

ACCELERATING SOCIAL RESPONSIBILITY IN SEAFOOD

CASS Collective Action Lab, June 2025 – February 2026

Executive Summary

OVERVIEW

Over seven workshops spanning from June 2025 to February 2026, the [Conservation Alliance for Seafood Solutions](#) (CASS) engaged a multi-stakeholder group to apply the Sustainable Market Transformation (SMT) model, developed by Amsterdam-based consultancy [NewForesight](#), to diagnose why social responsibility (SR) in seafood supply chains continues to lag behind environmental standards.

The series entailed developing a specific vision of what we want to achieve, understanding current system dynamics and barriers to identify where and why progress is stalled, mapping the last decade of SR efforts to assess their impact and maturity, and exploring recommendations to move toward a collective strategy to close that gap. Drawing on the expertise of 30 unique participants and facilitated by Gretchen Thuesen, Program Certification Manager, Seafood & Packaged Goods, at Fair Trade USA, the series produced a future-state vision, a system-loops analysis, a maturity map of current initiatives, and a set of strategic pathways to explore.

The report below summarizes the community group's discussion over the nine months spent working through the SMT model. The points below reflect the findings and reemerging conversations from this shared exercise and are shared to spur continued dialogue. The information shared is intended for educational purposes, rather than for strategy-setting by or endorsed by the Alliance. Any Alliance members can draw from it to inform their own work strategies or projects.

KEY FINDINGS

The Future State Vision

The group co-developed a “north-star” vision: a shared, forward-looking picture of what the seafood sector will look like once social responsibility has been fully institutionalized. The vision intentionally centers on market incentives because seafood is fundamentally a livelihood and business; economic incentives and consequences must reinforce socially responsible behavior.

In this desired future state of the sector, human rights and fair labor are upheld and embedded as the norm in market systems, business practices, and regulatory frameworks, with strong accountability mechanisms in place. A critical mass of aligned stakeholders across industry, government, and civil society collaborate to enforce accountability, ensuring a level playing field and sustained systemic change through coordinated incentives and strong governance. Sample activities include the seafood industry adopting HRDD as standard practice, with labor rights protections required and monitored; governments creating and enforcing enabling legislation

informed by civil society advocacy and market demand; and civil society shifting from policing violations to raising the bar, supporting thriving workplaces, and monitoring systemic outcomes.

→ **Full Text Here:** [Accelerating SR in Seafood Future State Vision \(Updated Mar 2026\)](#)

Where the Seafood SR Sector Stands: Between Phase 1 and Phase 2

Mapping a decade of SR initiatives against the SMT's four phases revealed that the sector sits between Phase 1 (Inception/Pilots) and Phase 2 (Competitive Advantage). Many projects currently exist, including social certifications (standalone or as part of environmental certifications), human rights due diligence (HRDD) tools, worker voice platforms, campaigns to increase WiFi access for fishers, collective bargaining efforts, and multinational treaties. However, most remain small-scale, philanthropically funded, and limited in market uptake or measurable ground-level impact.

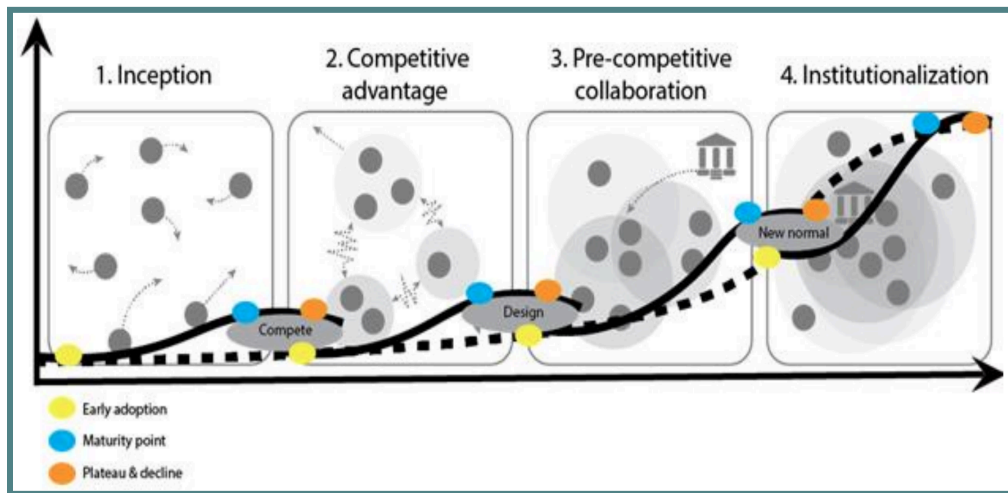


Figure 1: The four phases of market transformation from the Sustainable Market Transformation (SMT) model.

While it was determined that the sector as a whole is in a maturity range between Phases 1 and 2, some projects and initiatives extend into Phase 3. Although there are emerging signs of increased scrutiny and movement toward broader adoption, the sector has not yet reached the critical mass needed for systemic change, and ongoing competition, coordination challenges, and unclear signals to market actors continue to hinder advancement.

Below is a summary of the 4 phases of the Sustainable Market Transformation model and the corresponding sectoral activities discussed in the workshop series:

Phase	Name	Seafood Social Responsibility Activities
0	Inertia	Pre-2014: Globally recognized exposés of forced labor in seafood supply chains temporarily put the issue in the international spotlight and drove interest in funding solutions.

		<ul style="list-style-type: none"> • <i>Trafficked into slavery on Thai trawlers to catch food for prawns</i> (The Guardian, 2014) • <i>AP Investigation: Are slaves catching the fish you buy?</i> (AP News, 2015)
1	Inception / Pilots	Current primary phase: Many projects led by civil society (environmental NGOs, human rights groups, and international unions) have regional success but limited global market uptake.
2	Competitive Advantage	Emerging phase: Civil society-led pilots and pressure lead to some voluntary retailer uptake; not yet widespread. Participation is typically driven by NGOs and supported by a subset of committed companies, rather than widespread industry adoption. Impact (i.e., SR gains for fishers and workers) is variable and limited in scale.
3	Pre-Competitive Collaboration	Not yet reached at scale: Some pre-competitive collaborations have formed specifically to focus on SR (e.g., SEA Alliance, CASS Ethical Tuna Collaboration), but are nowhere near critical mass, as high market penetration of 40-70% required to tip the scale to SR becoming the default expectation.
4	Institutionalization	Not yet reached: Captured in the Future State Vision , co-developed by workshop participants. It highlights three core outcomes: respect for human rights and fair labor, widespread adoption of social responsibility as the norm, and equitable competition across the supply chain.

Three Core Barriers Holding the Sector Back:

- **Insufficient urgency:** Social issues in seafood lack the market-facing urgency that has driven environmental progress. Without urgency, pilots continue, but nothing scales.
- **Weak market incentives:** Bottom lines rule, and seafood economics reward sourcing cheaply. Externalized labor costs and the absence of accountability mechanisms mean front-movers bear a disadvantage rather than a gain.
- **Sector fragmentation:** Civil society groups, especially NGOs, compete for philanthropic funding rather than play coordinating roles. This misalignment creates mixed messaging to the seafood industry that perpetuates inaction (i.e., “The NGOs can’t agree on the best path forward, so why should we change?”).

The Civil Society Mirror: We Are Part of the Problem

A frank self-assessment by workshop participants found that civil society itself can be a barrier, unintentionally slowing progress toward social responsibility by contributing to fragmentation and confusion. A project-driven, competitive funding environment incentivizes NGOs to launch overlapping, poorly aligned initiatives to accommodate foundations' strategic timelines, rather than to align with the decades-long timelines needed to coordinate and scale globally-reaching solutions.

Moreover, organizations compete on fragmented theories of change rather than a single aligned vision, and the downstream proliferation of tools, platforms, and standards creates confusion for the seafood industry. Importantly, those best positioned to lead are not always those funded to do so. The result is differing approaches and inconsistent messaging that create uncertainty for market actors, leaving them without clear, practical guidance on how to engage, and ultimately hindering collective progress and systemic change.

EXPLORING FUTURE PATHWAYS

Two recurring themes that emerged within group discussions centered around creating greater alignment across civil society in the sector and exploring new funding models to move the sector towards institutionalization. Below are summaries of the conversations that explored these future pathways and potential ways to operationalize those priorities alongside supporting actions within the sphere of influence of workshop participants and their respective organizations.

1 Creating a shared theory of change to align the sector.

The single highest-leverage action is for NGOs, funders, and engaged first movers in industry to align on a shared transition strategy rather than pursuing fragmented approaches. This does not require a new framework from scratch: the Future State Vision developed in this series, the Fisheries Governance Project's corporate duties document, and the Issara Institute model offer ready starting points. Crucially, leadership within organizations must publicly commit to this alignment so it cascades to program teams. Aligning around a shared theory of change involves shifting from project-based work toward scaling and consolidation, ideally reducing fragmentation by consolidating tools and initiatives and prioritizing alignment and clarity for market actors.

2 Exploring long-term, whole-ecosystem funding approaches.

NGOs are typically beholden to short-term funding cycles that compel them to pivot from their mission to align with changing funder priorities, and to a philanthropic system that tends to reward novelty. Funders may consider a funding approach based on a shared, sector-wide strategy developed collaboratively to capitalize on various NGOs' comparative advantages and, in alignment, push the seafood industry towards market transformation. This change will necessitate funding assurances that grow from three to five cycles to decades-long commitments, allowing for long-form work and campaigns.

Recommendations for NGOs and Civil Society

- ✓ Stop launching standalone initiatives that sit outside any shared strategic framework; consolidate tools and platforms that are creating industry confusion.
- ✓ Shift from competition for project funding toward competing on comparative advantage within a shared strategy. Stakeholders should focus on their comparative strengths and roles (i.e., which organization is best positioned to build urgency, make the business case, or support first movers?).
- ✓ Establish transparent NGO-to-NGO communication norms; model collaboration from organizational leadership downward.
- ✓ Recognize and amplify the SR expertise that already exists in the sector to counter the mistrust that 'tacked-on' SR framing has created.

Recommendations for Funders and Philanthropy

- ✓ Shift from project-based to whole-ecosystem and market-transformation-based funding models that reward scale, impact, and institutionalization over launch.
- ✓ Coordinate across major foundations, particularly those based in North America, to co-develop a funding strategy aligned with Phase 2 market transition needs rather than independently reinforcing fragmentation.
- ✓ Provide sustained support for the shared theory of change process, including leadership convenings and cross-sector learning exchanges.

Potential near-term actions for the sector to take:

- Start a “Theory of Change Bank” to compile existing documents.
- Convene a small group of NGOs, funders, and industry frontrunners to agree on a common baseline (e.g., Future State Vision + 1–2 existing frameworks) and shared Theory of Change.
- Advocate to funders for reducing duplication of efforts in strategy setting across civil society and allowing for the submission of existing material for funding applications.
- Identify and agree on 2–3 simplified, unified external messages to the seafood industry that all participating organizations will use consistently.

The path forward may lie in alignment, not in more pilots.

A decade of SR work in seafood has generated real knowledge, committed practitioners, and emerging momentum. The missing ingredient could be to shift focus away from more tools or more data toward coordination, shared purpose, and leadership that is willing to subordinate organizational interests to maximize collective impact.

For questions or to contribute to the shared strategy document, contact:

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