional solidarity.

In a Special Address, **Hon. Jelta Wong**, PNG’s Minister for Fisheries and Marine Resources, articulated a bold proposition: through the East New

Britain Initiative (ENBi) and a Hubs & Spokes approach, Pacific Island countries can shift from being suppliers to becoming shareholders in their tuna future. Local processing, he argued, is the cornerstone – creating jobs, improving supply chain transparency, strengthening food security, and deterring IUU fishing. “A region that does not control its own purse, does not control its own destiny,” he concluded – a line that echoed throughout the week as a call to collective action.

INFOFISH Acting Director, **Ms Gemma Meermans Matainaho**, welcomed delegates on behalf of the co-organisers. She stressed the Forum’s unique role as a science-, policy-, and market-informed platform aligning resilience, innovation, equity and sustainable trade. With the WCPFC contributing more than 60% of global tuna, she reiterated INFOFISH’s long-standing commitment to market intelligence, capacity building, and trade facilitation, especially as regulatory, climate, and consumer expectations intensify.

A brief exhibition tour and press conference followed. PTF 2025 Chair **Dr Manumatavai (Manu) Tupou-Roosen** of the University of the South Pacific (USP) set out the Forum’s vision and the Pacific’s 2050 horizon for inclusive, sustainable growth. National statements by **Hon. Alitia Bainivalu** (Fiji) and **Hon. Jelta Wong** (PNG), alongside regional expert remarks by **Dr Paul Hamer** (SPC), **Mr Noan David Pakop** (FFA Director General), and **Ambassador Merewalesi Falemaka** (PIF Ambassador to the WTO), reinforced a shared agenda: combat IUU fishing, strengthen management partnerships, and elevate the Pacific’s voice in global trade and fisheries governance.

## Keynote pillars: collaboration, social responsibility, and ocean literacy

In the Chair’s Keynote Address, **Dr Manu Tupou-Roosen** outlined three pillars for action that threaded through nearly every session:

- **Deeper collaboration** across countries, industry, and partners—including ENBi, Pacific Island Tuna (PIT), and the FSM-led 100% electronic monitoring (EM) initiative for longliners;

- **Social responsibility**, with a focus on elevating women and vulnerable groups, and operationalising binding crew welfare standards; and
- **Investment in education and ocean literacy**, empowering the next generation of Pacific custodians.

She celebrated milestones such as the South Pacific albacore proportional allocation agreement, and called for Pacific-led solutions to climate impacts that balance stock sustainability with economic resilience. In essence: a Pacific future authored by Pacific people, grounded in science and fairness.

## Day 1 – Science, supply chains, and markets

### Session 1: Sustainable tuna resources and supply chains in the WCPPO

Moderated by **Mr Noan David Pakop (FFA)**, Session 1 set a baseline for resource status, management performance, and supply chain integrity.

- **State of the global tuna industry – Ms Bhakti Anand (FAO)** reported 6.68 million tonnes of global production in 2023, with the Pacific supplying the majority. Crucially, 87% of tuna stocks are now assessed as sustainably fished under effective RFMO management. She flagged climate risks, energy costs and certification pressures, urging broader uptake of FAO's Blue Transformation to bolster resilience and value.
- **Stock status & fishery trends – Dr Paul Hamer (SPC)** highlighted record 2024 catches in the WCPFC area of 3.04 million tonnes (valued at approximately USD 5.6 billion), dominated by skipjack and yellowfin. Key tuna stocks – skipjack, yellowfin, bigeye, and South Pacific albacore – were assessed as not overfished; swordfish remained healthy, while striped marlin and oceanic whitetip sharks require continued attention. He underscored the centrality of harvest strategies to reduce uncertainty, maintain ecological integrity, and secure economic returns.
- **Partnerships for sustainability – Mr John Maefiti (PNAO)** showcased how the Vessel Day Scheme (VDS), coupled with MSC certification, underpins sustainability and equitable outcomes. Verified supply chains and enhanced regional processing opportunities – via ENBi, Pacific Island Tuna, the FSM-RMI-PNG Tripartite MoU, and the Bina Harbour project – are translating policy frameworks into real value for Pacific communities.
- **Traceability through GDST – Mr Huw Thomas (Global Dialogue on Seafood Traceability)** explained how interoperable digital traceability, built on standardised Key Data Elements (KDEs) and Critical Tracking Events (CTEs), is enabling companies and governments to meet escalating sustainability commitments and regulatory requirements. With 112+ organisations now adopting GDST and governments aligning national systems, investors and regulators gain confidence – a prerequisite for market access and finance.
- **Operationalising PSMA & Transshipment Reform – Mr Francisco Blaha** argued for risk-based inspections, 100% port-based offloading, and an independent high seas observer programme to curb abuses of high seas transshipment, strengthen labour protections, and enhance transparency across the fleet.

**Takeaway:** The convergence of strong science, robust MCS frameworks, and interoperable traceability is safeguarding stocks and improving equity and value retention across Pacific supply chains.

### Session 2 – Investing in a sustainable and equitable Hubs & Spokes strategy

- The Western and Central Pacific (the Blue Pacific Continent) accounts for nearly 60% of the world's tuna harvest. This session, moderated by **Mr Noan David Pakop**, revealed how the region is operationalising the **2050 Strategy for the Blue Pacific Continent**, the **ENBi**, and the Hubs & Spokes concept to anchor **sustainability, equity, and resilience** at the centre of regional development.
- **ENBi Presentation – Mr Franklin Forau (FFA)** detailed an investment-led regional platform designed to expand Pacific participation along the value chain. Backed by PNG, the World Bank, the Japan Promotion Fund, and the European Union, ENBi couples feasibility studies and an implementation strategy with a Regional Fisheries Development Fund. It mobilises partnerships such as the FSM-RMI-PNG Tripartite Agreement and Bina Harbour to unlock processing and logistics capacity.
- **Inclusion & Equity – Ms Rose Martin (FFA)** emphasised that social inclusion, fair labour, and community participation are inseparable from sustainability. FFA initiatives now span small-scale value-adding, Respectful Workplace training to address forced and child labour risks, and embedding social inclusion within Tuna Management Plans.
- **Leaders' Panel –** Senior officials from Fiji, PNG, Kiribati, the Marshall Islands, the Federated States of Micronesia, and Solomon Islands discussed practical pathways to increase offloading, expand in-region processing, and accelerate skills development. A telling statistic framed the opportunity: of an average 2.7 million tonnes caught annually in the WCPPO over the past decade – 1.2 million tonnes in FFA waters – only about 214 000 tonnes are processed within FFA nations. The gap signals both the challenge and the prize: retaining value at home.

**Takeaway:** ENBi is widely viewed as the next big step after the VDS—a cross-sector catalyst combining infrastructure, finance, workforce development, and industry partnerships to re-root value in the Pacific.

### Session 3 – Global & regional trade and market access

Moderated by **Ms Gemma Meermans Matainaho (INFOFISH)**, Session 3 dissected a global market valued at USD 47 billion in 2024 and projected to reach USD 67 billion by 2034. The panel offered region-specific insights shaped by policy, logistics, and consumer preferences.

- **Europe – Mr Henk Brus (Pacifical)** spotlighted **EU sourcing** diversification and near-term opportunities for Pacific pre-cooked loin exports. Success will hinge on digital traceability and granular sustainability data to meet evolving EU requirements.
- **Asia/Pacific – Mr Chris Hsu (Tri Marine)** reviewed the WCPPO's dominant purse seine capacity and the gravitational pull of

processing hubs in Thailand, the Philippines, PNG, and Ecuador. He advocated vertical integration and Pacific-based production to navigate tariffs, rules of origin, and logistics frictions.

- **MENA – Mr Arnab Sengupta (Prime Products)** profiled a USD 1 billion market led by canned tuna, with value-added, pet food, and frozen segments growing quickly—an opening for Pacific exporters leveraging efficient logistics and zero intra-Arab customs.
- **United States – Ms Bhakti Anand (FAO)** underscored the US as a top tuna importer (about USD 2.06 billion in 2024), with steady demand for canned and sashimi-grade products. However, access depends on strict traceability and sustainability compliance.
- **China – Prof. Dr Zhengyong Yang (Shanghai Ocean University)** charted rapid import growth, premiumisation trends, and the regulatory steps foreign exporters must meet under GACC rules – highlighting the primacy of strategic partnerships, cold chain integrity, and product innovation.

**Takeaway:** Global seafood trade is becoming more fragmented yet opportunity-rich, shaped by regulatory precision, sustainability imperatives, and shifting regional demand. For Pacific producers, strategic localisation, compliance readiness, and innovation will be decisive for capturing future growth.

**Day one wrap-up** - In her closing summary, **Chair Dr Manu Tupou-Roosen** reflected on the day's discussions, highlighting how delegates had developed an integrated perspective on **resource status, governance, and market dynamics**. She noted that **ENBi** had crystallised as a unifying framework for **value-retention, inclusive participation, and education-driven workforce development**. The evening's Opening Cocktail, graciously hosted by Fiji's Ministry of Fisheries and Forests, provided an engaging setting for delegates to network and strengthen emerging partnerships.

## Day 2 – Policy reform, innovation at scale, and people at the centre

The second day opened with a **Special Address** from **Ms Katy Hladki (Pew Charitable Trusts)**, who urged acceleration of science-based harvest strategies – pre-agreed management procedures for all tuna species by 2028 – to secure long-term sustainability amid climate variability, underpinning a stable global seafood supply.

### Session 4 – Challenges & opportunities: Pacific tuna trade and market dynamics

Moderated by **Mr Rodney Ned Kirarock (MRAG Asia/Pacific)**, Session 4 probed how the region can align value retention, equity, and inclusive participation with regulatory reform and market shifts.

- **WTO Subsidies & ENBi – Amb. Merewalesi Falemaka (PIF Permanent Representative to the WTO)** connected the Fisheries Subsidies Agreement (effective September 2025) to Pacific development aspirations. Although the region accounts for less than 1% of global fishing capacity, reform can complement

ENBi by directing investment towards value-adding, quality, and standards, leveraging preferences (EU, PACER Plus) while preparing for preference erosion.

- **Tariffs and Pacific competitiveness – Ms Bhakti Anand (FAO)** modelled potential US tariff scenarios (10–15%) on key items, which could reduce direct Pacific exports by approximately 18–21%. While the region's direct exposure is limited, she warned of indirect impacts via third-country processors. Her prescription: regional coordination and a pivot toward value-added, sustainable products.
- **Transforming Markets through Social & Environmental Performance – Mr Bill Wall (The Nature Conservancy)** presented Pacific Island Tuna (PIT), a Pacific-led joint venture delivering 100% monitoring, dockside offloading, and community reinvestment. By aligning with ENBi, PIT is attracting major retailers seeking transparent, socially responsible supply.

**Takeaway:** Align policy reform, trade preferences, and private investment with ENBi to de-risk capital, expand Pacific processing, and reward best-in-class social and environmental performance.

### Session 5 – Innovative tuna technologies & value creation

Technology and innovation are reshaping tuna from deck to data, creating efficiencies, strengthening compliance, and opening new revenue streams. Session 5 unfolded in two parts.

#### 5(a) Innovative tuna technologies for the Blue Pacific continent

Moderated by **Mr Epeli Loganimoce (Global Fishing Watch)**

- **Food safety (histamine testing) – Mr Kyriakos Eleftheriadis (ProGnosis Biotech)** compared ELISA and lateral flow (LFD) methods as rapid, cost-effective tools to avoid shipment rejections. With AOAC-validated detection thresholds and minimal equipment needs, facilities can improve quality assurance without heavy capital expenditure.
- **By-products for marine ingredients – Mr Francisco Aldon (MarinTrust)** showed that by-products now constitute 54% of global fish oil supply (Asia 66%), revealing a 12 million-tonne uncollected opportunity. Realising that potential requires certification, traceability, and refining capacity, which are the building blocks of premium markets.
- **Interconnected smart fishing – Mr Jorge Pérez Bouzada (Marine Instruments)** demonstrated how digitalised buoy networks and AI-enabled decision tools can reduce fuel use and bycatch while improving catch efficiency – advantages that benefit both profitability and planet.
- **Real-time EM & smart tools – Mr Javier de la Cal (Satlink)** presented AI-driven electronic monitoring (with up to 99% catch accuracy) and smart buoys enabled by reliable connectivity. The result: stronger selectivity, traceability, and management



outcomes that support both RFMO objectives and market compliance.

- **A New Pacific research vessel – Mr Robert Christie (SPC)** unveiled the RV *Pasifika* (operational by 2028), a regionally owned, low-emissions platform for tuna tagging, oceanography, and climate research. It will serve as a flagship for Pacific-led science serving management and adaptation needs.
- **Fishing Vessel Observation Network (FVON) – Ms Cynthia Wickham & Mr Bipendra Prakash (SPC)** described a simple but powerful idea: turn fishing vessels into Ships of Opportunity. With 24+ systems across 10 countries already logging 900 000+ temperature data points, FVON is improving forecasts, safety, and fisheries planning while embedding science at sea.

**Takeaway:** Technological innovation is redefining the Pacific's tuna sector from boat decks to data clouds. Together, these tools are driving a science-based, low-impact, and digitally-connected blue economy that empowers Pacific nations to lead in sustainable ocean stewardship.

#### 5(b) Innovation labs and value creation in Pacific tuna supply chains

Moderated by **Mr Tony Sullivan (FFA)**

- **Pacific Islands Tuna Ventures Programme (PITVP)** — A multi-partner initiative (FFA, Blue X Ventures, Carbon Earth, Golden Ocean Fish, Shiino Foods) modelled on Iceland's "100% Fish" approach. PITVP is converting processing sidestreams into high-value bioproducts, from organic fertilisers and pet treats to collagen and biomedical serums. Phase II (2025–2028) prioritises commercial scaling, women's employment, food security, waste reduction, and climate resilience, including a proposed Marine Bioproduct Development Centre in Suva.

**Takeaway:** Technology and circular economy innovation are now core to competitiveness, lowering costs and carbon, de-risking compliance, and unlocking new revenue streams from sidestreams and data.

#### Session 6 – Future-proofing the tuna industry in the Blue Pacific

Moderated by **Mr Francisco Blaha**, Session 6 addressed how the region can future-proof the global tuna industry by strengthening resilience, enhancing participation, and ensuring shared benefits across the value chain – placing workers, communities, and ecosystems on equal footing with resource status and export earnings.

- **GCF Regional Tuna Programme – Mr Martin Chong (SPC)** introduced a USD 107.4 million, seven-year initiative spanning 14 Pacific nations. The programme will enhance food security, post-harvest value, and climate resilience through improved forecasting, distribution models, and industry engagement.
- **Certification Pathways (MSC v3.0) – Mr Bill Holden (MSC)** outlined new requirements—including harvest strategies and control rules, an Evidence Requirements Framework (ERF), Fins Naturally Attached, and gear loss prevention. These measures

position WCP0 fisheries to maintain market credibility and long-term sustainability in alignment with leading buyers' expectations.

- **Worker Welfare & Standards – Mr Mike Kraft (FISH Standard for Crew)** presented a third-party labour certification aligned to ILO C188, now SSCI-recognised (2025). He highlighted 34 FIA PNG tuna seiners as the Pacific's first certified fleet, setting a benchmark for ethical, transparent fisheries.
- **Social Accountability at Sea – Mr Marcelo Hidalgo (FIA PNG)** detailed a Responsible Sourcing Policy and a comprehensive model integrating crew welfare traceability, audits, and digital monitoring (iFIMS) to meet EU due diligence expectations and global buyer requirements.

**Takeaway:** Climate finance, credible certification, and verifiable social accountability are no longer optional – they are market gates. Early adopters in the Pacific are already converting these standards into competitive advantage and inclusive benefits.

#### Synthesis of discussions by the Chair: Balancing growth with guardianship

In closing the PTF 2025 programme, the Chair distilled four cross-cutting messages:

1. The constant balancing act between **economic gains and sustainability** must guide decision-making from sea to shelf.
2. **Pacific-led initiatives** – from the PNG Special Economic Zone to RMI's Pacific Island Tuna – are aligning investment with social and environmental outcomes.
3. **Technology and innovation** are accelerating improvements in **safety, monitoring, and value creation**.
4. **People remain paramount**, from observer safety and decent work to equitable participation, alongside biological and economic sustainability.

#### Closing and acknowledgements

In her Closing Remarks, **Ms Gemma Meermans Matainaho (INFOFISH)** thanked hosts, sponsors, moderators, speakers, and delegates, celebrating PTF 2025 as a waypoint toward a resilient, innovative, and equitable tuna industry. INFOFISH reaffirmed its role in research, market intelligence, and trade facilitation as the region advances toward **PTF 2027**. The Ministry of Fisheries, Fiji, hosted a convivial Closing Dinner, drawing a fitting line under two days of intensive work and purposeful networking.

INFOFISH gratefully acknowledges the Government and people of Fiji and Papua New Guinea; co-organisers FFA, SPC, PNAO, WCPFC, PIFS, FAO GLOBEFISH; sponsors and exhibitors; the AV team – ENCORE, the official exhibition contractor – Total Events and the Sofitel Fiji Resort & Spa for their hospitality and support.

## From signals to steps: What policymakers and industry can do now

The Forum concluded with clear **Action Signals** – pragmatic steps to convert shared vision into measurable outcomes:

- **ENBi/Hubs & Spokes:** Move from concept to **bankable investment pipelines**, prioritising offloading in-region, local value-addition, and logistics connectivity (processing plants, cold chain, and ports);
- **Harvest strategies:** Lock in management procedures for all tuna species by 2028 to uphold stock health amid climate uncertainty and protect market access (aligned with MSC v3.0);
- **Digital traceability:** Scale GDST-aligned systems and 100% monitoring (EM + dockside) to meet US/EU/China compliance and investor expectations;
- **PSMA & transshipment:** Expand risk-based inspections, increase port-based unloading, and explore an independent high seas observer model to lift transparency and labour protections;
- **Social accountability:** Mainstream the FISH Standard for Crew and robust due diligence (e.g., iFIMS, Responsible Sourcing Policy) to secure premium markets and protect rights at sea;
- **Circular Value:** Invest in by-product valorisation – fishmeal/oil, collagen, nutraceuticals, pet food – and support PITVP and the Marine Bioproduct Development Centre to scale regionally;
- **Science capacity:** Back SPC's RV Pasifika and FVON to expand Pacific-led data for management, climate forecasting, and safety at sea; and
- **Trade strategy:** Anticipate tariff/subsidy shifts, diversify markets (EU, MENA, China, US niches), and prioritise value-added, certified, story-rich Pacific products.

## Why PTF 2025 mattered

Three threads explain why this Forum felt different.

**First**, the **ENBi/Hubs & Spokes** conversation is no longer abstract. With partners and funds on the table and concrete projects like **Bina Harbour** advancing, the Pacific's value-retention agenda is ripening from **policy** into **bankable deals**. The leaders' panel laid bare the scale of the opportunity: **millions of tonnes** harvested in the region versus **a fraction processed** locally. Closing that delta – sensibly, sustainably – represents jobs, skills, and revenue that would otherwise depart with the fish.

**Second**, the technology frontier has moved decisively **onboard** and **online**. **EM systems approaching 99% catch accuracy**, **AI-enabled**

**buoys**, and **digitised supply chains** are transforming compliance from a cost centre into a **value proposition**. When traceability is interoperable and verifiable, it underwrites **market access, finance, and brand trust**.

**Third**, social accountability is becoming a **competitive edge**. The emergence of **SSCI-recognised crew standards**, fleet-level certification, and integrated **crew welfare traceability** demonstrates that the Pacific is not waiting for global mandates; it is **setting the benchmark**. In a world of **due diligence laws** and **values-driven consumers**, those who can **prove** ethical performance, will lead.

## A sector vision aligned with a regional identity

If one were to choose a single phrase to summarise PTF 2025, it might be this: **"Pacific-led and partnership-powered."** The region's comparative advantage lies not only in the abundance of its tuna but in the **cooperative institutions** and **shared norms** that have been painstakingly built: the **VDS** that internalises scarcity and allocates access, the **WCPFC** that coordinates science-based rules, and the **FFA/SPC** engine that integrates monitoring, research, and national capacity.

What the Forum illustrated is how these strengths are now being extended: from access to processing, from monitoring to full traceability, from environmental to social standards, and from raw material to high-value bioproducts. The coming decade will test the region's ability to scale these ambitions. But the pathway is clearer than ever: **bankable infrastructure, skilled people, credible certification, and interoperable data**—all under a regional umbrella that ensures **no one nation bears the burden alone**.

## From Forum to future

**PTF 2025** was not a moment of self-congratulation; it was a **workshop for the future**. The message from the podiums and panel tables was consistent: **lock in harvest strategies, finance the hubs, wire the supply chains, prove the social standards, and turn waste into value**. The Pacific has already demonstrated it can **manage the world's most important tuna fishery** to high ecological standards. The next test is to **translate that stewardship into prosperity** that is **widely shared, gender-inclusive, and climate-resilient**.

If the conversations in Nadi are any indication, the Pacific is ready. With ENBi as a flagship, PIT and PITVP as engines of innovation, SPC's RV *Pasifika* and FVON as symbols of scientific self-reliance, and crew welfare standards as non-negotiable facts of business, the region is writing a new chapter—one where **resilience, innovation, equity, and sustainable trade** are not just themes but **daily practice**.

The road to **PTF 2027** runs through cold stores and classrooms, through control rooms and community halls, through data standards and dinner tables. It is a road the Pacific is taking together—and that may be the Forum's most important outcome of all.