



2025 Global Landscape Review of Fishery Improvement Projects

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Access summary findings:

2025 Global Landscape Review of Fishery Improvement Projects, available in English, Spanish, French, Japanese, Chinese, and Bahasa Indonesia.
<https://oursharedseas.com/FIPReview>

2020 Global Landscape Review of Fishery Improvement Projects, available in English, Spanish, Japanese, Chinese, and Bahasa Indonesia.
<https://oursharedseas.com/FIPReview-2020>

2015 Global Landscape Review of Fishery Improvement Projects, available in English and Spanish.
<https://oursharedseas.com/FIPReview-2015>

Disclaimer

The findings and conclusions in this report represent the interpretations of CEA Consulting and do not necessarily reflect the view of the study funders or experts.

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Glossary of Terms Referenced in This Report

Term	Description
AIP	Aquaculture improvement project
AENOR	Spanish Association for Standardization and Certification
AP2HI	Asosiasi Perikanan Pole & Line dan Handline Indonesia
ASC	Aquaculture Stewardship Council
BSC	Blue swimming crab
BINGO	Big international non-governmental organization
BMSY	Biomass at maximum sustainable yield
C-FIP	Community FIP
CAB	Conformity assessment body
CALAMASUR	Committee for the Sustainable Management of the Southern Pacific Jumbo Flying Squid
CASS	Conservation Alliance for Seafood Solutions
CEA	CEA Consulting (formerly California Environmental Associates)
CI	Conservation International
COBI	Comunidad Biodiversidad A.C.
COREMAHI	Comité Regional del Mahi Communicatee
CSR	Corporate Social Responsibility
DCF	Developing country fisheries
EBFM	Ecosystem based fishery management
ECIP	Ethical charter implementation program
EEZ	Economic exclusive zone
ENGO	Environmental non-governmental organization
EM	Electronic monitoring
ETP	Endangered, threatened, protected
EU	European Union
FAD	Fishing aggregation device
FAO	Food and Agriculture Organization of the United Nations
FFSAPI	Fresh Frozen Seafood Association of the Philippines, Inc.
FIP	Fishery improvement project
FIP DB	Fisheries Improvement Projects Database
FIP CoP	FIP Community of Practice
FMI	Fisheries Management Index
FMSY	Fishing mortality at maximum sustainable yield
GEF (also UN GEF)	Global Environment Facility
GFAST	Global FIP Alliance for Sustainable Tuna
GiZ	German Society for International Cooperation
HCR	Harvest control rule
HRSRP	Human rights and social responsibility policy
HS	Harvest strategy
IATTC	Inter-American Tropical Tuna Commission
IFCA	Inshore Fisheries and Conservation Authorities
ISSF	International Seafood Sustainability Foundation
IUU	Illegal, unregulated, unreported
ILO	International Labor Organization

Term	Description
IMO	International Maritime Organization
IMARPE	Instituto del Mar del Peru
INP	Instituto Nacional de Pesca (Ecuador)
INPESCA	Instituto Nicaraguense De La Pesca Y Acuicultura
IPNLF	International Pole and Line Foundation
IUU	Illegal, unreported and unregulated
NGO	Non-governmental organization
MDPI	Yayasan Masyarakat dan Perikanan Indonesia
MMAF	Ministry of Marine Affairs, Indonesia
MPA	Marine protected area
MSC	Marine Stewardship Council
NOAA	National Oceanic and Atmospheric Administration
OECD	Other effective conservation measures
OPAGAC	Organización de Productores de Atún Congelado
PACPI	Philippine Association of Crab Processors, Inc.
PI	Performance indicator (MSC)
PNG FIA	Papua New Guinea Fishing Industry Association
PRODUCE	Ministerio de la Producción (Peru)
PUFKI	Project United Kingdom Fisheries Improvements
QDAS	Qualitative data analysis software
RFMO	Regional fisheries management organization
RLF	Resources Legacy Fund
ROP	Fishery management regulation, Peru
SAC	Scientific advisory committee
SEDER	Secretaría de Agricultura y Desarrollo Rural (Mexico)
SFP	Sustainable Fisheries Partnership
SFW	Monterey Bay Aquarium Seafood Watch
SNP	Sociedad Nacional de Pesquería (Peru)
SPRFMO	South Pacific Regional Fisheries Management Organization
SR	Supply chain roundtable
SRA	Social risk assessment
SRP	Subsecretaría de Recursos Pesqueros (Ecuador)
TAC	Total allowable catch
TOC	Theory of Change
TED	Turtle excluder device
TNC	The Nature Conservancy
TUNACONS	Tuna Conservation Group
T75	Target 75 Initiative
WCPFC	Western and Central Pacific Fisheries Commission
WCPO	Western and Central Pacific Ocean
WWF	World Wildlife Fund
UNDP	United Nations Development Programme
USAID	United States Agency for International Development

Executive Summary



The FIP landscape has continued to evolve since CEA's 2020 FIP Review. FIPs have diversified in end goals, geographies, commodities, and the political contexts in which they operate.

- **The landscape of FIP implementers has expanded dramatically.**

In 2016, there were 122 unique FIP leads; today that number is over 300. This increase is driven largely by more industry leadership, and to a lesser extent, the expanding role of consultants in implementing FIPs. A greater percentage of FIPs are led by multiple types of implementers. The number of FIPs listing multiple organization types as leads more than tripled between 2018 and 2023, from 28 to 90. The number of FIPs listing at least one industry lead grew until 2021, but growth has since slowed.

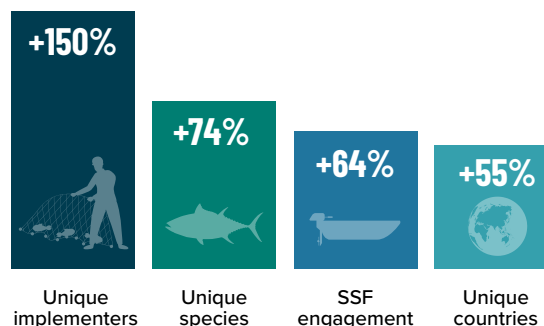
- **FIPs have grown their presence across geographies and commodities.**

FIPs remain a globally relevant mechanism, with regional hotspots in Southeast Asia and Latin America. Mexican FIPs grew in number for about a decade but have leveled off since 2020. Growth in Indonesian and Taiwanese FIPs has driven Asia to become the region with the most FIPs. As they did in 2020, tuna FIPs still dominate, but their growth has leveled off. Multi-species, lobster, and squid/octopus FIPs have increased.

- **The number of active and completed FIPs has plateaued and may be declining.**

From 2015 to 2025, the percentage of global landings within FIPs has remained at 11%. Over the same time period, the global proportion of catch certified by MSC has not increased significantly, suggesting that FIP volumes are not consistently moving to certification. The number of inactive FIPs has been increasing steadily for the past three years. In 2024, the number of new FIPs was not enough to fully account for the substantial increase in inactive FIPs and thus, the number of active and completed FIPs may have declined for the first time in two decades. COVID-19, lack of resources to implement the FisheryProgress Human Rights and Social Responsibility Policy (HRSRP), and funding were cited as causes for inactive FIPs.

ES.1 Growth in FIP landscape since 2018.

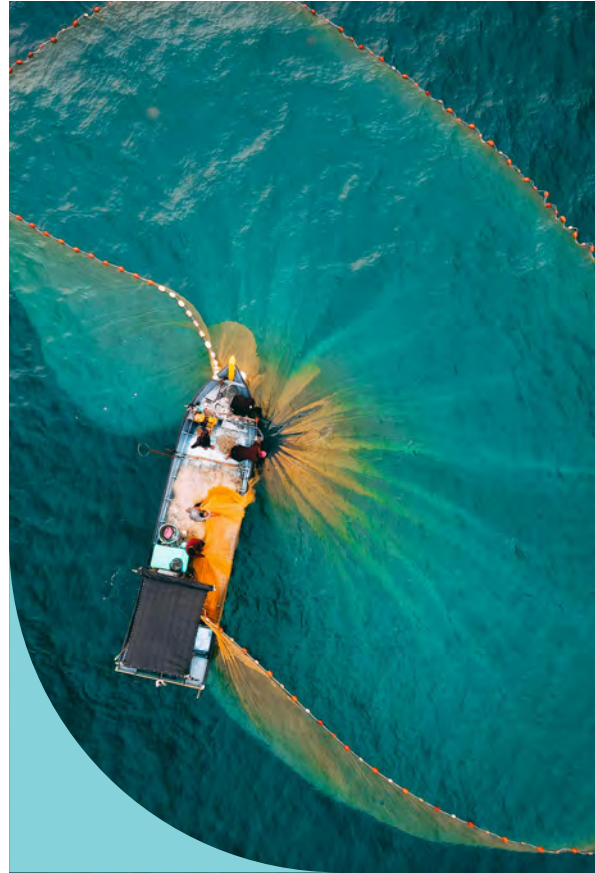


- **Price, not sustainability, remains the primary concern for industry in an era of increased uncertainty.**

Trade barriers and changing geopolitical landscapes were cited as reasons for heightened uncertainty among distributors and importers. Such uncertainty was negatively affecting their ability and willingness to engage in FIPs. Trade dynamics and policies have reduced the competitiveness of some FIP products especially from the Global South to the US and EU. Demand from East Asia, particularly Japan and South Korea, for sustainable seafood is mounting but it is still too soon to assess the strength of these markets.

- **Businesses must now balance sustainability with other priorities.**

The regulatory environment for seafood companies is far more complicated than it was just over a decade ago. Major market states have developed their own import control rules, in addition to requiring compliance with the Port State Measures Agreement. On the human rights side, companies must now navigate mandatory human rights due diligence directives and ILO C188, reflecting new legal mandates to manage human rights risks. At the same time, seafood companies face an increasing list of options to advance their environmental, social, and governance (ESG) priorities, including reducing their climate footprint and improving product circularity. All of these activities demand substantial time, energy, and resources – drawn from the same limited pool that supports FIPs.



- **FIPs today are seeking additional or even alternative end goals as they work toward sustainability.**

Up until about 2015, FIPs – many in industrial salmon or whitefish fisheries – were focused on attaining sustainability (often via reaching maximum sustainable yield (MSY)) of a single target stock. The incentives and standards associated with certification and ratings processes provided a pathway to more lucrative Western markets. In the intervening decade, FIPs have evolved their end goals to focus on fisheries as part of a broader socio-ecological system, in which other factors such as human rights, climate resilience, and marine ecosystem protections also matter.

- **FIPs are now utilizing a continuous improvement approach as opposed to a linear approach with a clear off-ramp.**

The patterns of FIP progress ratings suggest that FIPs achieve regular improvements over their lifespan, with varying degrees of frequency. FIPs often flip between grades A and C for years. FIPs appear to be undergoing infrequent, but regular, improvements over long periods of time. This trend lends credence to the notion that FIPs may be using a continuous improvement approach, rather than a linear progression toward completion.

- **A decade ago, comprehensive FIPs were the gold standard for fisheries seeking to reach certification. New alternative approaches aim to take on that role.**

Certification rates among FIPs have been low, with just 10% of all FIPs achieving certification. Since 2020, 11 of the 14 FIPs that achieved MSC-certification were for tuna fisheries, suggesting that the FIP-to-certification model may only be effective in certain contexts. Many comprehensive FIPs no longer seek certification as an end goal. This, in addition to the high percentage of FIPs certified with conditions, has prompted the community to explore alternative models. Some of these alternatives share characteristics with the FIP model and use different structures to drive improvement (“FIP-adjacent models”). Others differ significantly from FIPs as they operate at larger scales and require more time (“place-based alternatives”). These models may integrate FIPs within their frameworks, demonstrating the continuing interdependencies among fisheries improvement efforts.



FIPs can drive progress by improving participant coordination and data quality, leading to policy change.

- **FIPs are an effective tool to engage diverse participants and generate insights into fisheries.**

FIPs create structured platforms that break down silos to foster direct relationships and participation among industry, government, and civil society organizations. Through these collaborative efforts, FIPs reduce duplication of effort and generate or uncover valuable data to improve understanding of stock status and ecosystem health. This enhanced data – often produced through industry partnerships and technological advancements – supports evidence-based decision-making and policy reform.

- **FIPs generate information and systems that provide long-term management benefits.**

FIPs introduce technology, research collaborations, and trainings that help improve management capacity and provide momentum for ongoing sustainable management. Increased amount and frequency of data collection helps industry and governments respond to changing conditions; trainings and support for industry-led data collection and sharing increases buy-in, builds trust in the data, and supports ongoing management objectives, including creation of management plans.

FIPs demonstrate improvements in reporting, but challenges with assessing (and demonstrating) change on the water continue.

- **FIP volumes and timelines for achieving Stage 4 events are more realistic than in 2020, suggesting some progress in data quality.**

Today, no active FIPs list landings that exceed those of the fisheries in which they operate. FIPs also report a greater proportion of Stage 4 events in years 1-3, compared with year one in 2020. This timeline is more realistic for achieving a Stage 4 event and indicates that quality of data may be improving.

- **Few FIPs demonstrate clear evidence of increased abundance or other change on the water.**

Although more FIPs report Stage 5 changes in 2025 compared with 2020, manual review reveals that much of the progress is due to better data, rather than measurable stock recovery or other on-the-water improvements in the fishery. In addition, rating and reporting methods continue to present challenges for discerning FIP impacts. The majority of reported Stage 5 event changes were determined to be unlikely or clearly not a result of actions by the FIP. Only for a handful of cases, such as the Ecuador small pelagics FIP, could manual review directly link stock recovery to FIP actions.

- **Centralized reporting has supported a growing body of literature on FIPs; these works reinforce FIP success with policy wins and mixed evidence for environmental or social improvement.**

Peer-reviewed publications doubled from four to eight in the last five years, with an additional two dozen research reports and articles on FIPs. Despite the training and tools on proper handling and release of ETP, a study of 27 FIPs with high likelihood of ETP interactions showed the majority lack the monitoring or mitigation processes needed to reduce impacts effectively (Morgan et al., 2022). García-Rodríguez (2023) found no evidence that being in a FIP guarantees that a fishery will be more sustainable than a non-engaged fishery, a finding in contrast to Travaille's 2020 study that found FIPs contributed to significant environmental improvements leading to certification. Several case studies on social work in FIPs have found strong evidence of improvement, while other academic articles, such as Williams and Sparks (2023) strongly critique human rights work in FIPs.

Infrastructure for FIP reporting and implementation has grown substantially since 2015. However, gaps prevent effective impact measurement.

▪ FIP reporting platforms overlook social improvements.

FIP implementers increasingly integrate social components into their workplans to promote fisher well-being, incentivize engagement, and meet requirements set by FisheryProgress' Human Rights and Social Responsibility Policy (HRSRP). However, existing reporting frameworks fail to capture FIP reporting against these milestones; FIPs that prioritize social work thus appear to have stalled progress on the platform. This gap contributes to frustration and burnout among FIP participants and reducing transparency for buyers looking for socially responsible seafood sourcing options.

▪ Discrepancies between FIP DB and FisheryProgress create inefficiencies for impact measurement.

FisheryProgress tracks FIPs that report on its platform; FIP DB has data on all FIPs that report progress publicly, including all FIPs on FisheryProgress. The majority of the data on FIP DB is thus sourced from FisheryProgress. The FisheryProgress website also contains more detailed information on each FIP than FIP DB. Overall, Fishery Progress is considered the “source of truth” by the FIP community. Informants noted that if a FIP is not listed on FisheryProgress, only those engaging in the work will be aware of its existence. FIPs not publicly reporting limits engagement with downstream partners and unknowingly may bias public understanding towards FIPs with the capacity to report publicly.



ES Box 1 Key developments since 2020

- FisheryProgress' HRSRP required all active FIPs to demonstrate compliance to maintain their listing status, starting in 2022.
- The updated Conservation Alliance for Seafood Solutions' FIP guidelines were launched in 2023, providing additional guidance on economic responsibility, financial viability, and social improvements.
- SFP's updated Ratings methodology aimed to provide clarity to implementers, address the need for improved accountability, and identify connections between FIP actions and fishery improvements.
- Peer-reviewed research continued to provide empirical evidence that supports and challenges FIPs (e.g., Kall et al., 2022; Morgan et al., 2022; Samy-Kamal, 2021; Sparks et al., 2025; Finkbeiner et al., 2024).
- Philanthropic funding for FIPs has declined 25-30% since 2020, due to shifting priorities.
- A more complex regulatory environment has pushed the global seafood industry to address illegal, unreported, and unregulated (IUU) fishing as well as forced labor.

FIP success depends on both strong design and implementation, and external factors that shape progress beyond the FIP's control.

▪ As FIPs engage more community voices, aligned objectives and participatory processes contribute to FIP success.

Setting clear and aligned objectives across FIP participants leads to greater progress. Insights from site visits and informant interviews highlighted that workplans crafted in consultation with all FIP participants helped to identify shared values and anticipate potential conflicts. Diverse inputs from participants can be crucial to ensuring that workplans reflect the local contexts. Certification standards may help simplify and align expectations, as comprehensive FIPs constitute 81% of all completed FIPs. For example, participants noted that the expansion of the Indonesia pole-and-line and handline tuna FIPs was made easier because everyone knew what was required for a comprehensive FIP workplan.

To that end, active participation is central to building trust in FIP processes and data. When fishers and industry actors are engaged, management decisions based on that data gain legitimacy; in contrast, lack of trust among stakeholders can stall progress. Participatory approaches and ongoing engagement help raise fisher awareness of best practices, reinforcing sustainable behaviors. Vertically integrated companies, such as those in the Peruvian eel trap FIP, demonstrate how close coordination across the supply chain can strengthen participation and accelerate certification progress.

▪ Dependable resources, responsive implementers, and skilled leadership form the backbone of sustained progress within FIPs.

Dependable human and financial resources allow participants to maintain momentum across timelines that often exceed five years. Predictable funding flows are especially important for long-term planning, ensuring that activities are not delayed and participant engagement remains strong. Responsive FIP implementers keep participants motivated and projects on track. Durable financing is equally essential, as both the amount and reliability of funds determine whether workplans can be fully executed. Drafting robust budgets and ensuring continuity in team members contribute to trust and efficiency. Strong leadership further amplifies these strengths; effective leaders bring technical expertise, know how to build relationships with government and market actors, and foster inclusive dialogue among stakeholders.

▪ Technology can help create the enabling conditions for change on the water and long-term sustainability.

New technologies are helping to increase efficiencies and reduce the environmental impacts of fishing practices. Electronic monitoring and reporting help record catch data. Electronic logbooks are also common across FIPs and help support improved catch documentation. Fishing gear improvements can increase environmentally friendly practices and help create economic incentives for engagement. Some FIPs are even starting to use more advanced ocean observation technologies to monitor ocean conditions and build climate-resilient fisheries management plans.

▪ Lack of accountability across the supply chain undermines FIP progress.

Weak accountability and transparency systems undermine industry trust and participation in FIPs, slowing overall progress. Despite public commitments to source sustainably, some buyers prioritize price and avoid FIP participation to escape scrutiny, while others purchase FIP-sourced products without contributing resources, which disincentivizes other companies to engage. Opaque sourcing practices and “free rider” behavior discourages suppliers and investors from remaining committed to FIPs. In some cases, mislabeling or “FIP-washing” further erodes credibility by allowing companies to market non-FIP products as sustainable. Strengthening purchasing agreements, enforcing pay-to-play models, and ensuring full-chain traceability and verification would enforce accountability and instill greater confidence in the FIP model.

▪ Climate change disrupts FIP progress.

Climate change is increasingly disrupting FIP progress, exposing the need for more adaptive and resilient approaches. While the MSC standard embeds some adaptive management principles, many basic FIPs lack the flexibility or resources to adjust workplans in real time. Budget and capacity constraints limit the ability to monitor changing stock conditions or implement timely responses. Small-scale FIPs are particularly vulnerable, as they depend heavily on specific species and have fewer financial buffers against shocks. Strengthening climate adaptation and factoring in the socioeconomic realities of fishing communities are essential to ensure equity and resilience within the FIP model.



▪ **As was the case in 2020, government engagement remains critical for FIP success but varies widely.**

Governance capacity remains one of the strongest predictors of FIP success, yet the ways FIPs interact with government structures are complex and difficult to measure. Political turnover and shifting priorities frequently disrupt progress, forcing implementers to reinvest time and resources in re-engaging new officials, especially in long-running projects. Over time, however, government engagement often increases as FIPs demonstrate value through improved management and data collection. Support also varies by fishery type: export-oriented fisheries like tuna tend to attract stronger national involvement, while smaller or domestic-oriented fisheries rely more on proactive local partnerships. These variations, along with differing priorities across jurisdictions, create uneven progress and demonstrate the need for adaptive engagement strategies tailored to political and institutional contexts.



Success factors internal to the FIP

- Clear and aligned objectives
- Effort
- Leadership
- Participant engagement
- Technology uptake and capacity
- Accountability of participants



Success factors external to the FIP

- Government capacity for management
- Climate change and/or other environmental risk factors
- Initial health of fishery
- Socioeconomic conditions of fishing communities

FIPs have expanded to address broader social responsibility concerns; while they have made meaningful strides towards advancing social equity, FIPs remain ill-equipped to uphold human rights.

- **FIPs have broadened their scopes to include human rights and social equity work, two complementary but distinct pillars of social responsibility.**

Efforts focus on compliance, accountability, and due diligence aligned with international and national laws to ensure all value chain participants can exercise their fundamental rights. Frameworks such as FisheryProgress' Human Rights and Social Responsibility Policy (HRSRP) establish mandatory minimums and mechanisms to identify and address violations, reflecting non-negotiable legal obligations.

Practitioners are pushing for FIPs to move beyond demonstrating compliance to address broader social equity challenges facing fishers and coastal communities. Broadly, social equity is concerned with “fairness and justice in how people are treated or public policies are formed and implemented.”¹ While not a legally binding concept, social equity remains essential for fair and sustainable outcomes by addressing disparities in access, opportunity, and benefit-sharing among fishers and communities.

These social improvement efforts aim to ensure that FIPs not only meet legal standards but also build fairer and more just seafood supply chains.



- **FIPs are valuable mechanisms for reporting social data; they are less effective at addressing human rights concerns.**

FIPs demonstrate strong performance against HRSRP components that require them to report on existing information. For example, 76% of FIPs have published a social policy statement while 92% of FIPs report their vessel lists. Nevertheless, FIPs are less effective at addressing human rights concerns. CEA observes that just 40% of FIPs required to conduct a social risk assessment have done so, and just 35% have published a social workplan. FIP practitioners lack the expertise to develop social workplans, and the HRSRP does not reflect the diverse contexts in which FIPs operate.* Furthermore, a series of research studies, many led by J. Sparks and C. Williams, suggest that a voluntary improvement model is inappropriate to advance human rights, as FIPs cannot demonstrate improvements against human rights laws – “they are either compliant or they’re not.”² As a result, FIPs could be – and have been – used to “fair wash” labor exploitation and human rights abuses.^{3,4}

- **There are opportunities for FIPs to elevate social equity.**

CEA observed several social inequities in FIPs, from fishers who are unaware of their FIP, to numerous first-mile participants noting that they did not feel the distribution of costs and benefits was fair. Nevertheless, initiatives by FIP implementers (e.g., SmartFish, ABALOBI, Blue Ventures, etc.) and other entities such as Fair Trade, demonstrate the potential of intentionally designed FIPs to strengthen fisher livelihoods and deliver tangible returns to fishing communities.

*CEA conducted this analysis prior to FisheryProgress' launch of the Human Rights and Social Responsibility Version 2.0 in July 2025.

¹ Bennett et al., 2021; ² Williams et al., 2023. ³ Sparks et al., 2025. ⁴ Greenpeace 2025.

Philanthropic funding for FIPs has declined as FIPs have continued to expand, with costs likely picked up by industry. However, grant funds remain critical to the movement's success.

- **Since 2019, philanthropic funding for FIPs has decreased nearly 40% as funders have reduced investment into seafood markets work.**

Continuing the trend of funder divestment from direct FIP implementation noted in 2020, the majority of philanthropic investment over the past five years has focused on infrastructure, such as FisheryProgress, SFP ratings, and cross-cutting support such as FIP Community of Practice and CASS. As the number of active FIPs continued to grow through 2024, philanthropic investment per active FIP declined by over 50% since 2016.

- **Industry funding is estimated to be at nearly the same level as philanthropic funding in 2024.**

Qualitative and quantitative evidence suggest that industry is the most likely candidate for filling the funding gap, with many FIPs supported partially or entirely by industry. This support has allowed FIPs to continue to achieve progress, but industry support tends to focus on implementation for comprehensive, industrial FIPs, with less funding directed toward basic, small-scale FIPs or reporting infrastructure. Thus, some grant funding is still likely necessary to support the continued growth and progress of FIPs.

- **Novel financing mechanisms that blend capital from philanthropic and private sources remain nascent but on the rise.**

Several new mechanisms for crowding in additional capital to directly or indirectly support fisheries improvement work have been launched in the last few years. These include the new Fishery Improvement Fund (FIF) and a loan guarantee facility. Currently, these innovations only engage a small fraction (<10%) of FIPs, but they are actively piloting and seeking to expand their reach.

- **FIPs continue to build enabling conditions for sustainable fisheries in more diverse contexts at a reduced cost to philanthropy; continued success will require support to address challenges in accountability, long-term financing, and capacity building at regional levels and support for collective impact approaches.**

FIPs alone are unlikely to drive change on the water; however, FIPs can bring industry engagement and participatory processes to advance management. Philanthropic funding is necessary to support research to test collaborative models, identify sustainable financing mechanisms, and build system-wide traceability and verification systems that reduce FIP-washing and build the evidence base for responsible market-driven fisheries management approaches. Developing local social and environmental expertise can reduce costs and improve likelihood of progress.



Chapter 1



Introduction and Overview

- Purpose
- Research questions and data source overview
- Methods overview

Introduction to the global landscape review of FIPs

Purpose of the review

In 2025, CEA conducted the third Global Landscape Review of Fishery Improvement Projects (FIPs). As with the previous reviews in 2015 and 2020, the David and Lucile Packard Foundation (“Packard”), Walton Family Foundation (“Walton”), and Gordon and Betty Moore Foundation (“Moore”) asked CEA to help them to understand and assess the current state of FIPs worldwide, especially in a post-COVID-19 pandemic world. In addition, this review assesses longitudinal change over the past decade in the FIP landscape. As the primary philanthropic funders of FIPs and the seafood markets movement more broadly, these foundations are using this process to reflect on the progress that has been made to guide future strategies and investments. This synthesis provides a contemporary review to help inform those strategic processes and provide insight on the FIP movement.

The review is also meant to provide insights for the wider FIP field.

Audience for the 2025 review

The audience for our research is the FIP community, including implementers, buyers, funders, academics, practitioners, and other participants in the sustainable seafood movement. CEA hopes that these findings will support future strategy development across the growing community.

Box 1.1 Research questions for the 2025 review

The 2025 research builds upon questions from the 2015 and 2020 reviews and tackles new questions that address the movement’s evolution. CEA’s research was guided by five core questions with over a dozen sub-questions:

1. How is the fishery improvement landscape evolving?
2. What kind of impacts are FIPs generating and how are these measured?
3. What factors contribute to FIP progress and success?
4. What is the current landscape and impact of social responsibility work in FIPs?
5. What are the current finance landscape and associated challenges and opportunities for sustainable financing of FIPs?

Methods: Overview

Table 1.1 The matrix below displays how the CEA research team used different data sources to answer each of the key research questions as part of the study.

Key question	Data sources					Overview of methods
	Data analysis	Literature review	Key informant interviews	Site visits	Survey	
1. How is the FIP landscape evolving?	X	X	X	X		Reviewed relevant research and data, consulted with key informants, conducted FIP site visits, and performed original data analysis.
2. What kind of impacts are FIPs generating and how are these measured?	X	X	X	X		Reviewed relevant research and data, consulted with key informants, conducted several FIP site visits, and performed original data analysis.
3. What are the factors that contribute to FIP progress and success?	X	X	X	X		Reviewed relevant research and data, consulted with key informants, conducted FIP site visits, and performed original data analysis.
4. What is the current landscape and impact of social responsibility work in FIPs?	X	X	X	X		Reviewed relevant research, consulted with key informants, conducted FIP site visits, and performed original data analysis.
5. What is the current finance landscape and associated challenges and opportunities for sustainable financing of FIPs?	X		X	X	X	Analyzed FIP budgets anonymized from Fishery Progress, consulted with key informants, conducted FIP site visits, and deployed a FIP implementer survey.

Quantitative data analysis

CEA both recreated and performed original statistical tests using peer-reviewed, publicly available FIP DB data, and transcribed data from FisheryProgress. CEA also used the firm's proprietary FIP database, which includes FIPs that are not publicly reporting.

Literature Review

The CEA team relied on relevant reports and articles to better understand the FIP landscape and identify additional informants for interviews. CEA generated the list of more than 30 publications (peer-reviewed and other grey literature) for review based on insights from advisors, philanthropic funders, NGOs, academics, and other FIP practitioners.

Key informant interviews

CEA developed phone interview guides based on its research agenda and our previous experiences from the 2015 and 2020 FIP Review. CEA used a semi-structured interview approach to address specific questions while introducing new lines of inquiry relevant for our research. The research team conducted more than 130 phone interviews in either English or Spanish. Most interviews lasted 45 minutes.

CEA developed its list of key informant interviewees based on: 1) the previous list of informants interviewed in the 2015 and 2020 FIP Reviews; 2) the professional experience and knowledge of the FIP landscape; and 3) recommendations from advisors and other field experts. CEA conducted the informant interviews either in person or via video and audio calls. CEA typed interview notes, which were cleaned, uploaded, and coded in Dedoose (a qualitative data analysis software).

Site visit observations and interviews

To gather perspectives from a broad group of FIP actors (including fishers, fishworkers, and industry representatives), CEA conducted several site visits. CEA used the following criteria (among others) to select sites for observation interviews: 1) relevance of project and/or region for the Packard, Walton, and Moore foundations; 2) availability of FIP implementers, hosts, interpreters, and other key actors; 3) seasonal considerations; 4) religious and/or cultural holidays; 4) distance and flying time; and 5) capacity constraints.

CEA developed a site visit guide based on the phone interview guide and previous FIP site visit experience. The research team coordinated with FIP implementers to interview relevant FIP actors. In some cases, FIP implementers also provided real-time interpretation support. CEA wrote, transcribed, uploaded, and coded site visit notes in Dedoose.

Qualitative data analysis

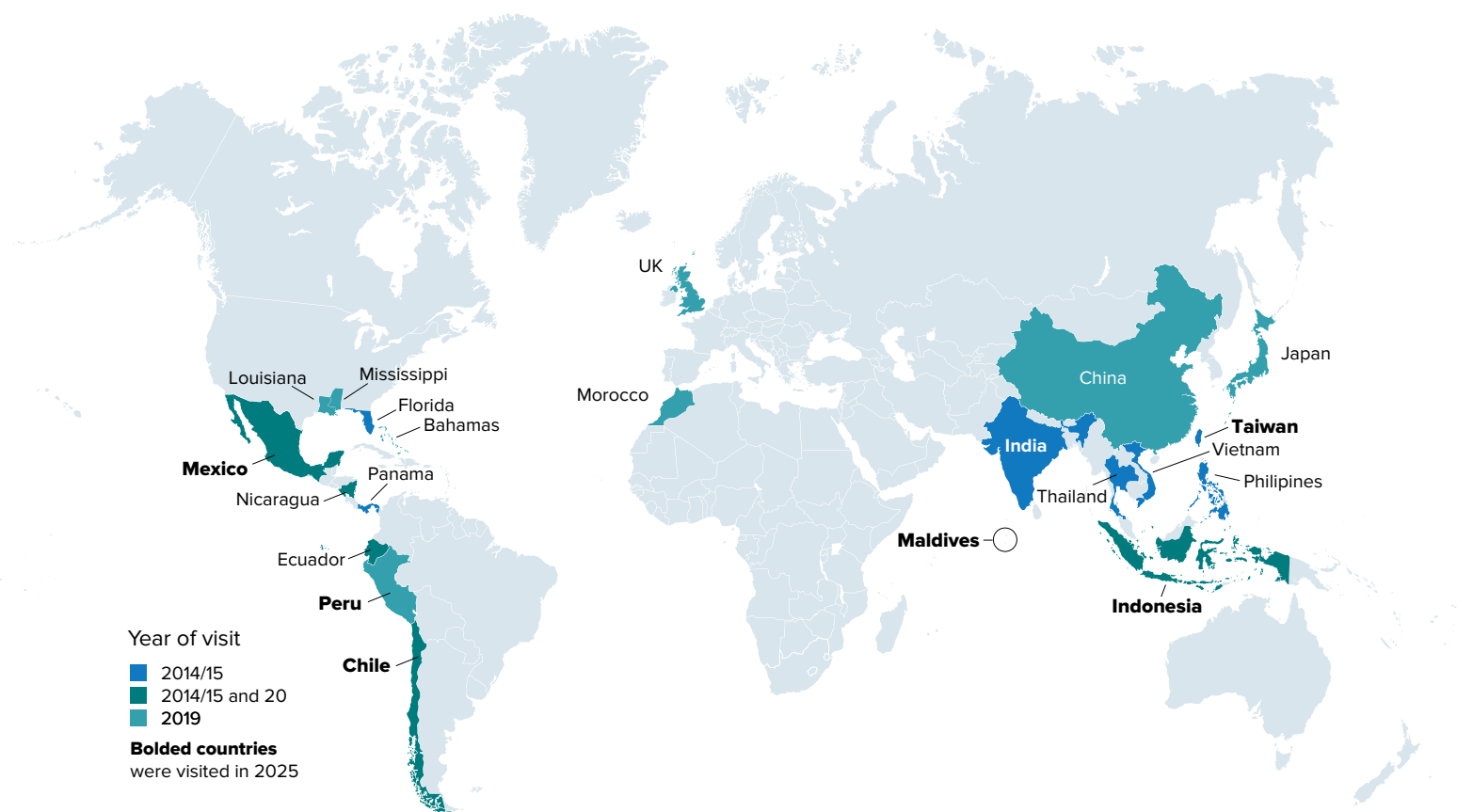
CEA uploaded notes from key informant interviews and site visits in Dedoose. The research team developed a codebook to label and organize qualitative data into themes relevant for our inquiry. Once coded, the data was reviewed in parallel with the quantitative analysis and survey data.

FIP budget survey

CEA developed and deployed an anonymous survey directed at FIP implementers to better understand the funding models and financial plans used to support FIPs. CEA analyzed the survey data (in addition to budgets available via FisheryProgress) using descriptive statistics and statistical tests.

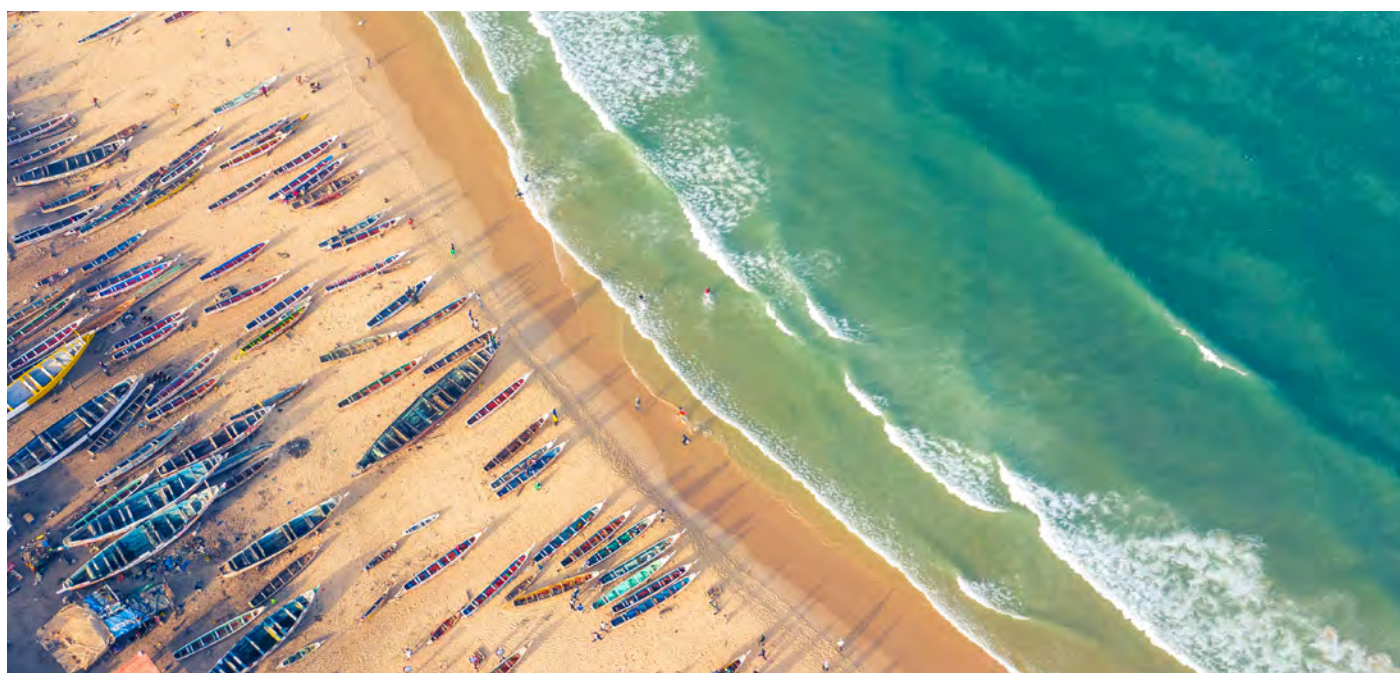
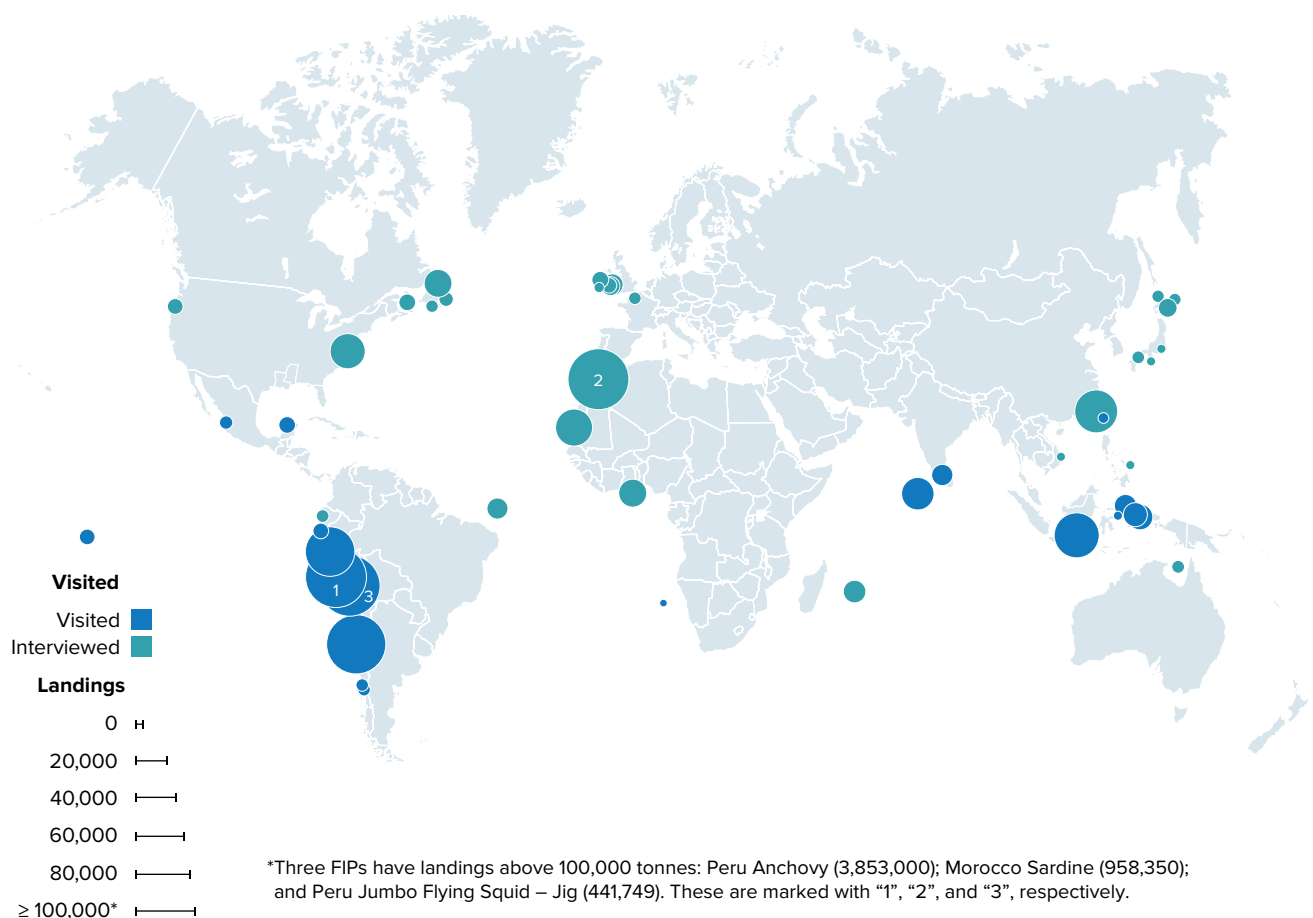
Site visit approach

Map 1.1 Our 2025 travel included revisiting five countries from our 2015 and/or 2020 review: Mexico, Peru, Chile, Indonesia, and India. We added Taiwan and Maldives as new countries. Maldives and India site visits were in collaboration with another research project. We visited 25 FIPs in 7 countries and interviewed experts by phone or at conferences with an additional 30 FIPs in 17 countries.



Key informant and site visit interviews

Map 1.2 Site visits and interviews covered FIPs across a range of sizes, geographies, and categories (i.e. basic, comprehensive, etc.)



Chapter 2



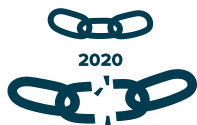
Reflections on the FIP Model

- New decade, new context
- How FIPs are responding in 2025
- Look back to look ahead



New decade, new context

The market and regulatory contexts that FIPs now operate in look different than in 2020 or 2015



Western markets' supply chain leverage has meaningfully weakened. Since the 2020 Global Landscape Review of FIPs, the seafood industry has faced major disruptions from the COVID-19 pandemic, shifting trade patterns, rising logistics and safety costs, and increasing geopolitical conflicts. These factors weakened market leverage and predictability, leaving some exporters with unsold MSC-certified volumes. Nevertheless, many FIPs continue to form in pursuit of improved market access or other market-based benefits.



So much more than sustainability: Seafood companies face an increasingly complex regulatory landscape focused on labor, environmental, and human rights compliance. New global and regional laws are tightening oversight of labor and environmental practices. Major markets including Korea, Japan, and Taiwan have also introduced import control rules to combat illegal, unreported, and unregulated (IUU) fishing. As a result, many in the seafood supply chain view (or perhaps hopefully consider) FIPs as practical tools to help meet emerging compliance requirements.

Market pull is difficult to predict and continues to evolve

Supply chain disruptions from COVID-19 shifted business practices and increased costs. The hotel, retail, and catering (HORECA) sector downturn led to long-term changes in some trade relationships and sourcing policies. Across the entire seafood industry, there were increased costs (especially in shipping and logistics) and more expenses related to safety and security measures, which have continued to affect bottom lines.

Industry is hesitant to engage in sustainable seafood efforts because of tighter profit margins and increased uncertainty. Trade barriers due to war in Russia/Ukraine and rapidly changing geopolitical landscapes were cited as reasons for heightened uncertainty among distributors and importers. Such uncertainty was negatively affecting their ability and willingness to engage in FIPs. Some exporters noted they had more MSC-certified volume than they could sell because of price sensitivity, despite buyers' stated interest in more certified product. Still, the promise of market access via FIPs or eventual certification remains enticing for many new FIPs, especially ones led by industry.

Trade dynamics and policies have reduced the competitiveness of some FIP products especially from the Global South to the US and EU. Some countries have exemptions from tariffs while others do not. Many seafood processors are no longer directly trading with the US or EU because of regulations. They are going through processing hubs such as Vietnam and Thailand to gain access to those markets, or are looking for alternative options (e.g., Australia). Even so, upstream actors (e.g., fishing cooperatives, processing associations, exporters), especially for tuna and high-value species such as octopus and lobster, continue to cite market access to the US and EU as the reason for entering into FIPs.

Efforts to build greater demand for sustainability in Asia may be starting to see results, but it is still too early to tell how powerful this market demand might be. Japan's first "Responsible Seafood Procurement Round Table" launched in October 2025¹ reflecting steady growth of demand for sustainable seafood over the past ten years. However, the weak yen has reduced demand from Japanese buyers in recent months. Interviewees also noted very early signs of potential interest by South Korean markets.

Domestic market engagement exists but remains slow to scale. Mexico continues to dominate domestic FIPs. These efforts focus on value over volume, employing work to improve quality, and have resulted in market access with preferential prices in some fisheries such as North Pacific barred sand bass. Nascent efforts by FIP implementers to engage domestic markets elsewhere include school lunches in Chile and Peru and restaurants in South Africa. Total volume of engaged product remains low across these efforts.

Today, seafood is traded in more complex and challenging regulatory contexts

The regulatory environment is more complicated as seafood companies must meet more requirements for environmental and human rights compliance. Developments in both international treaties and national laws (see Box 1) are forcing companies to address a host of risks and meet new data and transparency requirements. Focus on these legal requirements has pulled attention and resources away from FIPs, which are voluntary initiatives.

The Asian market continues to compete for product without sustainability requirements, with a few exceptions. China remains a big challenge, offering price-competitive options with far fewer requirements. New import control rules in Korea, Japan, and Taiwan are limited to certain species, but offer opportunity for sustainable products to have a market advantage in the future.

Sustainable sourcing policies are no longer the only corporate option for environmental improvement. Seafood companies face an ever-increasing list of potential "eco-friendly" projects, including reducing their climate footprint or engaging in the circular economy. These new options can draw time, attention, and resources away from FIPs.



Box 2.1. Examples of regulatory changes since 2020.

1. EU passed its Forced Labor Regulation which will ban products from entering the EU market if they were made "whole or in part" with forced labor starting in December 2027.
2. EU Corporate Sustainability Due Diligence Directive (CSDDD) passed earlier in 2024, which requires large companies to conduct due diligence into their internal operations and value chains.
3. The Western and Central Pacific Fisheries Committee adopted the first-ever Conservation and Management Measure (CMM) on Crew Labor Standards within a tuna Regional Fisheries Management Organization (RFMO) in 2024.
4. Korea, Japan, and Taiwan joined the US and EU in passing import control rules (ICRs) to reduce the flow of IUU product into their markets.
5. In Australia, a draft report and public comment period on measures to prevent importation of IUU seafood was completed in 2024. A final report is expected in 2026.
6. NOAA's comparability finding determinations under the Marine Mammal Protection Act (MMPA) has led to import bans for dozens of fisheries from around the world, including in Mexico, Indonesia, Vietnam, and Philippines. Ongoing lawsuits are adding to confusion regarding which fisheries (and FIPs) may be affected.

¹Responsible Seafood Procurement Round Table, 2025.

Today, fisheries management pursues broader ecosystem goals while philanthropic funding decreases



The goals of FIP fisheries are moving away from target-species improvement toward broader ecosystem and community improvements. Ecosystem-based fisheries management is increasingly popular and often includes social, climate, and spatial dimensions. Research highlights the nutritional, economic, and environmental benefits of sustainable fisheries. Furthermore, increased focus on small-scale fisheries has emphasized community vulnerabilities and a need for greater resilience. Across regions such as Latin America and Southeast Asia, FIPs are recognized for strengthening local fisher organizations and bringing greater policy attention to the challenges of small-scale fisheries (SSF) far beyond improvements for target species.



The philanthropic community is divesting from seafood markets, but others are paying. Since 2015, the Packard, Walton, and Moore Foundations have invested over \$300 million into seafood markets worldwide, accounting for more than 80% of philanthropic funding to the space. After years of signaling a pull back, funding for Seafood Markets, and for FIP-related work has started declining. Philanthropy still supports the undergirding “infrastructure” (e.g., Fishery Progress, FIP Community of Practice), while others are increasingly paying for implementation. CEA estimates that nearly half of FIP costs are paid by sources outside of philanthropy.

Fisheries management is now expected to manage fish for the benefit of people and communities, not just seafood businesses

Ecosystem-based fisheries management (EBFM) is a globally recognized approach, with continued calls for more integrated social-ecological frameworks over the past ten years. For example, NOAA released its Human Integrated Ecosystem-Based Fishery Management (HI-EBFM) Research strategy¹ in January 2021, and the Commonwealth Scientific and Industrial Research Organization (CSIRO) out of Australia has also published guidelines on this approach, highlighting the importance of human key performance indicators (KPIs) and participatory processes. An analysis by Hornborg et al. (2019) found that human performance indicators were generally weak across multiple EBFM approaches and models and this was a major impediment to more effective fisheries management. Efforts to integrate social dimensions, climate readiness, and spatial management into EBFM are expanding how managers and industry approach fisheries governance. Local managers often noted the importance of FIPs as a mechanism for generating the environmental and social data necessary for improved management.

“This decade presents unique opportunities to realize a vision of interdisciplinary marine resource management that balances conservation, preservation, industry profitability, food production, jobs, and human wellbeing.”

—NOAA HI-EBFM Strategy

Attention to SSF has increased, driven by global movements calling attention to fisheries’ importance for community livelihoods and food security. The UN International Year of Artisanal Fisheries and Aquaculture (2022) and publication of the Illuminating Hidden Harvests Report (2023) contributed to this momentum, as have concerted efforts to elevate SSF fisher voices in international fora such as the Small Scale Fisheries Summits (2022, 2024) that precede FAO’s Committee on Fisheries (COFI) meetings, and panels featuring SSF fisher representation at the 3rd UN Ocean Conference. The increased vulnerability of SSF to climate and biodiversity shocks is another reason to try to build more resiliency in this sector.

Studies exploring the potential benefits (and thus, objectives) of sustainable fisheries continue to expand. Research on how to maximize nutritional security from fisheries (e.g. Hicks et al, 2019; Robinson, 2022) adds to the research on the capacity of well-managed fisheries to support more fish, greater profits, and food security (e.g. Costello et al, 2016). This work, alongside rise of the “blue foods” movement, has elevated the importance of sustainable seafood to global human health, in addition to ocean health.

¹ NOAA HI-EBFM Strategy 2021-2025.

www.fisheries.noaa.gov/ecosystems/human-integrated-ecosystem-based-fishery-management-research-strategy-2021-2025.

Philanthropic funding for seafood markets has declined since 2021

Figure 2.1 Top 15 funders of seafood markets funding, 2015-2024 (millions USD).

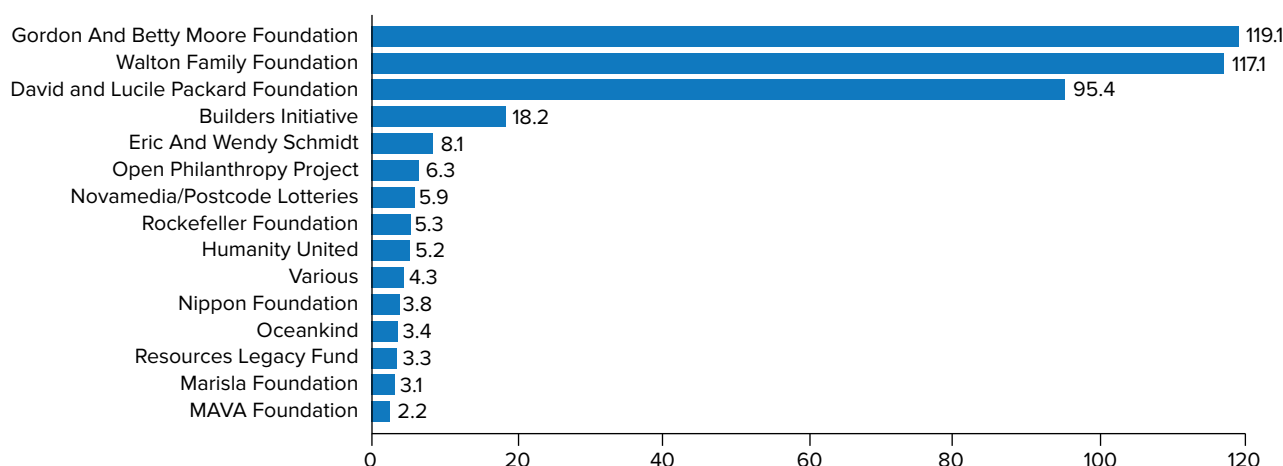
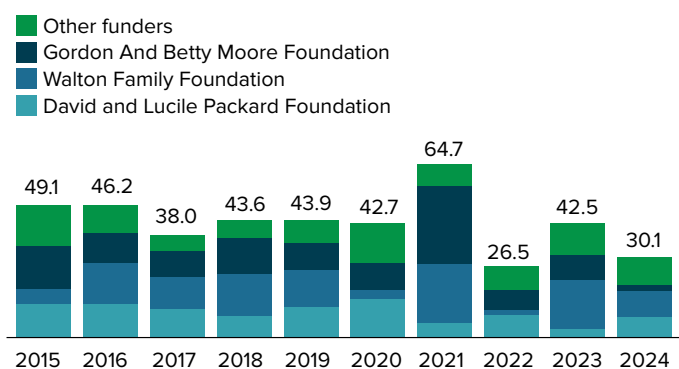


Figure 2.2 Annual philanthropic funding for Seafood Markets (millions USD).



Philanthropic funding has declined substantially since the last FIP review:

- Between 2015 and 2024, philanthropic funding totaled about 427 million USD.
- Between 2015 and 2019, philanthropic funding averaged 44.2 million USD per year.
- Between 2020 and 2024, average reported funding dropped to 41.3 million USD per year, with 2022-2024 having a particularly low average of 30 million USD per year.
- Not all philanthropies report their funding to CEA's ocean funding database.¹ Key informant interviews suggest that philanthropy invested an additional \$6 million USD into seafood markets between 2020 and 2024.
- Average annual funding in 2020-2024 declined by about 4% compared to 2015-2019, and annual average funding in 2022-2024 fell by 30% compared to 2015-2019.
- The top three funders have composed ~78% of all funding between 2015 and 2024.

¹ CEA Funding trends 2025. <https://oursharedseas.com/funding/>

Funding for cross-cutting initiatives continues to dominate seafood markets

Figure 2.3 Top 20 recipients of seafood markets funding, 2015-2024 (millions USD).

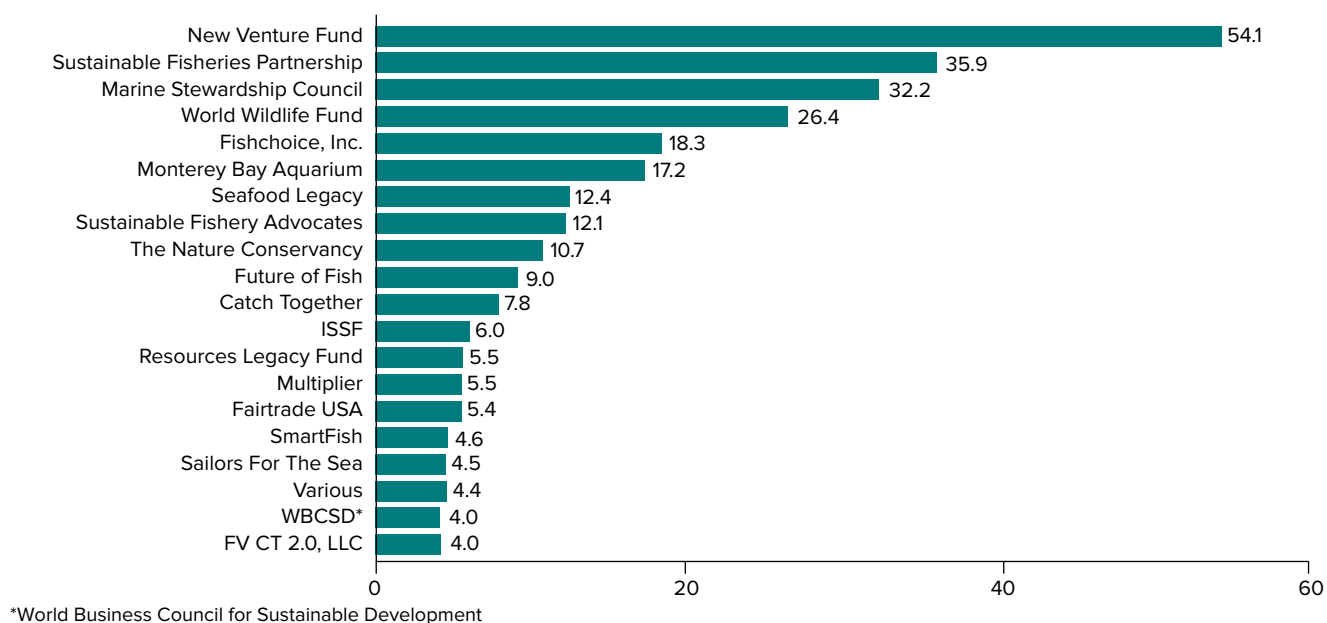
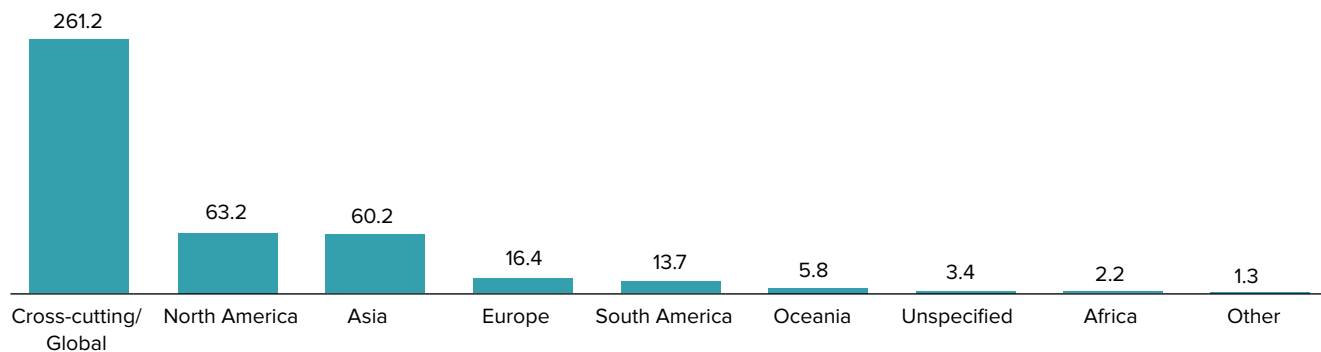


Figure 2.4 Total seafood markets funding by continent, 2015-2024 (millions USD).



The distribution of funding reflects the nature of work within Seafood Markets programs.

- The cross-cutting and global funding bucket includes the broad suite of infrastructure such as FisheryProgress and the Certification and Ratings platforms, as well as global efforts such as buyer engagement or implementation programs led by international NGOs.
- The total amount of funding to Asia and South America has expanded significantly since the 2020 FIP review, by 265% and 407%, respectively.
- Only Asia has increased its funding share relative to other regions. In 2020 Asia received about half as much funding as North America; today, it receives nearly the same (about 95%) as North America.

Philanthropic funding specifically for FIPs has also declined

Figure 2.4 Top 20 funders of FIPs, 2015-2024 (millions USD).

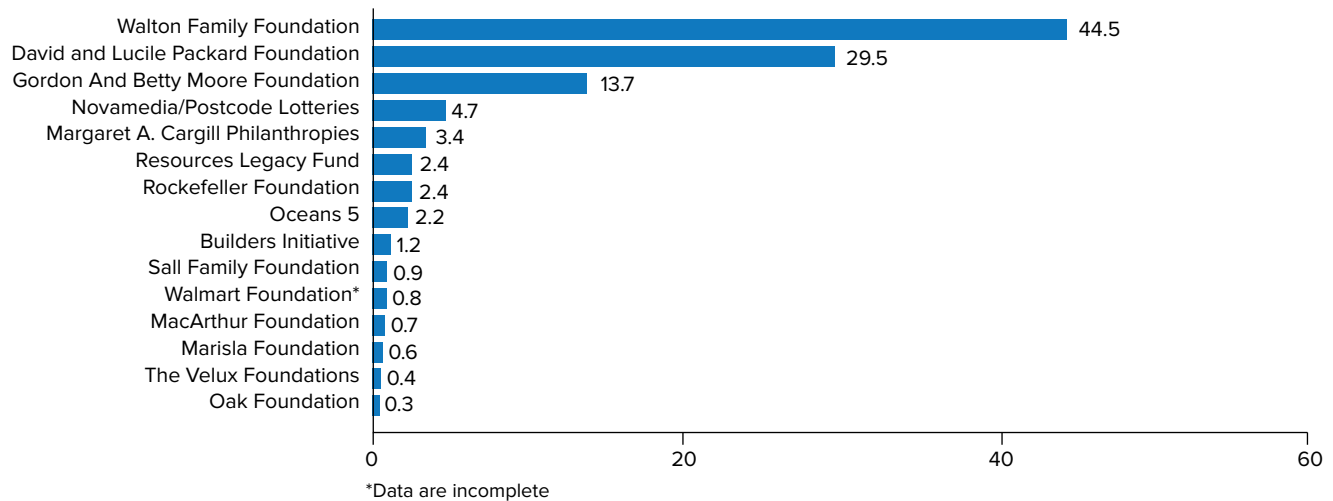
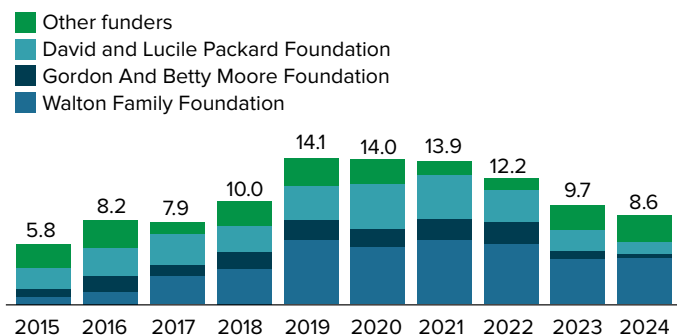


Figure 2.5 Annual philanthropic funding for FIPs (millions USD).



FIP-specific funding shows declines of approximately 25-30% since 2021. The top three funders of seafood markets also dominate this landscape, and at roughly the same level. The top 3 FIP funders have accounted for approximately 80% of the total funding over the last decade, compared with approximately 78% of funding from seafood markets generally.



FIP-specific funding benefits diverse grantees and geographies

Figure 2.6 Top 20 recipients of FIP-specific funding, 2015-2024 (millions USD).

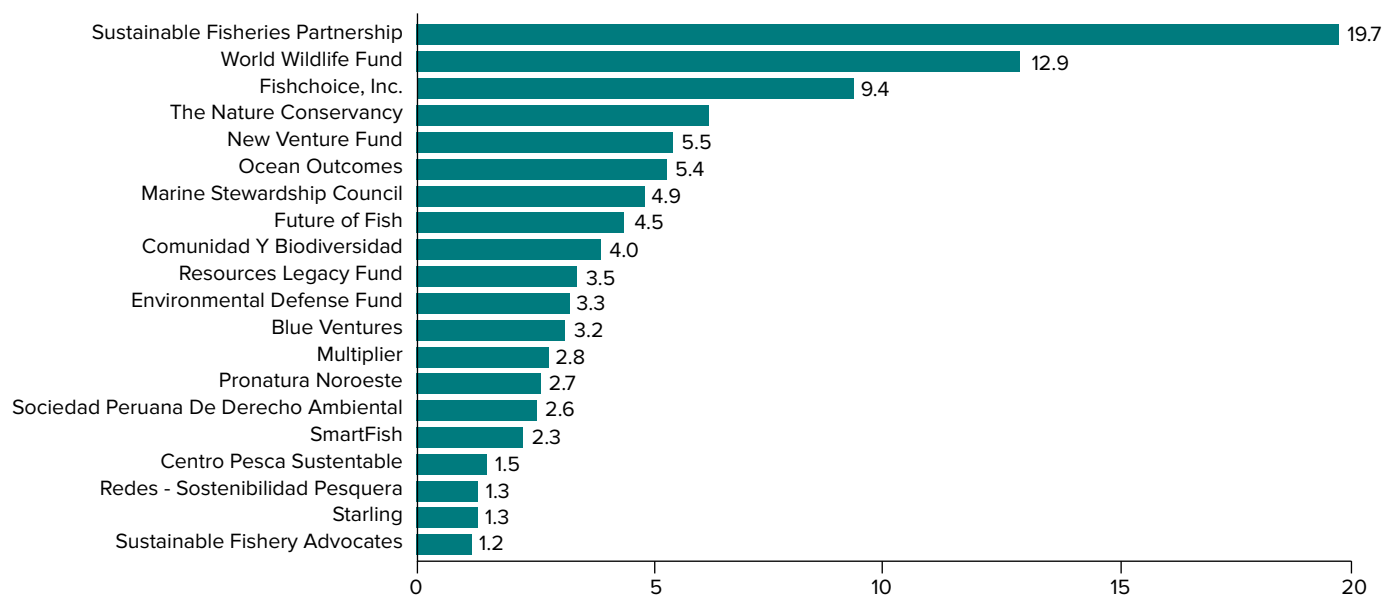
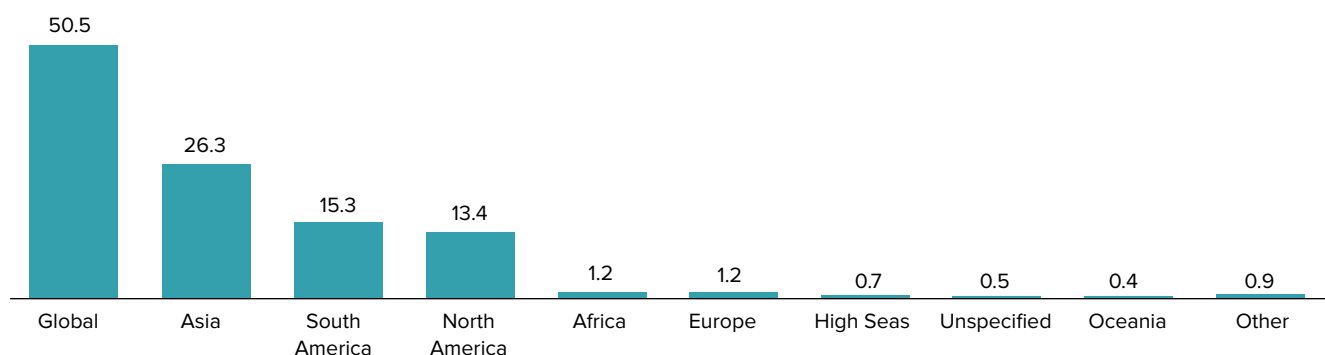


Figure 2.7 Total FIP-specific funding by continent, 2015-2024 (millions USD).



Recipients of FIP funding are diverse in terms of their geographic reach, mission, and share of total funding.

- Generally, there is more philanthropic funding for the continents with the most FIPs, although it is not a perfect match, suggesting non-philanthropic funding is more common in some continents over others.
- SFP and WWF together have received approximately 30% of funding for FIPs since 2015.
- Half of all recipients of FIP-specific funding are regional or local NGOs focusing on FIP implementation in the Global South.





How FIPs are responding in 2025

FIP categories still hold but are more complicated as fips expand into new contexts

Table 2.1 CEA has identified five categories to help with understanding FIP structure and trajectories since 2015. In 2025, a new category reflecting different approaches to social responsibility was also added.

FIP structure	Basic FIPs Light touch, low-cost model aimed at addressing fisheries issues piecemeal over an extended period of time	vs	Comprehensive FIPs High touch, resource-intensive model assessing and targeting all 28 performance indicators (Pis) aimed at near-term MSC certifiability
Supply chain engagement	Bottom up Using a FIP to access end markets and major buyers with sustainability commitments	vs	Top down Major buyers identify problem fisheries within their supply chain and motivate FIP engagement through existing leverage
Fishery condition	Fix a problem fishery The fishery needs improvements and seeks to use the FIP to address its issues	vs	Celebrate a good fishery The fishery is in relatively good shape and seeks to use the FIP to highlight its status
FIP implementer	NGO lead A dedicated NGO staff member is designated to implement the FIP	vs	Industry lead Stakeholders are left in charge of implementing their own FIP; NGOs often serve as strategic advisors in these cases
Target market	Engaged markets Motivation for engagement is generated by selling into markets engaged in sustainable seafood sourcing	vs	Not-engaged markets Motivation for engagement is generated by buyers with at most an emerging awareness of sustainable seafood
Social responsibility	Compliance Companies engage in social responsibility work with a focus on compliance with international standards, most often via reporting against the HRSRP	vs	Incentive Effort is dedicated to improving different dimensions of equity, most often as a means of improving well-being and/or increasing incentives for participation

Comprehensive FIPs still dominate but basic FIPs may drive more progress than previously recognized

FIP structure	Basic FIPs Light touch, low-cost model aimed at addressing fisheries issues piecemeal over an extended period of time	vs	Comprehensive FIPs High touch, resource-intensive model assessing and targeting all 28 performance indicators (PIs) aimed at near-term MSC certifiability
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Comprehensive FIPs still dominate the landscape. Especially in production centers selling to engaged markets (e.g. Taiwanese tuna fleets), companies choose comprehensive FIPs as a pathway to MSC certification and access to Western markets. In SSF, companies favor comprehensive FIPs to distinguish their product and prove their sustainability in a competitive landscape. Today, 71% of active FIPs are comprehensive, which is nearly the same percentage of comprehensive FIPs in 2020 (70%).

Comprehensive FIPs are no longer the only pathway to certification. Fewer FIPs are moving to certification (see page 34, 59) overall, including from comprehensive FIPs. Though more rigorous than Basic FIPs in terms of requiring audits, comprehensive FIPs are not as structured or focused as newly emergent improver programs, such as those created by the MSC (see page 35) . Highly customized, these approaches are more expensive than comprehensive FIPs but aim to increase likelihood of success in delivering certification in five years through a more intensive and supported process. This evolution of comprehensive FIPs towards a middle-of-the-road option further suggests that the line between comprehensive and basic (and its importance) is blurring.

Basic FIPs are no longer necessarily a “light touch” model. Many basic FIPs are tackling social and fisheries governance issues, such as reversing debt cycles to intermediaries or establishing co-management committees. These require highly engaged collaboration among FIP participants. While they may not address all MSC PIs, basic FIPs often work simultaneously on a variety of fishery issues. This means they are not necessarily “doing less” and can reach completion. A common perception among buyers of basic FIPs as “not as good” may hurt some of the most effective FIPs.

Basic FIPs can reach completion directly. This most frequently occurs in industrial fisheries, such as shrimp, tuna, and hoki. Sixteen percent (n=6) of all FIPs that have achieved completion to date reached completion as a basic FIP.

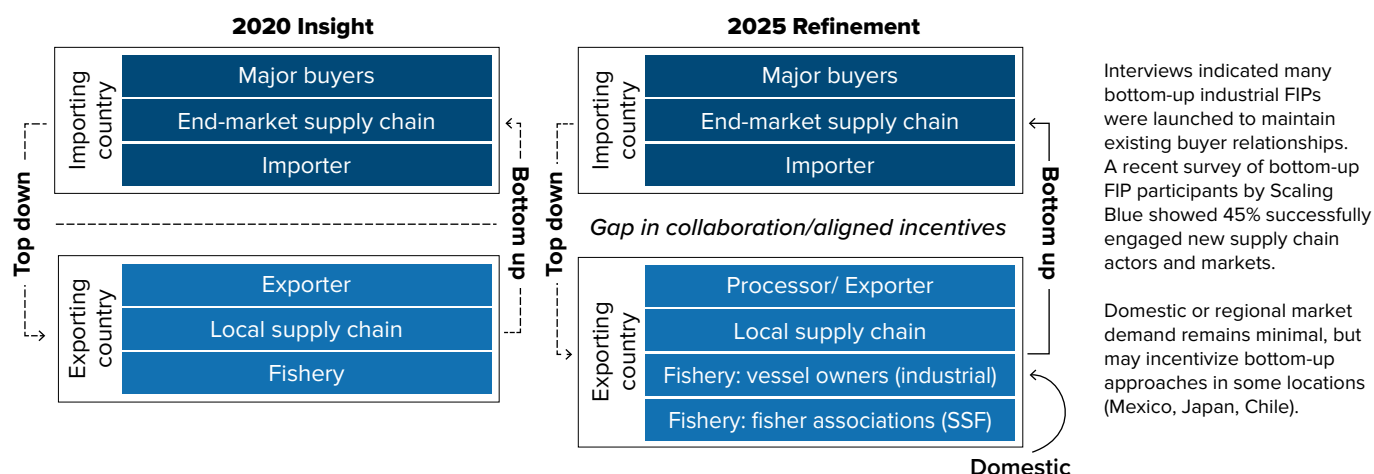
FIPs that transition from basic to comprehensive do not necessarily lead to completion. Between 2019 and 2024, eight FIPs shifted from basic to comprehensive, with at least one shift in every year except 2024. This shows that such shifts are regular, but of the eighteen FIPs that shifted from basic to comprehensive, only one achieved certification.

Bottom-up FIPs appear to be diversifying and expanding

Supply chain engagement	Bottom up Using a FIP to access end markets and major buyers with sustainability commitments	vs	Top down Major buyers identify problem fisheries within their supply chain and motivate FIP engagement through existing leverage
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New top-down FIPs include small pelagics (Chilean herring and anchovy) and crab (Oregon, USA) but interviews noted that a lack of mid-supply chain engagement in Western markets could be limiting the potential of this approach. In contrast, new bottom-up FIPs (which can launch without mid-chain engagement) increasingly appear to be led by vessel-owner and fisher associations (in industrial and small-scale fisheries, respectively) and span a diversity of fisheries, from octopus to tuna. Increased competition among FIPs (e.g., tuna FIPs in Taiwan) and models seeking to incentivize more vessel participation (Mexico, Indonesia) may be driving these trends. The success of bottom-up FIPs appears mixed: Site observations revealed several are suffering from weak engagement by mid-chain actors, but recent surveys showed new markets have been engaged.

Figure 2.8 Comparison of FIP structure insights 2020 and 2025.



Degraded and well-managed fisheries require different incentives but both may benefit from FIPs in an unstable climate world

Fishery condition	Fix a problem fishery The fishery needs improvements and seeks to use the FIP to address its issues	vs	Celebrate a good fishery The fishery is in relatively good shape and seeks to use the FIP to highlight its status
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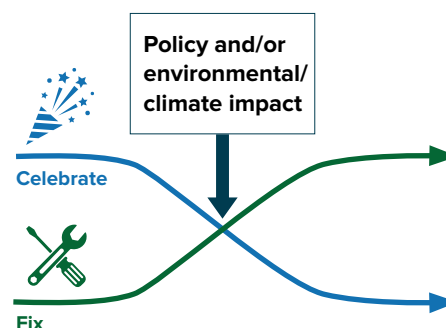
FIPs continue to launch with the intention of either fixing a declining resource or highlighting a well-managed fishery to gain market distinction. As in 2020, celebratory FIPs are correlated with success but may require more diverse incentives to engage fishers and increase volume within the FIP.

FIPs working to fix a fishery need different incentives than those celebrating a fishery. Fixing fisheries may take longer, as stock assessments and policy or management changes may take years. First-mile supply-chain actors can be incentivized to engaged in fix-a-fishery FIPs based on hope for increased or more stable catch, but they often need significant support up front because they are already struggling to maintain business in a declining fishery. For fast turnover species, such as octopus, recovery may be quick and serve as a strong incentive for fisher participation and compliance (Madagascar and Indonesia octopus). Mid-chain and end buyers may be interested in long-term assured supply, but their willingness to support depends on how long the improvement will take and how much volume/value the FIP is providing to the suppliers (India vs. Indonesian BSC).

In contrast, celebratory FIPs may require a stronger market response to maintain their momentum; with supply already in place, FIP participants, especially fishers, do not want to pay for FIP activities without receiving market benefits.

Some celebratory FIPs end up fixing a problem, especially due to unforeseen policy or climate change impacts. For instance, Peruvian anchoveta began as a celebratory FIP but has addressed environmental variability and climate change impact.

The organizing structure of a FIP may help improve resiliency of fisheries in both “fix” and “celebratory” conditions. For fix, the improvement work can drive better data to understand ecosystem health and thus support climate-adaptive management; for celebratory fisheries, the coordination across participants and improved data can increase responsiveness to new threats. More research is needed to determine if this hypothesis holds.



FIP leads have continued to diversify, localize, and increase in number

FIP implementer	NGO lead A dedicated NGO staff member is designated to implement the FIP	vs	Industry lead Stakeholders are left in charge of implementing their own FIP; NGOs often serve as strategic advisors in these cases
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Over the past ten years, the number of FIP leads has grown substantially, but without a standard definition of “FIP lead” it is unclear what roles each lead is playing and how much they are contributing to progress.

Trends toward localization identified by Villeda (2018) and CEA in previous reports have continued.

- NGO-led FIPs continue to shift to regionally or locally based organizations and away from larger, international NGOs, with SFP completely exiting the FIP implementation space and WWF focusing more on downstream engagement, with a few exceptions, such as the Honduras Caribbean spiny lobster, Ecuador mahi mahi, Peru mahi mahi/squid, and Philippines yellowfin tuna FIPs.
 - For-profit consultants include both large, international firms (e.g. Key Traceability) as well as smaller, sometimes highly localized companies (or individuals) that often have prior experience in government or industry to help build connections (Indonesia, Ireland). Expertise in human and labor rights remains a gap, creating challenges for FIPs. See section 3.4.
- “We have nothing we have to do for the FIP. It is very easy.”*

—Indonesian processor

Many FIPs report multiple leads on FisheryProgress, which may reflect a more complex work plan, easier reporting, or a desire for visibility.

- The number of FIPs with NGOs and industry both listed as leads has grown. This combination is associated with a higher likelihood of achieving Stages 4 and 5. We believe that these listings may reflect true collaboration.
- The organizing structure and shared costs across industry association members can help ensure more consistent support for on-the-ground work (fisher trainings, government engagement). For example, in Indonesia, the field staff for the blue swimming crab processor association, APRI, regularly meets with fishers and conducts all trainings; staff members also help the processors with FIP reporting, making it easy for the processors to participate.
- Lack of a clear definition for a “FIP lead” makes analysis difficult in terms of whether some leads are more effective than others.

COVID-19, inflation, and tariffs drive increased price sensitivity for all markets

Target market (2020)	Engaged markets	vs	Not-engaged markets
	Motivation for engagement is generated by selling into markets engaged in sustainable seafood sourcing		Motivation for engagement is generated by buyers with at most an emerging awareness of sustainable seafood

With regard to Western markets, retaining existing clients is as much a reason for launching a FIP as accessing new markets. FIPs launched by processors/exporters cited buyer requirements for FIPs/MSC as the motivation for launching. Often, they were as concerned about losing existing clients as hopeful about gaining new ones. Tuna FIPs and, increasingly, small pelagics exporting to North American feed companies appear as the FIPs most highly motivated by Western market demand for sustainable product.

Price continues to stifle sustainable seafood's edge in the marketplace. External factors, such as COVID-19, inflation, and tariffs have increased price sensitivity of engaged markets, reducing appetite to absorb additional costs associated with sustainable seafood. Japan has grown its role as an engaged market, but the low value of the yen has decreased market demand for sustainable (often slightly higher-cost) products. Interviews and site visits revealed that buyers were purchasing based on price above all else. Even with sustainability commitments in place, some FIPs move from engaged to non-engaged markets because the ex-vessel prices are higher based on rising demand in Asia or domestic markets.

New engaged markets for both export- and domestic-oriented FIPs remain scarce but experiments continue in Asia and Latin America. Participants noted early signs of growing interest in sustainability from the South Korean market. Multiple basic FIPs are supplying domestic markets in Mexico, Chile, and Peru. In some cases, these markets have nascent interest in sustainability; more often, these markets are benefiting from product quality improvements that accompany the FIP, as a way to increase the price fishers receive.

“Those that are dedicated to sustainability may have more movement [today], but in the last five years, there have been so many other things to concentrate on, [sustainability] is not a high priority. Financials and bottom line are the high priorities: COVID—can you still stay open and recover from it?—and rehiring, reorganization, and restructur[ing].”

—Industry implementer



There is a distinction in how and why FIPs engage in social improvements

Social responsibility	Compliance Companies engage in social responsibility work with a focus on compliance with international standards, most often via reporting against the HRSRP	vs	Incentive Effort is dedicated to improving different dimensions of equity, most often as a means of improving well-being and/or increasing incentives for participation
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Different drivers are shaping FIP engagement in social work. We observed some FIPs developing social action plans to demonstrate compliance and mitigate risk, while others (often small-scale or bottom-up FIPs) are working on social responsibility as an end goal and/or incentive for engagement. Still, the distinction between “compliance” and “incentive” is not structurally exclusive—a FIP can be motivated by both aspects—though this appears rare.

FIPs are engaging in social improvement work to demonstrate compliance with international and national standards.

Many of these FIPs are high-volume, industrial fisheries that aim to sell products to buyers in Western markets (e.g., EU, US), which have strong human rights laws and mandatory human rights due diligence policies. Buyers – particularly retailers – have integrated human rights risk policies into their sourcing commitments.

Beyond fulfilling the reporting requirements associated with FisheryProgress’s Human Rights and Social Responsibility Policy, FIPs are also beginning to engage in other social interventions to help manage human rights risk. For example, several of the Taiwan tuna longline FIPs have begun installing electronic monitoring systems and providing WiFi on vessels to increase transparency and mitigate the risk of human rights abuses.

FIPs include social improvements to incentivize engagement and deliver greater returns to fishing communities.

Across FIPs, especially in small-scale contexts, efforts to embed work focused on well-being have built trust and engaged fishers as part of the FIP. For example, in Southwest Madagascar, the FIP is working with local NGO partners to address broader, structural issues facing the community, such as lack of education, healthcare, and drinking water. In Mexico, several artisanal FIPs are working to support gender equity by advancing the visibility of women in cooperative administration and processing. Elsewhere, in Sri Lanka, the FIP has allocated a portion of its funding to development projects, to be determined by the local fishing communities.

“Labor issues are only increasing and for industry, the FIP is helping to tackle that. So, [the buyers] see this as a good step.”

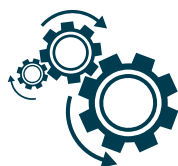
—FIP Industry implementer, Asia



FIPs increasingly appear decoupled from certification, with the percentage of certified and FIP product stagnant or declining since 2015



FIPs engage a smaller proportion of global catch today than a decade ago. The percentage of global catch engaged by MSC has also remained approximately flat. These trends suggest that markets demanding sustainable seafood are unlikely to expand volumes meaningfully. Efforts to develop additional domestic markets have inspired more projects in more regions but added negligible seafood volumes to global totals.



FIPs are increasingly engaging fisheries that are unlikely to seek certification. Eleven of the fourteen FIPs receiving MSC certification since 2020 were tuna fisheries. Outside of tuna, new FIPs rarely lead to certification. Instead, FIPs are better suited to a continuous engagement approach and regularly reported improvements that support fisheries and communities. Currently, many improvements go unrecognized because success is reported against the MSC performance indicators.

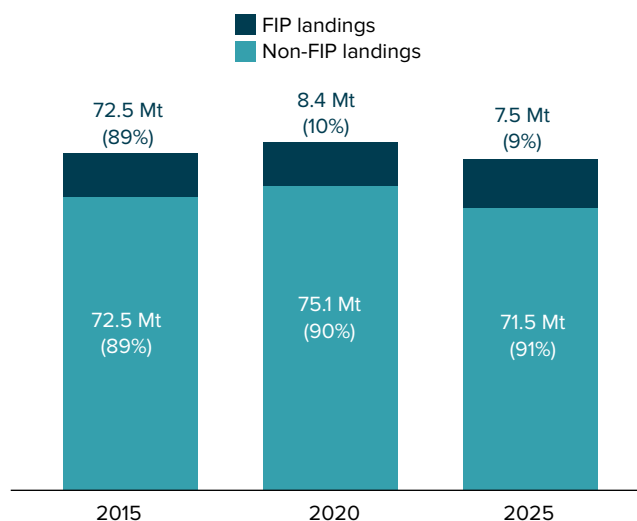
Despite the expansion of the landscape, the percentage of global catch engaged in MSC or FIPs has declined since 2015

In 2025, approximately 9% of global catch comes from FIPs; this represents a slight decline in the total landings from FIP-engaged fisheries since 2020. This has occurred in spite of the existence of more FIPs today than in 2020 and an increase in total global catch. As of 2025, FIPs engaged approximately 1.5MT less catch than in 2015.

The amount of global catch certified by MSC has remained relatively flat since 2017, suggesting that significant volumes, including from FIP fisheries, are not systematically shifting to MSC certification.¹

It has become more difficult to determine the percentage of landings sourced from well-managed but uncertified fisheries. In 2020, the Fisheries Governance Index provided a global index of the relative fisheries governance capacities of different countries; however, this database has not been updated since 2021, making it difficult to determine the amount of global landings that are well-governed but unengaged in MSC or FIPs.

Figure 2.9 FIP Landings Over Time.²



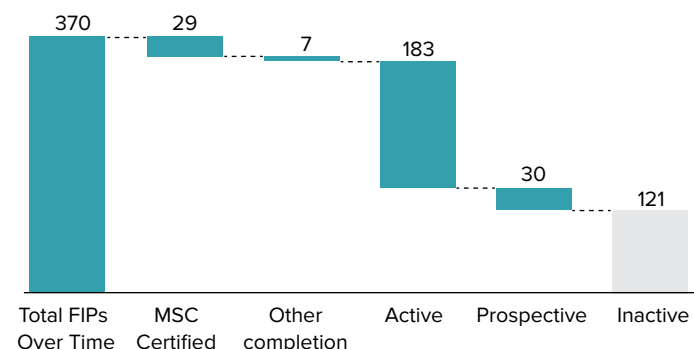
¹ Based on values from MSC's internal landings database

² In the figure above, the year values in the x-axis refer to the year CEA's FIP reports were published. The actual landings data are from the prior year (e.g., in the 2025 report, the data refer to landings from 2024).



Since the dawn of FIPs, only 29 have received MSC certification. Only 10% have achieved any certification

Figure 2.10 Breakdown of completed FIPs by number.



A total of 36 FIPs, approximately 10%, have achieved any certification.

- Five FIPs have achieved Responsible Fisheries Management
- One FIP achieved MarinTrust certification.
- One basic FIP achieved completion by completing its workplan without achieving certification.

New, non-tuna FIPs rarely achieve certification: since 2020, 11 of the 14 FIPs certified have been tuna

Table 2.2 FIP certification rates over time.

FIP Start years	FIPs achieving certification	FIPs achieving certification (tuna excluded)
Pre-2010	21%	21%
2010-2014	20%	15%
2015-2019	11%	4%
2020+	1%*	0%*

*FIPs started since 2020 may simply not have had enough time yet.

“FIPs are still very much necessary, at least for bottom-up and SSF FIPs. Certification is just not a viable option for SSF, especially if FIPs themselves are already expensive. FIPs are the most cost-effective tool if you have trained staff (not the same as training an MSC inspector). So FIPs do fill a space that no other tool fills.”

—NGO implementer

Tuna FIPs continue to seek and reach MSC certification, which may be due to several factors, including:

- **Data availability:** Tuna fisheries, under RFMO oversight, generally have some catch reporting and supportive studies to aid with stock assessments. Many tuna FIPs include efforts to implement Electronic Monitoring (EM) which is helping to address data gaps where they exist.¹
- **Strong support from major tuna brands and buyers:** This includes sourcing commitments for MSC and FIPs, and support for initiatives such as the Tuna 2020 Traceability Declaration (Tuna Transparency Pledge) which has been signed by more than 60 companies, representing 60% of global canned tuna market.
- **Extended timelines under MSC 3.1v:** in a new development since 2024, RFMO-managed stocks (which affects most tuna) are granted longer timelines to implement harvest strategies and control rules, due to the complexity of multi-lateral negotiations at the RFMO level. This allows RFMO fisheries to pass with conditions and maintain certifications when other fisheries may not.¹

The FIP model provides a structure to demonstrate progress; many participants view this as a core value of the approach. Processors and exporters extolled the virtues of FIPs as “where the action happens,” and acknowledged that certification was simply too expensive; buyers also noted that FIPs provided opportunities to engage with fisheries that were far from – and possibly never going to reach – certification but noted inherent risk in investing in these projects; implementers, especially in small-scale fisheries, noted FIPs as the “only way” to differentiate best practice in the marketplace.

The FIP model fills governance gaps and both aligns and competes with other approaches



FIPs are increasingly engaging in governance improvements, not just engaging governments.

As FIPs scale and grow in popularity they are now engaging in more fisheries and in more countries in a wider array of contexts than ever before. As a result, FIPs need to influence and incorporate more than just traditional government fisheries managers. FIPs are increasingly engaging in fisheries governance with local communities, fish workers and additional government entities, such as environmental and social ministries; this adds new complexities to implementation.



Fisheries improvement efforts now encompass a wider range of models beyond FIPs.

New and varied fisheries improvement models have emerged to overcome FIP limitations, spanning from species-specific projects to broader jurisdictional and ecosystem-based initiatives. These approaches have different goals, ranging from ecological management to fisher well-being, and different structures, including certification-linked and NGO-led efforts. Together, they reflect an increasingly diverse and complex ecosystem of strategies aimed at advancing both environmental and social outcomes in fisheries. CEA profiles thirteen of those alternative models in this report (see Section 4: How the Fishery Improvement Landscape is Evolving).

FIPs increasingly build decision-making processes and platforms through which management happens

From basic to comprehensive, small-scale to industrial, FIP participants are filling the gaps in fundamental enabling conditions around fisheries governance, including creating participatory processes and decision frameworks. For some FIPs, this work feeds into government-mandated consultation structures. Recent work on the GEF Marine Commodities program noted FIPs can serve as important bridges between such larger, sector-level platforms and fishery-specific efforts; however, where these platforms are missing, FIPs may be the only forum available.



In Madagascar octopus FIPs, participants engage in a comanagement system whereby they set the open and closed season for the fishery.



The North Atlantic Pelagic Advocacy group continues its uphill battle to push coastal states to develop a decision-making framework for catch allocation and dispute resolution.

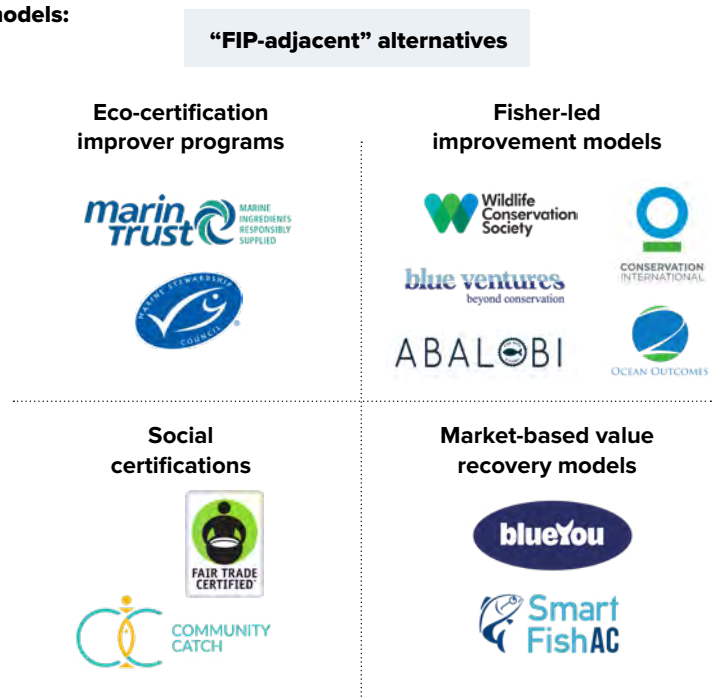


The FIP process supported multiple alliances of processors and fishers to collaborate and help shape regulations (ROPs) for both mahi mahi and squid.

“FIP-adjacent” models can, and often do, embed aspects of the FIP model within their structures, including reporting on FisheryProgress

CEA identified four broad categories of “FIP-adjacent” models:

1. Eco-certification improver programs have firm, time-bound objectives to move environmental change monitored through audits. FIPs are viewed as an on-ramp or accelerator for these initiatives, which are the only category that includes industrial fisheries.
2. Social certifications have a continuous improvement approach that is centered in advancing well-being and livelihoods of fishers.
3. Fisher-led improvement models focus on building fisher capacity across business (financial literacy, quality improvements) and management (organizing, advocacy) dimensions. Market access is secondary (and viewed as a means) to improving fisher well-being.
4. Market-based value recovery models enhance or build business models and financial tools to help fishers capture more value from the seafood supply chain.



Place-based alternative models leverage financial incentives (but not FIP infrastructure) to drive change

CEA identified three additional approaches to fisheries improvement. These models target improvement at the supply chain, ecosystem, and jurisdictional scales.

- **Managed Access Area with Reserves (MA+R):** With support from Rare and local partners, small-scale fishing communities establish “Managed Access Areas” that are mapped and managed for use, and “Reserves” where fishing is prohibited to allow fish populations to regenerate.
- **Jurisdictional approaches:** All those with influence and decision-making power over the physical resources (the jurisdiction) are engaged, with strong support from the companies that source from that region. First started in the terrestrial environment, jurisdictional initiatives have launched in farmed shrimp and Pacific tuna contexts, pioneered by long-standing FIP implementers, WWF and CI.
- **Value chain assessments:** Monterey Bay Aquarium is piloting value chain assessments to develop domestic market demand for high-priority export fisheries. This intervention strives to help fishers earn a higher, more consistent income from their catches. The first value chain assessment focused on the Philippines blue swimming crab fishery, identifying opportunities for fishers to sell their product to local hotel, restaurant, and catering businesses.



Today, FIPs are bumping up against the limits of the initial model, and are evolving to meet more demands



The original top-down FIP model achieved real improvement in several fisheries but is now limited by weak fisher engagement and inconsistent accountability across the supply chain.

Early FIPs, built around retailer and importer pressure to drive ecological improvements, largely excluded fishers and focused narrowly on environmental outcomes. The model enabled better data collection, coordination among stakeholders, and stronger partnerships between industry and NGOs. However, its market-pressure design has proven less effective in many contexts, as fishers often lack incentives to participate and importers and distributors remain driven by price and product availability rather than fisheries' sustainability commitments.



Engaging communities increases complexity of implementation: The initial theory of change prioritized intervening on points of consolidation at both ends of the supply chain, seeking to engage retailers and other “major buyers” of seafood and the primary processors. This was efficient and relatively effective early on. However, it externalized individual experience, and limited choices for both consumers and fishers. Now, the inclusion of fishers and communities into FIPs is adding new complexities for implementation, including the need to add and prioritize non-environmental objectives for projects.

Most fishers lack awareness and incentives to engage in FIPs; this is especially a problem when enforcement capacity is low

FIPs were not historically designed to engage fishers but this is increasingly necessary to achieve compliance. Few countries in the world have the capacity to effectively enforce fisheries regulations. As FIPs expand into lower governance environments, they must therefore not only push for management reforms, but also incentivize compliance. This is not part of the traditional remit of FIPs.

Competition over shared resources makes compliance unrealistic for many fishers. Currently, FIPs do not take into account shared resource challenges. For example, in the India BSC gillnet FIP, the industrial shrimp trawl fleet regularly damages gillnets and catches undersized and berried female crabs as bycatch. FIP BSC fishers therefore have no incentive to leave these crabs behind, despite regulations.

Incentives are needed to entice more fishers to grow FIP volume. Implementers of top-down and bottom-up FIPs both noted challenges with securing enough supply due to lack of awareness or interest of vessel owners/fishers. Often, these trading partners provided additional benefits, such as insurance or safety equipment to entice participation.



Lack of verification and accountability undermine credibility of FIPs

Buyers often do not have enough leverage over suppliers to make top-down approaches work. Interviews with both retailers and mid-chain traders highlighted concerns that engagement of the middle of the supply chain remained a weak link in the model. Trusted, long-term trading relationships are important to successfully translate buyer commitments to supplier actions; so are mechanisms to verify suppliers are actually sourcing (and supporting) FIPs.

Biggest concern is traceability. I'm confident suppliers will say it is coming from a FIP even if they and the supply chain have nothing to do with improvement work.

—FIP consultant

Lack of follow through on commitments across all nodes continues to erode trust and stall FIP progress. FIPs currently lack verification systems to be able to hold both ends of the supply chain accountable. Stories of price-seeking by buyers (switching away from FIPs to secure lower-priced product) and fishers (selling to non-FIP partners for higher prices) were prevalent in interviews.

Buyers not held accountable to their commitments, [this] is what the example of [this buyer of our product] has shown us.

—Fisher, Mexico

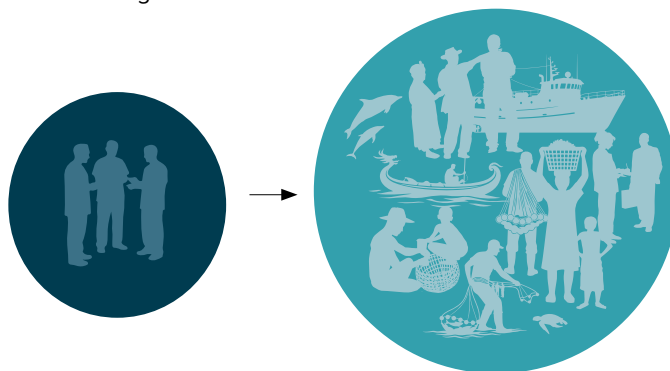
Progress reporting is an art form for those who know how to optimize the system. The ability to carefully time and pace progress reporting and activities is an expertise honed by some implementers and criticized by others as gaming the system to artificially improve ratings.

The credibility and effectiveness of the FIP model has been questioned. ... FIPs with limited or no progress are still gaining some market access due in part to limited verification standards and capacity.

—Alonso-Poblacion et al., 2024

FIPs are expanding to include more voices, which complicates decision-making and prioritization processes

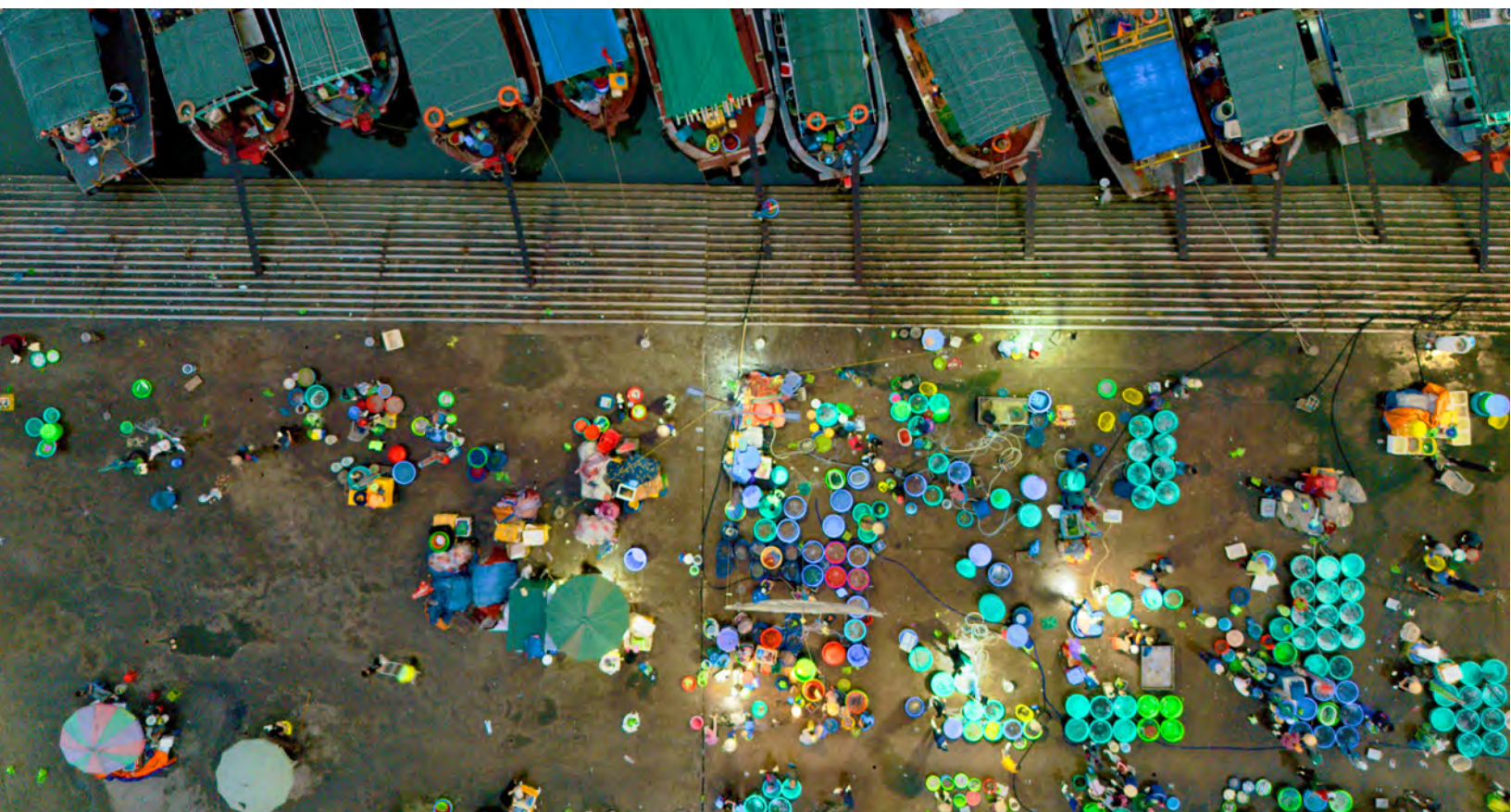
Logistical challenges are increased as the seats at the table expand. Key informants and site observations highlighted that costs and time associated with bringing FIP participants together is a significant component of FIP budgets, but necessary to make progress. Fisheries with participants spread out across large and remote geographic areas, lacking organized associations or other representative structures for vessel owners/fishers and/or processors, and with seasonal or migrant labor were noted as particularly difficult to organize and manage.



As FIPs seek to build more participatory and inclusive processes, more demands and needs emerge. FIP workplans no longer focus only on improving low-scoring performance indicators from a pre-assessment. They also include efforts to build the incentives needed to engage the right actors to tackle some of these barriers (see next page). Examples of topics being addressed across the FIP landscape include:

- building climate resilience (including insurance programs);
- improving coordination across labor and IUU issues;
- supporting capacity development for fisher; organizations and industry participation in management;
- improving monitoring, control, and surveillance.

Determining which issues need to be addressed first, and how, is not a straightforward exercise.



More diverse incentives are needed to meet multiple objectives and priorities

The diversification of incentives started in 2020 has continued across all categories (near-term, medium-term, and long-term) and now appears especially aimed at engaging first-mile participation and buy-in.

Table 2.3 Diversification of incentives.

Near-term		Medium-term		Long-term	
Continued since 2020	New since 2025	Continued since 2020	New since 2025	Continued since 2020	New since 2025
Social FIPs: Additional actions that deliver short-term benefits via addressing social, economic, and/or business deficiencies.	Social FIPs: Social FIPs: Noticeable focus on financial literacy and addressing financial inequities, such as correcting debt cycles (Mexico, Indonesia)	Bottom-up FIPs: Promise of new market access	Bottom-up FIPs: Viewed as a mechanism to meet environmental (EM) and social (HR/LR) regulations	Continued march towards sustainability persists as long-term motivation for movement and supply chain	BUT: “Sustainability” is viewed by many as requiring an integrated EBFM approach that looks beyond the stock and considers the whole social-ecological system, placing importance on governance, livelihoods, and social aspects of the fishery, as well as exogenous environmental factors such as climate change.
Build new market demand for sustainable seafood in both export and domestic channels	Successful growth in Japan; domestic market efforts continue in Mexico, Peru, and Chile to limited effect.	Proliferation of new FIP-like interventions	Significant expansion of complementary models that focus on fishing communities’ needs in addition to leveraging market incentives (see Appendix A4).		
	FIPs serve as a mechanism to secure resources for better data collection (Chile octopus and stone crab; Indonesia snapper/grouper, BSC)	Pursuit of non-MSD end goal. FIPs seeking other types of certification	Pursuit of non-certification end goals. FIPs, especially basic FIPs, are seeking outcomes for sustainability that are not dependent on MSD certification, including complementing other types of initiatives such as area-based conservation (MPAs).	Social and equity considerations still on the rise	FIPs now explicitly require action on human rights via the HRSR policy, but there is significant pushback from labor organizations that note this is insufficient and potentially harmful; social and socioeconomic equity work is prevalent but lacks standardization or guidance.



Look back 2015-2025: What's the same and what's changed?

Ten years ago, the FIP model had a singular pathway leading to one end goal

The pathways for FIPs in 2015:



Gain access to more lucrative Western markets by achieving certification through environmental improvements in single-species, predominantly industrial fisheries, especially whitefish and salmon.

The end goals for FIPs in 2015:



Ensure that fishers are extracting the target species at maximum sustainable yield (MSY), thereby showing that the fishery is being exploited in a sustainable manner.

Today, FIPs use many pathways to achieve multiple different goals

The pathways for FIPs in 2025:



Use holistic ecosystem-based management approaches and social well-being improvements that embrace fisheries as complex socio-ecological systems, often aiming for multiple environmental and social goals.

The end goals for FIPs in 2025:

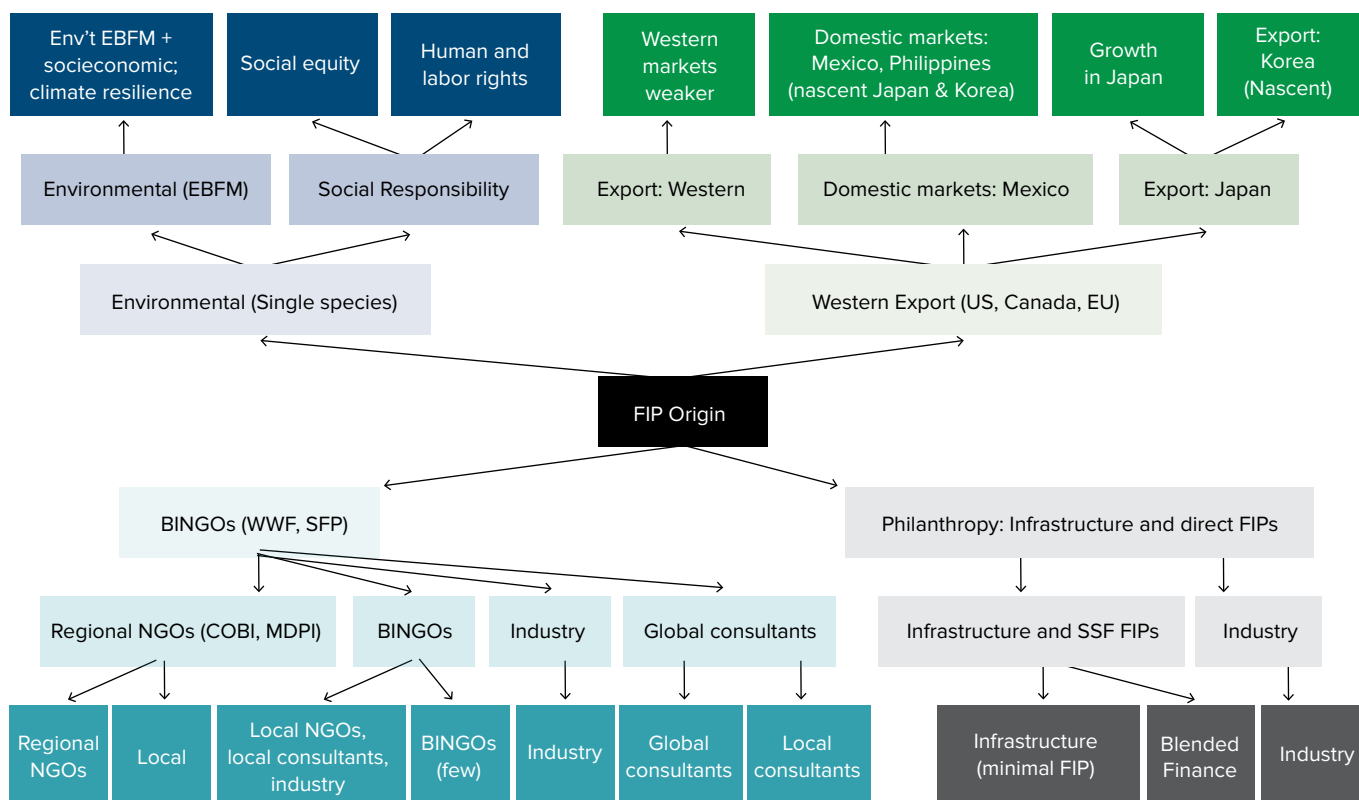


Achieve integrated ecosystem-based fisheries management, marine area protection, fishery certification, enhanced data, value addition/rescue for fisheries products, improved equity, human and labor rights compliance, or any combination thereof.

FIPs have expanded their scope across multiple dimensions of the model

If we look across major dimensions of the FIP model, such as outcomes (dark blue), markets (green), implementers (teal), and funding sources (grey), there have been incremental expansions of scope since 2015, as shown below. Shading denotes timeframe: 2015 (light); 2020 (medium); and 2025 (dark).

Figure 2.11 Major dimensions of the FIP model and diversification over time across those dimensions.



As the pathway and end goals have evolved, so has the Theory of Change

Table 2.4 Evolution of FIP TOC over time.

Dimensions of the TOC	2005-2015	2015-2019	2020-2025
Market leverage (pull) on supply chain: Assumption of strong export market pull	• High: FIPs export primarily to US, Canada, Northern EU	• Medium: FIPs expanding to fisheries with exports to non-engaged markets	• Low: Asian markets still largely unengaged (Japan as exception; S. Korea as nascent); Western market demand shows limits • Domestic market destinations largely unengaged
Target fisheries	• Single species • Whitefish dominate • Industrial fleets	• Single species • Rise of tuna FIPs • Expansion into small scale • Majority industrial	• Multispecies (e.g. small pelagics) Growing number of small-scale fisheries and increase in proportion of FIP fisheries that have both industrial and small-scale fleets (13% in 2018 to 18% in 2024). • Increasing diversity of commodities: squid/octopus; lobster; shrimp, tuna, etc.
Supply chain characteristics	Vertically integrated Consolidated	• Less consolidated (small scale; global distribution)	• Unconsolidated; global distribution
Governance capacity	• High/medium	• Mixed	• More limited (increasing number of FIPs in Global South where governance capacity is often more limited)
Barrier to change behavior/practices	• Low: producers/ vessel owners have the capacity to make change, existing social safety nets in place	• Medium: producers take on more burden to make change due to lower governance capacity, fewer resources; less incentives due to diluted market pull.	• High: poverty and limited infrastructure limit capacity for change within producers; very low awareness of FIPs among producers; processor/exporters and/or their associations push FIPs forward but often require NGO support to execute FIP.
Incentives for producers	• Short-term: none needed. • Longer-term: market access and assured supply	• Short-term: beneficial but not necessary. Resources to improve quality or safety help bring producers on board • Long-term: market access; assured supply	• Short-term: necessary for engagement. The focus on socio-economic incentives is used to build capacity for engagement in environmental change • Long-term: assured access to resource

Despite this evolution, many of the insights from 2015 still hold today

Table 2.5 Insights from 2015 and relevance for today.

2015 insights	Relevance to the current FIP landscape
1. FIPs are the worst tool for change, except for all others →	Relevant: FIPs are a scalable and effective tool for multistakeholder organizing and engagement as well as improving data collection, but there are increasingly more market-based options to pick from that may be equally or more effective. Comparing effectiveness across these alternative models was beyond the scope of this research.
2. Muddled Theories of Change generate a lot of confusion and criticism. The FIP model is evolving, creating substantial friction. →	Very relevant: Efforts by the seafood markets community to harmonize the FIP model temporarily helped to reduce some confusion in 2019. However, the FIP space has continued to grow increasingly complex as implementers innovate in pursuit of a wider array of objectives.
3. FIPs succeeded in whitefish; we need other success stories, but progress has been slow. →	Relevant: Tuna FIPs have been the predominant success story since whitefish and salmon, with few other commodities reaching certification; as FIPs seek alternative outcomes, definitions of success and completion may need to shift in order to measure cumulative impact of FIPs, given that the proportion of engaged seafood has flatlined.
4. FIPS are providing market benefits in a variety of forms, but there's no evidence to suggest that fishers are benefiting. →	Relevant with more exceptions than in 2020: Since 2020, additional models (Abalobi) and the HRSR Policy have increased focus of FIPs on fishers and local communities. However, research and interviews with fishers show that fisher organizations still bear a high cost of FIP implementation and the vast majority of FIPs do not engage fishers or fishworkers in the decision-making processes.
5. Dependable progress ratings are essential. Retailers and buyers rarely confront the issue of stalled and underperforming FIPs. →	Very relevant: Despite updates to ratings, confusion among retailers and narrow interpretations continue to undermine efforts to reward FIPs making legitimate progress. Retailers need to be educated that basic FIPs can never be rated "A", or that a "C" rating may reflect significant work within a challenging fishery. Progress ratings also need a more nuanced way to include social improvements in the fishery.
6. Key drivers of success now: a. on-the-ground implementation; b. real engagement by government; c. short and narrow supply chains; d. government and fisheries management capacity.	Very relevant: As in 2020, these elements are cited as important factors for FIP success by key informants and are supported by site visit observations. Government engagement and the capacity for good governance remain particularly significant barriers, especially in the Global South. As FIPs seek more diverse objectives, alignment on goals and consistent, reliable funding to support longer-term workplans have also become key to success.

Table 2.5 Insights from 2015 and relevance for today, continued.

2015 insights	Relevance to the current FIP landscape
7. You get what you pay for; 6a and 6b are expensive.	→ Somewhat relevant: Money helps, and comprehensive FIPs still show the greatest rate of completion and the most investment in terms of funding. However, overall cost of FIPs on an annual basis appears to be decreasing, indicating some efficiencies in process. We also observed increased leverage across multiple FIPs working as part of a greater ecosystem of projects, where the FIP serves to complement or effect impact at scale within aid and development efforts (USAID) or multilateral projects (GEF, Blue Action Fund).
8. Local capacity is a bottleneck.	→ Very relevant: As FIPs have continued to expand into new fisheries and geographies, there remains a need for local, inexpensive consultants to support implementation. The number of consultants is on the rise, especially in SE Asia and Latin America, but capacity remains limited. During site visits, we heard multiple local implementers lament they had to turn down or delay work with seafood industry partners wanting to launch FIPs due to limited capacity. Lack of experts with background in social responsibility work is another significant gap.
9. There are a variety of well-founded FIP critiques; rate of progress and opportunity cost are foremost among them.	→ Relevant: The ability to generate change in the water is still one of the biggest critiques of the FIP model. Opportunity costs will always be a question, and in 2025 the landscape has a number of alternatives to the FIP model for improving fisheries sustainability.
10. FIP model should keep evolving.	→ Very relevant: As in 2020, the FIP model has continued to evolve and scale by some measures (e.g., number of FIPs, diversification of funding, fishery type, implementers) but not others (e.g., volumes, recovered fisheries). Determining if all the categories and types of FIPs that now exist in the landscape are FIPs is an existential question but may be critical to protecting the legitimacy of the model.



FIPs have delivered on many of their stated intentions

Since 2015, CEA has tracked evidence to determine how well FIPs have met different expectations of the model. Solid evidence now exists to show FIPs have met at least half of these expectations, including capacity to create policy change, bring in new funding sources to fisheries management, and effectively bring industry to the table. And, in 2025, evidence that some FIPs can benefit local communities also exists.

Table 2.6 Degree to which FIPs have met select expectations of the model over time.

✓ Evidence supporting ↔ A mix of supporting and countering evidence ✗ Little to no evidence

2015 supporting rationale	2020	2025	Commentary
Local communities benefit from participating in a FIP.	✗	↔	CEA found evidence of local communities seeing organizational capacity improvements, improved data collection, and improved livelihoods. The rise in social FIPs focused on local community livelihoods as part of basic and/or bottom-up FIPs has helped drive these benefits, but many FIPs continue to overlook or exclude fishers and communities in their implementation, and there are cases where newly launched FIPs compete with existing FIPs or recently certified fisheries (Indonesia; Maldives).
FIPs bring industry to the table as a stakeholder and partner in conservation.	✓	✓	This is true for most FIPs, with a few exceptions; bottom-up FIPs may not have an industry partner, but often we see an evolution from “bottom up” to meet “top down” as industry alliances and associations become involved in the FIP process throughout its lifecycle (>5 years).
FIPs have raised the awareness of sustainable seafood among multilaterals.	✓	✓	UNDP/GEF now operate programs with FIPs in Indonesia, Philippines, Ecuador, and Costa Rica. USAID funding helped with FIP implementation via MDPI in Indonesia and Por la Pesca in Peru and Ecuador.
FIPs can bring in additional revenue from new sources traditionally absent from fisheries reform.	✓	✓	Industry contributions have continued to grow and now may represent up to half of all funding directly to FIP implementation. However, sustainable finance mechanisms remain nascent and limited.
FIP can create change on the water.	↔	✗	Stage 5 changes include improvements in fundamental measures (e.g., stock health) and document discovery or data analysis that sheds new light on the fishery, improving understanding of the fishery’s health.
FIPs can create change in fisheries policies and regulations.	✓	✓	There are now several examples of FIPs leading to management changes in various countries. FIPs have proven instrumental in generating data that can inform the development of fisheries management policies. For example, data from FIPs in Indonesia and Peru have been used to create harvest control rules.
FIPs extend the reach of sustainable seafood commitments, allowing for more comprehensive and actionable commitments from major buyers.	✓	↔	While buyer commitments remain a motivating driver for FIP formation, the ability of FIPs to effectively translate commitments is increasingly called into question in interviews. Stagnation of proportion of engaged seafood volumes and launch of MSC’s Improver Program suggest the FIP model may be limited in its effectiveness to drive actionable commitments from major buyers.
Processors have received financial benefits from engaging in a FIP.	↔	↔	Lack of transparency into this information limits assessment of financial benefits. Site visits and interviews revealed several processors were able to retain clients due to FIPs, but others noted FIPs were a cost burden.

Since 2015, FIPs have consistently built critical enabling conditions for sustainable fisheries management



FIPs effectively enhance coordination and participant engagement, improving fisheries management across diverse contexts.

FIPs serve as valuable platforms for organizing collaboration and communication within fisheries. They help increase government engagement (e.g., in Indonesia, Costa Rica), centralize information management (e.g., in Peru, the US), and incorporate fisher knowledge into management processes (e.g., in China, Indonesia, Mexico). By streamlining priorities and reducing duplication of effort, FIPs strengthen management effectiveness in both industrial and artisanal fisheries.



One of the most significant outcomes of FIPs is improved data collection and sharing, which strengthens fisheries management and policy.

FIPs often generate or reveal valuable data on stock status and ecosystem health, with implementers noting that data collection is frequently the first major success of a project. This information may come from uncovering existing but unused data or from new collection efforts supported by industry partnerships and technology. Enhanced data, paired with advocacy, has helped drive policy and regulatory changes in fisheries including EU finfish, Peruvian squid, and Sri Lankan blue swimming crab. As FIPs spread into more data-poor and data-limited contexts, data capture and generation has become an increasingly valued benefit of these initiatives.

In more complex fishery systems, FIPs alone are helpful but insufficient to drive change on the water



FIPs have achieved progress in policy influence and stakeholder engagement.

There is limited evidence of direct environmental change. Evidence indicates that FIPs have influenced fisheries policy and regulation, engaged industry and multilateral partners, and in some cases provided financial or community benefits. However, while they expand participation and funding for fisheries reform, there is little evidence that FIPs have produced measurable improvements “on the water.” Eighty percent of the reported State 5 changes are unlikely to actually be improvements associated with FIP-related activities. FIPs not covering enough of the stock, external threats, and unrealistic time horizons were all surfaced by key informants and site observations as contributing factors to lack of change on the water.



As timelines needed for change increase and objectives diversify, FIPs may best support change on the water as collaborative efforts alongside other initiatives.

In 2025, we are seeing that FIPs work well as part of a larger ecosystem of social, environmental, and economic improvement efforts. In particular, the following attributes of FIPs are leveraged to help advanced larger-scale fisheries reform: 1) transparent reporting of FIPs to monitor impact and identify gaps; 2) data generation for improved stock assessments; 3) multi-stakeholder collaboration and coordination for greater efficiency and effectiveness. Sometimes, these collaborations are embedded in the FIP model (Peru Mahi Mahi FIP, USAID Por la Pesca project); other times they are operating in parallel, leveraging the resources strategically (Costa Rica EM program and Eastern Pacific large pelagics long-line FIP (inactive); Solar Ice Maker Ocean Innovation Challenge (UNDP, GIZ) and SSF tuna FIPs in Maluku province, Indonesia).

FIPs positively contribute to wider portfolios of intervention for fisheries management

FIPs increasingly appear to be complementary pieces of larger portfolios of work on fisheries that collectively contribute to progress. Such efforts often provide win-win situations: FIPs leverage additional resources that these program provide; governments and other actors harness the convening and organizational structure as well as name recognition of the FIP to gain buy-in and efficiencies. Such efforts can contribute to diverse and complementary management objectives across ocean conservation space (Leadbitter, 2021).

Table 2.7 Examples of FIP overlap with other types of management or conservation effort.

Project or Initiative	Role of the FIP	Where we see this happening
Area-based management efforts	FIPs provide fishery-specific focus that can complement efforts, especially around 30x30 and demonstrating sustainable fishery management in multi-use MPAs.	Indonesia, especially where FIPs are intersecting with coral reef habitats Mexico MPAs – Gulf of California and Marismas Nacionales
Co-management approaches	FIPs can support producer organizations, especially SSF, to engage in more formal co-management models (GEF project).	Chile: red octopus; stone crab (now inactive)
Electronic monitoring	FIP implementers can help facilitate the implementation of electronic monitoring onboard vessels to meet MSC’s observer coverage requirements.	Pacific Ocean tuna (TTLA) – longline Pacific Ocean tuna (Fue Shin) – longline
Combatting IUU	FIP helps support multistakeholder convenings, data collection and aligns with producer and industry organizations’ goals, such as CAPECAL and Peru Mahi Alliance.	Peru mahi-mahi longline (WWF Peru and Peru Mahi Alliance) and Peruvian jumbo squid (WWF Peru and CAPECAL)



Chapter 3



Findings by Core Research Questions (RQs)

1. How is the fishery improvement landscape evolving?

Summary of the FIP landscape

FIPs are now more complicated than ever as the landscape has expanded in terms of end goals, geographies, commodities, and the political contexts in which FIPs operate. Compared with 2015, FIPs operate in 50% more countries, work on 70% more species, and interact with 40% more small-scale fisheries.

In particular, the landscape of FIP implementers has expanded dramatically. In 2016, there were 122 unique FIP leads; today that number is over 300. This increase is driven in large part by more industry leadership and, to a lesser extent, the expanding role of consultants in implementing FIPs. Further, a greater percentage of FIPs are being led by multiple types of implementers. FIPs with both an industry and NGO lead now represent the plurality of FIPs.

At the same time, the number of active and completed FIPs is plateauing and may be decreasing. The total number of active and completed FIPs began to plateau in 2022 and declined between 2023 and 2024. It remains to be seen if this trend will continue.

FIPs appear to now be utilizing a continuous improvement approach as opposed to a linear approach with a clear off-ramp. The patterns of FIP progress ratings suggest that FIPs achieve regular improvements over their lifespan, with varying degrees of frequency. However, these improvements rarely lead the FIP to achieve completion, calling into question whether FIPs follow a linear path from launch to completion.

Emerging models in the fisheries improvement landscape build on the original FIP model to varying degrees. “FIP-adjacent” models share characteristics with the original FIP model, such as the use of certifications, structured workplans, and reporting tools like FisheryProgress. Nevertheless, these models use different structures, incentives, and business models to drive progress. Place-based alternatives differ more significantly from FIPs as they operate at broader scales and require longer time horizons. In some cases, these models even integrate FIPs as components within their broader framework, demonstrating the continuing interdependencies among fisheries improvement efforts.

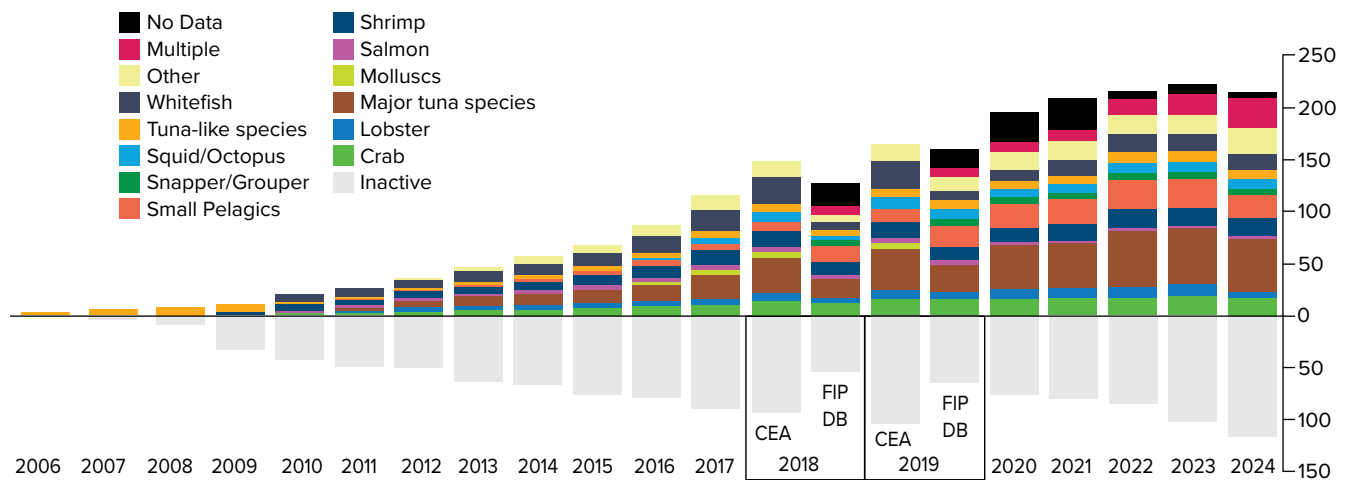
The number and diversity of commodities targeted by FIPs are increasing

While tuna FIPs still dominate, as they did in 2020, their growth has leveled off. FIPs targeting multiple species have grown, as have FIPs targeting lobster, squid/octopus, and other miscellaneous fish.

Tuna FIPs' meteoric growth has slowed in recent years, although current numbers are misleading because reporting requirements split projects into different individual FIPs. Since 2016, there have been more tuna FIPs than whitefish FIPs. This is a result of both more attention being paid to tuna globally and single tuna projects needing to report as separate FIPs to satisfy public reporting templates. WWF/OPAGAC runs one project that is reported as four FIPs on FisheryProgress because of reporting requirements. As such, this proliferation in the number of FIPs has not necessarily led to an increase in volume in FIP-engaged tuna catch, as more FIPs have a smaller volume scope.

After many years of continued growth, whitefish FIPs have leveled off in the past few years. This is partially due to many whitefish stocks having passed through the program already.

Figure 3.3 Number and diversity of commodities engaged in FIPs over time.



Whitefish FIP volumes are down, while squid/octopus is on the rise

Volume changes across the three CEA review cycles highlight differences in FIP and MSC engagement across commodities. FIP volumes of whitefish have fallen precipitously since 2020, while squid and octopus volumes have skyrocketed. The landings of many other commodities, such as large pelagics and molluscs, have stayed similar since 2020.

Table 3.1 Change in volume of different commodities in FIPs over time.

Thousand tons of catch	2015		2020		2025		
	FIP	% Global landings	FIP	% Global landings	FIP	% Global landings	
Crabs, lobsters, and crustaceans	157	6%	181	7%	115	11%	↑
Molluscs	*	0%	44	2%	44	3%	→
Major tuna species	3744	77%	1661	33%	1521	30%	↓
Miscellaneous fish	29	0%	68	0%	61	0%	→
Salmon and diadramous fish	10	1%	33	4%	*	0%	↓
Shrimp	207	6%	258	7%	183	7%	→
Small pelagics	3397	17%	4276	21%	4365	9%	↓
Snapper/grouper	*	0%	206	20%	149	15%	↓
Squid/octopus	227	5%	46	1%	708	24%	↑
Other tunas, bonitos, billfishes	101	4%	85	3%	81	3%	→
Whitefish	846	9%	1219	12%	277	4%	↓
Total	8719	11%	8077	10%	7506	8%	↓

*negligible

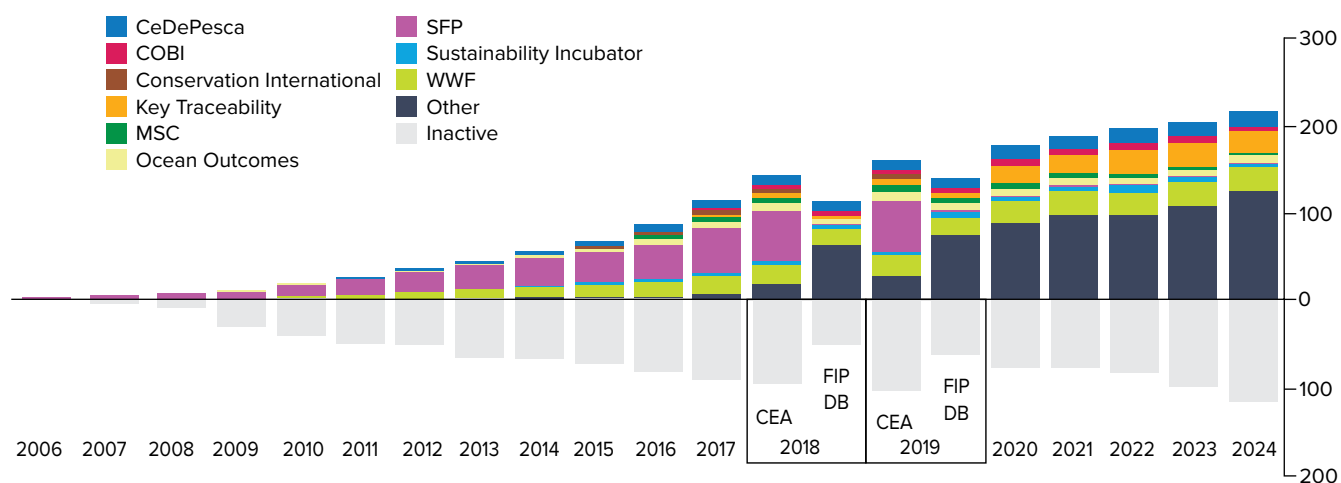
More FIPs are being led by non-NGOs, especially industry

A greater proportion of FIPs in recent years are being led by actors outside of the traditional NGO implementers. Growth in “other” implementers (bottom bar) has occurred especially since 2022. Note: 2018-2019, growth in “other” is partly due to recategorization of SFP; FIP DB does not categorize Sustainable Fisheries Partnership (SFP) as a lead implementer for nearly all FIPs in which the CEA database (through 2019) did categorize SFP as a lead. However, even outside of those differences, there is a notable increase in the number of FIPs led by other actors.

In general, we see more diversified implementer types in recent years. FIPs are now implemented frequently by industry, consultants, academic institutions, or NGOs outside of the traditional implementers.

FIPs are also being led more frequently by multiple implementer types. This is discussed in greater detail on the following slide, but many of the FIPs being led by NGOs also have an industry partner, and vice versa.

Figure 3.4 Major FIP Implementing entities.



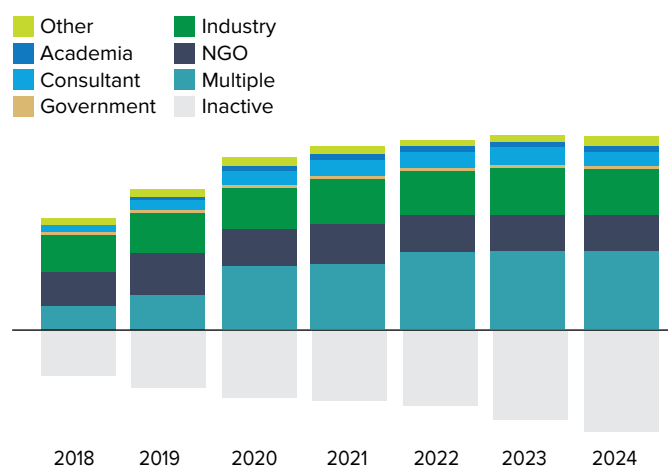
Industry, consultants, and NGOs continue to lead FIPs, but rarely alone

The number of FIPs listing multiple organization types as leads more than tripled between 2018 and 2023, from 28 to 90. This group now represents the plurality of FIPs. However, it is worth noting that a “lead” organization is not defined in the CASS guidelines, and there appear to be different responsibilities for “lead” organizations across different FIPs.

The number of FIPs listing at least one industry lead grew strongly until about 2021, but growth has slowed in the past four years. In 2018, 47 FIPs listed an industry organization as a lead, and in 2023, 74 FIPs listed at least one industry lead. Further, the number of FIPs listing a consultant as a lead has jumped from 12 in 2018 to 48 in 2023.

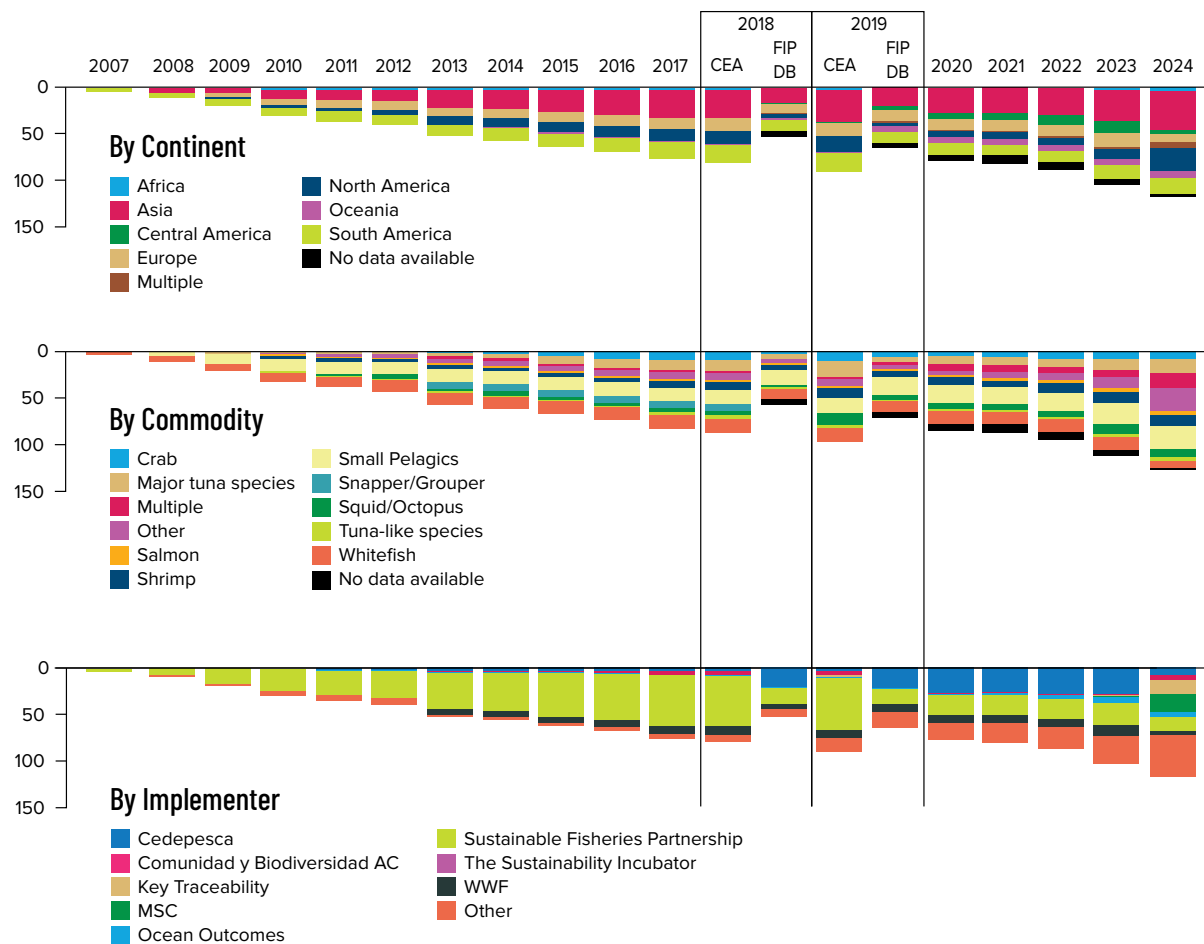
While more FIPs are listing industry or consultants as a lead organization, nearly all of these FIPs have leads from other sectors as well. Thus, while we have seen substantial growth in the number of FIPs with industry and consulting leadership, these organizations rarely lead a FIP alone.

Figure 3.5 Different kinds of entities listed as leads for FIPs.



Inactive FIPs have grown substantially in the last three years

Figure 3.6 Geographic, commodity, and implementer data for inactive FIPs.

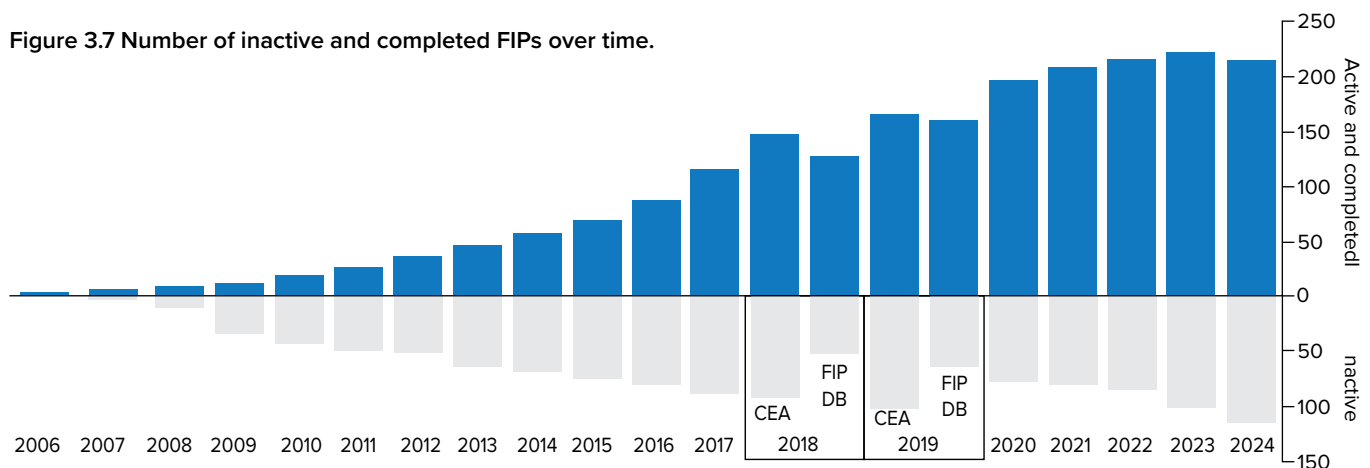


The number of active and completed FIPs has plateaued and may be declining

The number of inactive FIPs has been increasing steadily for the past three years. In 2024, it appears that the number of new FIPs was not enough to fully account for the substantial increase in inactive FIPs and thus, the number of active and completed FIPs may have declined for the first time in two decades.

COVID-19, lack of resources to implement the HRSR Policy, and funding were all cited as reasons for FIPs going inactive.

Figure 3.7 Number of inactive and completed FIPs over time.



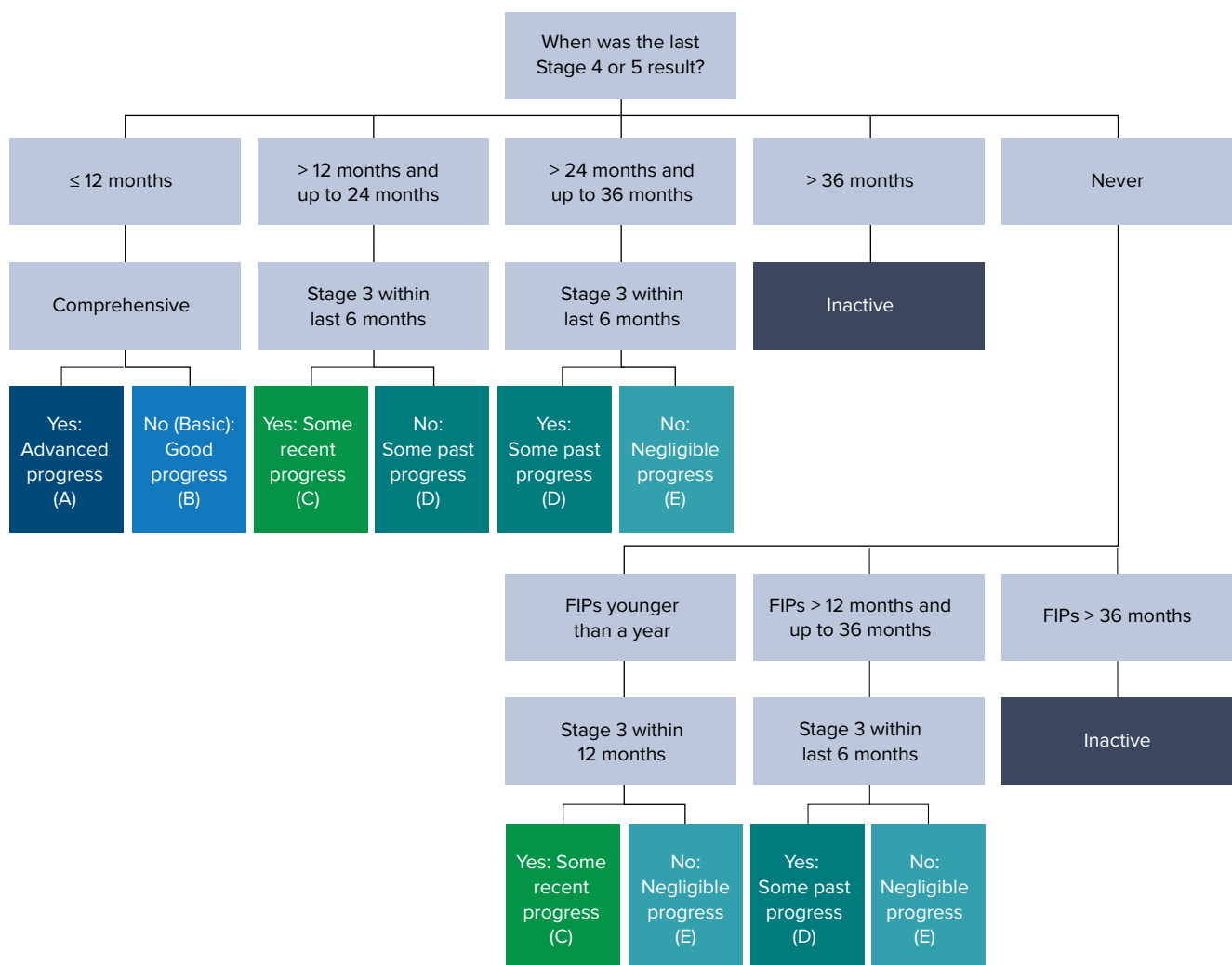
FIP Progress Ratings are based on FIP age and how long it has been since the FIP last achieved a Stage 3, 4, or 5 event

The flow chart at right demonstrates how SFP determines a FIP's grade. The determination considers the time since the FIP achieved a Stage 4 or 5 event, the time since the FIP achieved a Stage 3 event, and the FIP's age.

The grading system was updated in 2021, in part with the intention of rewarding FIPs that maintain more regular progress.

- The “Inactive” categorization was added to differentiate FIPs that have never achieved a Stage 4 or 5 event and are over three years old.
- Lower grades denote FIPs that have not made progress recently or newer FIPs that have made little progress overall.
- Key informants noted that some FIP implementers “game” this system by strategically reporting updates across six-and twelve-month cycles, even if the progress was made over different timeframes.

Figure 3.8 SFP grading system for FIPs. Based on Figure 1 (page 14) of SFP's “FIP Evaluation Tool 2021”.



Almost none of the FIPs on FisheryProgress are failing (as defined by Progress Ratings)

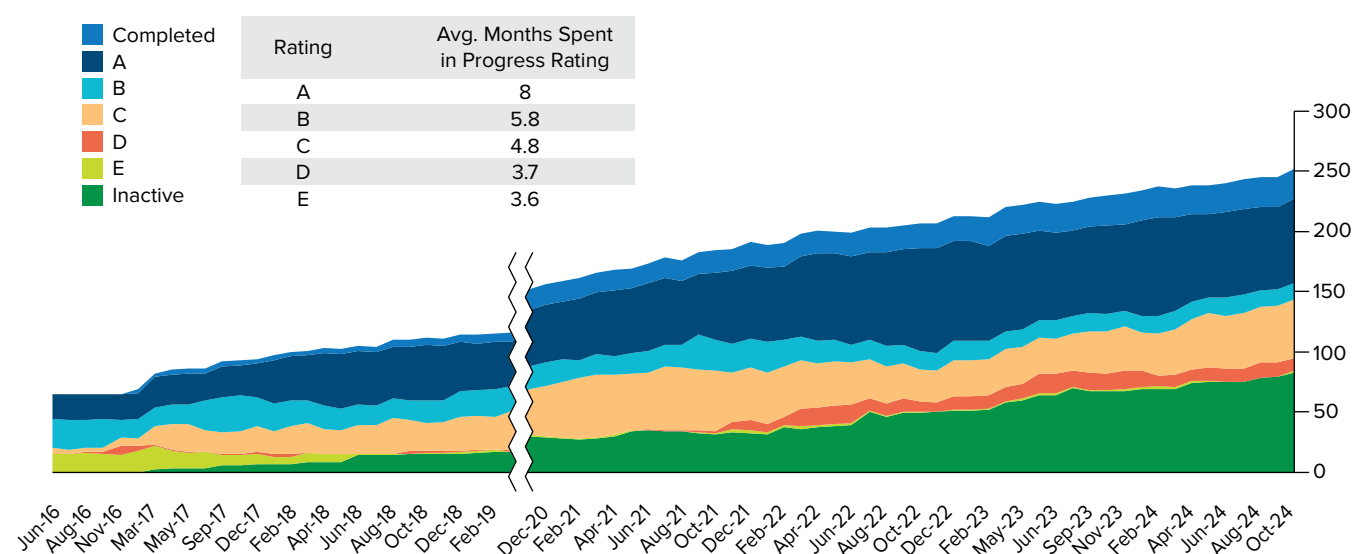
The past five years have seen a dramatic increase in the percentage of inactive FIPs. The plurality of FIPs that were active in November of 2020 went inactive by November of 2024 (see the following page for additional details).

The majority of FIPs have Progress Ratings of A or B. This measure of a “well-performing FIP” comprises nearly two-thirds of active FIPs reporting on FisheryProgress. A-rated FIPs alone make up 49% of those reporting, 7% higher than in the previous report.

The plurality of remaining FIPs have a Progress Rating of C. FIPs rated D and E, which made up 34% of FIPs in 2016, declined to almost none in 2019 (2 D and no E); this increased to 11 D and 1 E in October of 2024.

All but 12 FIPs are making sufficient progress (i.e., grades C or above), suggesting “grade inflation,” although this grade inflation is not as bad as in previous years. “Grade inflation” is a process by which FIPs are either reporting in a way that ensures that they maintain a passing Progress Rating and/or that Progress Ratings are not fine-tuned enough to reflect certain FIPs lack of progress.

Figure 3.9 Number of FIPs in different grade categories over time.



A-graded FIPs are most likely to reach completion, yet still rarely do; many more end up inactive

Few (n=5) FIPs that had an A grade in November 2020 ended up completed; the plurality of FIPs with an A in November 2020 ended up inactive (n=16). A-graded FIPs are more likely to reach completion than other FIPs, but completion rates are still very low.

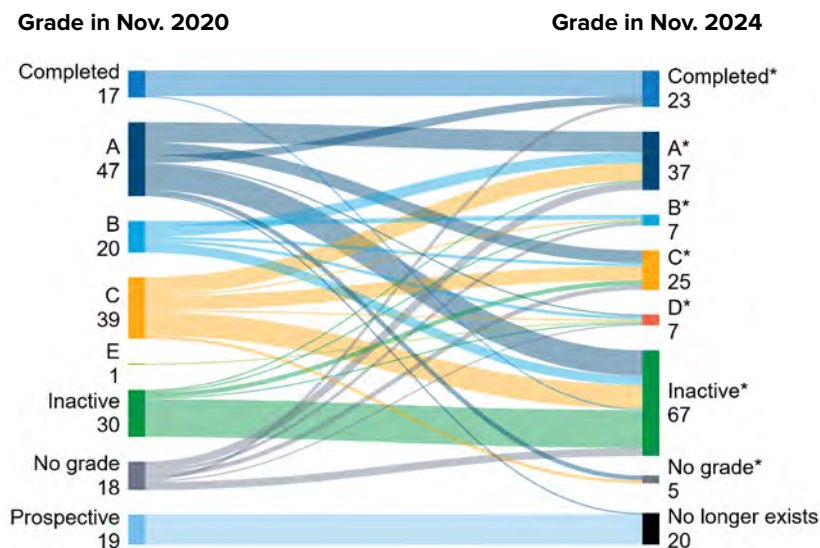
The plurality of FIPs that existed in November 2020 were Inactive by November 2024 (n=43), while six FIPs that were inactive in November 2020 were reactivated in November 2024.

Thirteen FIPs maintained their A over the four-year period, suggesting frequent, ongoing improvements. A few FIPs graded A in November 2020 dropped to C (n=8) or D (n=1)

Most of the FIPs graded B in November 2020 shifted to A (n=7) or went inactive (n=6). The large number of B-graded FIPs shifting to A was due to a change in grading rules that occurred in 2021.

The chart to the right only shows FIPs that existed in November 2020 (n=191).

Figure 3.10 Fate of FIPs depending on starting grade in November 2020 through December 2024.

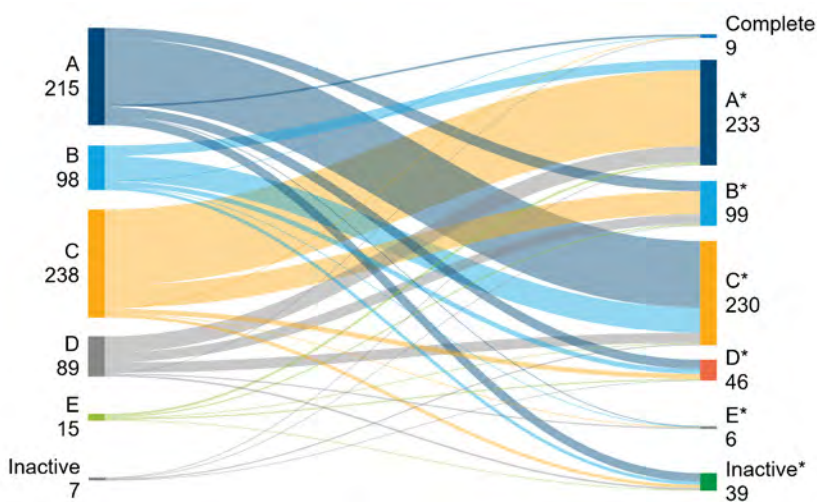


Of all grade changes between November 2020 and December 2024, transitions from A to C or vice versa were most common

FIPs frequently flip-flop between Grades A and C for years before going inactive, which suggests many FIPs utilize a continuous improvement approach. The pattern indicates that many FIPs would achieve a Stage 4/5 event and then have a gap of 12-24 months before achieving the next one. Many FIPs went through this pattern for years before eventually going inactive. This suggests that many FIPs are undergoing infrequent, but regular, improvements over long periods of time without ever achieving a final goal or off-ramp. This lends credence to the notion that FIPs are utilizing a continuous improvement model, rather than a linear progression toward completion.

D-graded FIPs are highly likely to improve, suggesting low grades motivate FIP implementors. 92 percent of all stage changes from a D grade were improvements; only 8% of changes from D led to E or inactivity. FIPs that start at a D grade are more likely to improve their Progress Rating than FIPs starting at other grades.

Figure 3.11 Shifts in proportion of FIPs in different grades between November 2020 and December 2024.





Rise of alternative models

Comprehensive FIPs are not strong engines for certification; new alternative approaches aim to take on that role

A decade ago, comprehensive FIPs were the gold standard for fisheries seeking to reach certification. This is no longer the case.

- Certification rates have been low overall (10% of all FIPs); where certifications have occurred, nearly half have come with conditions (including all tuna FIPs certified – see next page).
- MSC's improver program provides a more rigorous (and expensive) process than comprehensive FIPs that aims to increase likelihood that a fishery will achieve certification.
- Many comprehensive FIPs are no longer seeking certification as an end goal.

Table 3.2 Characteristics of FIPs and the new alternative MSC improver program.

Requirements	Basic FIP	Comprehensive FIP	MSC Improver Program
MSC performance indicators	Partial	All	All
Workplan development	Led by FIP participants; prioritize based on performance indicator scores in pre-assessment	Led by FIP participants, often with support from expert NGO or consultant; prioritize based on performance indicator scores in pre-assessment	Led by a conformity assessment body (CAB); prioritize activities based on scoring issues within each performance indicator
Required audit	None	Once every 3 years	Annual
Verification	FisheryProgress	FisheryProgress	CAB reviews for each action
Funding	Philanthropy and industry	Philanthropy and industry	Access to transition-assistance fund within Ocean Fund

The vast majority of fisheries with MSC certification since 2010 have kept their certification. This is especially the case for tuna FIPs.

Every tuna FIP certified came with conditions. Just under half of all certified FIPs (45%) received conditions; 100% of tuna FIPs did.

The high percentage of FIPs certified with conditions (nearly half) has raised concerns regarding robustness of this pathway.

Table 3.3 FIPs that reached certification and their current MSC status.

FIP	Completion	Current MSC Status
Barents cod/haddock	April 2010	Certified
East Baltic Cod	April 2011	Withdrawn
Argentine hoki	May 2012	Withdrawn
Russian SOO pollock	September 2013	Certified
Orange Roughy ESCR	December 2016	Certified
Orange Roughy NWCR	December 2016	Certified
Orange Roughy ORH7A	December 2016	Certified
Cook Islands yellowfin tuna–longline	March 2017	Certified with conditions
New England ocean perch–hook and line/otter trawl	April 2018	Certified
Bahamas spiny lobster–trap/casita	August 2018	Full Assessment
US Acadian redfish, pollock, and haddock–trawl	August 2018	Certified
FSM yellowfin and bigeye tuna–longline	October 2018	Certified with conditions
Guyana Atlantic seabob–otter trawl	August 2019	Certified
Russian Pacific cod and halibut	October 2019	Certified
Marshall Islands bigeye and yellowfin tuna–longline	October 2019	Certified with conditions
Cook Islands bigeye tuna–longline	August 2020	Certified with conditions
Indonesia Banda Sea yellowfin tuna–handline	January 2021	Certified with conditions
Russia West Bering Sea pollock–midwater trawl	July 2021	Certified
Western & Central Pacific skipjack & yellowfin tuna–purse seine (CFC)	August 2021	Certified with conditions
China manila clam–dredge	September 2021	Certified
Atlantic Ocean tropical tuna–purse seine (OPAGAC)	December 2021	2 stocks cert. w/conds, 2 full assessmt
Eastern Pacific Ocean tropical tuna–purse seine (OPAGAC)	December 2021	Certified with conditions
Indian Ocean tropical tuna–purse seine (OPAGAC)	December 2021	2 stocks cert. w/conds, 1 withdrawn
Western and Central Pacific Ocean tropical tuna–purse seine (OPAGAC)	December 2021	Certified with conditions
Russia Western Kamchatka salmon–beach seine/trap net	February 2022	Certified
Eastern Pacific Ocean tropical tuna–purse seine (TUNACONS)	July 2022	Certified with conditions
Western Central Pacific Ocean tuna–longline (Yaizu)	March 2024	Certified with conditions
Pacific Ocean tuna–longline (Thai Union)	June 2024	Certified with conditions
Western and Central Pacific tuna–purse seine (Thai Union)	July 2024	Certified with conditions

A range of new fisheries improvement approaches now complement or exist in parallel with the original FIP model

CEA observed a range of alternative models that have emerged in response to the FIP model's practical limitations. Some of these models seek to drive durable change on the water through focused efforts on governance reform and co-management. A key focus for several alternative models has been to identify different channels for generating market demand, especially in contexts where traditional certification and ratings frameworks are not powerful incentives. FIP practitioners consistently noted that FIP requirements, particularly those of comprehensive FIPs, may not be suitable or realistic for small-scale fisheries contexts. These alternative approaches adapt the FIP model's limitations and the need for more solutions that align with local capacities, incentives, and improvement pathways. See Appendix A4 for detailed descriptions of different models.

CEA organized this portfolio of alternative models into two distinct approaches:

FIP-adjacent models

draw from key elements of the FIP model (e.g., use of certifications, workplans, and reporting tools) while experimenting with different structures, incentives, and business models.

Place-based alternative models

operate at broader scales and/or using alternative mechanisms to promote improvement.

FIP-adjacent models share characteristics from the original FIP model, but differ in the structures, incentives, and business models

- FIP-adjacent models share certain characteristics with the original FIP model, such as the use of certification frameworks, structured workplans, and reporting tools like FisheryProgress.
- Eco-certification improver programs – like those organized by MSC and MarinTrust – use rigorous auditing methods to evaluate FIP progress against their workplans. These improver programs aim for fisheries to move toward certification readiness, often with financial support and clear, time-bound milestones (5 years).
- Social certification initiatives (e.g., Fair Trade, Community Catch) may use FIPs as an organizing tool but focus explicitly on human rights, labor conditions, and community well-being as part of their standard criteria.
- Fisher-led improvement models prioritize capacity-building among fishers —enhancing their data collection skills, quality control, and post-harvest handling — while providing broader social supports such as financial literacy programs and insurance coverage.

FIP-adjacent models

Eco-certification improver programs



Social certifications



Fisher-led improvement models



Market-based value recovery models



Place-based alternative models represent a more significant departure from the original FIP model

Place-based alternative models operate at broader scales, commonly addressing entire supply chains, ecosystems, or jurisdictions.

- In recognition of the limits of improving fisheries management at the single-stock level, place-based alternatives seek to drive change at an ecosystem or jurisdictional scale. These models leverage government and co-management platforms to implement improvements. Given their scale, place-based alternative models generally require timeframes longer than 5 years to be implemented and achieve success.
- Despite their independence, these models still draw inspiration from FIPs by using market-based mechanisms, certification schemes, and industry partnerships to stimulate demand for responsibly sourced seafood. In some cases, jurisdictional or ecosystem-level programs even integrate FIPs as components within their broader framework, demonstrating the continuing interdependencies among different fishery improvement models.

There may be opportunities for the fisheries sector to learn from approaches used in other industries. For instance, the produce sector has piloted continuous improvement models (e.g., Ethical Charter Implementation Program) that focus less on formal auditing and more on producers' self-assessments of risk. These models emphasize providing tools and resources directly at the farm level to drive progress.

Place-based alternative models

Larger-scale improvement and management models



Managed access
with reserves



Jurisdictional approaches



Improvement models piloted in other sectors



Ethical charter implementation
program (ECIP)



The FIP-to-certification pathway often doesn't suit small-scale fisheries, prompting efforts to explore alternative models

For small-scale fisheries (SSFs), the economic case for pursuing eco-certification is weak due to limited production volumes. Certification generally makes sense only when volumes are large enough to maintain competitive prices, cover the costs of certification and reassessment, and sustain the fishery's operations.

- Key informants representing lower-volume, SSF FIPs noted that while these projects aim for certification to secure market advantages, they often face human capital and supply constraints that raise the price per kilogram of raw material, undermining competitiveness. One implementer from a certified tuna fishery in Southeast Asia described struggles to remain competitive with rival tuna producers; to address this, the fishery is now expanding its unit of assessment (UoA) to include more vessels, hoping to increase catches, lower costs, and generate higher returns for fishers and operations.
- Other informants suggested that lower volume SSFs should consider alternatives that may be able to improve their market positioning.

A focus on MSC certification can cause many SSF FIPs to distract from broader priorities that could drive more meaningful social change. Multiple key informants noted that many of the current eco-certifications stop short of addressing broader structural challenges that may lead to more meaningful benefits for fishers than eco-certification. The emergence of alternative certifications, such as Community Catch or Fair Trade, in addition to implementer-specific models (e.g., Blue Ventures, ABALOB, C-FIP) may offer a pathway to market access while still addressing high-priority risk factors (e.g., lack of adequate infrastructure, limited financial literacy, etc.).

The traditional FIP model raises fundamental questions about its relevance for SSFs. If certification is neither economically viable nor contextually appropriate, should these fisheries remain within a framework designed as a pathway to eco-certification? Once a cooperative “graduates” from a FIP without achieving certification (e.g., ‘Basic’ FIPs), it often loses the visibility and recognition associated with ongoing improvement efforts. Without an alternative mechanism to acknowledge social or management progress, these fisheries risk being overlooked despite credibly meeting both environmental and social objectives. This underscores the need to explore off-ramps beyond certification and consider pathways that acknowledge and reward continuous improvement.



“FIPs use the MSC standard to assess progress. The result is that you have a market player that wants certification, but only if it makes economic sense to do so. Certifications are expensive. Small volume fishery costs are higher per kilo than big industrial fisheries...”

—NGO implementer

“One of the main issues that FIPs have is that you don’t know what happens when a fisher cooperative graduates from a Basic FIP – then they could lose everything. They don’t have a certification or anything to acknowledge they’re participating in a sustainability program.”

—Buyer for Mexican FIPs

2. What kind of impacts are FIPs generating and how are these measured?

Summary of FIP impacts (1 of 2)

FIPs increase coordination across fishery participants, successfully generate new, relevant data for fisheries management, and contribute to policy change. Change on the water, however, remains elusive.

FIPs are recognized as an effective tool for increasing coordination to support more effective management across a wide range of fishery contexts. From providing a structured pathway to increase government engagement (Indonesia, Costa Rica) to providing centralized information management (Peru, US), to supporting greater inclusion of fisher knowledge and perspective in fisheries management processes (China, Indonesia, Mexico), FIPs provide a platform for participants to discuss priorities and engage in activities in an organized fashion. This helps reduce duplication of effort and has been noted as a major benefit of the FIP in both industrial and artisanal fisheries.

New data may be generated or “uncovered” through the FIP process; either way, the result is better insight into stock status and ecosystem health. Interviews with FIP implementers noted that often the first and best outcome of a FIP is collection of data. Depending on the FIP structure, new data may be the result of simply accessing and sharing information that already existed but was not being applied, or it can be new data collection efforts (red swimming crab, China). For the latter, this data generation is often the result of partnerships with industry and supported by technology. This improved data, combined with advocacy, can help drive policy and regulatory change (finfish in EU, squid in Peru).

“The FIP enables to actors to talk. Because they meet and take the time to talk, they can discuss how to improve the fishery. The coordinator of the FIP has its own website and everything is there. This is the focal point for the FIP implementers. It’s provided a forum for different actors to talk to each other.”

—FIP implementer, EU

“The FIP has created a venue for positive research and efforts to be harnessed in one location. We knew we were doing good things but it was very piecemeal – it’s all centralized and accessible for people to see what we’re doing.”

—FIP industry participant, US

Summary of FIP impacts (2 of 2)

Current reporting systems for FIPs overstate change on the water while underrepresenting progress in other areas.

Few FIPs demonstrate clear evidence of environmental improvements; most point to changes in practice that theoretically could lead to stock recovery and healthier ecosystems.

- FIP implementers noted upticks in compliance and/or changes in gear as evidence of positive impacts. For example, in the US, the FIP helped increase awareness of the high penalties for harvesting oysters in closed areas, helping to reduce the level of illegal poaching that was happening. In Indonesia, changing gear to a larger mesh size helped to reduce catch of juvenile crab while changes to FAD design in tuna FIPs in the Indian Ocean helped to reduce bycatch. New electronic monitoring systems are helping to verify these claims)
- When it comes to impact on endangered, threatened, or protected (ETP) species, site visits and interviews noted the many trainings and tools FIPs provide to support proper handling and release of ETP; however, a study of twenty-seven FIPs with high likelihood of ETP interactions showed the majority lack the monitoring or mitigation processes needed to reduce impacts effectively (Morgan et al, 2022).

Most change on the water reported by FIPs is due to improved information, not recovery of stocks. There are only a handful of cases where improvements in stock health can be associated directly with FIP activities (e.g. Ecuador small pelagics FIP). As was the case in 2020, manual review of all change on the water (Stage 5) events reported by FIPs revealed that the majority were due to improved data proving stock status was better than originally thought; or, if change on the water was recorded, it could not be directly linked with FIP activities. Current reporting systems therefore overstate the degree to which FIPs are driving change on the water.

Reporting platforms fail to adequately reflect social improvements, structurally overlooking progress. As FIP implementers work to comply with the HRSRP and leverage social benefits as a means of incentivizing engagement and building more equitable outcomes for FIPs, they are often having to sequence environmental and social activities in the workplan. But the current reporting framework does not provide the opportunity for FIPs to accurately report on their efforts and milestones in the social space, creating a false appearance of stagnation as the FIP slows environmental progress in exchange for social improvements. This is creating frustration and burn out among FIP participants and reducing transparency for buyers looking for responsible seafood sourcing options.

Effective coordination increases efficiencies and helps garner government engagement

The FIP process breaks down silos to foster direct relationships and participation among industry, government, and civil society organizations. For fisheries where government interest or capacity to participate has been historically low, FIPs have served as the impetus and pathway to bring fishers, supply chain companies, and fisheries agencies to the same table (Indonesia handline tuna, EU finfish).

By building coordination, FIPs help streamline data collection and sharing processes, increasing efficiencies in the management process. This is especially beneficial when FIPs are one of multiple initiatives operating within a single region or fishery.

Assessments can help highlight where there are gaps and better coordinate response. Several implementers noted that pre-assessments were an effective way to align different fisheries actors — including government — to divide and conquer more effectively and reduce duplication of efforts.

Coordination with industry requires patience and incremental asks. Interviews with FIP implementers that engage industrial fisheries noted that industry often needs smaller, incremental actions over longer time periods to stay onboard. Asking too much all at once leads to attrition. For artisanal FIPs, fishers often need immediate incentive to have capacity to engage — these incentives may require support for activities that are not the most efficient pathway to change on the water, but they do support long-term participation so fishers can eventually move improvements.

“But results may take time. Long-term FIPs may take time because of cost — may need to move [a] small percentage of effort over longer time periods. Industry can’t afford to do all the changes all at once.”

—Global FIP implementer

“If the FIP structure and FisheryProgress was to go away, I’m not sure we would have been able to formalize this procedure and get where we are... [FIPs] are important. I hope they never go away.”

—FIP industry implementer

FIPs participants consistently report FIPs deliver improved data to inform sustainable fisheries management

FIP participants commonly cited the capacity to contribute better data for improved fisheries management as a key benefit of the FIP. This sentiment includes reflections on FIPs’ providing more data as well as improved data to support fisheries management.

FIP helps identify the specific data gaps and then fill those data gaps. By providing a framework to hone data collection needs, FIPs help direct limited resources to the most critical data gaps. This includes information on target species, bycatch, and general management strategies.

Quality of data is often improved through the FIP process. This may be a result of engagement of more industry actors (increasing the comprehensiveness of data collection) and/or it can be the result of engaging other experts, such as from academia, to support data collection and analysis processes.

“In terms of data, there were no stock assessments for the FIP fishery [pre FIP]. So, there’s been a lot of progress in terms of data collection. Thanks largely to the FIP, there are stock assessments for all stocks and proper scientific advice.”

—FIP implementer in Africa

Not only is data improved, it is also trusted. Multiple FIP participants noted that the FIPs, by engaging industry, government, and often independent researchers in the data collection process, helped to increase trust in the data (China red swimming crab, Indonesia snapper/grouper).

“Comprehensive FIPs drive forward data solutions that are trusted, and trust in data is needed for sustainable fisheries management to cause change on the water.”

—FIP implementer in Latin America



Data generated by FIPs benefits fisheries management in multiple ways

Tools and processes that support data collection and analyses during a FIP can support longer-term management. Solutions such as e-logbooks for fishers or engaging academic researchers to support long-term population monitoring provide durable resources for improved fisheries management.

Data generated by the FIP can help inform adaptive fisheries management by providing updated assessments on stock and ecosystem health. With more reporting, more frequently, FIPs help local governments and industry be more responsive to changing conditions, including monitoring the effectiveness of management strategies.

Improved data and monitoring of bycatch are common outcomes of both small-scale and industrial FIPs. FIPs have supported training in bycatch reporting, which provides ongoing data to government officials.

Data collection is often an effective way to positively engage fishers and vessel owners in the management process. Across both industrial and artisanal fisheries, FIPs have supported training and technology implementation (EM, mobile applications) that facilitate fisher-led data generation and sharing. This process leads to stronger engagement and buy-in of producers. The GEF Marine Commodities project reinforces this finding, noting that, when paired with co-management models, FIPs can be a powerful way to catalyze effective fisheries management.

“It’s hard to say if there’s progress on the water, but I can say management has significantly improved. We have more data from landings, vessels, and processing factories”

—FIP implementer in South America

FIPs increasingly appear to contribute to policy change, as reflected in field and FisheryProgress data

FIPs have been successful in driving management plans. In Indonesia, both the blue swimming crab FIP and the yellowfin tuna FIPs are credited with providing important data and pressure on government to advance national management plans. In Peru, FIP partners played a key role in securing policy change to move from an open-access to a closed fishery, a step needed for sustainable management.

Several FIPs noted policy changes to help prevent illegal fishing. For example, regulations in Sri Lanka, supported by the FIP, have helped to reduce illegal fishing by outside trawlers; in Indonesia, the mud crab FIP has seen new local-led village decrees formalize size limits and spawning-ground closures.

“We are being seen by the government and have more opportunities to shape the regulations. The government is noticing us.”

—Tuna industry association, Indonesia



Larger movements pushing policy reform can benefit from FIP engagement. FIPs have contributed to national policy reforms that were the result of broader movements. In Peru, for example, the government published a new giant squid regulation (ROP) as part of the larger movement under to the USAID Por la Pesca project to decrease IUU fishing and improve sustainability.

Review of the literature revealed general agreement that FIPs effectively bring more actors to the table to improve fisheries and can result in policy changes.



“The recent review of FIPs found that 30% of all FIPs demonstrated some type of policy output implemented by the government.”

—Kall, 2022

Time to Stage 4 change is now more accurately reported and shows tuna in the lead

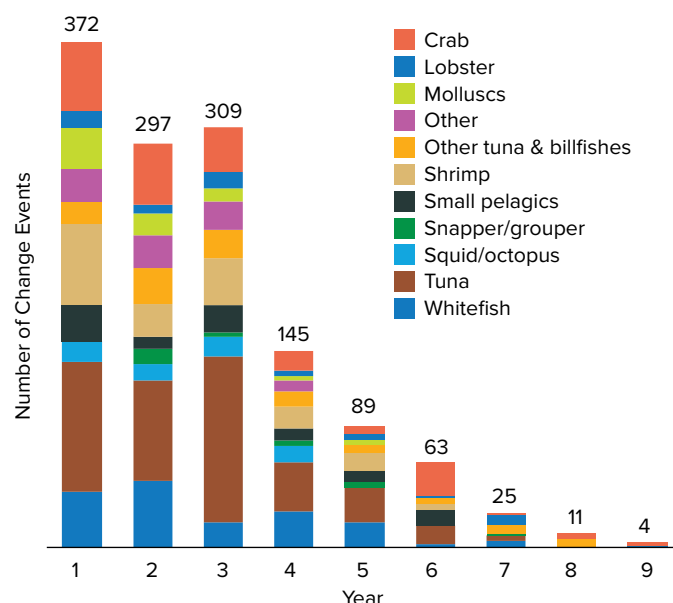
The percentage of Stage 4 events in years 2 and 3 increased compared to 2020. In 2020, we found a 50% drop-off in Stage 4 events after year 1; we now see that drop-off shifting to year 3. This is likely a more accurate reflection of the timeline that FIPs require to achieve Stage 4 event change. In the 2020 report, there was an artifact of FisheryProgress coming online, whereby all existing FIPs reported all their accumulated change up to that date in year 1.

Tuna FIPs are slightly more likely to achieve Stage 4 compared to other FIP types. Tuna FIPs alone composed more than 25% of all Stage 4 changes.

FIPs covering all commodity types achieved at least one Stage 4 event in their first two years.

Snapper and grouper appear to have disproportionately few Stage 4 events, compared with the number of total snapper and grouper FIPs.

Figure 3.12 Number of Stage 4 change events by commodity across duration of the FIP.

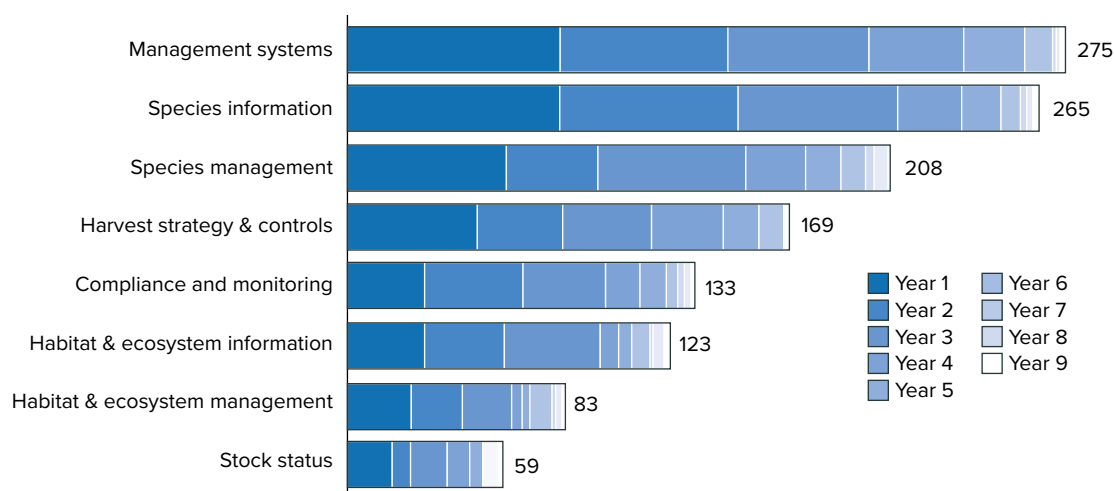


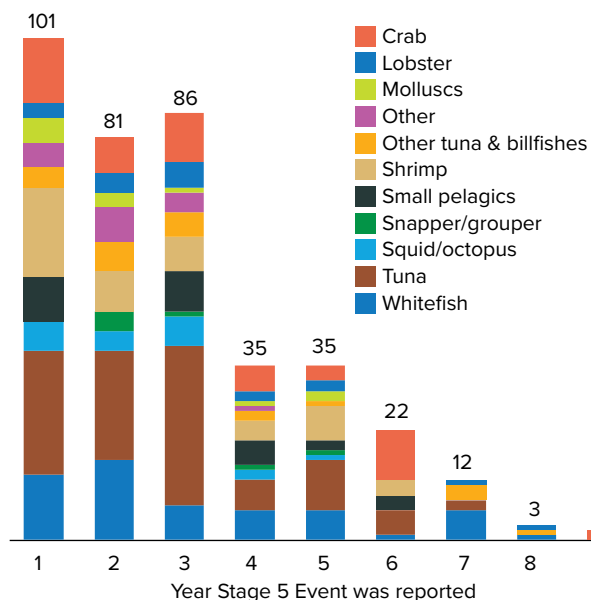
Consistent with 2020, management systems and data remain the leading areas of FIP impact

Analysis of reported change events shows that “management systems” (i.e., improvements in the structure and processes of management systems) and “species information” are the most frequently reported categories for Stage 4 events. This reinforces key informant and site visit observations that FIPs are effective at generating better data and can support policy changes.

The pattern shown here is similar to 2020. The most common methods of achieving Stage 4 today appears to be the same as in 2020.

Figure 3.13 Types of Stage 4 change events and frequency of when they occur during lifespan of a FIP.



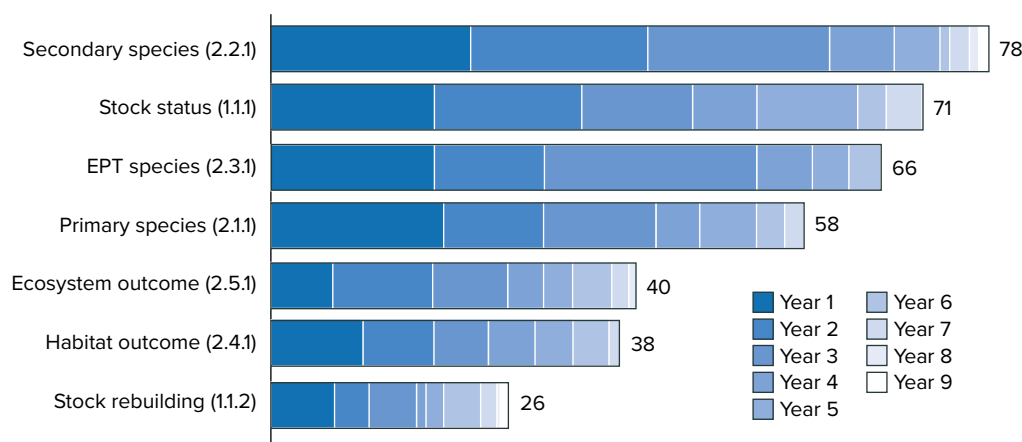


Reported improvements on the water are primarily recorded for target stocks and secondary species

The largest share of Stage 5 events is related to improvements of secondary species and target stock status. This represents a substantial increase in the percentage of Stage 5 events related to the target stock; in 2020, stock status was the fourth most frequent type of Stage 5 event.

ETP species remain an active area of improvement but also an often-cited barrier to progress. Changes in gear, such as adopting circle hooks and altering FAD design, were noted as resulting in significant bycatch reduction. However, research into FIP interactions with ETP species (Morgan et al, 2022), as well as conversations with FIP implementers, highlighted that effective monitoring of impacts on ETP species remains a need; new EM pilots are working to fill this gap (Costa Rica, Taiwan).

Figure 3.16 Frequency of reported Stage 5 events by category.



“While some FIPs are appropriately working to mitigate and reduce fishery impacts on ETP species, there is a clear need for improvement in some FIPs and for FIPs to be more systematic in their approach to identifying and addressing ETP issues in fisheries.”

—Morgan et al., 2022

Most Stage 5 events were the result of new data, not necessarily new actions by the FIP

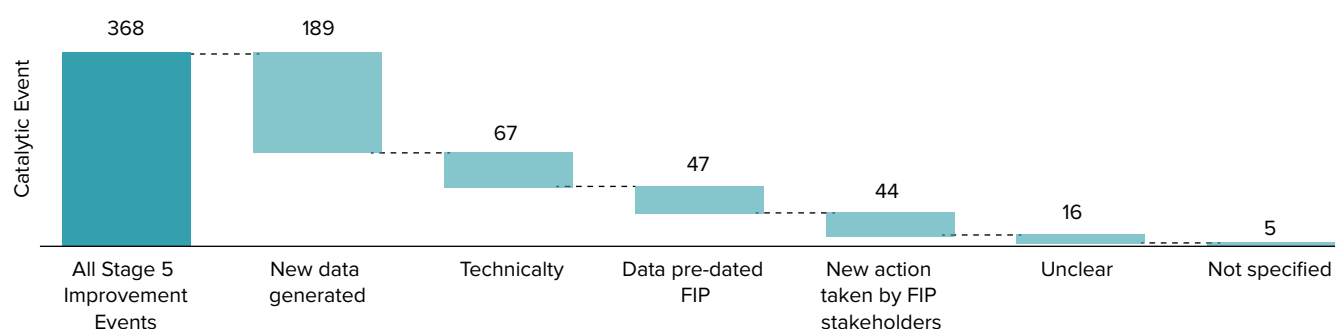
New data is the cause of about 51% of all Stage 5 improvements, the largest category

- New data generated aids in improving models that can better show stock status or secondary species status.
- New data does not necessarily indicate that biomass of target stock has increased over the timespan of the FIP; rather, new data generated by the FIP allowed implementers to determine that an element of the fishery (e.g., stock status, ETP interactions) met MSC’s standards for that indicator, either at the conditional or full-pass level.

Technicality and data pre-dating the FIP also contribute significantly, leading to a combined 30% of all Stage 5 events.

- These two categories indicate FIPs are benefiting from changes that have no connection to the FIP, such as pointing to a change in stock status that began before the FIP was implemented, or application of a new model that has a different methodology and results in a different stock status determination (independent of new data additions).

Figure 3.17 The number of Stage 5 improvements caused by different type of catalytic event.



When looking at Stage 5 improvements, few changes are attributable to the FIP

Most Stage 5 events are not directly attributable to the FIP that is reporting them, nor are they required to be under current reporting practices or Stage 5 definition/criteria. CEA analyzed all 369 Stage 5 events reported on FisheryProgress as of January, 2025 to determine how likely each Stage 5 event was caused by FIP actions.

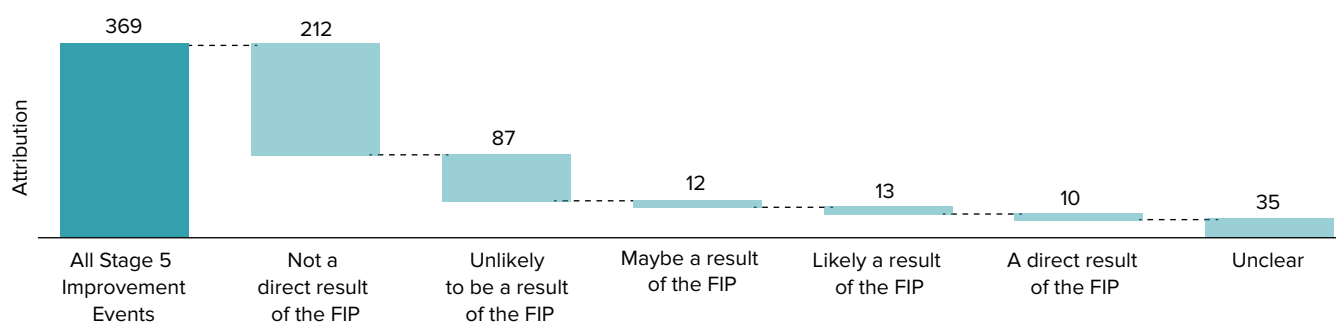
- Only 7% of all Stage 5 events were likely a result of FIP actions.
- Most events were unlikely to be or clearly not a result of the FIP.
- Note: in 2021, SFP shifted its accounting methodology to better tie FIP activities to Stage 5 achievement. A separate analysis on Stage 5 changes from after this change was implemented did not result any material increase in changes attributable to FIP activity.

Stage 5 events that were a direct result of a FIP tended to be related to effort reduction. See page X for details.

Site observations and key informants had mixed feedback on FIPs' contributions to the on-the-water change. Examples included FIPs indirectly supporting efforts as a part of larger collaborative strategies (Indonesia tuna FIPs) and where they have been much more peripheral.

We were unable to definitively determine if certain commodities were more likely to have Stage 5 changes attributable to FIPs. We found that crab have a higher proportion of Stage 5 events in years 4 and beyond than other commodities. Further, 12% of Stage 5 events for Crab were attributable to FIP actions, compared to 6% for all other commodities. These suggest that crab FIPs may be more effective at driving change on the water than the FIP model envisions, but the small sample size remains a limiting factor for more definitive analysis, especially for other commodities. We interpret this cautiously.

Figure 3.18 Number of Stage 5 changes across different degrees of likelihood of FIP attribution.





Crab and tuna FIPs dominate Stage 5 events likely attributable to FIP actions

Table 3.4 FIPs with Stage 5 events that are a likely a direct result of FIP actions.

FIP	MSC performance indicators addressed
Chile Patagonian red octopus–hookah	1.1.1
Chilean hake–bottom trawl	1.1.1; 1.1.2; 2.2.1
Eastern Atlantic Ocean tuna–pole & line	2.5.1
Eastern Atlantic tuna–purse seine (Ghanaian Fleet)	1.1.2
Ecuador mahi mahi–longline	2.3.1
Ecuador small pelagics–purse seine (CNP)	1.1.1; 1.1.2
Indian Ocean tuna–longline (Thai Union)	2.1.1*
Indonesia blue swimming crab–gillnet/trap	1.1.2; 2.2.1
Marshall Islands bigeye & yellowfin tuna–pelagic longline	1.1.1
Nicaragua Caribbean spiny lobster–trap	2.2.1
Philippines blue swimming crab–bottom-set gillnet & pot/trap (PACPI)	1.1.1; 1.1.2
Russia Northern Sakhalin salmon–trap/net	1.1.1; 1.1.2*
Thailand blue swimming crab–bottom gillnet/trap	1.1.2
Vietnam blue swimming crab–bottom gillnet/pot/trap	1.1.1
Vietnam yellowfin tuna–handline	2.3.1

*Achieved two improvements against this PI that were likely a direct result of FIP actions

FIPs that truly drive change on the water generally have activities that reduce effort; this can only be ascertained from deeper, manual review

Table 3.5 Illustrative examples of reported Stage 5 changes and CEA's assessment of the likelihood that the change is attributable to the FIP.

FIP	MSC performance indicator	Change	Rationale given for change by FisheryProgress	Attributable to the FIP?
Chilean hake –bottom trawl	1.1.1	R to Y	New analysis shows the hake population is above biomass impairment level.	Yes — There was a measurable improvement in the stock status, and the FIP had conducted substantial advocacy to improve harvest control rules, which were implemented three years before the improvement and likely led to it.
Eastern Atlantic Ocean tuna–pole & line	2.5.1	Y to G	The FIP helped close an unsustainable bait fishery	Yes — The FIP's advocacy helped improve management of its associated bait fishery, with impacts on bait fishers' behavior.
Argentina Patagonian toothfish– bottom trawl	2.2.1	R to G	No bycatch species were a significant enough portion of catch to be considered a “primary” bycatch species, rendering this score G.	No — This is a technicality; the FIP only got a stage change because of how MSC defines a “primary” bycatch species.
France Eastern English Channel thornback ray–bottom trawls, trammel net, and Danish seine	1.1.1	Y to G	A new stock assessment shows that the stock is above biomass at maximum sustainable yield (BMSY) and has a low fishing rate	No — The stock did not improve in the two years of the FIP's existence; rather, the FIP created a new stock assessment to replace an outdated one.
Indian Ocean tuna and large pelagics –longline (Afrifex)	1.1.1	R to Y	Stock assessments show that the stock is likely above the point of recruitment impairment	No — The data used for this analysis were from 2014-2019, but this FIP began in 2019.
Philippines yellowfin tuna–handline	2.1.1	Y to G	Improved data about the handlines used in the fishery proves that the gear is highly selective and does not lead to substantial bycatch	No — While the FIP's gear does minimize its impact on non-target species, the gear is inherent to the fishery and not an improvement from the FIP, so the FIP did not itself increase selectivity.

More complex governance contexts are likely to make FIPs take longer to achieve completion

The longer timelines to completion likely are due to an increasing number of FIPs coming online in low-governance contexts. In low-governance contexts, FIPs often have to navigate more complex systems, which necessitates additional time to set up the enabling conditions needed for certification.

FIP DB does not show a clear trend in the number of FIPs achieving completion over time. The data do not show that more FIPs are achieving certification than in previous years.

Timelines to Stage 4 and Stage 5 have remained relatively stable or decreased slightly. Combined with the data on increasing timelines to completion, this signifies that FIPs can make initial progress quickly but require significantly more time to translate that initial progress into completion.

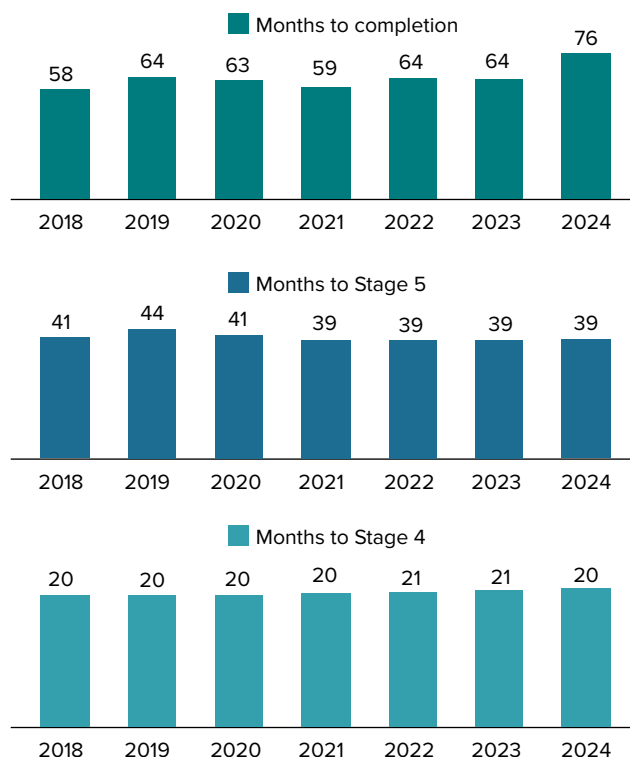
The promise of the market remains an enticing yet elusive benefit of FIPs

Many bottom-up FIPs continue to hope that if they build it, the buyers will come, but there is no guarantee. The promise of the US and EU markets continues to motivate companies, often processors/exporters and their associations, to launch FIPs. This is especially the case for tuna and other large pelagics (e.g., Taiwan, Indonesia, Peru). Often, these companies have existing relationships with importers and end buyers who have expressed a desire for sustainable products, but, according to site observations, these buyers do not contribute directly to FIP projects and regularly source from competing FIPs or simply lower-priced options.

FIPs play an important role in maintaining existing trade relationships with US/EU buyers. Beyond reaching new markets, FIPs were credited with helping retain contracts with existing buyers in an increasingly competitive environment.

Comprehensive FIPs, launched with the intent to reach a certifiable level of performance, do not necessarily help seafood companies gain new access to the US and EU markets. Feedback was mixed, especially from exporters in production countries, with some noting that MSC was necessary to achieve market access; others noted that FIPs were acceptable to US and EU buyers as long as they were performing well.

Figure 3.19 Average number of months for FIPs to reach different stages or completion over time.



“Without this FIP, we would’ve easily lost ~40% of the supply in [location]. If we hadn’t had a formal sustainability effort, we would’ve easily lost business. We’re not getting more money for our product (if anything, we’re getting less) but getting benefits of continued business.”

—FIP industry participant

“The FIP actors want to continue, and the market wants to continue buying this product as long as they are on FisheryProgress. This is the most normal case.”

—FIP implementer, Latin America

“There is a kind of opportunistic approach. We want MSC because it gives us access; but don’t want to pay all the costs. FIP is the answer.”

—FIP industry implementer

FIPs linked with product quality improvements can increase profit margins but otherwise, FIPs rarely improve pricing

Most implementers interviewed noted that price premiums are nonexistent for FIPs and erratic for MSC, despite expectations to the contrary.

- Exporters noted that they rarely receive price premiums for FIPs; those that receive price premiums for MSC noted the increase is just enough to cover the costs of certification.
- Hope and/or expectation that FIPs will deliver economic returns, especially price premiums, remains widespread across geographies and fisheries; such hopes are particularly held by fishers, processors, and exporters.
- A handful of key informants in the US and EU noted FIPs led to improved livelihoods for fishers, but only one specifically attributed better prices to fishers stemming from a “trickle down” of price premiums from buyers.
- Key informants, especially fishers, noted transparency as an important step towards greater economic benefit, and something they hoped participation in a FIP would provide.

“Price premiums? There are none according to the exporter and the importers/distributors.”

—FIP implementer, US/EU

Product quality improvement work in small-scale FIPs can lead to better engagement and support environmental outcomes.

Site visit observations and key informants noted that handling and quality improvement initiatives that accompany the FIP project (such as in Mexico and Indonesia) can lead to better prices for fishers.

- These efforts range from providing better access to ice to training on proper bleeding and storage of product on board to preserve quality.
- Increases in profits helps incentivize engagement, but these approaches also can reduce waste and decrease undersized catch.
- Importantly, quality improvements require strong enforcement mechanisms to ensure increases in price do not drive increases in effort.

“Prices increase as result of some of the quality work—in Indonesia we saw this, as well as in Chile and Mexico.”

—FIP implementer consultant

FIPs may also lead to economic impact via increases in efficiencies, such as through electronic monitoring. These efforts are often complementary projects but leverage the convening power of FIPs to pilot systems.



FIP infrastructure: How do we measure impact and do we have the right tools in place?



Overview of FIP infrastructure findings

Infrastructure for FIP reporting and support systems for FIP implementation has grown substantially since 2015. FIP stakeholders have formed valuable communities of practice and have a variety of online tools that have proven helpful with implementation, increased learning, and improved engagement. However, there are still major gaps in terms of reporting and platform efficacy despite an updated SFP rating methodology and updated FisheryProgress website.

FIP DB's dataset contains the largest number of FIPs, but much of the data is sourced from FisheryProgress. Most FIP stakeholders view FisheryProgress as the most important platform for reporting and accessing FIP data. This creates tension for measuring impact.

- The Conservation Alliance for Seafood Solutions (CASS) guidelines still require a FIP to report publicly. Site visits and interviews confirmed there are multiple projects that self-define as FIPs that do not report on FisheryProgress and therefore are not counted or monitored.
- Despite CASS guidelines, a single and robust way to do FIP reporting is still in question. This is not beneficial for FIP transparency in general, especially with reporting historically having been done on multiple platforms.
- Usership of FisheryProgress has increased significantly since 2020; however, many FIP stakeholders still view FisheryProgress as difficult to use, citing confusion and bias around progress ratings and stages.
- Reporting on social impacts remains outside of FIP ratings and stage-change considerations, reducing the influence/recognition of this work.

The last decade has seen steady growth in online resources and in-person events that build FIP capacities, share learnings and support implementation and achieve impact.

- FIP Communities of Practice (CoP) remain important venues for FIP stakeholders to share lessons learned and improve their capacities and capabilities for FIP progress and success, as well as identify challenges and areas of improvement for the FIP model. They are region-specific and offer tailored approaches for increased collaboration in the two regions with the most FIPs – Asia Pacific and Latin America and the Caribbean.
- Online courses such as those offered by WFF provide FIP stakeholders with technical assistance and training.

Adequate infrastructure on traceability is still missing, creating significant barriers to progress.

- FisheryProgress has a place to report on traceability efforts, but it does not verify if the traceability allows for market distinction of the product(s) or the quality of the traceability effort. There is also no way to filter or search for FIPs with traceability in the FisheryProgress directory.

FIP data shows incongruencies and does not fully capture global FIP activity despite improvements in data reporting

The number of FIPs depends on who you ask. Publicly available data sources FIP DB and FisheryProgress have different requirements for listing FIPs, which reflects evolution of the FIP guidelines since 2015. For FIP DB, any publicly reporting FIP is included; for FisheryProgress, only FIPs that directly report to that platform are included. Despite new FIPs launching since 2019, the CEA database has more FIPs than either FIP DB or FisheryProgress because it included FIPs that did not publicly report.

In particular, FIPs that were prospective in the 2019 CEA database have not been captured, as many of them are not listed publicly. Beyond the prospective FIPs, we also found that many of Conservation International's Community FIPs (C-FIPs), ISSF's FIPs, and FIPs run by regional WWF offices were not included in publicly available databases. Under this study, CEA considers C-FIPs to be an alternative model given its lack of public reporting.

We heard multiple reasons for not reporting on FisheryProgress, with burdensome reporting requirements, including reporting in English, foremost among them. Implementers cite onerous reporting requirements and a lack of flexibility around data types as reasons for not submitting information. This barrier is significant: For example, the WWF network had 21 active FIPs in Indonesia in 2019, none of which were reporting to either of the public databases.

Limited reporting hinders what the FIP community knows and unknowingly biases our understanding towards more capable FIPs. The use of these datasets may bias our understanding of FIPs toward those led by NGOs or those with technical expertise to be able to report on progress. Further, because some projects claim to be FIPs but do not report publicly, and thus are not officially FIPs, there is an enhanced risk of FIP-washing if a buyer sources from one of these projects and claims FIP engagement, despite these projects not truly being FIPs.

FIP DB is the most complete source of FIP data, but FIP participants view FisheryProgress as the most accepted reporting platform

FIP DB has now become the most complete source for FIP-related data.

Since 2015, CASS guidelines require FIPs to report publicly on progress to meet the definition of a "FIP." For this reason, Sustainable Fisheries Partnership (the managers of FIP DB) only gather data on FIPs that report progress publicly.

- Approximately 75% of the data in FIP DB comes from Fishery Progress.
- Approximately 10% comes from SFP's own documentation.
- A smaller proportion comes from the websites of individual FIP implementers.

FisheryProgress is generally considered the "source of truth" in the FIP world, despite having fewer FIPs included than FIP DB.

Key informants noted that if a FIP is not listed on FisheryProgress, only those engaging in the work will be aware of its existence, including potential trading partners.

Peer-reviewed research on FIPs has increased, likely driven by the data now available on FisheryProgress. Literature review identified eight peer-reviewed publications between 2020 and 2025, compared with four from 2015-2020.

Figure 3.20 Total number of FIPs according to different databases.

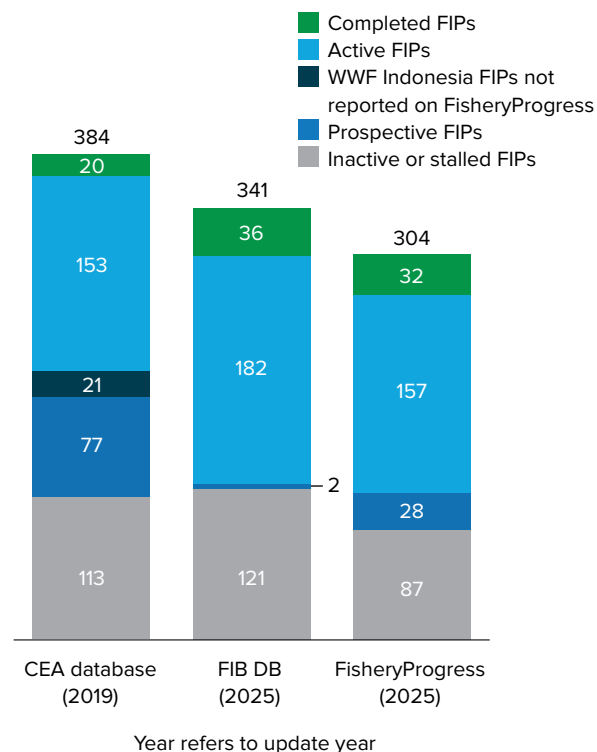
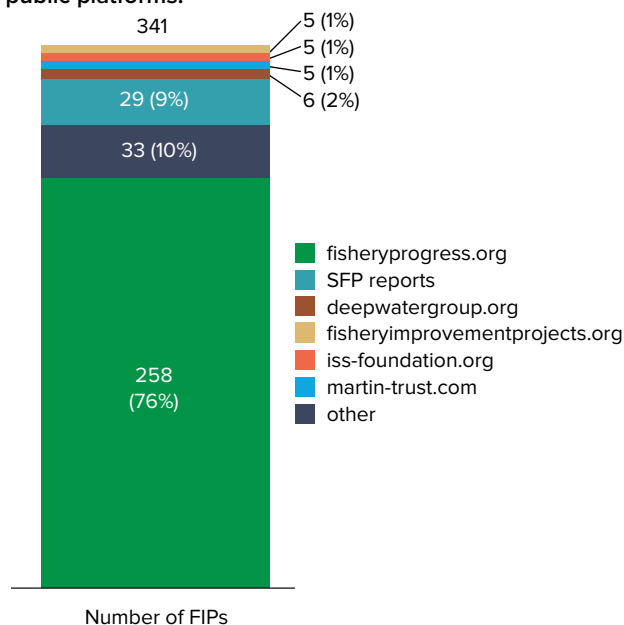


Figure 3.21 Number of FIPs reported on different public platforms.



Centralized FIP reporting supports a growing body of research tracking FIP outcomes, which show mixed results

The landscape of literature on FIPs has grown substantially since 2020. Peer reviewed publications specifically on FIPs have doubled (from approximately four to eight) and another two dozen research reports, white papers, theses and articles have emerged in the past five years.

Approximately a third of the literature utilized either FIP DB or FisheryProgress data as inputs. Funding for these studies is often through academic channels, providing evidence that philanthropic investment into centralizing FIP data platforms may be supporting not only industry engagement (as intended) but also research to advance best practice in fisheries management.

The growing body of research reflects the increasingly diverse nature of the FIP model. Approximately a third of the papers that CEA reviewed focused predominantly or in part on FIPs' social impacts or procedural equity in FIP management.

The growing body of literature provides no consensus on FIP performance, environmentally or socially, with a wide array of conclusions depending on whether the literature focuses on social impacts or environmental impacts for the whole FIP landscape or just FIPs of certain categories.

- For instance, some case studies of social work in FIPs found strong evidence of improvements, while academics investigating human rights impacts of FIPs, such as Williams & Sparks, have provided critiques on the structure of human rights work in FIPs.

Some of the literature critiques individual components of the FIP model, but it does not suggest that the model is entirely broken. Rather, the findings identify elements of the model that can limit the models' efficacy in specific contexts.

- García-Rodríguez found no evidence that being in a FIP guarantees that a fishery will be more sustainable than a non-engaged fishery.
- However, case studies of some FIPs, such as Travaille's 2020 review of the Bahamas Caribbean Spiny Lobster FIP, found significant environmental improvements that led to certification, suggesting real potential success under the model.

"Although studies have shown that FIPs can advance fisheries management and result in positive ecological outcomes, they...have been criticized for not delivering long-lasting positive improvements, being unsuitable in small-scale fishery settings, and not generating benefits across the whole value chain."

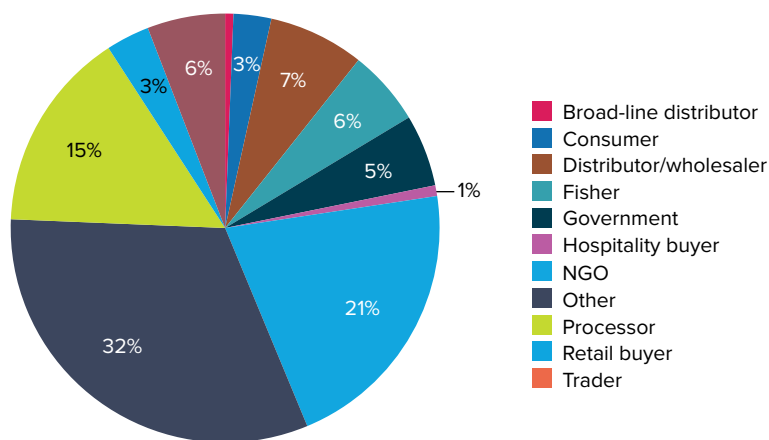
—Kall et al., 2022

The number of users on FisheryProgress has increased 120% since 2020

In mid 2020 FisheryProgress had 3149 users; as of mid-September 2025, FisheryProgress had 6,939 users (increase of 3,790 or 120%).

- In 2025, FisheryProgress revamped the website and began requiring free registration for access. This new requirements has not dampened growth, with over 1,000 new registrations since the launch in June.
- Data on users provided by FisheryProgress demonstrates that the platform is used by different actors across the seafood supply chain, including retail and hospitality sectors and government representatives, in addition to FIP implementers.

Figure 3.22 Breakdown of categories of FisheryProgress Users



Source: FisheryProgress

Profile of FisheryProgress user base in 2025.

Reporting on FIP volumes appears to be more accurate than in 2019

Today, no active FIPs list landings that exceed those of the fisheries in which they operate. This suggests that across the board, FIP implementers are providing more reasonable estimates of landings. Examples from two tuna FIPs, one from Indonesia, one from Costa Rica, are shown on the right. In 2019, these FIPs listed landings that were higher than the total landings reported for those fisheries in government databases. Today, these FIPs report landings lower than the fisheries' total catch, suggesting more accurate reporting of FIP volumes.

Accuracy of total fishery landings and FIP volumes cannot be confirmed due to lack of robust traceability systems.

Total fishery landings rely on government data, which can range in quality depending on the country and fishery.

FIP volumes remain a percentage of overall landings for many commodity fisheries, leaving significant proportions of the catch unengaged in FIPs.

Table 3.6a Indonesia tuna reporting volumes in 2019 and 2024.

Year	FIP volume (t)	Total country landings (t)	FIP % of country landings
2019	905,640	726,287	124%
2024	67,475	1,180,390	5%

Table 3.6b Costa Rica tuna-like fish reporting volumes in 2019 and 2024.

Year	FIP volume (t)	Total country landings (t)	FIP % of country landings
2019	3,935	2,801	140%
2024	6,000	20,290	~30%

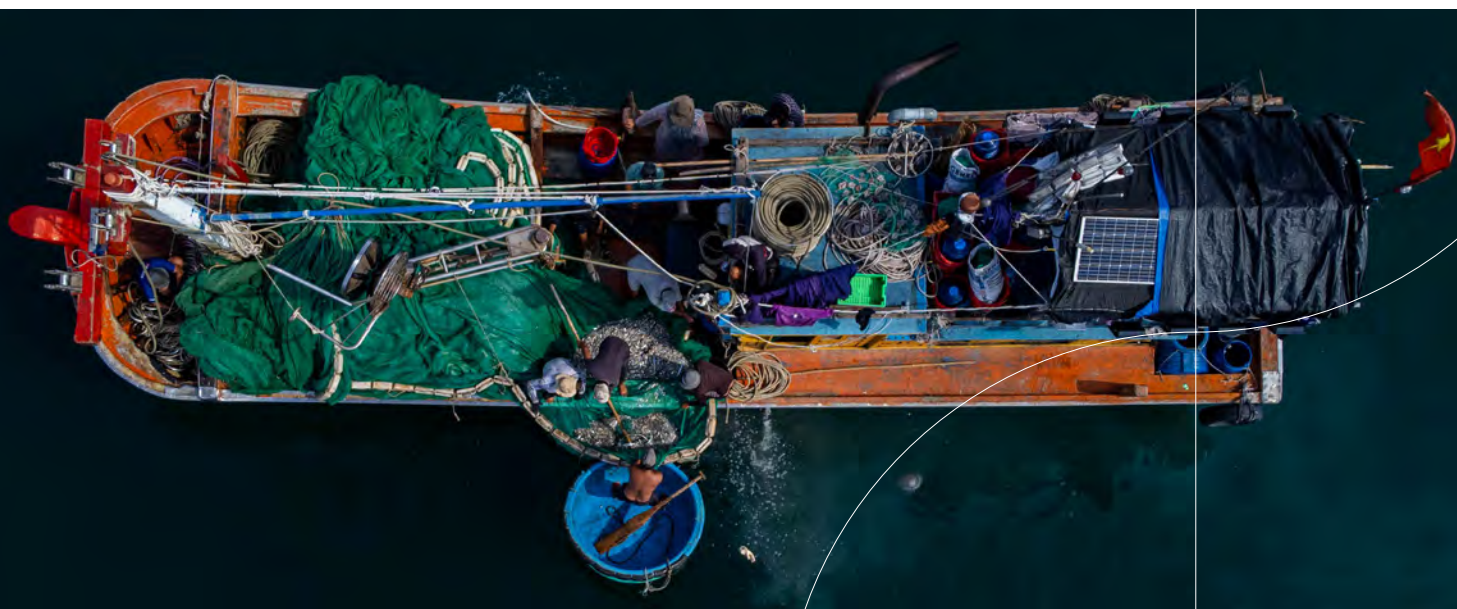
SFP updated its rating system in 2021 to improve rigor and link actions to outcomes more than process

Major changes from before and after this update include:

- Only basic FIPs can achieve a B rating, which is the highest possible rating for basic FIPs.
- C-rated comprehensive or basic FIPs are only one step below their respective highest potential ranking.
- Progress on a FIP's social work is not included in the rating system.
- D and E FIPs must report some form of activity to avoid going inactive. The inactive tier was added in 2021.
- FIPs are now required to link their activities to reported results in Stage 4 and 5 to receive recognition for those results and the associated progress rating.

Table 3.7 New updated definition of FIP ratings since previous report in 2020.

Progress Rating	Definition from October 2021-2025
A	▪ The FIP is comprehensive and has achieved a Stage 4 or 5 event within the last 12 months.
B	▪ The FIP is basic and has achieved a Stage 4 or 5 event within the last 12 months.
C	▪ The FIP is over one year old and has achieved a Stage 4 or 5 event between 12 and 24 months ago. ▪ The FIP is less than one year old, has never achieved a Stage 4 or 5 event, and achieved Stage 3 within the past 12 months.
D	▪ The FIP is over 1 year old, has achieved a Stage 4 or 5 event between 12 and 24 months ago, but has not achieved Stage 3 within the last six months. ▪ The FIP is over one year old, has achieved a Stage 4 or 5 event between 24 and 36 months ago, and achieved Stage 3 within the last six months. ▪ The FIP is over one year old, has never achieved a Stage 4 or 5 event, and achieved Stage 3 within the last six months.
E	▪ The FIP is over one year old, has achieved a Stage 4 or 5 event between 24 and 36 months ago, and has not achieved Stage 3 within the last six months. ▪ The FIP has never achieved a Stage 4 or 5 event, has not achieved Stage 3, and is younger than three years.
Inactive	▪ The FIP is older than three years and has not reported a Stage 4 or 5 event within the last 36 months or went inactive voluntarily.



Data-related recommendations from 2020 have been partially addressed

In 2020, CEA provided several recommendations regarding how to advance data systems to support FIP progress. Recommendations and current status, along with remaining or new gaps, are detailed below.

Table 3.8 Previous data-related recommendations from 2020 and updated status in 2024.

Recommendation	Update on status
Improve data on fisheries not engaged in FIPs to allow for comparisons between the health of engaged fisheries and unengaged fisheries.	This remains a gap. Comparison between FIP and non-FIP fisheries is limited in the literature and requires more comprehensive data collection across non-FIP fisheries.
Require FIPs to report the extent to which they contributed to a reported change on the water.	This is not a requirement on FisheryProgress, but in the 2021 update of the progress ratings, SFP now requires FIPs to transparently link FIP tasks and actions to Stage 5 outcomes.
Improve details in social reporting to gain a more accurate picture of the landscape.	FisheryProgress' June 2025 website relaunch provides more space for social responsibility reporting. However, the effects of this update are not yet known, and social responsibility efforts remain excluded from FIP ratings or stage-change calculations.
Standard budget reporting should be required.	This is partially completed. Budget reporting is not required, but a standardized, multi-year, Excel-based budget template has been developed and includes areas to fill in individual cost items and the funders supporting those costs. However, budgets are often filled out incompletely or miss key data, such as the currency being used.

Rating and reporting design flaws continue to undermine FIP progressd

The structure of rating and reporting systems combined with legacy buyer commitments (supported by NGO partners) is generating perverse outcomes for FIPs that may be legitimately working to advance sustainability.

Table 3.9 Summary of challenges with FIP rating system and reporting infrastructure.

Challenges with rating system	Challenges with reporting infrastructure
C-rated FIPs may be making significant progress, but they are overlooked by industry. Despite efforts to educate and coach industry on the updated rating system, buyers continue to prefer A- and B-rated FIPs, creating negative outcomes for some C-rated FIPs that are making significant progress. FIP implementers shared examples of being passed over by buyers because of a C rating. NGO buyer partners confirmed that industry does not understand the rating system and that it disadvantages FIPs that may be working effectively (but slowly) in more complicated contexts.	FIP DB and FisheryProgress databases serve different but overlapping needs, introducing redundancies and inefficiencies into the system. Analyses that rely on information from both datasets require significant data cleaning efforts. Increased alignment, such as unified ID numbers for FIPs that are found in both databases, would be relatively simple and effective solutions to increase the usability of both datasets.
The current rating system and buyer commitment design penalizes FIPs for investing in social workplans. Limited resources mean that many FIPs spend time and effort on social improvements at the expense of tangible environmental progress. This results in lower grades, as ratings do not incorporate social progress. Key informants noted that FIPs are passed over by both buyers and funders because of this, even if the social work is considered enabling or important to environmental outcomes.	Key informants noted significant numbers of FIPs are not reporting on FisheryProgress, and that this was a new (and troubling) trend. CEA was not able to confirm this via quantitative data, but key informants noted a few reasons why projects are not reporting, including the HRSR Policy adding burden while having lower standards than government requirements and local buyers not using FisheryProgress, instead engaging directly in projects.
SFP’s ratings do not incorporate FIP reporting against the HRSRP. Informants suggest social work yielded little change in progress ratings, identifying underlying misalignment between the HRSRP requirements and SFP’s Progress Ratings methodology used to assign FIP grades.	Prior to June 2025, Fishery Progress had only a small space for FIP leads to provide qualitative data on social progress, traceability, and other work streams. FIP leads noted that this unfairly limited their ability to showcase their holistic progress and gain recognition for work completed. The newly revamped FisheryProgress website provides more real estate for social progress reporting, but it is too early to tell if this solves the problem.

FIPs are not adequately recognized or rewarded for HRSRP implementation

The HRSRP* creates perverse incentives for FIPs investing in social work but see little recognition from FisheryProgress or the market. Several FIP implementers expressed frustration that their FIP's progress rating did not reflect their level of engagement in social work. For example, one FIP in Africa doing extensive work to build local co-management capacity, provide access to financial services (e.g., insurance, small business loans), and help establish fishers' customary tenure was assigned a "D" progress rating due to slower progress on its environmental workplan. As a result, this FIP has faced challenges with attracting funding due to its lower progress rating, which could further stall environmental and social work. This frustration was echoed by other FIP implementers that felt investing in social work yielded little to no change in their progress ratings, suggesting the underlying misalignment between the HRSRP requirements and SFP's Progress Ratings methodology used to assign FIP grades.

For many comprehensive FIPs pursuing MSC or equivalent eco-certification, the HRSRP represents an additional, unrelated layer of requirements that does not contribute toward their ultimate certification goal. This misalignment suggests that if MSC remains a FIP's goal without integrating social criteria, participants will continue to experience confusion, which could drive FIPs away from publicly reporting on the FisheryProgress platform. An informant from the Japan North Pacific blue shark and swordfish FIP explained that introducing the HRSRP requirement damaged the trust of the local fisher cooperative that had launched the FIP to pursue MSC certification. Combined with MSC's revised policy prohibiting shark fisheries from becoming certified, this breach of trust contributed to the FIP's eventual inactivity. A chief frustration amongst implementers, supporting NGOs, and fishers is that there are no price premiums guaranteed by social engagement; in Indonesia, leads for the recently MSC-certified yellowfin handline and pole-and-line FIPs noted that fishers saw no price premiums from their engagement on the HRSRP.

"Funders are interested in the work we are doing but they see the 'D rating,' so [they table the conversation] until the profile is improved. I am showing them all indicators we are driving change, but this is not reflected on platform so they are not willing to engage. We have no funding so we are carrying all the costs ourselves to drive the FIP – it is not working for us, and it is not working for the fishers."

—Implementer for African FIP

"FisheryProgress' social requirements are at a higher level than what MSC requires. One FIP in the UK exited FisheryProgress for this reason."

—Implementer for European FIP

*CEA conducted this analysis prior to FisheryProgress' launch of the Human Rights and Social Responsibility Version 2.0 in July 2025.

Traceability can now be reported on FisheryProgress, but gaps in verification and reporting requirements limit the potential value of this information

Traceability efforts can be updated on FisheryProgress but lack detailed information. FIPs can voluntarily choose to report on traceability improvements via checking a box. Standardized data collection on the type of traceability system, data elements, and/or nodes in the supply chain covered are not part of current reporting.

Most FIPs reporting traceability do not have clear links to traceability in their workplans, raising questions regarding the role of FIPs as a pathway for traceability implementation. Manual review by CEA showed that less than 12% of FIPs that list traceability can verify their work via a plan or action. Given that traceability is NOT a requirement of FIPs, it is possible that traceability implementation is happening but is outside of FIP workplans. By not requiring evidence of traceability, the current reporting framework prevents insight into how FIPs are actually contributing to traceability efforts.

Improved reporting requirements could help address FIP-washing concerns. Key informants repeatedly cited the need for traceability to guarantee product is sourced from FIPs. Requiring more detailed reporting about existing data collection and traceability systems within FIP supply chains could help to direct resources to FIPs that are lacking robust traceability and raise the bar on “best practices,” helping to scale traceability solutions.

A diverse digital landscape of resources supports FIPs

The FIP landscape has seen a rise in online resources and training courses that provide best practice guidance, tools, and information for FIP implementers and FIP participants. Many are geared toward supporting commodity fisheries with engaged markets and/or buyers looking to understand a FIP and source from it.

Table 3.10 Breakdown of traceability reporting data on FisheryProgress

Category	Number of FIPs (%)
Total FIPs on FisheryProgress	290 (100%)
List traceability action	71 (24%)
Verifiable traceability plans	35 (12%)
Verifiable traceability action	26 (9%)
Describe non-traceability work	13 (4%)

WWF online training tool

This online only tool includes seven courses, case studies, a community forum. Participants can downloadable resources to teach stakeholders how to develop, implement, and manage FIPs. **This tool is accessible on mobile devices and can be used offline, with versions available in multiple languages (English and Spanish).**



CASS

FIP Guidelines provide high level guidance to the FIP community. These guidelines establish the key criteria and processes for FIPs, including private sector participation and measurable progress. They are the foundation for platforms like FisheryProgress, which tracks FIP progress.

PROFISHient was created to help seafood companies with sustainable sourcing guidance. It provides newcomers with basic definitions and help with decision-making on seafood sourcing. It links to existing industry resources. Companies can use it to onboard and train staff on sustainability, while NGOs can use it to educate their industry partners and find common language for partnerships

ISSF FIP Resources

These resources include the MSC and FIP resources finder, **which matches resources to specific performance indicators, technical consultations, workshops, and an array of online materials like scientific reports and best-practice guides.**

These online resources are meant to **compliment the work being done by FIP implementers, mainly in comprehensive FIPs for globally traded commodities such as tuna.**



FIP Communities of Practice (CoPs) provide valuable cross-pollination among different FIP participants and categories of FIPs

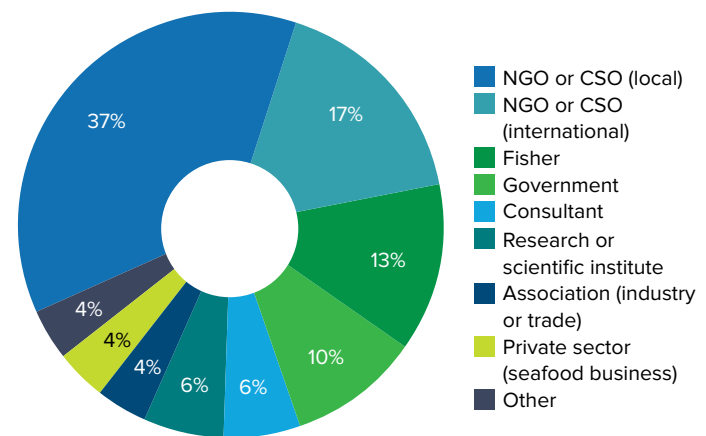
The FIP Communities of Practice (FIP CoPs) in Latin America and the Caribbean and Asia Pacific regions remain active, positive support systems in 2025, after almost a decade of work.

FIP CoP representation is extensive and diverse, reflecting the growing complexity of the FIP landscape.

- FIP CoPs include members from over 40 countries globally with nearly 90% actively engaged in at least one FIP.
- Participants include a mix across new and more seasoned experts. For example, the Latin America CoP membership includes new implementers (19%) and experts with 1-2 years (13%), 3-5 years (37%), and more than five years of experience (23%).

All categories of FIP implementers, from private sector to NGO to government, are members of the FIP CoP.

Figure 3.23 Diverse participant base in the Latin America and Caribbean FIP CoPs in 2025.



Source: Scaling Blue

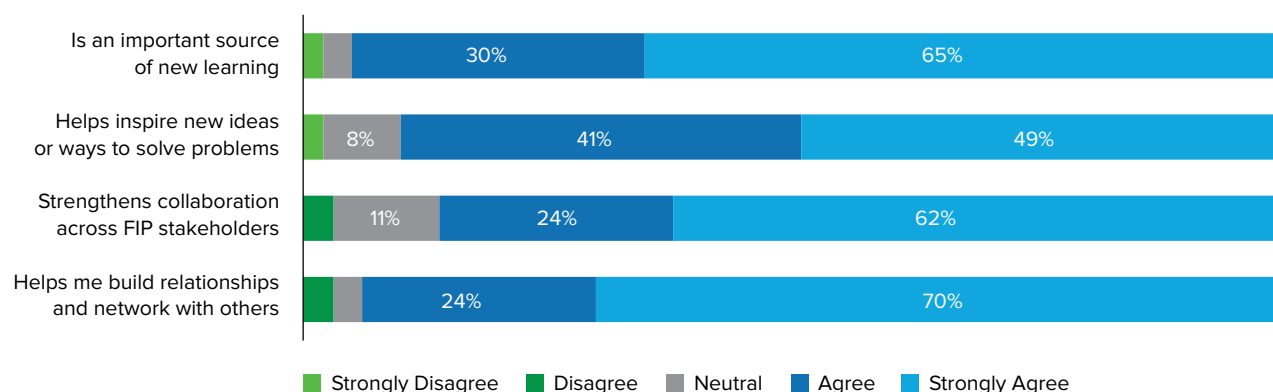
FIP Communities of Practice workshops provide valuable relationship-building and learning opportunities for implementers

FIP CoPs hold in-person and virtual training and discussion across a wide variety of topics, co-developed by the community. These include: traceability, multisector participation, social and business improvements in FIPs, stock assessment and harvest strategy tools. Key informants and site observations elevated the value of online forums in providing follow up discussion and learning opportunities for FIP CoP participants. This can help with scaling best practices as well as identifying and solving for common challenges.

FIP CoPs have especially supported the community to more quickly adapt to changes.

- New FIP guidelines and requirements, including the HRSR Policy, led to confusion and learning curves, which key informants noted were addressed effectively through the FIP CoPs. Both virtual and in-person sessions helped provide platforms for asking questions and receiving detailed answers.
- FIP CoPs also help implementers navigate regional policy and regulatory shifts, such as how to contextualize social responsibility work in a culturally appropriate frame.

Figure 3.24 Feedback on value of Asia Pacific FIP CoP workshop 2024.



The LatAm FIP CoP in 2025 had similar responses. Source: Scaling Blue.

3. What factors contribute to FIP progress and success?

Summary of FIP progress and success factors

Concepts of FIP progress and success are still rooted in stages but increasingly incorporate more diverse end goals beyond certification. For example, participation levels and capacity building outcomes are also considered signs of “success” by implementers. In basic FIPs especially, success may be defined by various factors from increased equity to improved Marine Area Protection (MPA) governance.

New factors related to how FIPs are implemented and structured have gained importance as FIPs stretch into more complex fisheries conditions. As FIPs engage a wider array of community voices, aligned objectives and participatory processes have emerged as contributing drivers of FIP success. Accountability of participants and technology uptake also matter, but often appear outside of current FIP project design, with some notable exceptions.

Ecological and socioeconomic factors outside the FIP but influencing fishery dynamics affect FIP progress.

- Government capacity remains a critical driver of FIP progress.
- Climate impacts and socioeconomic conditions for fishers and communities are increasingly important factors affecting rate of progress in FIPs.
- These exogenous factors, including initial fishery status, can significantly affect FIP timelines and resource demands and remain important considerations for FIP implementers, especially at the start of the FIP.



FIP dynamics include internal factors that are part of the FIP process and structure; these are within the FIP's control.

- Clear and aligned objectives
- Effort
- Leadership
- Participant engagement
- Technology uptake and capacity
- Accountability of participants



Fishery dynamics include factors external to FIP implementation that can impact progress; these are generally outside the FIP's control and include elements of fisheries as ecological and socioeconomic systems

- Government capacity for management
- Climate change and/or other environmental risk factors
- Initial health of fishery
- Socioeconomic conditions of fishing communities

Setting clear and aligned objectives across FIP participants leads to greater progress

Inclusive, collaborative objective setting from the start helps FIPs to focus efforts and engage participants more fully.

Site visits and key informant interviews highlighted that workplans and objectives created in collaboration with all FIP participants early on helped to identify shared values and anticipate potential conflicts.

Objectives must be grounded in the reality of the fishers and the markets in order for workplans to be feasible. Site visit observations confirmed that input from diverse participants was essential to ensuring workplans were realistic and grounded in the local context and business environment. This included transparent conversations with government officials to determine realistic timelines for policy change and awareness of how competing fisheries may undermine FIP efforts (i.e., shrimp trawlers impacting the blue swimming crab gillnet FIP in Palk Bay, India).

Trade-offs between social and environmental improvement efforts can impact success. As both environmental and social improvement efforts require time and resources, it is important to align participant commitments and expectations so that workplans are appropriately sequenced and can effectively demonstrate progress. Challenges with current rating systems make understanding these trade offs particularly important.

Comprehensive FIPs reach completion faster than basic FIPs. The clear objectives defined by a certification standard may help to simplify and align expectations. For example, in Indonesia, participants noted the expansion of pole-and-line and handline tuna FIPs was made easier because everyone knew what was required for a comprehensive FIP workplan. Building transparent and well-structured objectives, regardless of certification as an end goal, appears essential for FIP progress.

Table 3.11 Percent completion for Basic and Comprehensive FIPs

Type	% of all FIPs	% of completed FIPs
Basic	37%	37%
Comprehensive	63%	63%

“If fishers don’t participate in objective setting and have all the information, they cannot help progress the FIP model. NGOs need more transparent and responsible communication to stakeholders and what FIPs are and how to be successful.”

—FIP COP participant, Mexico

Effort matters: Consistency of personnel and funding helps to advance FIP progress

As in 2020, level of effort was cited as critical to FIP success by key informants in 2025. While “effort” is difficult to quantify, availability and reliability of both support (personnel) and funding were key elements highlighted in interviews.

Component of “effort”	Reliability and availability of support	Durable and consistent funding
Description	Responsiveness is key to keeping FIP participants engaged and on track. Key informants highlighted the importance of having dependable FIP implementers, meaning they are prepared for planned and unplanned meetings, responsive to calls and emails promptly, and able to troubleshoot issues quickly.	Durable and consistent financing is a key factor for progress in a FIP, especially with FIP timelines often exceeding five years to achieve completion. Total funding needs to be sufficient, but a predictable flow of funds is just as important so that FIP participants can develop long-term plans. Drafting robust FIP budgets to support such planning is critical. See section 3.5, FIP Finance, for more details.
Supporting quote	<i>“I call him day and night. My wife is jealous from how often I speak with him! But this allows me to have my questions answered and address concerns quickly, which keeps me confident in the FIP and able to support it.”</i> —FIP industry lead, referring to NGO implementing partner	<i>“We had three years of funding for social policy implementation, mostly Packard but also some from Walmart.org via regrant from FishChoice. Fully spent that down now. And no renewal. So, we are in hibernation as of January 2025.”</i> —FIP implementer



FIP progress benefits from strong and effective leadership

Consistent with the literature and previous FIP Reviews, CEA site observations and key informants indicated that strong and effective leadership remains one of the most important drivers of FIPs achieving workplan objectives. Key characteristics of effective leadership in the 2025 FIP context include:

Ability to engage diverse participants in productive dialogue. As FIPs expand seats at the table, leaders need to balance the competing interests and needs of more voices and facilitate productive dialogues that foster collaboration.

Technical expertise to support FIP workplan development and implementation. This includes having someone skilled with reporting to FisheryProgress in order to keep the FIP in good standing. Increasingly, this role is held by locally based consultants or regional NGOs.

Government connections and diplomacy. Gaining the attention and support of government agencies is critical to advancing policy and management shifts that most FIPs require for success. Effective leaders have the political acumen and relationships to be able to work with the needed government actors and build effective collaborations; this is especially important in weathering government turnovers due to political cycles.

Understanding of markets and downstream trade dynamics. Traits such as industry insights, business savvy, and previous experience with industry and trading partners were all noted as valuable contributions of leaders in the FIP space. Especially given growing uncertainties due to the global sociopolitical climate, effective FIP leaders increasingly need to demonstrate strategic awareness of shifting market and trade partner requirements and needs.

“FIPs need a committed and effective leader from start to finish. If this leader can come from industry and understand the fisher perspective, the supply chain, and the market dynamics then even better.”

—Industry implementer in Peru

Participatory processes, especially with fisher and industry participants, can lead to more progress

Active participation helps build trust, in the process and in the data. When fisher and industry actors participate actively under the FIP, data is more trusted and thus, the fisheries management using the data is more trusted. FIP interviews and site observations highlighted that when there is little trust between FIP stakeholders, progress is impeded.

Fisher awareness and knowledge of regulations and best practices remains a challenge to sustainable management; participatory processes help close this gap. FIP workplans often include fisher trainings – on everything from ETP and bycatch reduction techniques to improved handling practices. However, in addition to these one-off trainings, more participatory processes that provide occasional but recurring touchpoints can help reinforce information sharing and build greater fisher knowledge of best practices and regulations, increasing potential for success.

Vertically integrated companies are at an advantage in engaging the first mile of the supply chain. Having production and processing nodes all under one management should make it easier to engage relevant participants and implement workplans. Site observations suggest at least one powerful example from the Peruvian eel trap FIP. This is the first FIP from Peru to enter into full MSC certification assessment and it benefits from robust participatory processes due to its vertically integrated structure.

Research shows that collaboration, especially involving fishers and communities, can help build regulatory compliance and buy-in necessary for advancing ocean health. Collaborative and participatory processes that increase transparent information exchange, build a sense of inclusivity, and increase awareness of the need for sustainable management have been shown to help advance progress in FIPs (Gammage et al., 2024).

“Promoting a participatory approach by involving all interested parties in the decision-making process—inclusive of the fishing community, administrative entities, and local NGOs—also seems to lead to improved implementation and enforcement of management regulations.”

—Morgan et al., 2022

Technology uptake and capacity makes a difference in how a FIP progresses

Today, technology plays a critical role in advancing data collection and monitoring improvements that help create the enabling conditions for change on the water and long-term sustainability. New technologies are also helping to increase efficiencies and reduce environmental impacts of fishing practices. Currently, FIPs demonstrate a mix of technological advancement funded and supported directly by the FIP, versus gaining access to new technology through complementary initiatives.

Electronic monitoring (EM) and electronic reporting and logbooks are present in many FIPs helping to record catch and bycatch data. EM efforts often focus on helping improve data on bycatch and can be integral parts of the FIP (e.g., Pacific Ocean tuna - longline (Thai Union)) or be part of initiatives that complement the FIP (e.g. pilot project with National Taiwan Ocean University and Taiwan tuna longliners). Electronic logbooks are also common across FIPs and help support improved catch documentation (Oregon, US Dungeness crab; Ecuador small pelagics).

“Both FIP and Fair Trade requirements have led to improvements in data collection and product traceability, with increasingly higher numbers of fishers completing logbooks. ... This has contributed to a wider understanding of fishers’ impact on the yellowfin tuna stock as well as secondary and bycatch species.”

—FAO, 2020

Technology also supports FIPs with increasing efficiencies and building climate adaptive management.

- improvements or changes that incorporate technology can both increase environmentally friendly practices and efficiencies and help create economic incentives for engagement. Often, these innovations aim to reduce unwanted bycatch, and can range from simple gear modifications, such as circle hooks, to more advanced innovations in bycatch reduction devices (BRDs).
- More recently, some FIPs are starting to use ocean observation technologies to help monitor ocean conditions and build more climate-resilient and adaptive fisheries management plans (Peru anchovy).

Lack of accountability across the supply chain undermines FIP progress

Interviews and site visits indicated that the lack of accountability systems deters industry engagement and slows FIP progress. Currently, there are no system-wide to improve accountability and hold partners to their commitments across the FIP landscape, but some implementers and FIP participants are attempting to address these challenges on a case-by-case basis.

Table 3.12 Examples of accountability challenges and solutions.

Accountability challenge	Opaque sourcing practices	Free riders	FIP-washing
Description	Public buyer commitments set expectation of demand for FIP product. However, there is evidence that buyers are not following through, chasing price over sustainability. Key informants noted some companies choose not to be listed as a participant in a FIP (even if they are) so that they are not held accountable if they choose to source outside the FIP.	Buyers outside the FIP purchase product from the FIP without materially contributing to FIP activities or progress. Suppliers may sell to these external companies because: 1) they may offer a better price or 2) suppliers do not know which industry actors invested in the FIP. Lack of loyalty by producers who sell outside the FIP disincentivizes industry to actively invest in a FIP.	Buyers claim to be sourcing (and then selling) FIP product when it is not actually FIP product.
Supporting quote	Stronger purchasing agreements and detailed reporting by those with public commitments to prove they are sourcing from FIPs. Robust traceability systems are needed to verify any sourcing claims.	Pay-to-play models can set up agreements that ensure only those that invest in the FIP can access FIP product; but, this must be done in a way that ensures prices are fair and competitive for producers.	Full-chain traceability and verification of FIP product. Robust traceability systems improve verification and legitimacy of sourcing claims.
Example	Conceptual – not yet existing.	SFP noted it is using its roundtables to implement this approach.	FishWise verification pilot with Peru and Ecuador mahi mahi longline FIPs identified this is a priority but challenges persist.

Traceability remains an important but weak element of FIP infrastructure (see Table 13.a & b on following page)

Robust traceability is necessary for holding industry trading partners accountable across the supply chain; currently, traceability is not required and remains difficult to track across the FIP landscape.

- FisheryProgress introduced a checkbox for traceability on their current reporting platform, but details on the quality and type of system in place are not required.
- About one-quarter of all FIPs reported on their traceability actions.
- Half of all FIPs with verified traceability action (13) are in Mexico, and 11 (85%) of these are in small-scale fisheries.

The most common traceability systems are traceability-specific apps (e.g., NADIR, GoChain) or barcodes.

Many (36) FIPs listing traceability did not have verifiable activities on traceability in their workplans. Clarity and standardization for accurate traceability reporting on FisheryProgress could help address confusion and mis-reporting.

- Fourteen use the word “traceability” or describe interest in “traceability” without clear plans and three have no clear evidence of traceability work.
- Twelve describe transparency or monitoring plans/work, rather than traceability.
- Seven describe existing traceability systems used by FIP participants, without clear relation to FIP activities.
- Three have no clear relation to traceability.

Table 3.13a Number of FIPs across categories of traceability action.

Category	Number of FIPs (%)
Total FIPs on FP.org	290 (100%)
List traceability action	71 (24%)
Verifiable traceability plans	35 (12%)
Verifiable traceability action	26 (9%)
Describe non-traceability work	13 (4%)

Table 3.13b Number of FIPs engaged in verified traceability actions.

Type of FIP involved in verified traceability action	Number of FIPs (%)
Total verified traceability	26 (100%)
Mexico small-scale (myriad species)	11 (42%)
High seas industrial tuna	3 (12%)
Indonesia small-scale tuna	2 (8%)
Vietnam small-scale pelagics/tuna	2 (8%)
Other	8 (30%)

Government engagement remains critical and can vary across the landscape

Research continues to show that governance and management capacity are important drivers of fisheries improvement (Rasal et al., 2023; Travaille, 2020); however, the way in which FIPs interact with existing governance structures and capacities to drive progress remains difficult to predict and measure (Melynchuk et al., 2025).

Level of government engagement changes over time. FIP implementers expressed that the constant political cycles that require FIP participants to spend time and resources re-educating and re-engaging government officials are a key challenge. This challenge often increases in FIPs that require longer time horizons to reach completion. However, interviews and site visits also noted that government engagement may increase over time, as the value of FIPs are proven.

Anticipating government support based on FIP or fishery type can be challenging. FIPs that are engaging economically important fisheries (often export-oriented) such as tuna tend to receive more attention from national fisheries agencies than domestic or less-lucrative fisheries. However, provincial (or similar) agencies can be very engaged with FIPs locally, especially where industry is bringing funding that helps (often budget-limited) local agencies to collect data or improve enforcement. Differences in government priorities across jurisdictions can cause problems for cross-boundary FIPs and changing political strategies are also known to affect outcomes (Kall et al., 2022).

Table 3.14 Variable nature of government engagement in FIPs.

Country	Examples of variable government engagement
Costa Rica	Across administrations, the Costa Rican government went from creating roadblocks to the FIP (mostly through policies promoting protection of species that negatively impacted the fishing industry) to strongly supportive (current administration is providing direct financing and agency engagement has been strong and positive).
Taiwan	Taiwan has several policies that conflict with MSC standards (mostly around shark bycatch), creating confusion for vessel owners. However, the government has also provided funding for monitoring and surveillance in tuna FIPs and has worked to move forward several actions under MSC Principle 3.
Indonesia	Some provincial governments have signed memoranda of understanding (MoUs) with MSC Indonesia to fund pre-assessments and workplans for various fisheries, strengthening provincial and national support for FIPs as a pathway to MSC certification. Provincial Ministry of Marine Affairs officials also engage in FIPs to collect data for harvest control rules, though government involvement tends to be higher in more lucrative fisheries such as tuna and octopus.
Peru	The Ministry of Production and the Institute of the Sea (IMARPE) participate in the anchoveta, giant squid, eel, and mahi mahi FIPs. They see their governance and scientific support role as important for FIP progress, helping to publish new regulations such as the regional observer program for giant squid.

Climate change, natural disasters, and environmental variability are meaningful setbacks to FIP progress

Natural disasters and heightened environmental variability due to climate change impact FIPs’ ability to make progress against their workplans and/or objectives. Several interview and site visit respondents noted the importance of improving the FIP model to include methods for achieving more climate-resilient and adaptive fisheries in all aspects – environmental, social and economic.

The MSC standard includes adaptive management and need to monitor stocks under changing conditions, building some climate resilience guidelines for comprehensive FIPs. Basic FIPs may miss key elements of necessary climate resilience, depending on how they sequence their workplans. However, for all FIPs, capacity to incorporate more adaptive management practices and implement them in real-time remains challenging, due to budget and capacity limitations.

Small-scale FIPs may be particularly at risk. Industrial fisheries generally have more capital and thus resources with which to adapt to change; in contrast, small-scale fisheries have high dependency on specific gear and species, often limited logistical infrastructure, and lower capacity to absorb resource declines or shift to alternative income streams.

Socioeconomic conditions of fishers, fishworkers, and communities significantly affects vulnerability of individuals and supply chains to external shocks, as was well-demonstrated during the COVID-19 pandemic (Mangubhai, S. et al., 2024). Consideration for these contextual factors when implementing FIPs is of increasing importance for equity and resiliency.

Table 3.15 The impacts of climate change on FIPs.

Climate change impacts	How impacts deter FIP progress	FIP responses
Changing oceanographic conditions and stock distribution changes. This has been seen in Peruvian giant squid and mahi mahi FIPs (both transboundary stocks)	FIPs need to invest more in fisheries science and data to understand stock status and fishing patterns for management improvements and climate adaptive policies.	Heightened government engagement, as well as vessel owner and fisher engagement in data collection (logbooks, eletronic monitoring, sensors) in order to better understand changing oceanographic conditions.
Increased storms and storm intensity (hurricanes). This has been felt by Mexican shrimp fisheries where mangrove nursery ground habitat has been damaged by hurricanes.	Fishery landings decrease when habitat and landing infrastructure are impacted by storms. FIP participants prioritize fishing for livelihoods over accomplishing FIP workplans.	Creation of savings clubs and fishing cooperative financing mechanisms to help buffer against the fishing seasons with lower landings due to storms and natural disasters.

4. What is the current landscape and impact of social responsibility work in FIPs?

Summary of social responsibility

FIPs have expanded to address broader human rights and social equity concerns. Efforts to drive human rights within FIPs emphasize compliance, accountability, and due diligence in line with international laws and principles to ensure that all members of the value chain can exercise their fundamental rights. By contrast, social equity work strives to create a more equitable distribution of costs and benefits from participating in a FIP.

Though human rights and social equity work are complementary, they should be understood as two distinct areas of action. Human rights work is grounded in ensuring compliance with universally recognized standards and establishing mandatory minimums. Frameworks such as FisheryProgress' Human Rights and Social Responsibility Policy (HRSRP) are designed to guarantee that the most fundamental rights are upheld and that violations are identified and addressed through accountability mechanisms. These interventions are not optional; they represent baseline obligations under international and national law. By contrast, social equity is not governed by legal mandates but remains essential to uphold fair and sustainable interventions. It addresses disparities in access, opportunity, and benefit-sharing that affect livelihoods and can ultimately determine the FIP's outcomes.

While FIPs have made significant strides towards advancing social progress, they remain ill-equipped to uphold core human rights standards. The HRSRP is insufficient at providing the necessary infrastructure for verification, remediation, and human rights due diligence. Current FIP practitioners lack the requisite expertise to develop social workplans that address key human rights concerns raised by the social risk assessment. In addition, the HRSRP adds start-up costs and capacity demands that pose further challenges for FIP implementers.* CEA observes that just one-third of all FIPs required to report their social workplans on FisheryProgress have done so. A series of research studies, many led by J. Sparks and C. Williams, suggest that a voluntary improvement model is inappropriate to advance human rights, as FIPs cannot demonstrate improvements against human rights laws – “they are either compliant or they're not.”¹ As a result, FIPs could be used to “fair wash” serious issues of labor exploitation and human rights abuses.^{2,3}

There are strong opportunities for FIPs to elevate social equity. CEA observed several social inequities in FIPs, from fishers who are unaware of their FIP, to numerous first-mile participants noting that they did not feel the distribution of costs and benefits was fair. Nevertheless, initiatives by FIP implementers (e.g., SmartFish, ABALOB, Blue Ventures, etc.) and other entities such as Fair Trade, demonstrate the potential of FIPs to strengthen fisher livelihoods and deliver tangible returns to fishing communities.

*CEA conducted this analysis prior to FisheryProgress' launch of the Human Rights and Social Responsibility Version 2.0 in July 2025.

¹ Williams et al., 2023. ²Sparks et al., 2025. ³Greenpeace, 2025.

FIPs face pressure to address human rights and social equity issues in fisheries

The seafood industry is an important source of livelihoods. The global fisheries sector employed an estimated 33.3 million people.¹ Beyond income, seafood plays a central role in upholding cultural traditions, meeting nutrition and food security needs, and facilitating community cohesion. Given the interlinked dynamics between seafood and people, FIPs and their outcomes bear profound implications for the well-being of the communities they engage.

Since 2020, regulatory changes, buyer demands, and public pressure have pushed FIPs to demonstrate commitments and action to ensure responsible seafood production. Corporate social responsibility policies and mandatory human rights due diligence requirements in major market states have intensified expectations for FIPs to uphold and promote laws and principles governing human rights. As regulatory requirements tighten, seafood buyers are revising sourcing policies aligned with these standards. As a result, FIPs are now being asked to demonstrate compliance with human rights obligations as a condition of market access.

Practitioners are pushing for FIPs to move beyond demonstrating compliance with human rights standards to address the broader social equity challenges facing fishers and coastal communities. Broadly, social equity is concerned with “fairness and justice in how people are treated or public policies are formed and implemented.”² While social equity is not a legally binding concept and lacks the same legal implications as human rights obligations, it is gaining traction as a key consideration in fisheries management.

Practitioners recognize that focusing on compliance can overlook the socioeconomic realities of fishing communities; FIPs could respect human rights norms while contributing to an inequitable distribution of benefits and costs for fishers. As a result, FIP implementers and buyers seek to promote social and economic benefits as integral outcomes for FIPs, using this focus to incentivize community engagement and enhance the durability of the intervention. For FIPs focused on securing fisher livelihoods, social equity represents a central objective.

Since 2020, the landscape of actors and initiatives addressing human rights and social concerns in FIPs has expanded considerably. However, this proliferation has occurred without a shared set of indicators or common data foundation, leading to fragmentation, duplication, and confusion among implementers and partners. CEA, for example, identified at least four distinct tools designed to monitor human rights risks in seafood supply chains. Greater coordination across these tools and platforms could improve data comparability and streamline social responsibility monitoring efforts within the global seafood sector.



¹FAO, 2024; ²Bennett et al., 2021.

Without a unifying framework, it remains difficult to track progress and coordinate action

While the HRSRP offers a mechanism for FIPs to measure and communicate progress, its reach is limited as not all FIPs report on the platform. Beyond publicly reported initiatives, different frameworks and tools strive to achieve social improvements but lack a set of shared indicators and demonstrate significant redundancies. For example, there are at least four tools focused on monitoring human rights risks in seafood supply chains. In addition, CEA identified at least twelve social frameworks or certifications, up from nine in 2020. Such duplication poses risks of confusion, fragmentation, and inefficiency, given that these tools draw from different data sources and may rely on the same sources of philanthropic funding. There is an opportunity for organizations to standardize and consolidate to promote more robust measurement, eliminate redundancies, and enable the integration of diverse data to monitor and address human rights and social risks in seafood supply chains.

Lack of accountability across the supply chain undermines FIP progress

Interviews and site visits indicated that the lack of accountability systems deters industry engagement and slows FIP progress. Currently, there are no system-wide measures to improve accountability and hold partners to their commitments across the FIP landscape, but some implementers and FIP participants are attempting to address these challenges on a case-by-case basis.

Table 3.16 Landscape of social responsibility in FIPs including tools, policies, frameworks, and practitioners engaged.

	Implementers	Frameworks and certifications	Assessment tools and methodologies	FIP-adjacent activity
NGO Industry-affiliated Industry For-profit	▪ Pronatura Noroeste AC ▪ COBI ▪ MDPI ▪ Ocean Outcomes ▪ Smartfish A.C. ▪ ABALOB ▪ Blue Ventures ▪ Conservation International	▪ FisheryProgress Human Rights and Social Responsibility Policy ▪ Community Catch ▪ Fair Trade USA Capture Fisheries Standard ▪ Sustainable Supply Chain Initiative ▪ Roadmap for Improving Seafood Ethics - (RISE) ▪ AENOR's Responsible Tuna Fishing (APR) certificate ▪ FISH Standard for Crew ▪ Conservation Alliance for Seafood Solutions FIP Guidelines ▪ Global Seafood Alliance Responsible Fishing Vessel Standard ▪ Responsible Fishing Port Scheme ▪ Clearview Global Labour Provider Certification Scheme ▪ PNG FIA Responsible Sourcing Policy	▪ Social Responsibility Assessment ▪ Triple Impact Fisheries Evaluation Framework ▪ Labor Safe Screen ▪ Seafood Slavery Risk Tool ▪ Seafood Watch Seafood Social Risk Tool ▪ Certifications and Ratings Collaboration – Human Rights Abuses and Risks in Seafood Tool ▪ SFP's Seafood Metrics Human Rights Risk Indicator Relevant policy agreements ▪ International Labour Organization (ILO) – Work in Fishing Convention 188 ▪ EU Corporate Sustainability Due Diligence Directive (CSDDD) ▪ IMO Cape Town Agreement ▪ US Seafood Import Monitoring Program	▪ Destructive Fishing Watch ▪ Worker-Driven Social Responsibility Network ▪ Global Labor Justice – International Labor Rights Forum ▪ OxFam ▪ Human Rights at Sea ▪ International Transport Workers' Federation
	▪ AP2HI ▪ IPNLF ▪ OPAGAC ▪ PACPI			▪ FAO Small-Scale Fisheries Guidelines ▪ ILO Ship to Shore Rights Southeast Asia ▪ UN Guiding Principles on Business and Human Rights
	▪ Del Pacifico Seafoods ▪ Starkist ▪ Thai Union			
	▪ Key Traceability ▪ Kolektif ▪ Pelagikos Private Ltd. ▪ Meliomar			▪ Seafood Task Force ▪ Seafood Ethics Action Alliance ▪ Global Tuna Alliance

The HRSRP aims to embed social responsibility in the FIP reporting process

The UN Guiding Principles on Business and Human Rights served as the framework for the development of the Human Rights and Social Responsibility Policy (HRSRP). Principle 15 of the Guiding Principles outlines core requirements for business enterprises to respect human rights, including: (1) a policy commitment to uphold human rights; (2) a due diligence process to identify, prevent, mitigate, and account for human rights impacts; and (3) processes to enable the remediation of any adverse human rights impacts they cause or to which they contribute. Building on these principles, the HRSRP serves as a guiding framework for FIPs reporting on FisheryProgress to incorporate key human rights and social responsibility considerations into their operations. As a condition of their visibility on FisheryProgress, all FIPs are required to comply with the HRSRP, with additional requirements for projects deemed higher-risk. Since its first publication in May 2021, the HRSRP has undergone several revisions and updates to reflect the feedback from and realities of a diversifying FIP landscape. FisheryProgress released another update to the HRSRP in June 2025 – its most significant change was to require an assessment of the availability and effectiveness of grievance mechanisms. Other components have remained relatively unchanged.

Table 3.17 Alignment of HRSRP with UN Guiding Principle 15.

UN Guiding Principle 15: Requirements for business enterprises	FisheryProgress HRSRP components
15a. Policy commitment outlining responsibility to respect human rights	Component 1: Baseline requirements for all FIPs. All FIPs reporting on FisheryProgress must: 1.1 Have a public policy statement committing to human rights and social responsibility. 1.2 Provide detailed information about the vessels and/or fishers participating in the FIP. 1.3 Make efforts to raise awareness among fishers about their rights. 1.4 Ensure a grievance mechanism is available to all fishers. (Revised in June 2025 to: FIPs must assess the availability and effectiveness of grievance mechanisms for fishers in the FIP). 1.5 Conduct a self-evaluation against criteria for increased risk of forced labor and human trafficking.
15b. Human rights due diligence process to identify, prevent, mitigate, and account for how impacts on human rights are addressed.	Component 2: Additional actions for high-risk FIPs. If an FIP meets at least one risk criteria per Requirement 1.5, it must also: 2.1 Complete a formal risk assessment using the Social Responsibility Assessment (SRA) tool or an equivalent method. 2.2 Develop and implement a social workplan to address high-risk findings from the assessment. Progress must be reported publicly on FisheryProgress through six-month and annual updates until those risks are reduced to at least a medium level.
15c. Processes to enable the remediation of any adverse human rights impacts	Component 3: Voluntary reporting for broader social performance. Any FIP on FisheryProgress may choose to voluntarily report on the requirements outlined in Components 1 and 2.

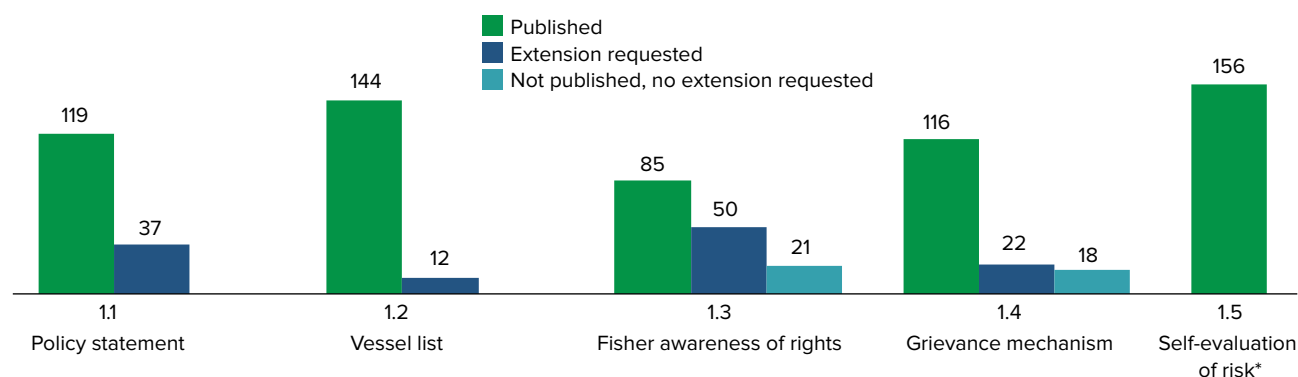
FIPs excel at generating social data but are weaker with implementation

FIPs demonstrate strong performance against the HRSRP components that require FIPs to gather and report information.

76% of all FIPs have published a social policy statement, which may reflect pressures from EU and US market expectations where tighter social responsibility regulations are common and where client companies are increasingly adopting human rights commitments within their sourcing policies. Companies may also be seeing an increasing ease with compliance due to growing awareness and technological advancements. Similarly, 92% of FIPs report their vessel lists, and 75% of FIPs have demonstrated that a grievance mechanism is available to all fishers. FIPs can serve as a critical vehicle to gather and publish social data on FisheryProgress, consistent with their broader role in coordinating across actors and generating ecological information about the fishery.

By contrast, fewer FIPs have published reporting on the fisher awareness of rights requirement. Just 55% of active FIPs have provided reporting against this requirement, suggesting that facilitating more substantive action to address human rights risks remains a challenge. FIPs typically fulfill the fisher awareness requirement by organizing group trainings and sharing informational materials on fishers' rights. NGO implementers often coordinate these sessions, though some FIPs have reported the need for extensions to identify capable local partners and align with fishers' schedules.

Figure 3.25 Number of FIPs that have taken various HRSRP actions and reported on FisheryProgress (N=156).*



*FIPs are required to complete the self-evaluation of risk to be published and maintain active status on FisheryProgress.

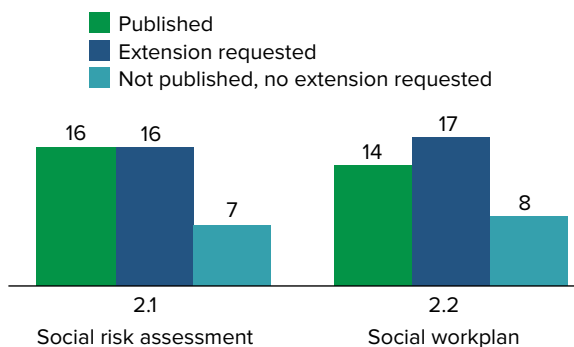


FIPs are less effective at identifying and addressing human rights concerns

While FIPs are instrumental to generating data, the evidence suggests they may be less effective at identifying or addressing human rights concerns. Data from HRSRP reporting shows that the majority of FIPs identified as higher risk for forced labor and human trafficking have not published reports in support of requirements 2.1 (social risk assessment (SRA)) or 2.2 (social workplan). Only 40% of FIPs required to conduct an SRA have done so, and just 35% have published a social workplan. Those that requested extensions on these requirements commonly cited funding shortages and challenges with finding consultants qualified to conduct assessments and/or develop workplans.

While the HRSRP has established clear expectations to identify and remediate issues concerning human rights, many FIPs appear to lack the financial resources and expertise to meet these requirements. The limited uptake of SRAs and social workplans not only highlights resource constraints at a landscape-level but reflects the broader challenges within the FIP model. FIPs can generate environmental and social data but are less equipped to meaningfully address social risk and uphold human rights norms in the global seafood industry.

Figure 3.26 The number of FIPs reporting in different categories for HRSRP social risk assessment and social workplan (for FIPs that require a social risk assessment).



Social workplans published on FisheryProgress aim to address a range of challenges within and outside of the FIP

FIPs identified as higher-risk (e.g., relies on distant water fleets, migrant fisher labor) are required to submit a social workplan to address any gaps identified by a mandatory social risk assessment. A smaller subset of FIPs voluntarily submits social workplans. FIPs vary widely in the issues they aim to address and the approaches they use to accomplish workplan goals. Examples of the variety of FIP social workplans are shown below.

Table 3.18 Examples of FIP social workplans.

FIP	Components of published social workplan	Excerpt of workplan actions
Mauritania small pelagics – purse seine	▪ Design oversight mechanism for vessel operators (brokers). ▪ Increase coastal fleet crew awareness of rights, terms and conditions of employment, health and safety, access to unions, and grievance mechanisms. ▪ Ensure all regulations on pollution and waste disposal are respected. ▪ Ensure employment conditions in the factories comply with the regulations. ▪ Ensure that crew on the pirogues landing to the factories includes no minors, are not suffering from debt bondage, and work in appropriate conditions.	<i>“Evaluate local supply chains for fish products, estimate requirements in terms of volume and price needed to support food security, and adjust management accordingly.”</i>
Southwest Atlantic Argentine shortfin squid – jig (TSSFA)	▪ Enhance the salary repayment process for crew members.	<i>“Survey the opinions and practices regarding the salary payment frequency and methods from crew members and vessel owners, and facilitate a discussion to establish an salary payment process and verification mechanism, ensuring that crew receive their salaries.”</i>
South Africa yellowtail amberjack handline	▪ Enhance livelihoods security by creating market access for Struisbaai-caught yellowtail, explore market opportunities, advance traceability systems, and create greater fuel resource efficiency. ▪ Improve the quality and access of medical care through first-aid preparedness trainings and establishing ambulance services to serve the Struisbaai community. ▪ Engage fishers and relevant government agencies to recognize and protect customary tenure for Struisbaai traditional linefishers and collaboratively map fishing grounds.	<i>“Investigate establishment of MoU or similar agreement with ambulance services to serve Struisbaai community. Contact National Sea Rescue Institute and harbour master to assist in improving access to emergency services.”</i>

Low-risk FIPs are voluntarily using social risk assessments and workplans to advance social objectives

Table 3.19 FIPs voluntarily conducting social risk assessments and developing social workplans on Fishery Progress.

FIP on FisheryProgress	Implementer	Risk assessment	Social workplan
Mexico Bahía de Kino penshell – hookah	COBI	Submitted	Submitted
■ Indonesia South Kalimantan shrimp – trammel net	Kolektif	Submitted	Submitted
Vietnam yellowfin tuna – handline	WWF – Viet Nam	Submitted	Did not submit
Vietnam swordfish – handline	Hong Ngoc Seafood	Submitted	Did not submit
■ Mexico Yucatan octopus – drift rod and line	COBI	Submitted	Did not submit
■ Peru Tumbes & Piura eel – trap	Redes-Sostenibilidad Pesquera	Submitted	Submitted
Panama Northern nylon shrimp – bottom trawl	Marpesca	Submitted	Submitted
South Africa yellowtail amberjack – handline	ABALOB	Submitted	Submitted
■ Mexico Marismas Nacionales artisanal whiteleg shrimp – trap/ cast-nets	Smartfish AC	Submitted	Submitted
Philippines yellowfin and bigeye tuna – handline (FFSAPI-Sargen)	FFSAPI and Sargen	Submitted	Submitted
■ CEA site visit			

Ten FIPs published voluntary risk assessments on FisheryProgress as of October 2025. Eight are comprehensive and two are basic; they are based in Latin America, SE Asia, and Africa.

The majority (7) chose to develop social workplans to address risks identified in their assessments. The Vietnam swordfish and Vietnam yellowfin tuna FIPs were deemed “low risk” across all assessment indicators, but the swordfish FIP is in the process of developing a follow-up action plan.

Comprehensive FIPs may be using social workplans to differentiate their products. The eight comprehensive FIPs with voluntary workplans are all aiming to supply buyers in the US and EU; key informants noted social workplans could be a mechanism to meet buyer demands or to gain market advantages, but our research could not confirm if this benefit is real.

Risk assessments and social workplans are supporting basic FIPs to advance their goals of establishing fishery co-management plans and improving fisher well-being.

The HRSRP has helped advance awareness and raise the profile of social work in FIPs

Table 3.20 Examples of positive impacts from social responsibility work in FIPs.

Impact	Description
Recognition for social efforts	Some informants noted that the additional requirements mandated by the HRSRP policy have granted FIPs, particularly those that have had long-standing commitments to social responsibility, some degree of recognition on FisheryProgress. There is limited evidence to suggest that this recognition translates into market advantages.
Increased awareness of social and human rights among fishers and fishworkers	Fisher and fishworker informants noted that the rights awareness trainings were helpful tools to make them feel safe onboard vessels. Although a weak spot for FIPs, these findings indicate that with funding and expertise, trainings on rights and grievance mechanism efforts can be effective ways to support fishers' in gaining rights awareness.
Industry uptake of social responsibility commitments within their sourcing policies	HRSRP requirements help reinforce industry commitments to social responsibility. The policy statement requirement can be a helpful catalyst for companies, especially those leading bottom-up FIPs, to develop their own responsible sourcing policies. One buyer informant noted that they were able to use the FIP's social risk assessment data to inform their company's internal human rights due diligence process.
Increased availability of social and human rights data	FisheryProgress' public reporting requirements have contributed to greater transparency and availability of social data. Informants noted that open-source social risk data has helped elevate awareness of the key challenges facing wild-caught fisheries. Buyers are now able to use FisheryProgress to reference, review, and compare social data across FIPs to inform their buying decisions. Nevertheless, informants expressed strong support for greater consolidation and collation of social data (e.g., a central social-data reporting platform) to improve user interface.

"We did an SRA a few years ago and found that there was a lack of awareness of social rights. Without the FIP, we would not have organized opportunities for fishers to learn more about their rights."

—Implementer for African FIP

"We had good engagement from the industry...[Even though it wasn't required], the industry wanted a social workplan to inform their own human rights due diligence process."

—Implementer for European FIP

"The cooperatives were doing social improvements before the HRSR, but there was no recognition - now there is more official recognition, even if it is not yet rewarded by markets."

—Implementer for Mexican FIP

HRSRP implementation disadvantages small-scale and bottom-up FIPs

The costs associated with SRAs (which can be at least \$10,000 per assessor) and social workplans create significant financial challenges for FIPs. Resources Legacy Fund (RLF), in partnership with the Packard Foundation, offered grant support on a competitive basis for FIPs to implement the HRSRP and conduct SRAs between 2021 and 2023. Approximately 40% of FIPs applied for support, but only about one-third of FIPs that applied to RLF received funding, due largely to demand for grants far outstripping available resources. This large unmet need for financial support suggests a lack of investment in HRSRP implementation by industry and private sector beneficiaries of social responsibility work.

For new FIPs, the HRSRP adds data and implementation requirements that increase initial start-up costs, creating a higher barrier to entry. This disproportionately affects small-scale and bottom-up FIPs, which have fewer financial resources available, especially at the start. Key informants and site observations from small-scale FIPs in low- or middle-income countries cited the costs associated with the SRA and social workplan implementation as a major barrier. For bottom-up FIPs that seek to engage buyer commitments through their efforts, commissioning an SRA and implementing a social workplan can be especially challenging due to lack of financial support at the beginning of the FIP. To that end, a recent evaluation of the HRSRP found that FIPs with existing industry partnerships were more likely to have funding available for HRSRP implementation.¹

FIPs that began before the HRSRP's launch in 2022 did not plan or budget for the costs associated with implementation. There is evidence of some of these FIPs going inactive at least in part due to the additional burden of HRSRP compliance. For example, the implementer for the Japan North Pacific blue shark and swordfish longline FIP noted that they developed a workplan through a yearlong process of careful consultation with fishers; after the HRSRP was introduced, this “killed trust” among participants, especially as there were no equivalent requirements under MSC. Similarly, one FIP in the UK chose to exit FisheryProgress entirely, while the France Eastern English Channel thornback ray FIP seriously considered leaving the program due to concerns about HRSRP but ultimately decided to remain.

Ultimately, the HRSRP introduces a paradox for small-scale and bottom-up FIPs. The policy adds additional activities that raise the start-up costs for FIPs, increasing the urgency to secure additional support from industry or philanthropy. At the same time, FIPs aim to use FisheryProgress to develop buyer relationships and hopefully increase their access to financial resources. Yet, because maintaining a listing on FisheryProgress requires HRSRP compliance, FIPs that struggle to meet these expectations risk being labeled inactive – further limiting their ability to attract the very support they need to comply with the HRSRP.

Just as limited expertise constrained environmental assessment efforts in 2015, the same challenge now hampers effective implementation of the HRSRP

Lack of local social expertise constrains HRSRP implementation. In the 2015 FIP Review, CEA observed that FIP implementers lacked the technical expertise and capacity to develop environmental assessments and workplans. Today, new social responsibility requirements present a similar steep learning curve for implementers. Interviews with implementers acknowledged they lack the technical capacity or awareness of local customs to implement the HRSRP appropriately.

- At least seventeen FIPs requested an extension for the SRA
- Sixteen FIPs requested an extension on the social workplan, citing that they needed additional time to identify a qualified consultant that could conduct the SRA and develop the workplan.

The limited bench of qualified SRA evaluators adds additional financial burdens as assessors must travel to sites to conduct assessments; this can be especially challenging for distant-water FIPs with dispersed vessels. Currently, the SRA Community of Practice is working to build local capacity to mitigate the costs of identifying available assessors and facilitating travel to remote sites.

“[We are concerned about] the continued application of the HRSRP even after the FIP implementers leave – what if the fishers run out of money to run the FIP? There’s not a lot of funding to implement the social improvements.”

—Implementer for Mexican FIP

¹ Causal Design, 2025.

“Fortunately, I have been in the sector a long time and can leverage [previous experience] to manage the SRA. A lot of organizations do not have that. We are privileged to have had resources and capacity in-house to develop tools for the SRA. Most don’t have that.”

—Implementer for African FIP

“We have to take international trips (~\$10K per person) for the SRA...our hope is that the SRA Community of Practice can grow the capacities of local practitioners to do the SRAs so we can avoid taking on this cost.”

—Implementer for East Asian FIP

The HRSRP does not reflect the diverse cultural, legal, and contextual realities of FIPs

The HRSRP’s criteria and mechanisms are less relevant for small-scale fisheries. Fishers representing FIPs in Indonesia noted the infrequent use of the national grievance mechanism operated by Destructive Fishing Watch, preferring to engage the community directly to resolve issues.

Risk evaluation indicators cannot be applied uniformly to both small-scale and industrial FIPs, as their operating conditions differ. The presence of formal, long-term contracts is relevant for FIPs that rely on migrant labor, but it is less applicable in small-scale FIPs where informal, day-based work is the norm. Similarly, while the SRA identifies child labor as a risk factor for labor exploitation, FIP implementers have expressed confusion about the definition of child labor in the SRA and its applicability to the contexts in which they work, where it is often common for children to accompany their parents on fishing trips as part of local fishing traditions.

For FIPs in countries with strong human rights and labor laws, the HRSRP may duplicate or undercut existing standards.

- In France, FIP implementers and producer organizations do not have the authority to communicate with fishers about their labor rights, conflicting with the HRSRP’s rights awareness requirement. This role is reserved for labor organizations and government agencies that have the legal mandate to communicate about human and labor rights.
- Canadian and French implementers note the requirements often overlap or fall short of existing national standards, adding confusion rather than value.
- In Ireland, key informants note existing state agencies are already responsible for labor inspections, audits, and enforcements; it would be inappropriate for FIPs to duplicate or interfere with these official roles. Instead, FIP efforts would be more effective if they focused on understanding and aligning with existing enforcement and remediation systems before taking independent action.



Finally, the HRSRP offers no mechanism to address the underlying drivers of human rights risks, many of which are beyond the scope of individual FIPs. Key informants and site observations described the pervasive threats posed by organized crime and drug trafficking, particularly as greater on-water surveillance and enforcement of IUU fishing increase fishers’ exposure to violence and coercion. Similarly, structural conditions such as unreliable electricity, limited access to education, and gender-based violence exacerbate vulnerabilities but remain outside what a FIP can feasibly address through a social workplan. Although these factors appear in the SRA as risk indicators, there are limited pathways for FIPs to remediate such context-specific challenges.

Documented human rights risks have occurred in at least one FIP and possibly several MSC-certified tuna fisheries

The UK Nephrops FIP case demonstrates the weaknesses of the FIP model in addressing human rights risks. Research identified 62 vessels (approximately 17.5% of the vessels listed on FisheryProgress) each with at least one crew member who experienced exploitative labor practices. Together, these vessels impacted at least 138 migrant fishers, indicating the scale of harm. Of the 62 vessels, 11 were also referred for investigation under UK law for suspected human trafficking.¹ During this period, the FIP claimed progress against HRSRP baseline requirements but frequently requested extensions due to a lack of funding, resources, and expertise.¹ A 2025 Greenpeace investigation found that 17 Indonesian tuna fishing vessels listed as part of a FIP allegedly experienced ILO indicators of forced labor, including abuse of vulnerability, debt bondage, and deception.² This case underscores the broader risks within the HRSRP reporting model: FIPs can collect data and assess risk but are not well equipped to address those risks.

Currently, 60% of FIPs flagged as higher-risk for human trafficking and forced labor have missed or requested an extension for the SRA reporting due date (see page 97), creating opacity that heightens potential for undetected abuses.

Human rights risks in FIPs may magnify as they move into MSC certification. MSC-certified vessels are not obligated to provide the same level of reporting on human rights and social responsibility as FIPs. Active FIPs must comply with the HRSRP to be listed on FisheryProgress, but there is no equivalent policy once they achieve MSC certification. As a result, FIPs risk backsliding into human rights abuses as they are no longer required to provide the same level of human rights and social reporting once they are certified.

- As the FSF Pacific Ocean Longline Tuna FIP nears certification, concerns surrounding human and labor rights remain, and will not be addressed via the move to MSC.³
- While MSC certification claims it is keeping forced labor out of the certified supply chain, widespread lack of traceability limits the credibility of its assurances. A 2024 analysis found that the majority of tuna vessels listed on MSC's registry are participating anonymously. In addition, vessel conditions are untraceable for 74% of the tuna catches reported by independent third-party organizations and auditing bodies, meaning that vessel employment practices and violations for which these employers are responsible are unknown.⁴ Certificate-holders commonly self-reported positive, risk-free accounts of the conditions on the tuna vessels, which contradict the reports from fishers reporting forced labor on at least 11 vessels in the program since 2019.⁴

“MSC’s labour procedures, and the data it is collecting, suggest that the ecolabeling approach to handling labour and human rights is client-centered and not fisher-centered.”

— Nakamura, 2024

“As the FIP transitions to MSC, we have emphasized the importance of maintaining the human rights due diligence efforts in recognition that it is a voluntary environmental standard that does not address labor rights.”

— Ocean Outcomes in Godfrey, 2025

¹ Sparks et al., 2025; ² Greenpeace, 2025; ³ Godfrey, 2025; ⁴ Nakamura, 2024.

The FIP model is ill-suited to advance enforceable human rights laws

The incremental, continuous improvement model of FIPs threatens to voluntarize legally binding human rights principles.

Fisheries reporting on FisheryProgress may see market access advantages conditional on demonstrating progress towards a benchmark.¹ This can pose problems where human rights are concerned. If an FIP demonstrates reduction in reliance on forced labor, but there is still forced labor, that could be considered as an improvement even though a subset of workers are still suffering from human rights abuses. Retailers with zero tolerance policies can continue sourcing from FIPs under the guise of having a plan in place for improvement. The voluntary nature of corporate engagement and commitments to fisheries improvements allows buyers to avoid addressing causal factors driving exploitation and human rights abuse. For example, while FIPs (or their buyers) can request vessel owners to provide documentation demonstrating alignment with ILO C188's minimum standards under UNCLOS, they are not required to; the opt-in nature of adherence to ratified human rights principles limits effectiveness and threatens workers' rights.

Voluntary, market-based programs aiming to advance fishers' working rights may fail in their objectives and potentially distract from more worker-driven approaches that can lead to social transformation. A catalogue of voluntary, market-based social governance tools (e.g., MSC's Chain of Custody standard, Fair Trade USA, the Responsible Fishing Vessel Standard, etc.) found that the tools would selectively include some international human rights conventions at the exclusion of others.² The analysis found that none of the eight voluntary tools examined met all three fundamental principles of the UNGPS: support for human rights policy, human rights due diligence, and access to remedy.

"A fishery or buyer cannot make progress or demonstrate continuous improvement or movement toward upholding fundamental human rights – you are either compliant or non-compliant."

— Williams et al., 2023

Worker-driven social responsibility (WSR) approaches may offer an additional pathway for addressing human rights abuses in seafood supply chains. By centering the power and participation of workers, WSR proponents suggest these approaches offer enforceable systems of accountability that go beyond voluntary market-based commitments.² Strengthening collective bargaining agreements and ensuring genuine worker representation are also critical to guaranteeing that human rights laws are not only adopted but actively enforced.³ While the FIP model has yet to meaningfully integrate such worker-driven mechanisms, there is potential to explore opportunities for these models to complement one another and drive lasting improvements in social responsibility.

¹ Sparks et al., 2023; ² Sparks et al., 2022; ³ Williams, 2025.

In contrast to human rights, FIPs can be a powerful tool to advance social equity

FIPs are increasingly integrating social equity, particularly in small-scale fishery contexts. CEA notes more explicit equity interventions in these settings, likely reflecting the direct common pool resource challenges inherent in managing coastal fisheries that demand community engagement.^{1,2} Scholarship supports that conservation projects achieve ecological success and enhanced human well-being when Indigenous Peoples and local communities have a central voice and meaningful influence over decision-making processes.³

For marine conservation projects to be successful in engaging communities, it is critical for equity and justice to be embedded in their design. This entails ensuring that participants are treated fairly, which builds trust.⁴ It is equally important to ensure communities perceive benefits to their participation in marine conservation projects to incentivize their ongoing engagement. CEA uses the Bennett framework, which details five dimensions of social equity: contextual, distributional, procedural, management, recognition, and environmental.⁴ These dimensions are detailed in the box to the right.

There are different motivations for integrating social equity as part of an FIP's interventions. On one hand, social equity interventions can be used to help drive the FIP's ecological outcomes by incentivizing fisher and community engagement. For example, in the Indonesia Western and Central Pacific Ocean yellowfin handline tuna FIP, fishers have their choice of which company to fish for/sell product to; buyers implement social equity practices as a way of building trust and retaining suppliers. Other FIPs approach social equity as the primary goal, by seeking secure livelihoods through a combination of economic, social, and ecological interventions.

Components of social equity⁴

- **Recognition equity:** The consideration of local rights, values, visions, knowledge, needs, and livelihoods in policy and practice.
- **Procedural equity:** The level of inclusiveness and participation in decision-making and the embodiment of good governance principles.
- **Management equity:** The extent of local capacity for, leadership in, and authority over management activities.
- **Distributional equity:** The degree of fairness in the allocation of benefits and the minimization of harms to local populations and among groups.
- **Environmental equity:** The safeguarding and maintenance of local environmental quality, sustainability and nature's benefits to people.
- **Contextual equity:** The extent to which contextual factors enable or undermine equity and its advancement in policy and practice.



¹ Ostrom 1990; ² Ferraro et al., 2021; ³ Dawson et al., 2021; ⁴ Bennett, 2022.

The FIP landscape confronts a range of social equity issues

Social equity challenges vary widely across FIPs and largely shape how these projects engage with social issues. While there are many such challenges, a few illustrative examples are included here using the Bennett 2022 framework. Although these equity dimensions are presented separately, they often reinforce one another and are mutually shaped by overlapping factors. Additionally, some challenges predate the FIP and are deeply rooted in the local context, while others emerge over time as inequities arise through the FIP's ongoing operations.

Table 3.21 Examples of the different dimensions of equity and challenges that can manifest across these dimensions.

Equity Dimension	Examples of Challenges
Contextual	▪ Lack of reliable access to basic infrastructure and essential services, such as running water, electricity, and medical care. ▪ Pervasive gender roles limiting women and girls' engagement with or ability to benefit from the FIP. ▪ Prevalence of organized crime threatening fisher safety and/or perpetuating illegal, unreported, and unregulated (IUU) fishing.
Recognitional	▪ Lack of recognition for fishers' customary tenure rights when developing management plans. ▪ Limited embeddedness of local or Indigenous worldviews in management plans or grievance mechanisms. ▪ Disregard of international human rights laws and norms governing migrant labor rights on distant water vessels.
Procedural	▪ Limited awareness among fishers about their participation in a FIP. ▪ Limited local capacity to lead FIP or social improvement efforts.
Management	▪ Lack of fisher and/or community inclusion in fishery management decisions. ▪ Lack of secure financing mechanisms to support local capacity for and leadership in management decisions.
Environmental	▪ Ineffective environmental workplans that have not been able to help with species recovery or ETP bycatch.
Distributional	▪ Skewed distribution of economic benefits, with greater returns directed to downstream, industry actors for engagement in FIP. ▪ Position, age, and gender determining FIP participant's ability to experience benefits from the FIP or certification. ▪ Export demand for product limiting local market access and food security.

Without intentional design, FIPs risk magnifying social inequities

While FIPs were designed to enhance market access, some have unintentionally reinforced or magnified existing social inequities. A research study examining the equity impacts of voluntary sustainability standards across FIPs in India, the Maldives, and Indonesia found that 75% of surveyed fishers were unaware of their participation in a FIP.¹ CEA's own site visits revealed similar patterns of low or limited awareness. These asymmetries in information (particularly in contexts where buyers are initiating the FIPs) alter fishers' expectations and limit their ability to benefit from FIPs striving for certification. Without understanding that these initiatives aim to improve market access and potentially secure higher prices, fishers cannot recognize or negotiate these outcomes as part of their collective bargaining efforts. As a result, fishers (and other first-mile receivers) are unable to assert their rights and share equitably in the gains that FIPs and certifications can deliver.

More broadly, many fishers across regions invest time and resources into improving practices without receiving commensurate financial rewards. Consistent with CEA's 2015 and 2020 findings, fishers are not seeing the economic returns on their involvement in FIPs and/or those projects that eventually achieve MSC certification. Key informants observed that fishers and fishworkers have experienced little to no change in their incomes from their participation in an FIP; instead, these benefits appear to accrue further upstream with retailers capturing most of the profit. When asked about buyers' willingness to pay more, key informants universally agreed that while end buyers bear a moral imperative to pay more, they often refuse to do so.

Further inequities arise from perceptions of unfairness surrounding the MSC ecolabel. On occasion, fishers and vessel owners expressed frustration at the inequities inherent in the ownership of the MSC label once a FIP achieves completion. In many cases, vessel owners bear the greatest costs in terms of financing improvements demanded by the environmental and social workplans but see no tangible benefits as other actors responsible for initiating the FIP (e.g., traders, retailers, distributors, and exporters, etc.) own the label. This point of tension partly motivated the Taiwan Tuna Longline Association to form its own bottom-up FIP so vessel owners could see greater returns on their effort through MSC label ownership.

FIPs that successfully implement equity-oriented interventions that can achieve both ecological and social goals are context-specific and intentionally designed. For example, SmartFish provides value addition and rescue services and, through its commercial arm, provides additional price premiums for fishers (sometimes 300% above market rate), generating tangible financial returns for upstream participants. For FIPs to serve as a credible vehicle to advance social equity, they must prioritize transparency, embed mechanisms for meaningful community engagement, and consider existing structural inequities when designing social interventions.

*"Fishers are not seeing any benefits.
They are just doing [the FIP] for survival."*

— Buyer for Oceania FIP



¹Yadav et al., 2025.

FIPs can elevate social equity, but don't always do so

Many FIPs engage in social work solely through their engagement with the FisheryProgress HRSRP. However, CEA observed many FIP efforts that go beyond reporting requirements that delivered meaningful social improvements. Many of these FIPs are bottom-up and small-scale, with a strong focus on improving fisher livelihoods through capacity building, data democratization, gender empowerment, and value addition/rescue interventions (to name a few). In some cases, strong collaboration between fishers and supporting implementers drives social transformation, while in others, active and engaged buyers have played a critical role in advancing social equity. There are also cases where certification has directed economic returns to the community. CEA also documented examples where FIPs bore negative implications for social equity.

Table 3.22 Illustrative examples of different types of equity outcomes across FIPs.

Example	Description	Social equity implications
Belize spiny lobster – free-diving and casitas	- Fishers' traditional knowledge was integral to the FIP's zoning lobster nursery grounds and updates to gear regulations. - Data about the status of the fishery (e.g., stock status, distribution of fishers across fishing grounds) is not shared with fishers, and they see this is an obstacle to having a sense of ownership over the lobster fishery.	(+) Recognitional: Fishers' local knowledge used to inform management. (–) Procedural: Information regarding the fishery is not transparent to fishers.
Indonesia North Sulawesi skipjack and yellowfin tuna – purse seine	Purse seine vessels' use of fishing aggregation devices (FADs) are perceived to block tuna from coming nearshore and cause pole-and-line and handline fishers to fish further from shore. According to the North Sulawesi provincial government, there has been a decline in catch due to purse seine fishing activity in Fishing Management Area 715. This catch decline, in addition to rising bait costs, has led to the decline of the pole-and-line fishing tradition.	(–) Distributional: Disparities in the catch between purse seine and one-by-one fishing gears (e.g., pole and line, handline).

How to read:

Type: + (positive impact); – (negative impact); ? (ambiguous impact)

Impact: the different dimensions of equity (see Table 3.21)

Note: Impact types and direction (positive, negative, ambiguous) are based on information shared by informants or from CEA's site visit observations. Other participants who were not interviewed may have other perspectives on these impacts.

FIPs can elevate social equity, but don't always do so (2 of 4)

Table 3.22 Illustrative examples of different types of equity outcomes across FIPs (continued).

Example	Description	Social Equity Implications
Sri Lanka blue swimming crab – bottom gillnet	- Any financial benefits from doing the FIP have likely been absorbed by the importers in North America, or the exporters in Sri Lanka. Fishers participating in the project do not appear to be seeing any economic benefits as part of their engagement. - The implementer for this FIP established a community outreach and development program to incentivize ongoing participation. The FIP implementers have allocated 30% of the FIP's funding to the community outreach fund, which communities can use to finance development projects in their villages. Communities have used the fund to upgrade their boats, refurbish local schools, and install electricity for residential buildings.	(?) Distributional: Inequities in the benefits distributed to FIP participants, with downstream buyers seeing the greatest returns and fishers seeing the fewest. The community fund aims to remedy this by using FIP funding to improve community well-being. (+) Contextual: The community fund is addressing infrastructure needs within the fishers' villages.
India Palk Bay blue swimming crab – gillnet	- The remote and dispersed nature of the fishing population has made outreach and fisher engagement in the process challenging. Most fishers interviewed were not aware of the FIP, let alone their participation in it. - Industrial shrimp trawlers infringe on the traditional gillnet fishers' fishing ground and catch significant amounts of crab as bycatch.	(–) Procedural: Fishers are not aware of their participation in the FIP. (–) Recognitional: Traditional fishing methods and grounds of gillnet fishery are not recognized.
South Africa yellowtail amberjack – handline	- The implementer, ABALOB, has connected participating fishers to financial services and insurance products to improve their financial resilience during low fishing seasons. - As part of its social workplan, the FIP is working to help improve basic healthcare services for the Struisbaai fishing community by providing first aid workshops. - The FIP has been engaging with the Department of Forestry, Fisheries, and Environment to strengthen the protection of fishers' traditional right. - Despite ABALOB's efforts to establish an independent platform to sell the FIP product and direct greater premiums to fishers, they are not seeing any financial benefits from engaging in the FIP.	(+) Contextual: The FIP is addressing structural factors such as lack of access to financial and medical services. (+) Recognitional: The FIP is working with the South Africa local government to recognize traditional fisher tenure. (–) Distributional: Fishers are not seeing any commercial benefits from engaging in the FIP.

FIPs can elevate social equity, but don't always do so (3 of 4)

Table 3.22 Illustrative examples of different types of equity outcomes across FIPs (continued).

Example	Description	Social Equity Implications
Indonesia blue swimming crab – trap and gillnet	- While fishers did not appear to be aware of the FIP, they acknowledged the training they had received had improved their ability to manage the fishery. Fishers noted that they were better informed about local regulations. - As a result of the FIP, crab stocks have generally rebounded; fishers are now able to catch more and bigger crabs than they have in previous low seasons, which has improved their income.	(+) Procedural: Fishers have adequate information to help manage the fishery's resources. (+) Distributional: Fishers have more stable incomes through low season. (+) Environmental: Observed improvements in crab stock and size.
Peru jumbo flying squid – jig	The National Society of Artisanal Fishing of Peru (SONAPESCAL) formed to push for formalization of small-scale squid and mahi mahi vessels. This fisher led association participates in the FIP and is pushing for state benefits (e.g., insurance) and more stable relationships with buyers.	(+) Contextual: The FIP is helping to address the prevalence of informality in the Peruvian fishing sector, which is helping fisher associations gain voice and visibility in decision-making.
Pacific Ocean tuna – longline	Vessel owners are paying for improvements (e.g., fishing gear changes) and pushing for better handling practices onboard vessels. To avoid locking themselves into exclusive offtake agreements with trader-led FIPs (e.g., Fue Shin, Cheng Hung Frozen Co. Ltd., and FCF) the vessel owners established the Pacific Ocean tuna – longline FIP through the Taiwan Tuna Longline Association to give them greater independence to choose to whom they sell their product.	(–) Distributional: Vessel owners are not seeing any commercial returns for their engagement in the trader-led FIPs. (+) Procedural: Vessel owners leveraged the FIP process to build their negotiation power with traders.
Virginia oyster – cages, dredges, and tongs	The FIP has helped recover the oyster stock in Chesapeake Bay; according to the implementer, the state of Virginia would have lost ~40% of its supply without the FIP. This has helped retain the local workforce and generated higher incomes for FIP participants.	(+) Distributional: FIP participants are seeing economic returns. (+) Environmental: Observed improvements in oyster stock.

FIPs can elevate social equity, but don't always do so (4 of 4)

Table 3.22 Illustrative examples of different types of equity outcomes across FIPs (continued).

Example	Description	Social Equity Implications
Indonesia Western and Central Pacific Ocean yellowfin tuna – pole & line (COMPLETED)	▪ All Fair Trade-certified fishers must progressively comply with the six elements of the FT standard, including structural requirements, empowerment and community development, fundamental human rights, wages, working conditions and access to services, and resource management. ▪ AP2HI members, including Harta Samudra, Aneka Sumber Tata Bahari (ASTB), and PT Bintang Mandiri Bersaudara (BMB) have introduced initiatives that strengthen community livelihoods and support sustainable fishing. Harta Samudra invested in constructing mini-plants within fishing villages, generating local employment and improving fish processing efficiency. In partnership with the UN and the German Society for International Cooperation (GiZ), ASTB opened a solar-powered ice-making facility that allows fishers to collect ice for free before fishing trips. PT BMB continues to fund its pole-and-line fleet by redirecting profits from its other vessel operations to ensure the welfare of local fishers. ▪ AP2HI/IPNLF/MDPI provides training and other capacity-building support to ensure the implementation of the FairTrade program. Fishers have received training on compliance, good handling practices, and financial literacy.	▪ (+) Distributional: FairTrade premiums directed to communities to help fund key development projects. ▪ (+) Procedural: Participation of fishers and other community members in the FairTrade Association meetings. ▪ (+) Management: Fishers equipped with data and capacity to lead co-management. ▪ (+) Environmental: Observed improvements in tuna stock and size.
Mexico Marismas Nacionales artisanal whiteleg shrimp – trap/cast-nets	▪ SmartFish A.C. has been working with the local fisher cooperative to improve organizational capacity and administration. As the NGO implementer for the FIP, SmartFish has conducted training sessions on business practices, handling practices, and financial literacy. SmartFish has also helped register fishers, trained them on data collection practices, and addressed potential areas of non-compliance. ▪ To elevate the role of women in the FIP, SmartFish has providing capacity-building support for women in the community to participate in cooperative administration (e.g., bookkeeping, marketing, etc.) and post-harvesting. ▪ To increase product quality and reduce the role of middlemen, SmartFish helped cooperatives construct mini processing plants ('mini plantas') closer to offloading sites. These plants employ local community members.	▪ (+) Contextual: Elevating the role of women in fisheries management. ▪ (+) Management: Fishers have enhanced leadership capacities and data to participate in co-management and the mapping of fishing refugia. ▪ (+) Distributional: Improved cooperative business capacity freed fishers from buyers' predatory lending practices that perpetuated debt cycles.

5. What is the current finance landscape, including challenges and opportunities, for sustainable financing of FIPs?

Summary of FIP financing

FIP budget data suggests that annual operating costs may be less in 2025 than in 2020, however, significant data limitations continue to make it difficult to analyze FIP costs.

Annual FIP cost in 2025 ranged from \$22,000 to \$106,000, compared with \$70,000 to \$420,000 in 2020. Scale (landings) were the primary predictor of FIP cost, along with FIP type, with comprehensive industrial FIPs the most expensive. Small-volume, high value FIPs had the highest per-unit cost, similar to 2020.

Philanthropic funding for FIPs has decreased nearly 40% since 2019, while FIP progress has continued, albeit at a slower pace. This sizeable decline in philanthropic funding has not corresponded with a significant contraction of the FIP landscape. However, there are early signs that FIPs may be losing some momentum. Whether these reductions are related to the decline in philanthropic funding, FIPs simply expanding to more difficult contexts, or other factors, could not be determined by this study.

Industry appears to be paying for a greater share of FIP costs, which has likely allowed the FIP landscape to maintain progress despite reduced philanthropic funding. Philanthropic investment has declined, but the industry appears to be contributing substantially to FIP implementation costs, possibly even matching philanthropic contributions at this point. This has allowed FIPs to continue achieving Stage 5 events and reaching completion. This indicates that the FIP landscape can maintain progress without the historical level of philanthropic investment, but likely not to the same degree as before.

The novel financing mechanisms that aim to shift FIP financing away from philanthropy are nascent and unproven. These models rely on a combination of philanthropy and private capital, with the intention of using philanthropy to catalyze private dollars. It is not yet possible to determine how much of the FIP landscape could be supported by these innovations, but for now, they support only a small fraction (<10%) of the total number of FIPs.

Philanthropic funding remains key to many core elements of the FIP landscape. Without philanthropy, these core elements likely would not exist, threatening the model's future viability. This is especially true for elements of the FIP landscape where industry has a low willingness or ability to pay (e.g., the FIP Community of Practice, fisheryprogress.org, HRSR work).

Budget data for FIPs is limited and challenging to access and analyze

Table 3.23 Summary of budget data for FIPs.

FIP Type	% of FIPs with budgets	% of FIPs in FP DB (2024)
Basic, small-scale	18%	11%
Basic, both	8%	5%
Basic, industrial	13%	11%
Comprehensive, small-scale	18%	20%
Comprehensive, both	8%	11%
Comprehensive, industrial	34%	42%

FIP budget data has improved but landscape-level availability and consistency remain barriers to understanding FIP costs.

- Budget data is only available for FIPs that have chosen to make their budgets publicly accessible on FisheryProgress.
- New budget templates from FisheryProgress are an effective means of comparing FIP budgets to one another but are limited by missing data and the voluntary nature of submissions.
- Information about first-order funders of the FIP is available in some of the public budgets, but not all.

Publicly available budgets overrepresent basic FIPs and underrepresent more expensive comprehensive industrial FIPs.

Because comprehensive industrial FIPs tend to have higher total costs but lower per-unit costs, our data may be biased down in terms of total costs and biased up in terms of per-unit costs. However, our methodology controls for this.

Most FIPs operate at between \$22K and \$106K per year, significantly less than found in the 2020 Global FIP Review

CEA analyzed 258 annual budgets from 61 unique FIPs. The plots show average (mean) cost as an “x” and median cost as a line. 25-75% of all budgets fit within the box, and 95% fit within the “whiskers” (lines and bars). The dots beyond those bars are outliers.

Annual operating costs of FIPs may be declining since 2020.

- Annual FIP cost ranges are much lower in 2025 than in 2020 (which ranged between \$70,000 to \$420,000).
- Half of FIPs cost less than \$50,000 per year in 2025, compared with \$150,000 in 2020.
- Today, most FIPs cost between \$16 and \$59 per ton of catch per year to run.

Annual per unit cost of FIPs also appear to be declining.

- Compared with 2020, the average per unit cost of FIPs has decreased from \$209 to \$112, a decline of approximately 50%.
- Compared with 2020, most species groups have lower per unit costs than five years ago (see page 117), with a few exceptions.

Table 3.24 Distribution of FIP total and unit costs.

	Total cost	Unit cost
1%	\$4,927	\$0.07
25%	\$22,375	\$5
Median	\$50,250	\$16
Mean	\$130,020	\$112
75%	\$106,231	\$59
99%	\$2,028,241	\$1,894

Figure 3.27 Average total annual cost (\$/year) (N=258).

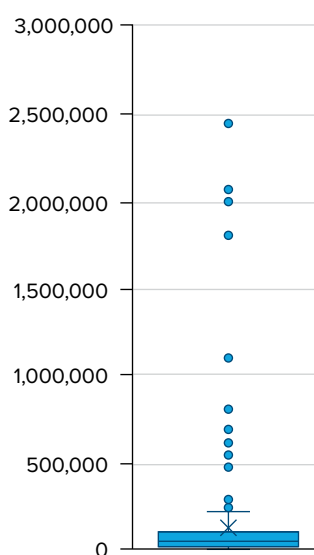
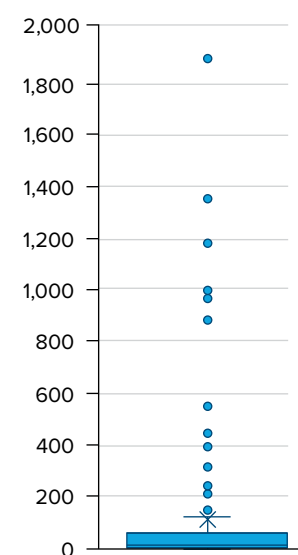


Figure 3.28 Average annual per-unit cost (\$/tonne/year) (N=198).*



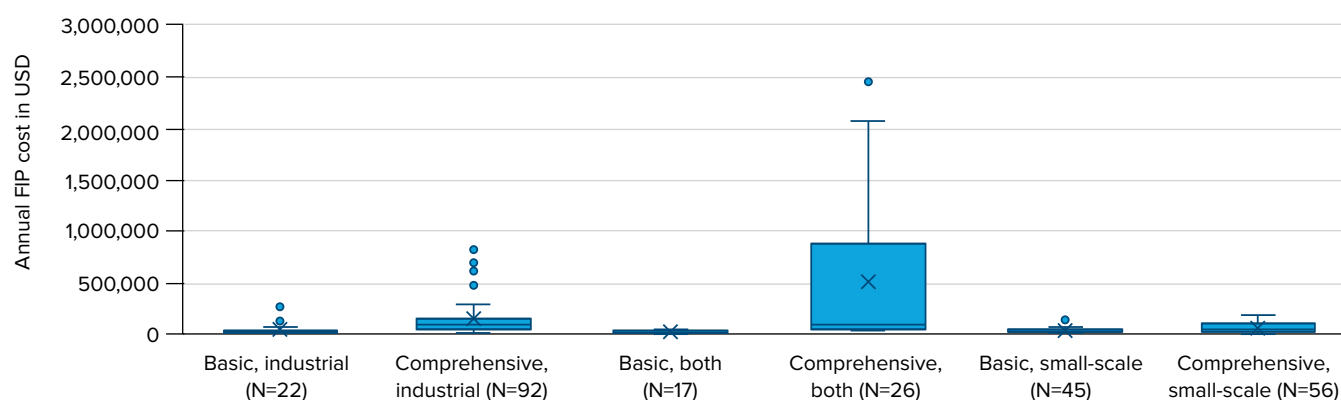
* Lower N value due to limited availability of landing data

Comprehensive FIPs are substantially more expensive to operate

Annual costs across studies vary but can be explained by FIP type

- Based on analysis of FisheryProgress' public budgets, CEA calculated an annual budget of approximately \$130,000.
- Comprehensive FIPs are generally more expensive than basic FIPs, and industrial FIPs are slightly more expensive than small-scale FIPs.
- Small-scale FIPs tend to be more expensive on a per-unit basis. The scale of catch, rather than another variable (e.g., commodity), principally drives per-unit FIP costs (see next two pages).
- López-Ercilla et al. (2024) analyzed budgets from twelve small-scale FIPs in Mexico, with an average annual cost of approximately \$60,000. This lower mean value is likely because they only reviewed small-scale FIPs, which generally have lower total costs (but higher per-unit costs).
- Similarly, a survey of FIP implementers yielded an average budget of approximately \$39,500. However, this data set overrepresents both basic and small-scale FIPs, which significantly drives down average costs, and it has a very small sample size (5), which reduces its accuracy.

Figure 3.29 Average annual cost by FIP type.



Budget data for FIPs is limited and challenging to access and analyze

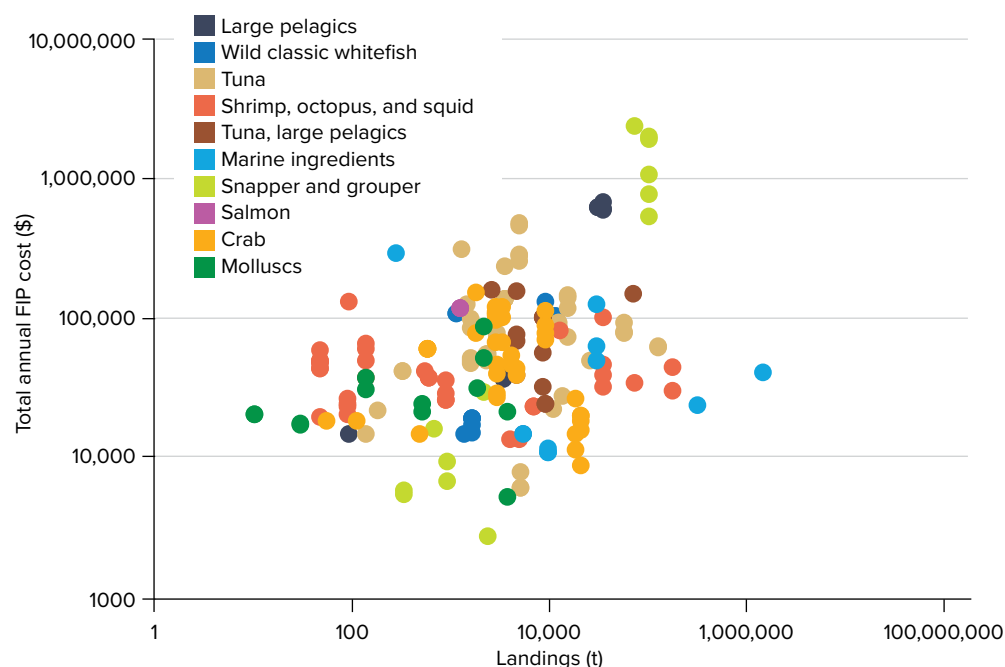
Higher landings are associated with higher annual costs.

The correlation is statistically significant but not strong (i.e., it does not explain much of the variation in cost). Similar to 2020, high-value, high-volume species (e.g., tuna, large pelagics) generally had higher total annual costs, and high-value, low-volume species (e.g., molluscs) had higher per-unit costs.

The influence of commodity type on total cost is less clear (see next page).** Due to the low number of FIPs with budget data in each group, we interpret cautiously.

- Snapper/grouper were both the highest and lowest annual cost; tuna FIPs similarly showed a broad range in annual cost.
- Tuna and large pelagic FIPs had similar total cost to crab and whitefish FIPs.
- The bundling of multiple commodities within single FIPs (shrimp, octopus and squid; warm- and cold-water crab) may obscure some trends.

Figure 3.30 Total FIP costs vs. FIP landings*



This figure uses a logarithmic scale; each interval represents a 10-fold increase in scale.

*Commodity types grouped by CEA Consulting

Commodity trends, including over time, are less clear due in part to limited data

Per unit costs appear to be decreasing since 2020, but there are exceptions. Please note these analyses are constrained by a limited number of FIPs with data available, so we interpret cautiously.

- Tuna, snapper/grouper, whitefish, large pelagics, and molluscs have an average per-unit cost at least 70% lower than in Small pelagics and the bundled shrimp, octopus, and squid FIPs have significantly higher per-unit cost.
- Per-unit cost of crab FIPs is the same as five years ago; however, the annual cost of crab FIPs is significantly less.

Shrimp, octopus, and squid and small pelagics are the only two commodity groups where annual and per-unit costs have increased since 2020. The factors driving these trends are difficult to discern from the data; bundling of shrimp, octopus, and squid may be obscuring some important trends; similarly in 2020, there was only one small pelagic FIP budget included in the analysis, which may skew the trends.

Molluscs and tuna are the only commodities that show declines in both annual cost and per-unit cost since 2020.

Table 3.25 Annual and per unit FIP budgets by commodity from public data.

Commodity	Average annual budget (USD)	Avg. per-tonne annual budget (USD/t)	Number of FIPs
Snapper and grouper	\$695,842	\$13	5
Large pelagics	\$465,629	\$28	4
Lobster	\$186,098	N/A	1
Tuna	\$131,417	\$37	12
Salmon	\$122,500	\$89	1
Small pelagics	\$96,767	\$102	6
Tuna and large pelagics	\$86,152	\$14	3
Wild classic whitefish	\$64,982	\$21	6
Crab	\$61,877	\$38	9
Shrimp/octopus/squid	\$42,898	\$302	10
Molluscs	\$29,165	\$425	4

Beyond philanthropy: Estimating total investment into FIPs (Step 1)

CEA worked with the data available through public budgets on FisheryProgress and philanthropic spending data from CEA's Funding Trends 2025 report, supplemented by insights into FIP costs provided by key informants, to generate broader understanding of the finance landscape of FIPs in 2025.

Three Step Approach to Calculating Total Investment into FIPs 2025

Step 1: Identify average cost by FIP type

- We downloaded all publicly available FIP budgets from FisheryProgress.org and compiled them into a database.
- Utilizing this database, we determined average costs for six different FIP types: basic industrial, comprehensive industrial, basic small-scale, comprehensive small-scale, basic both, and comprehensive both (see page 115).
- The groups above were chosen because FIP type and fleet type were the clearest and strongest predictors of annual budgets, and there were enough budgets of each type to give us confidence that their average values are reasonably accurate. We attempted to break down the budgets further (e.g., by commodity or year), but by slicing the budgets into such specific categories, we lost the power of averaging, as some categories only had one or two budgets.

Table 3.26 Average annual implementation cost by FIP type.

	Basic	Comprehensive
Small-scale	\$34,747	\$61,568
Both	\$19,915	\$94,500
Industrial	\$41,101	\$154,354

Beyond philanthropy: Estimating total investment into FIPs (Step 1)

Step 2a: Identify total annual implementation costs

- After identifying the average annual costs by FIP type, we used FIP DB to count the number of FIPs of each type that were active each year.
- We then multiplied the average costs of each FIP type by the number of FIPs of that type active each year. This allowed us to estimate a total implementation cost for all FIPs in that year.
- The tables at right demonstrate how we conducted this calculation to identify the total implementation costs for all active FIPs, using 2018 as an example.
- Note: The annual calculated costs only account for implementing individual FIPs and do not account for costs of infrastructure (e.g., FisheryProgress) or general operating costs of groups implementing FIPs.

Step 2b: Identify total philanthropic investment into FIPs

- Use the CEA Funding Trends 2025 database to tag all grants that include philanthropic support for FIPs since 2015, including general operating support for NGOs that implement FIPs (see next page).

Table 3.27 Average annual implementation cost by FIP type.

	Basic	Comprehensive
Small-scale	\$34,747	\$61,568
Both	\$19,915	\$94,500
Industrial	\$41,101	\$154,354

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Table 3.28 Total number of active FIPs by type, 2018.

	Basic	Comprehensive
Small-scale	10	28
Both	4	10
Industrial	14	37

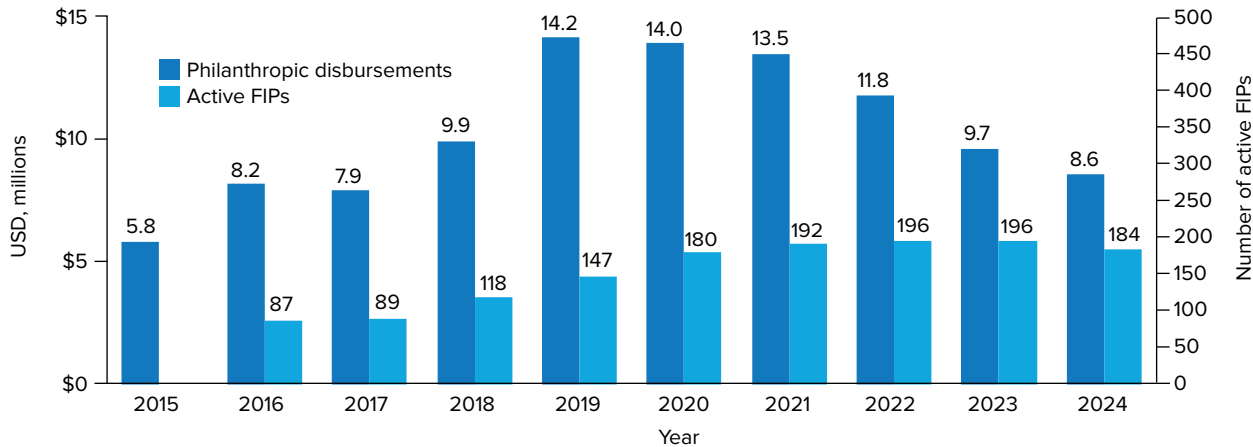
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Total estimated 2018 implementation cost:

\$9,500,000

Beyond philanthropy: Estimating total investment into FIPs (Step 1)

Figure 3.31 Annual philanthropic spending.*



*Disbursals, not commitments

Since 2022, FIP funding has fallen by about 40%. This follows a period of steady growth from 2015-2021.

The majority of philanthropic investment in FIPs today is focused on infrastructure (FisheryProgress, FIP DB) and cross-cutting programs (e.g., buyer partnerships; supplier roundtables). This continues the trend of philanthropic divestment from direct FIP implementation noted in the 2020 report.

Noticeable shifts in philanthropy's investments in FIPs are partially driving interest in fisheries finance. As noted by one key informant: "We've seen philanthropic contributions go down. That is why it is very important to work on sustainable financing."

Decline in philanthropic dollars has occurred at the same time as early signs of potential slowing growth in FIPs (i.e., a plateauing of the number of active FIPs and FIPs with longer timelines to completion). These trends are likely due to a confluence of factors, including FIPs operating in more complex systems and potentially declines in access to some resources.

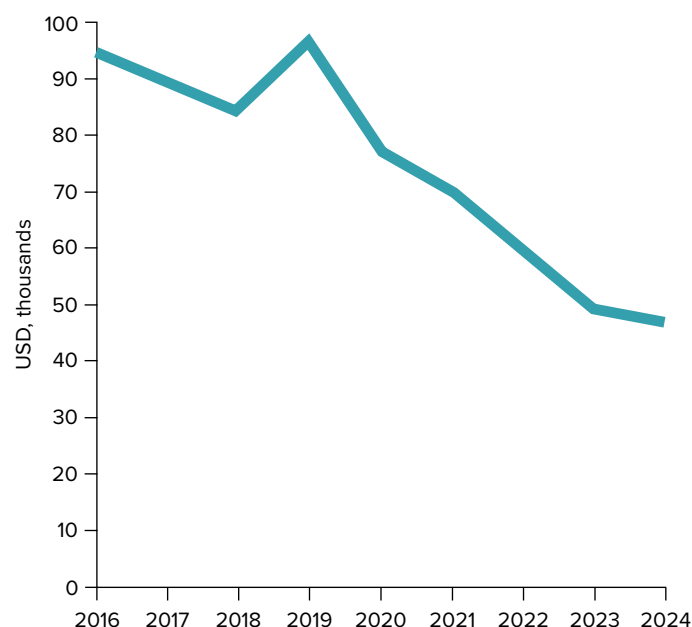
Philanthropic investment per active FIP has declined by almost half since 2016

Philanthropic funding per active FIP has decreased almost 50% since 2016. As the total amount of philanthropic funding for FIPs decreased over time, the number of active FIPs grew:

- Between 2016 and 2018, both philanthropic giving and the number of active FIPs grew, but the rate of FIP growth was faster than philanthropic giving;
- Between 2020 and 2024, the number of active FIPs continued to grow even as philanthropic giving decreased.

There was a noticeable spike in philanthropic giving in 2019 for FIP-related activities. This is due to a greater number of grants disbursed in that year, rather than an increase in the average grant size or the disbursement of particularly notable, high-value grants.

Figure 3.32 Philanthropic spending per active FIP.



Philanthropic spending per completed FIP has declined, and philanthropic spending per Stage 5 events has stabilized, indicating FIPs are securing other funding sources

Philanthropic spending per completed FIP doubled from about \$2 million per completed FIP in 2016 to \$4 million 2021. During this period, philanthropic investment continued to increase, but the number of completed FIPs did not keep pace.

Since 2021, the philanthropic spend per completed FIP has declined to about \$2.5 million. This decline reflects a period in which the number of completed FIPs increased while philanthropic investment declined. This suggests that FIPs can continue to achieve completion with reduced philanthropic support.

Philanthropic investment per Stage 5 event shows a slightly different trend, with philanthropic spend more than doubling from \$100,000 to \$250,000 between 2016 and 2020 for each Stage 5 event. Since 2020, the philanthropic spend per Stage 5 event has remained relatively stable at around \$250,000 per event. This trend suggests that FIPs have been able to navigate increasingly complex environments and demands to achieve the same progress (i.e., a Stage 5 event) without requiring additional funding from philanthropy. This is a preliminary indication that other sources are coming online to fill in the financing gap being left by philanthropic retreat.

Estimating total investment into the FIP landscape: Step 3

Step 3: Determine total implementation costs, philanthropic funding, and the associated gap in all years

- We compared yearly estimated total implementation costs with the total FIP-related philanthropic contributions that we identified in the CEA Funding Trends 2025 report (see next page).
- The difference between annual implementation costs and philanthropic funding was calculated to estimate a funding gap. Because our estimated costs cover only FIP implementation, a significant portion of FIP-related costs is not accounted for, so the values in the “estimated implementation cost” row should be interpreted as an underestimate. This is why philanthropic contributions appeared to exceed the cost of the FIP landscape in 2018 and 2019.

Table 3.29 Annual estimated FIP costs by funder type. Table values in millions USD.

	2018	2019	2020	2021	2022	2023	2024
Estimated implementation cost	\$9.5	\$12.6	\$16.1	\$17.5	\$18.7	\$18.3	\$16.9
Philanthropic contributions	\$9.9	\$14.2	\$14.0	\$13.5	\$11.8	\$9.7	\$8.6
Estimated annual gap	(\$0.4)	(\$1.6)	\$2.1	\$4.0	\$6.9	\$8.6	\$8.3
Estimated running gap	(\$0.4)	(\$2.0)	\$0.1	\$4.1	\$11.0	\$19.6	\$27.8





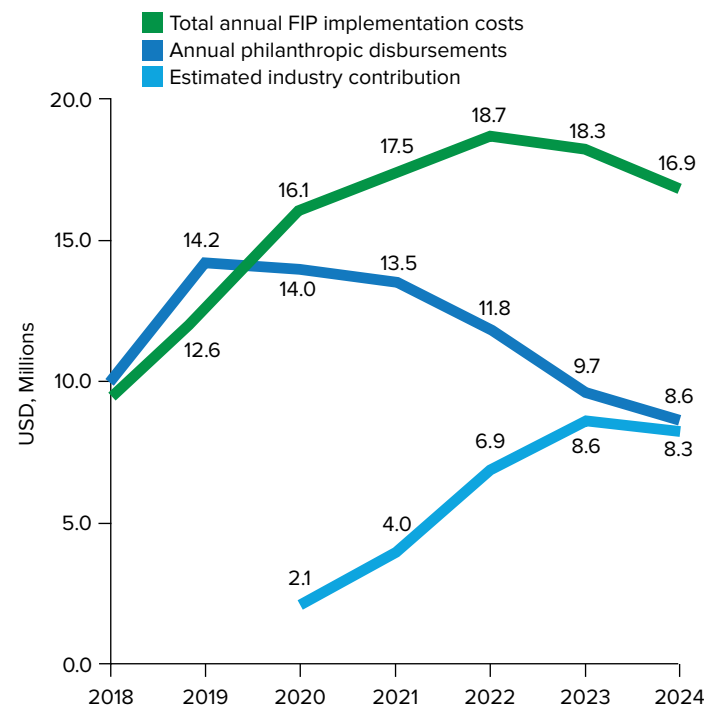
We estimate that industry funded FIPs at nearly the same level as philanthropy in 2024

Philanthropic support has declined as FIP implementation costs have held steady. Following a peak in 2019, philanthropic funding for FIPs has declined (blue line). This occurred as yearly FIP implementation cost (green line) continued to increase and then decreased only slightly, leading to a funding gap.

Industry is the most likely source of non-philanthropic funding. A preponderance of qualitative information, supplemented with some quantitative data, indicates that the existing funding gap is most likely filled by industry. This contribution (difference between green and blue lines) is shown in the yellow line. Additional funding from multilateral sources appears to be limited to certain FIPs in certain regions (e.g., the GEF Marine Commodities project, which ended in 2021, and USAID's Por La Pesca project in Peru and Ecuador). Similarly, government funding appears to remain limited, often in the form of in-kind support.

Total FIP landscape costs are higher than the implementation costs shown in green, and thus the reported gap in yellow is conservative. The cost value in the green line does not include "fixed costs" for FIP-related infrastructure (e.g., Fishery Progress, NGO seafood buyer partnership engagement costs). Thus, the cumulative cost for FIPs is likely greater in all years. Further, the philanthropic disbursements line in blue is likely accurate. Thus, because the green line is likely an underestimate and the blue line is accurate, the yellow line representing industry payment (i.e., the gap between costs and philanthropic disbursements) is also likely an underestimate.

Figure 3.33 Estimated contribution of industry support for FIPs.





Funding models and the sustainable finance landscape of FIPs

Many FIPs are partially or fully supported by industry

The majority of FIPs with data on source of funding describe at least partial contributions from industry.

- Twenty-eight FIPs quantify the amount of money coming different funding sources; of these, 93% describe some degree of industry funding.
- Fourteen FIPs listed a single funding source, with nearly 80% of them supported by industry alone. The other three were funded entirely by philanthropic or NGO sources.
- Some FIPs have funding from private sector (industry), philanthropy, and public (government) sources.

Industry contributions may come from one or multiple nodes in the supply chain.

- Key informant and site observations highlighted some FIPs (often bottom-up) that were supported by contributions from industry via membership or annual fees collected by industry associations at a single node in the supply chain (often processor/exporter or importers).
- Examples also exist of top-down FIPs where FIP costs are distributed across multiple nodes. For example, a processor/exporter may pay for FIP implementer/coordinator fees but share costs of assessment with vessel owners.

Table 3.30 Examples of combinations of FIP funding from industry, philanthropic, and public sources.

FIP Name	Budget year(s)	Industry %	Phil/NGO %	Gov't %
Indonesia Southeast Sulawesi yellowfin tuna and skipjack tuna – purse seine	2019-2028	68%	68%	20%
Mexico Gulf of California hake – bottom and midwater trawl	2019-2025	25%	25%	25%
Mexico Northern Gulf of California swimming crab – pot/trap	2019-2028	15%	15%	0%
Mexico Gulf of California small scale blue shrimp – drift net cast net bottom trawl	2019-2022	75%	75%	12%
Vietnam mixed species – trawl	2021-2024	100%	100%	0%

However, industry and governments have limited willingness to pay for some FIP costs

The landscape of FIP costs includes both implementation costs of specific FIPs (green) as well as the costs of supportive infrastructure shared across the greater FIP community (yellow). The different categories of cost tend to be born by different types of funders, including different actors across the supply chain. Key informants and site observations suggest that industry actors often support FIP launch costs, such as pre-assessments and specific workplan activities (such as stock assessments or gear changes); overall maintenance (regular coordination, reporting to FisheryProgress) is mixed, with philanthropy often indirectly supplementing via general operating support to NGO implementers. Governments may lend in-kind resources for specific activities, such as stock assessments or data collection but often do not contribute financially. FIP infrastructure is by-and-large not funded by industry, and thus, indicates a need for continued philanthropic support or crowding in of other finance.

Table 3.34 Categories of FIP costs distilled from FIP workplans, budgets, and key informant conversations. Light blue columns are costs associated with direct FIP implementation and tend to be covered by industry; darker blue columns are costs related to supportive infrastructure and generally not funded by industry.

FIP launch	Maintenance	Specific improvement activities	Reporting infrastructure	Learning/ best practice
Pre-assessment	Downstream buyer partnerships and commitments, including roundtables	Fisher and vessel owner trainings	FisheryProgress website and review process	Community of Practices
Workplan creation				
Budget and financing plan	Upstream industry engagement and advisory	Stock assessments and government management capacity building	Ratings research and reporting	Research and peer review of FIP performance and impact
	Data collection and reporting	Gear changes	SRA development	FIP guidelines and policy development
		Data collection and sharing		



In addition to philanthropy and industry funding, new blended finance mechanisms are attempting to provide another funding source for FIPs

Funding from different sources is often complementary. Many FIPs utilize a combination of two mechanisms. For example, some FIPs are funded by both philanthropic grants to NGO implementers and membership fees from industry partners.

Blended finance mechanisms have received increasing attention as a method of more sustainably financing FIPs. On the next two pages, we profile two of these blended finance mechanisms: the Fishery Improvement Fund (FIF) and the Ocean Stewardship Fund. Both are relatively nascent and limited in their reach so far.

Table 3.35 Types of financing arrangements found across FIPs.

Group	Mechanism	Description
Philanthropy-and NGO-only	Philanthropic grants to NGO implementers	A private philanthropy gives a grant, usually to an NGO, to implement a specific FIP.
	NGOs’ general operating budgets	NGOs draw from their organizational budgets to work on one or more FIPs.
Industry-only	Price-per-unit fees	Industry actors pay per unit of FIP product purchased.
	Membership fees	Industry players pay a flat fee; this is often via an industry association or cooperative. These fees contribute to a fund that supports FIP activities.
	Efficiency gains (theoretical)	A FIP yields efficiency gains, and the avoided costs finance the FIP.
	Impact investment (theoretical)	A FIP yields an ROI, attracting private investment.
Blended finance	Fishery Improvement Fund	Model combines a per-unit fee, membership fee, and a philanthropic loan.
	MSC Improver Program Loan Guarantee Facility (part of the Ocean Stewardship Fund)	Projects start with grant funding from the Ocean Stewardship Foundation and transitions to industry investment. LGF provides a FIP with a guarantee for a third-party loan, in the form of a repayable grant.



The Fisheries Improvement Fund

Background: The Fishery Improvement Fund (FIF), launched by WWF and Finance Earth in 2023, aims to provide an innovative financing mechanism that can cover the full cost of FIP implementation. Investments into the fund are repaid with interest through contracts set with seafood companies that agree to pay fees into the fund based on the volume of product they procure.

Types of FIPs: FIPs that are facing funding challenges or new basic or comprehensive FIPs. FIF is currently piloting the financing model in a Chilean small pelagics FIP for herring and anchovy (destined for fishmeal and fish oil) with support from Cargill and Skretting.

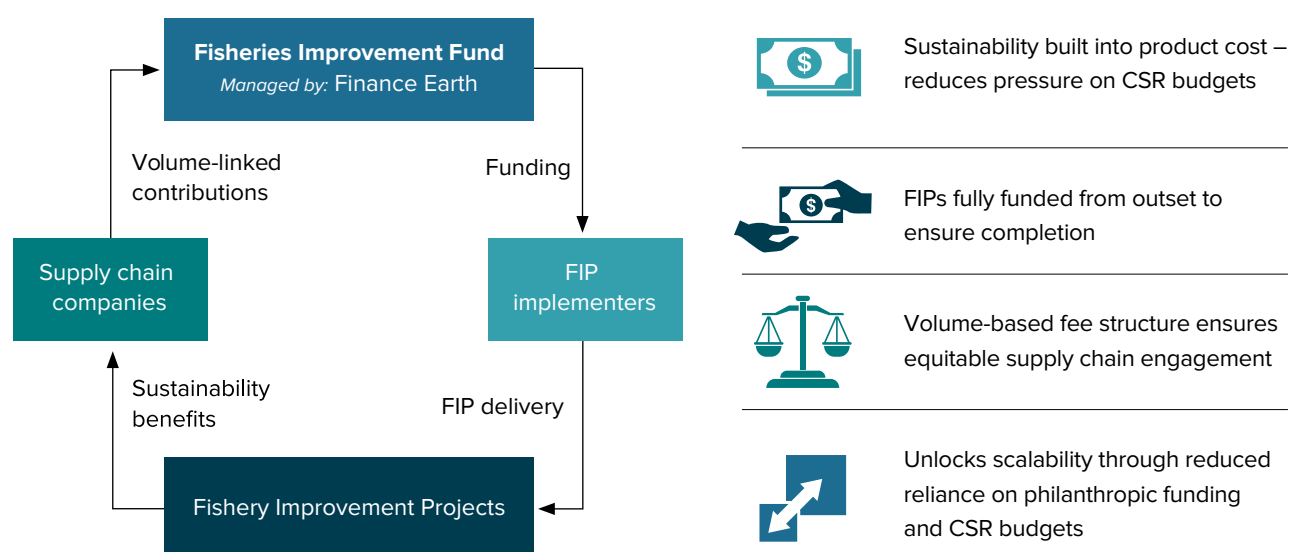
Key objectives: The financing model typically engages supply chain companies through a volume-based fee model tied to FIP sustainability objectives. For companies further downstream, they may contribute through other mechanisms, such as annual fees.

The financing model can help with the upfront costs of a FIP to ensure it is fully funded through its longevity and reduce reliance on philanthropic and CSR budgets.

The fund seeks to mobilize \$25 million (USD) into fishery improvement by 2030.

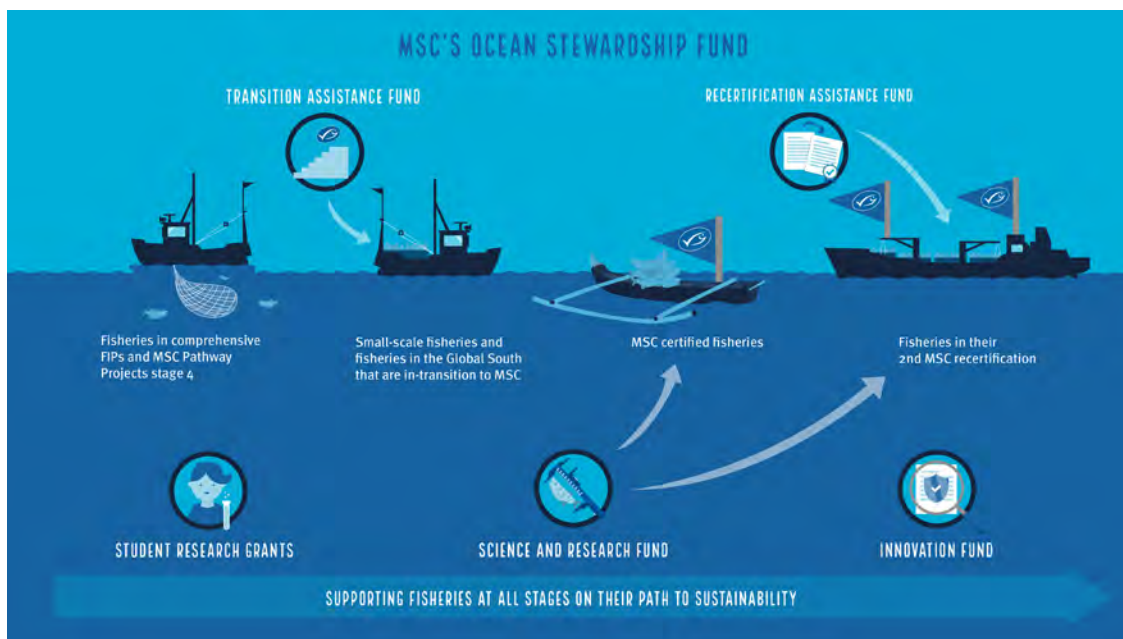


Figure 3.34 Fishery Improvement Fund model (adapted from Finance Earth).



Source: Finance Earth

The Ocean Stewardship Fund (OSF) and the Loan Guarantee Facility (LFG)



OSF background: Launched in 2019, the OSF supports fishery improvements (including but not limited to FIPs) and funds research to support more sustainable fisheries. To capitalize the fund, MSC commits 5% of its annual royalties from MSC-certified product sales, supplemented by private donations. In 2025, the fund disbursed \$2.2 million.

Type of FIPs: Comprehensive, focused on small-scale fisheries and those in developing economies that are part of the MSC Improver Program (see page 176).

Key objectives: The fund supports four categories of support:

- Transition Assistance Fund supports fisheries that are working toward MSC certification through the MSC Improver Program.
- Science and Research Fund to support basic research to overcome common challenges to certification, such as bycatch reduction.
- Recertification Assistance Fund helps MSC-certified fisheries with the costs associated with their second or subsequent recertification.
- Student Research Grants are awarded to postdoctoral students working with fisheries engaged or working toward MSC certification.

The fund provides individual grants usually on the order of tens of thousands of USD.

Loan guarantee facility: In 2025, MSC, in partnership with Clarmondial, launched a loan guarantee facility to test how non-grant instruments could help fisheries transition to more sustainable management, using MSC performance indicators as a metric for monitoring progress. The facility is in its very early stages and is exploring pilots in a handful of fisheries looking at how loan guarantees could help companies in these fisheries gain access to more capital to make improvements.



Sustainable financing for FIPs remains limited but there may be opportunities for philanthropic investment to scale solutions

New blended finance mechanisms are working to bring in more capital; philanthropy could support best practices and learnings to encourage growth of this field. Conservation finance as a field is growing, and FIPs (like other interventions) are intersecting with new innovative models. Key informants and site observations highlighted emergent efforts, including parametric insurance, loan guarantees, and blue carbon financing, as potential pathways to unlock additional capital to support FIP-related efforts. Continued support for research and monitoring/evaluation of these approaches, and where and how they work across different types of FIPs and fishery contexts, is needed to build and scale these solutions effectively.

Invest in local implementation capacity and field-building to reduce FIP costs. Key informants highlighted two approaches to reducing FIP costs:

- Key informants and site observations support the argument that FIPs could significantly reduce costs by engaging more locally based implementation support. This theme, elevated in the 2015 report in terms of environmental expertise, is once again needed, as social and cultural expertise to support social workplan implementation remains a significant barrier to progress.
- There are still inefficiencies and duplication of effort across the landscape – multiple NGOs or partners engaging in the same fishery; implementers repeating mistakes or running into the same challenges as peers and colleagues. The FIP Communities of Practice can help at regional levels, but investment in sub-regional or national coordination could help advance progress, especially in areas with high growth of FIPs (SE Asia).

“Not easy to fund actual improvements with non-grant instruments...so grant money is potentially going to still be necessary – not sure how to solve/close this gap for the improvements that are needed that do not deliver a return on investment.”

— Conservation finance expert

“Could funders think about supporting a regional solution or toolkit, [such as] comprehensive FIP guidelines that are culturally appropriate for a region? A model that includes collective action by NGO and business leaders, governed by the people from the area. That may be more meaningful.”

— NGO implementer



Chapter 4



Site Visits and Country Reflections Through August 2025

Latin America

- Chile
- Mexico
- Peru

Asia

- India
- Indonesia
- Maldives
- Taiwan

Countries visited show an increasingly diverse FIP universe

Table 4.1 Overview of Asia site visits as of August 2025.

Asia	
Country	High-level takeaways
India	▪ A country with an increasing number of FIPs in recent years, India hosts several export-oriented FIPs targeting Western markets, but it is currently suffering from trade barriers and growing concerns over human and labor rights in the seafood processing sector.
Indonesia	▪ FIPs collaborate with the provincial Ministry of Marine Affairs (MMAF) to provide data that can inform species-specific harvest control rules. Government involvement with the country's FIPs varies by commodity and is strongly influenced by global demand; the tuna and octopus FIPs see the most proactive engagement, while the shrimp, snapper/grouper, and blue swimming crabs see the least. ▪ FIPs have provided an effective forum to help develop and advance community-based and co-management approaches. ▪ Changes to fishing licensing and governance structures have redirected the flow of capital to the central government, creating challenges for provincial agencies trying to regulate nearshore fisheries.
Maldives	▪ Certification of tuna has a long history in the Maldives, with the government and processing/exporting sector dedicated to distinguishing their one-by-one tuna in the global marketplace. ▪ Advocacy at the regional level has led to some progress, opening the doorway for possible certification in the near future, but governmental price interventions and competition with more powerful industrialized fleets from the EU threatens the profitability of Maldivian tuna.
Taiwan	▪ Taiwan is an emerging hub for FIP activity, with an emphasis on driving the country's tuna longline fisheries towards MSC certification. ▪ Trader-led FIPs and vessel owner-association FIPs present different incentives and trade-offs. ▪ All the Taiwanese tuna longline FIPs are racing to get MSC certified first in the hope of securing preferred trade relationships and the potential for better prices. This window will close as more FIPs in Taiwan achieve MSC certification. ▪ Taiwanese FIPs face challenges due to misalignment between government and MSC requirements. While the Taiwanese Fisheries Agency allows fishing vessels to catch and sell shark bycatch, MSC requires fishers to release sharks. These discrepancies have caused frustration and confusion.

Table 4.2 Overview of Latin America site visits as of June 2025.

Latin America	
Country	High-level takeaways
Chile	▪ FIP finance innovations are being tested in large commodity fisheries with the Finance Earth Fisheries Improvement Fund for anchovy and herring FIP. ▪ Some FIPs are becoming inactive despite supplying engaged markets. This seems especially prevalent in small-scale, bottom-up FIPs. ▪ Chilean FIPs are seeing reduced government engagement compared to previous years, when fisheries in Chile were receiving MSC certifications.
Mexico	▪ Mexico has more FIPs on FisheryProgress than any other country but growth has tapered over the last five years. ▪ Many FIPs supply the domestic market in Mexico and have goals that go beyond certification. ▪ A majority of the FIPs are in small-scale fisheries with strong community management, livelihood, and value-add components. ▪ Trade and political tensions between United States and Mexico have industry participants in FIPs (especially processor exporters) on alert and looking for alternative markets.
Peru	▪ Strong Peruvian government engagement in FIPs over the past five years has led to greater cooperation with NGOs and industry on fisheries science and policy, helping to improve the regulatory environment and formalization of some of Peru’s largest FIPs (e.g., mahi mahi and jumbo flying squid). ▪ Peru is close to its first MSC certified fishery, as the Eel Trap FIP has entered MSC full assessment with strong industry support. ▪ Given the size of some of Peru’s large small-scale fisheries FIPs (e.g., mahi mahi and jumbo flying squid), attention to fisher and fishworker participation as well as high-level governance, policy and improvements in data collection are needed to overcome challenges with IUU fishing and ensure change on the water.

Latin America

Chile

- Chilean small pelagics (anchovy and herring – WWF)
- Chilean stone crab (Stone Crab Committee – Pesca Sustentable)
- Chango octopus (Pesca Sustentable)

Summary Reflections

Chile continues to see FIP growth and innovation, but not without delays and inactivity. Chile has seen growth in both small-scale fishery FIPs and industrial fishery FIPs, and several export fisheries are prospective FIPs (Patagonian toothfish). On one hand, Chile's FIPs are demonstrating the potential of new FIP financing tools; on the other hand, some FIPs have gone inactive due to lack of funding, inability of top-down incentives to motivate FIP participants, and governance conflicts in fisheries that have both small-scale and industrial fishing pressure.

- **Chile is on the cutting edge of FIP finance.** A new Finance Earth Fishery Improvement Fund FIP for herring and anchovy that was launched in 2024. While this FIP is still in its early Stages, it shows promise for strong market engagement; many in the FIP community are watching this FIP's progress in one of Chile's largest fisheries for small pelagic species.
- **Chile's small-scale fisheries FIPs are becoming inactive.** Inactivity is happening despite some of the small-scale fisheries supplying engaged markets in the US and Europe, for some crab and octopus respectively. The fisheries have not been able secure long-term financing for the improvements they need for MSC certification. Improvements such as data collection and better, and more participatory management processes (e.g., management councils) are still taking place in these fisheries, however aligning incentives with downstream supply chain actors and the cost of reaching certification have been barriers for continued progress.
- **FIPs in Chile lack government support.** After the initial boom of Chile's MSC certified fisheries between 2015 and 2019, when government and industry support of certification was at an all-time high, the recent administration in Chile has focused less on market-based solutions and more on human rights-based approaches and quota reform for small-scale fisheries. Industry and NGOs, such as WWF and Pesca Sustentable, continue to work as FIP implementers, but they lack government support to help propel the FIP work plans forward.



Figure 4.1 Chile (thousands of tonnes).

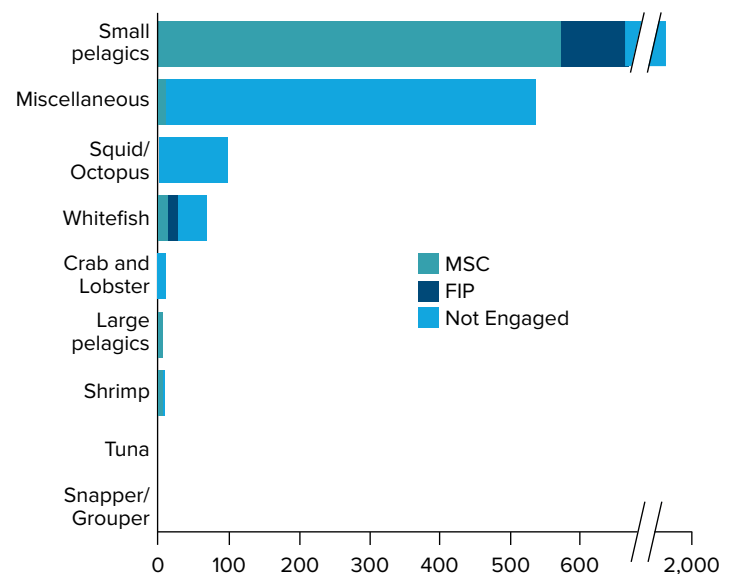


Table 4.3 Summary of FIPs in Chile.

Summary Data	
# FIPs on FP.org:	13
# Stage 4+ FIPs:	5 (3 inactive)
Sites visited:	3

Chilean small pelagics (anchovy and herring – WWF)

Basics	Overview								
Implementer: World Wildlife Fund Stage: Stage 4 Progress Rating A Launch Year: 2024 FIP Volume: 100,000 MT Structure: Comprehensive Supply Chain Engagements: Top-down Condition: Fix End Market: Domestic and Export Implementer Type: NGO	▪ This high-volume FIP uses a novel way of receiving sustainable funding from industry to ensure the sustainability of farmed salmon inputs. ▪ The FIP is struggling to secure deeper engagement from industry, and tensions between industrial and small-scale fishers are limiting the number of vessels participating in the FIP.								
Fishery Issues	Motivation and Goals								
▪ The fishery is a key input for the high-value farmed salmon industry, which seeks to address sustainability issues in its chain of custody. ▪ The fishery needs an ecosystem-based approach to management, given that the anchovy is a low-trophic species. ▪ The FIP must assess and mitigate bycatch and reduce the risk of IUU fishing.	▪ The FIP seeks to achieve MSC certification for the fishery, which will benefit mid-supply chain actors who are trying to sell MSC-certified feed to Chilean salmon farms. ▪ Salmon farms want to demonstrate sustainability of their product and associated inputs via certification (ASC) and robust traceability systems.								
History and Activities	CEA Assessment								
▪ The FIP was launched in 2024 with 5 years of guaranteed funding, including financial support from buyers; the FIP uses Finance Earth’s Fishery Improvement Fund to aggregate and administer funding from fishmeal buyers. ▪ The FIP is struggling to get buyers engaged beyond financial support. ▪ The FIP is developing background data and documentation to support improvements in the stock assessment process. ▪ The FIP is working to expand the number of vessels involved. This is a challenge, as a substantial portion of the fishery’s quota now belongs to small-scale fishers. Due to tensions with industrial fishers (the primary vessels in the FIP), the FIP has had trouble recruiting more boats. ▪ The FIP aims to ensure sustainability and traceability by implementing EM systems and continuing to advance science-based control rules.	<table><tr><td>Progress</td><td> ▪ The FIP is nascent, but it has had substantial progress in securing sustainable funding and with initial baseline data efforts. </td></tr><tr><td>Market context</td><td> ▪ The FIP mostly serves buyers seeking fishmeal and fish oil, such as Skretting and Cargill; engagement from these buyers has been strong financially but lukewarm beyond that. </td></tr><tr><td>Implementer effectiveness</td><td> ▪ Not enough time has passed to truly assess WWF’s efficacy as an implementer of the FIP, although the Fishery Improvement Fund model seems promising. </td></tr><tr><td>Funding</td><td> ▪ The Fishery Improvement Fund model promises more financial sustainability and support from industry. While it predominantly leverages funding from industry, some capital from philanthropy has been used to set up the FIP. </td></tr></table>	Progress	▪ The FIP is nascent, but it has had substantial progress in securing sustainable funding and with initial baseline data efforts.	Market context	▪ The FIP mostly serves buyers seeking fishmeal and fish oil, such as Skretting and Cargill; engagement from these buyers has been strong financially but lukewarm beyond that.	Implementer effectiveness	▪ Not enough time has passed to truly assess WWF’s efficacy as an implementer of the FIP, although the Fishery Improvement Fund model seems promising.	Funding	▪ The Fishery Improvement Fund model promises more financial sustainability and support from industry. While it predominantly leverages funding from industry, some capital from philanthropy has been used to set up the FIP.
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Funding	▪ The Fishery Improvement Fund model promises more financial sustainability and support from industry. While it predominantly leverages funding from industry, some capital from philanthropy has been used to set up the FIP.								

Chilean stone crab (Stone Crab Committee – Pesca Sustentable)

Basics	Overview								
Implementer: Pesca Sustentable Stage: Stage 4 (Inactive) Progress Rating B Launch Year: 2018 FIP Volume: 800 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic and USA Implementer Type: NGO	▪ The stone crab FIP has achieved change on the water for both the target species through regulation and secondary species through improvements in gear. ▪ Despite technically going inactive due to the loss of philanthropic capital, new funds from industry have allowed critical efforts to continue.								
Fishery Issues	Motivation and Goals								
▪ The fishery has suffered from poor stock status due to a lack of strong, well-enforced, and science-based management rules. ▪ Fishers have historically lacked training on sustainable fishing practices. ▪ Substantial bycatch occurs from using pots without bycatch escape hatches. ▪ Climate change is having adverse impacts on the crab population.	▪ The FIP seeks to improve the sustainability of its fishery, both by securing a more sustainable stock status for the Stone Crab and by reducing bycatch. ▪ The FIP hopes to achieve certification to differentiate its sustainable product in the US market.								
History and Activities	CEA Assessment								
▪ The FIP successfully enhanced its understanding of the fishery's stock status and the science underpinning the fishery. ▪ The FIP used improvements in science to secure more effective harvest rules from the government agency Subpesca. ▪ The FIP has worked on analyses to determine the rate of compliance with management regulations and identify methods for increasing compliance. ▪ The FIP has expanded its reach to include women in the committee and has expanded environmental education about the fishery. ▪ The FIP helped improve the gear used by fishers, introducing pots with bycatch escape hatches. ▪ Following the loss of funding, the FIP became inactive, but industry association funding from Ancud Crab Committee continues to support data collection, monitoring, management efforts and environmental education.	<table> <tr> <td data-bbox="833 1115 987 1140">Progress</td><td data-bbox="1011 1115 1442 1262"> ▪ The FIP has made substantial progress in terms of the sustainability of both target and secondary species, but progress toward certification has stalled with the loss of philanthropic funds. </td></tr> <tr> <td data-bbox="833 1297 922 1350">Market context</td><td data-bbox="1011 1297 1442 1444"> ▪ There is strong demand for sustainable product in the U.S., but not enough to pay for the FIP, and domestic markets do not distinguish sustainable from unsustainable product. </td></tr> <tr> <td data-bbox="833 1480 987 1533">Implementer effectiveness</td><td data-bbox="1011 1480 1442 1661"> ▪ Pesca Sustentable and the local Crab Committee effectively improved sustainability of the fishery and engaged local communities. Strong local leadership now leads the implementation of fishery improvements. </td></tr> <tr> <td data-bbox="833 1696 930 1722">Funding</td><td data-bbox="1011 1696 1442 1902"> ▪ The comprehensive FIP was initially supported by philanthropy. The FIP did not reach certification in five years and eventually lost funding support; some additional funds now come from industry, but not enough to restart the FIP formally. </td></tr> </table>	Progress	▪ The FIP has made substantial progress in terms of the sustainability of both target and secondary species, but progress toward certification has stalled with the loss of philanthropic funds.	Market context	▪ There is strong demand for sustainable product in the U.S., but not enough to pay for the FIP, and domestic markets do not distinguish sustainable from unsustainable product.	Implementer effectiveness	▪ Pesca Sustentable and the local Crab Committee effectively improved sustainability of the fishery and engaged local communities. Strong local leadership now leads the implementation of fishery improvements.	Funding	▪ The comprehensive FIP was initially supported by philanthropy. The FIP did not reach certification in five years and eventually lost funding support; some additional funds now come from industry, but not enough to restart the FIP formally.
Progress	▪ The FIP has made substantial progress in terms of the sustainability of both target and secondary species, but progress toward certification has stalled with the loss of philanthropic funds.								
Market context	▪ There is strong demand for sustainable product in the U.S., but not enough to pay for the FIP, and domestic markets do not distinguish sustainable from unsustainable product.								
Implementer effectiveness	▪ Pesca Sustentable and the local Crab Committee effectively improved sustainability of the fishery and engaged local communities. Strong local leadership now leads the implementation of fishery improvements.								
Funding	▪ The comprehensive FIP was initially supported by philanthropy. The FIP did not reach certification in five years and eventually lost funding support; some additional funds now come from industry, but not enough to restart the FIP formally.								

Chango octopus (Pesca Sustentable)

Basics	Overview								
Implementer: Pesca Sustentable Stage: Stage 4 Progress Rating C Launch Year: 2024 FIP Volume: 905 MT Structure: Basic Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic and export to Japan Implementer Type: NGO	▪ The Chango Octopus FIP seeks more recognition in export markets by enhancing the sustainability of its stock and improving traceability; it has already begun progress on improving harvest rules. ▪ Lack of sustainable funding and buyer engagement threatens the long-term viability of the FIP.								
Fishery Issues	Motivation and Goals								
▪ The stock is in an overfished state and needs a rebuilding plan. ▪ Management control rules are not robust enough to maintain a sustainable stock. Closed seasons and gear restrictions are necessary. ▪ Updated stock information is not available, leading to a limited scientific basis on which to make management decisions.	▪ The FIP seeks recognition from the Japanese market for its sustainable product, because sustainability is not rewarded by the domestic market. ▪ The FIP wishes to enhance traceability for its product.								
History and Activities	CEA Assessment								
▪ While early in its process, this FIP has successfully convened fishers, government officials, scientists, and a limited number of buyers through the creation of an Octopus Roundtable. ▪ Most of the FIP's engagement has been with fishers and the government; the actors in the Octopus supply chain have shown limited willingness to be involved. ▪ The FIP is conducting an analysis of existing harvest control rules. ▪ The FIP is discussing potential additional harvest control rules based on the findings of its analysis of existing rules. It aims to incorporate the new rules into the fishery management plan. ▪ While initial efforts have showed progress, long-term financing remains a challenge, as the FIP launched with only two years of guaranteed philanthropic funding.	<table><tr><td>Progress</td><td> ▪ The FIP has made decent initial progress in gathering local actors and beginning an assessment of existing rules. </td></tr><tr><td>Market context</td><td> ▪ The octopus supply chain has shown limited willingness to engage with and support the FIP, limiting the FIP's ability to expand its market access. </td></tr><tr><td>Implementer effectiveness</td><td> ▪ While it is too early to fully assess Pesca Sustentable's effectiveness, their initial efforts to analyze and suggest improvements to harvest control rules appear promising. </td></tr><tr><td>Funding</td><td> ▪ The FIP has 2 years of philanthropic funding but lacks a more sustainable funding source. </td></tr></table>	Progress	▪ The FIP has made decent initial progress in gathering local actors and beginning an assessment of existing rules.	Market context	▪ The octopus supply chain has shown limited willingness to engage with and support the FIP, limiting the FIP's ability to expand its market access.	Implementer effectiveness	▪ While it is too early to fully assess Pesca Sustentable's effectiveness, their initial efforts to analyze and suggest improvements to harvest control rules appear promising.	Funding	▪ The FIP has 2 years of philanthropic funding but lacks a more sustainable funding source.
Progress	▪ The FIP has made decent initial progress in gathering local actors and beginning an assessment of existing rules.								
Market context	▪ The octopus supply chain has shown limited willingness to engage with and support the FIP, limiting the FIP's ability to expand its market access.								
Implementer effectiveness	▪ While it is too early to fully assess Pesca Sustentable's effectiveness, their initial efforts to analyze and suggest improvements to harvest control rules appear promising.								
Funding	▪ The FIP has 2 years of philanthropic funding but lacks a more sustainable funding source.								

Latin America

Mexico

- Whiteleg shrimp (Smartfish A.C.)
- Marismas finfish (corvina, snook, snapper - ProNatura)
- Yucatan octopus (COBI and Alianza por el Pulpo Yucatan)

Summary Reflections

Mexico has more FIPs on FisheryProgress than any other country, following explosive growth in the 2010s. It now has nearly 40 active FIPs. Mexico's numerous FIPs cover a large diversity of species. Several multispecies FIPs in small-scale fisheries also include non-commodity fisheries. In addition, Mexico has more numerous and diverse implementers than many other countries; they range from local NGOs to large international NGOs to industry.

- **Mexico is a global leader in non-engaged market FIPs, with many FIPs being exemplary of the multiple end goals we see across all FIP categories.** Site visits showed FIPs can help improve MPA governance issues, social equity, and community livelihoods in small-scale fisheries. Many of these FIPs are fisheries that are destined for the domestic market with objectives that strive for quality improvements and added value that improve economic benefits to fisheries and communities despite the market not requiring certification.
- **FIP implementers in Mexico have installed capacities for reform.** Through alliances, networks, and years of training and capacity building, FIP implementers in Mexico are diverse and have prioritized creating higher levels of installed capacity around fishery management reform and greater fisher and fishworkers knowledge of the FIP model. This ability has helped implementers work together in and across many subregions of Mexico, such as the Gulf of California and Yucatan peninsula.
- **Tensions between United States and Mexico are felt by processors and exporters.** The current tensions and trade uncertainties created by tariffs were noted by the FIPs that are export-oriented and have historically relied on an engaged US market for their seafood products. Many Mexican processors and exporters are hoping to diversify their sales to other markets, given their concerns that the US market is unstable and buyers are not providing the commitments they are hoping for given their investment in FIPs.



Figure 4.2 Mexico (thousands of tonnes).

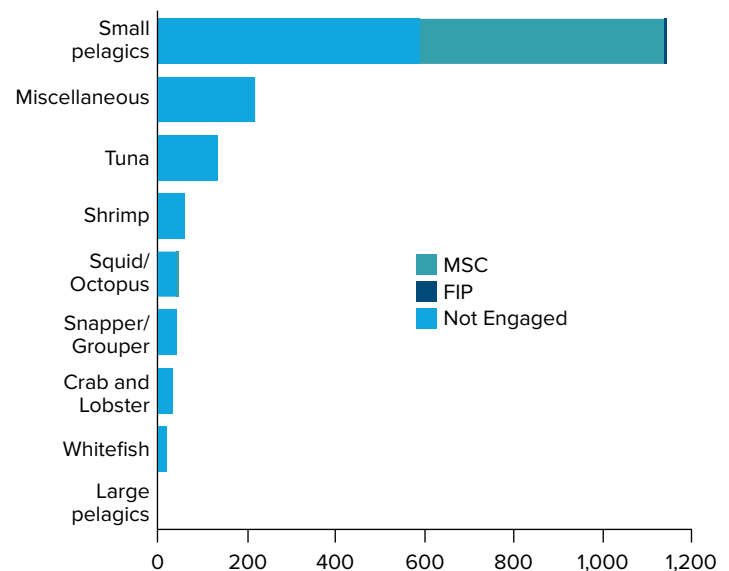


Table 4.4 Summary of FIPs in Mexico.

Summary Data	
# FIPs on FP.org:	47
# Stage 4+ FIPs:	32 (8 inactive)
Sites visited:	3

Whiteleg shrimp (Smartfish A.C.)

Basics	Overview								
Implementer: SmartFish A.C. Stage: Stage 4 Progress Rating B Launch Year: 2018 FIP Volume: 455 tonnes Structure: Basic Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic Implementer Type: NGO	▪ The whiteleg shrimp FIP aims to turn the fishery into a value-over-volume fishery by enhancing management, improving robustness of data, and building infrastructure so the shrimp can become a value-added commodity.								
Fishery Issues	Motivation and Goals								
▪ Climate change impacts, particularly increases in hurricane frequency and intensity, have resulted in lower fishing volumes. ▪ The fishery has historically received low prices for its product; during the season, the market is flooded and fishers receive lower prices, negatively impacting their livelihoods. ▪ Data deficiencies have historically made effective management difficult.	▪ Fishers developed the FIP to transition to a value-over-volume fishery, improving livelihoods and allowing fishers to make a living without overexploiting their resources. ▪ The FIP seeks to improve management of the fishery within the Marismas Nacionales Biosphere Reserve (MNBR), increasing resilience of the fishery and ecosystem.								
History and Activities	CEA Assessment								
▪ The FIP has developed and implemented logbooks to better record catch data, along with a new hydrological data sampling program. ▪ Using the improved data, the FIP was able to develop more accurate models of the fishery’s impact on the target stock and the local ecosystem. ▪ Analysis from the FIP determined that the biomass is below BMSY, but fishing mortality is below mortality at Maximum Sustainable Yield (FMSY). That is, the fishery is overfished but not experiencing overfishing. ▪ The FIP has also developed new cold chain and processing plants, which have enhanced the product’s value on the market and provided better community livelihoods and employment opportunities. ▪ Through the value enhancement, the fishing cooperative became debt free and empowered women by providing them with jobs at the new processing plant. ▪ The FIP has also increased fishers’ awareness of ecological issues related to the fishery and enhanced the cooperative’s leadership.	<table><tr><td>Progress</td><td> ▪ While the FIP has helped improve data availability and fishers’ economic status, IUU fishing remains an issue and few domestic buyers are willing to pay the premium for their product. </td></tr><tr><td>Market context</td><td> ▪ Three cooperatives are engaged in the FIP, but there is little engagement from other supply chain actors, and the fishers are still struggling to break out of predatory relationships with their buyers. </td></tr><tr><td>Implementer effectiveness</td><td> ▪ SmartFish A.C. has effectively boosted the capacity of local fishers/ cooperatives, enhanced stock assessments, and improved data gathering. </td></tr><tr><td>Funding</td><td> ▪ The FIP is funded through philanthropy. </td></tr></table>	Progress	▪ While the FIP has helped improve data availability and fishers’ economic status, IUU fishing remains an issue and few domestic buyers are willing to pay the premium for their product.	Market context	▪ Three cooperatives are engaged in the FIP, but there is little engagement from other supply chain actors, and the fishers are still struggling to break out of predatory relationships with their buyers.	Implementer effectiveness	▪ SmartFish A.C. has effectively boosted the capacity of local fishers/ cooperatives, enhanced stock assessments, and improved data gathering.	Funding	▪ The FIP is funded through philanthropy.
Progress	▪ While the FIP has helped improve data availability and fishers’ economic status, IUU fishing remains an issue and few domestic buyers are willing to pay the premium for their product.								
Market context	▪ Three cooperatives are engaged in the FIP, but there is little engagement from other supply chain actors, and the fishers are still struggling to break out of predatory relationships with their buyers.								
Implementer effectiveness	▪ SmartFish A.C. has effectively boosted the capacity of local fishers/ cooperatives, enhanced stock assessments, and improved data gathering.								
Funding	▪ The FIP is funded through philanthropy.								

Marismas finfish (corvina, snook, snapper – ProNatura)

Basics	Overview								
Implementer: ProNatura Noreste Stage: Stage 5 Progress Rating C Launch Year: 2018 FIP Volume: 1,500 tonnes Structure: Basic Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic Implementer Type: NGO	▪ The Marismas Finfish FIP demonstrates how FIPs can support conservation goals such as effective MPAs. ▪ The FIP is improving the fishery through both regulatory means (guiding an enhanced management plan) and direct engagement with fishers (switching them from nets to hooks and lines).								
Fishery Issues	Motivation and Goals								
▪ The fishery is based in the sensitive habitat of the Marismas Nacionales Biosphere Reserve (MNBR), and the use of nets was impacting habitats and causing substantial bycatch. ▪ IUU fishers continue to bring in destructive fishing gear (nets) despite improvements in fishing practices among fishers in the FIP.	▪ The FIP aims to improve fishers' stewardship of the MNBR, while also supporting development of better management of the fishery. ▪ The FIP seeks to differentiate the higher quality product produced by its fishers within the national marketplace to transition the fishery into a value-over-volume model.								
History and Activities	CEA Assessment								
▪ The FIP has instituted multiple new data-gathering practices, such as enhanced use of logbooks, to track finfish catch in the fishery. ▪ While the FIP hopes to use these data to develop an improved management plan for the fishery, that has yet to happen. ProNatura is working with the Mexican government to improve fisheries management in the MNBR. ▪ ProNatura Noreste has increased fishers' understanding of local ecology and the impacts of fishing. ▪ ProNatura has successfully moved many fishers away from the use of nets and toward hooks and lines, which have much lower impacts on the MNBR habitat and lower rates of bycatch. ▪ ProNatura trainings have reduced fishers' discarding of fishing gear, which has decreased the amount of ghost gear and litter in the MNBR. ▪ The FIP is still working to find domestic buyers to reward a value-over-volume strategy, including through enhanced traceability.	<table> <tr> <td data-bbox="833 1115 987 1140">Progress</td><td data-bbox="1011 1115 1446 1325"> ▪ The FIP has made some progress on environmental impact by encouraging some fishers to move away from nets. The data it has produced is also aiding in the development of a better management plan, but progress is behind schedule. </td></tr> <tr> <td data-bbox="833 1356 987 1413">Market context</td><td data-bbox="1011 1356 1446 1503"> ▪ The FIP has minimal market engagement with downstream supply chain actors, which has been a major barrier to the FIP's transition into a value-over-volume model. </td></tr> <tr> <td data-bbox="833 1535 987 1598">Implementer effectiveness</td><td data-bbox="1011 1535 1446 1755"> ▪ ProNatura has effectively engaged local fishers to increase their ambition for sustainability and improve their gear choice, while also enhancing data robustness; however, they are behind schedule on their regulatory efforts and ability to engage the market. </td></tr> <tr> <td data-bbox="833 1787 987 1812">Funding</td><td data-bbox="1011 1787 1446 1812"> ▪ The FIP is funded through philanthropy. </td></tr> </table>	Progress	▪ The FIP has made some progress on environmental impact by encouraging some fishers to move away from nets. The data it has produced is also aiding in the development of a better management plan, but progress is behind schedule.	Market context	▪ The FIP has minimal market engagement with downstream supply chain actors, which has been a major barrier to the FIP's transition into a value-over-volume model.	Implementer effectiveness	▪ ProNatura has effectively engaged local fishers to increase their ambition for sustainability and improve their gear choice, while also enhancing data robustness; however, they are behind schedule on their regulatory efforts and ability to engage the market.	Funding	▪ The FIP is funded through philanthropy.
Progress	▪ The FIP has made some progress on environmental impact by encouraging some fishers to move away from nets. The data it has produced is also aiding in the development of a better management plan, but progress is behind schedule.								
Market context	▪ The FIP has minimal market engagement with downstream supply chain actors, which has been a major barrier to the FIP's transition into a value-over-volume model.								
Implementer effectiveness	▪ ProNatura has effectively engaged local fishers to increase their ambition for sustainability and improve their gear choice, while also enhancing data robustness; however, they are behind schedule on their regulatory efforts and ability to engage the market.								
Funding	▪ The FIP is funded through philanthropy.								

Basics

Implementer:
Alianza por el Pulpo
Yucatan and COBI

Structure: Comprehensive
Supply Chain Engagements:
Bottom-Up

Stage: Stage 5 | Progress
Rating A

Condition: Celebrate

Launch Year: 2019

End Market: USA

FIP Volume: 2,633 tonnes

Implementer Type:
Industry and NGO

Overview

- This celebratory FIP aims to achieve certification to receive better recognition from the US market.
- Progress has been made to improve data on ETP species interactions through bait monitoring, but more work is needed to solve issues related to IUU (by fishers outside the FIP).

Fishery Issues

- The fishery has substantial IUU catch, although from fishers outside the FIP, and the Mexican government has historically not pushed back against these fishers.
- The fishery did not have good data on ETP species interactions with the crab bait fishery. This could limit its ability to achieve MSC certification, but studies on the FIP's use of selective gear could fill this gap.

Motivation and Goals

- The FIP hopes to secure market access and recognition for its product, which is more sustainable than other octopus coming to the US.
- It wants to scale sustainable fishing methods across the fishery.
- The FIP intends to show that sustainable fishing is possible within a marine reserve context.

History and Activities

- Soon after launching, the FIP established a new committee on Yucatan octopus management and published a paper on Mayan octopus biomass.
- Observers were trained in logging ETP interactions, including through bait use, and have begun recording data.
- The FIP supported government actors in producing a stock assessment that showed some species are above BMSY while others are below. Further analyses indicated that despite interannual fluctuations, stock is healthy.
- The FIP has conducted annual audits since 2022 on the use of bait to confirm that no ETP species are being used.
- Since 2022, the FIP has held an annual Octopus Fishery Workshop to promote compliance with the fishery's management plan.
- The FIP has helped improve the quality of its product.
- The FIP has strong industry participation and processor exporters involved and improving social responsibility alongside environmental sustainability.

CEA Assessment

- | | |
|----------------------------------|--|
| Progress | <ul style="list-style-type: none"> ■ The fishery has made substantial progress in assessing and confirming the fishery's impact on bait species, including the confirmation that ETP bait is not used. |
| Market context | <ul style="list-style-type: none"> ■ Industry stakeholders are committed to this FIP, despite a lack of price premiums from US markets for FIP products. All actors are facing economic challenges due to the long-tail impacts of the pandemic and US tariffs. |
| Implementer effectiveness | <ul style="list-style-type: none"> ■ The local Alliance for the Yucatan Octopus is an effective implementer in the FIP and demonstrates a high level of industry commitment to achieving sustainability. |
| Funding | <ul style="list-style-type: none"> ■ The FIP is funded through a combination of philanthropy (through COBI) and industry contributions to Alianza por el Pulpo Yucatan. |

Latin America

Peru

- Eel trap (Peru Pez and Redes)
- Giant squid (WWF and CAPECAL)
- Anchovy (SNP)
- Mahi mahi (WWF and Peru Mahi Alliance)

Summary Reflections

Peru's FIPs represent some of the world's most important commodity fisheries which supply a wide array of markets from engaged Western markets to non-engaged Asian markets. These large-volume fisheries (anchoveta, mahi mahi, and jumbo flying squid) have captured government attention. That has helped improve fisheries science and improve regulatory policies, especially in the case of small-scale commodity fisheries. While many challenges to reaching completion still exist, FIPs in Peru have shown they can be a collaborative model for improvement. Nevertheless, they require long-term investment for completion; Peruvian industry partners have been willing to assume some of these costs and help with continued progress.

- **Peru is close to achieving its first MSC-certified fishery with the Eel Trap FIP, and it has several well-performing FIPs with high government engagement.** The Peruvian government agencies and scientific institutes (PRODUCE and IMARPE, respectively) have demonstrated that their cooperation and engagement with FIPs that are led by industry plus NGOs are making demonstrable progress towards certification, even without preferential market demand.
- **The growth in squid and octopus FIPs is noteworthy in Latin America with the large volume jumbo flying squid FIP in Peru.** This FIP is a notable small-scale fishery and has benefitted from other initiatives that surround the FIP, such as the USAID Por la Pesca project, which helped provide support for fisher and vessel formalization (permitting) and data generation for improved fisheries science.
- **Peru's large commodity fisheries are striving for change on the water and fisher participation.** FIPs are improving data generation, science and policy, especially to combat IUU fishing; however, these large fisheries still need to achieve change on the water (Stage 5) which is a challenge when there are so many fishers (more than 11,000) and different types of vessels exerting fishing pressure. Observer coverage and capacity-building efforts are helping to monitor and involve fishers and fishworkers, but this remains a challenge in Peru.

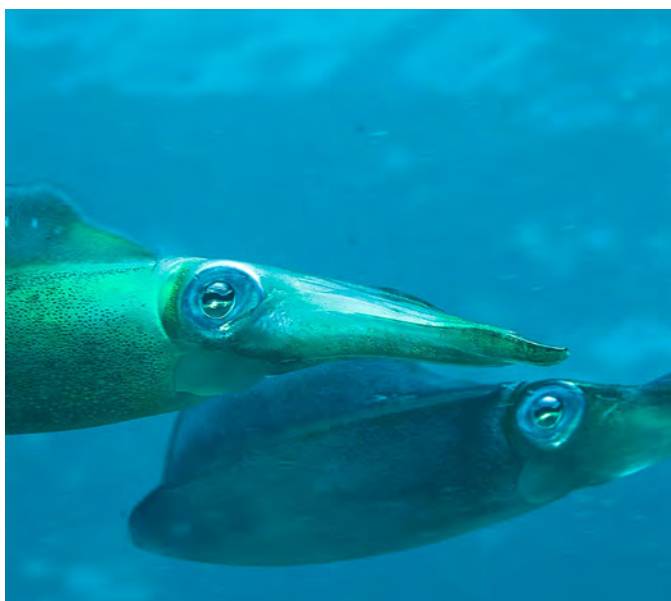


Figure 4.3 Peru (thousands of tonnes).

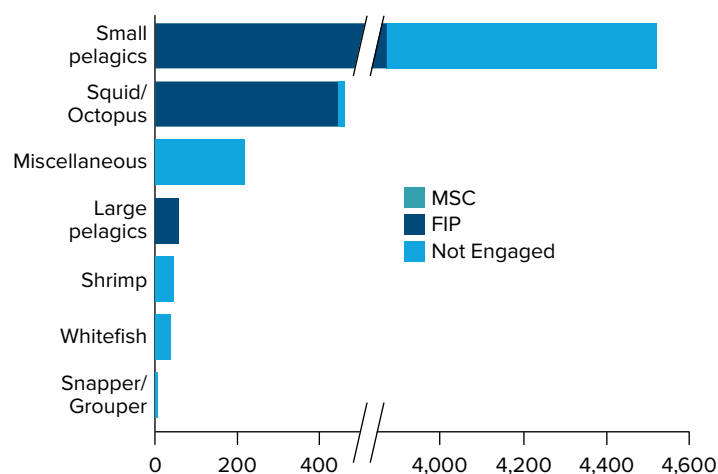


Table 4.5 Summary of FIPs in Peru.

Summary Data	
# FIPs on FP.org:	11
# Stage 4+ FIPs:	8 (2 inactive)
Sites visited:	4

Eel trap (Peru Pez and Redes)

Basics		Overview	
Implementer: Peru Pez and Redes	Structure: Comprehensive	▪ The Peru eel trap FIP demonstrates how the FIP model can be particularly effective and sustainable with a vertically-integrated company that highly values the sustainability of its stocks. ▪ Eel's high value status and Peru Pez's complete control over its supply chain are important enabling factors to the FIP's success.	
Stage: Stage 4 Progress Rating A	Supply Chain Engagements: Top-down		
Launch Year: 2021	Condition: Fix		
FIP Volume: 4,706 MT	End Market: Japan, Korea, and China		
	Implementer Type: Industry with technical assistance from NGO		
Fishery Issues		Motivation and Goals	
▪ Landings began to fall in 2011. ▪ The fishery initially lacked a robust management plan, and the lack of a vertically integrated supply chain made it challenging to ensure sustainable fishing. ▪ Peru Pez is concerned about the long-term viability of the resource.		▪ Peru Pez started the FIP because of concerns that landings would continue to fall and their revenues would not be sustainable long-term. ▪ The company aims to achieve MSC certification for the fishery by the end of this year.	
History and Activities		CEA Assessment	
▪ The FIP is led by industry and only utilizes NGO support for technical assistance; this has resulted in a more sustainable funding model. ▪ Peru Pez and its NGO partners had to educate Peruvian government officials and scientists about the importance of the FIP and eventual certification. ▪ The FIP has helped hone governance of the fishery; most of its proposed improvements were accepted by the Ministry of Production and then codified into fisheries management regulations. ▪ The FIP is also improving stock assessment data through partnerships with IMPARPE and the use of onboard observers, biological surveys, and scientific studies. These studies have enhanced relationships between fishing vessel owners, fishers, scientists, and local eNGOs. ▪ The FIP has developed a best practices guide for trap use to avoid bycatch. ▪ The FIP has secured funding from RLF and MSC to continue supporting the fishery toward certification. It will likely be Peru's first MSC-certified fishery.		Progress	▪ The FIP has made substantial progress in improving science-based regulations for the eel fishery, although it has yet to effect change on the water.
		Market context	▪ Eel is a high-value export commodity, and Peru Pez's supply chain is vertically integrated.
		Implementer effectiveness	▪ Peru Pez and Redes have been effective implementers, providing sustainable capital for the project, successfully advocating for improved regulations, and leveraging expertise from NGOs as need.
		Funding	▪ Funding is largely coming from industry implementers but some support comes from philanthropy and MSC.

Jumbo flying squid (WWF and CAPECAL)

Basics

Implementer: World Wildlife Fund	Structure: Comprehensive
Stage: Stage 4 Progress Rating A	Supply Chain Engagements: Top-down
Launch Year: 2018	Condition: Fix
FIP Volume: 441,749 MT	End Market: Export and Domestic
	Implementer Type: NGO

Overview

- Peru's large small-scale squid fleet has suffered from a lack of formalization that has made IUU run rampant.
- WWF's efforts have significantly improved the landscape of both IUU and data through formalization and trainings, and they are working to implement enhanced fisheries regulations.

Fishery Issues

- The fishery has high rates of IUU due to underreporting of catches and the existence of a large fleet of unregulated small-scale fishing vessels
- The fishery is data-poor and does not have a clear stock status or recent stock assessments
- Small-scale fishing organizations have poor administration and management capacities.

Motivation and Goals

- The FIP's primary goal is to reduce IUU fishing through formalization.
- Secondly, the FIP is improving the fishery's data landscape through enhanced onboard coverage and use of data logs.
- The FIP ultimately aims to be MSC certified and implement traceability to distinguish sustainable Peruvian squid from competitors.

History and Activities

- The FIP was started to improve the data landscape and formalize the existing fleet of small-scale fishers.
- As of August 2025, 750 vessels have been formalized, which entailed licensing and registering both fishers and their vessels.
- Over 1600 fishers have been trained in best practices for data collection monitoring, use of logbooks, and bycatch reduction.
- In April 2025, the FIP helped "to" "In April 2025, a fishing regulation (ROP) to establish harvest control rules, gear restrictions, monitoring and traceability requirements, and vessel monitoring systems (VMS) was published.
- WWF has partnered with the Peruvian government to design Sitrapesca, a traceability system, although the system has yet to be implemented in the FIP. Traceability is particularly crucial to this FIP, as the supply chain needs to be able to differentiate Peru's more sustainable product from the less sustainable squid being produced by Chinese distant water fishing.

CEA Assessment

Progress	■ The FIP has made substantial progress on the formalization of the small-scale fleet and data improvements, but no changes on the water have been recorded.
Market context	■ The FIP supports both domestic and export markets and is in competition with squid produced by Chinese distant water fishing vessels.
Implementer effectiveness	■ The NGOs have been remarkably effective in formalizing this fishery (with help from USAID Por la Pesca funding) and they have successfully secured some government buy-in for the FIP. The NGOs remain committed to implementing the ROP despite a likely arduous uphill battle.
Funding	■ Both industry and philanthropy support this FIP

Anchovy (SNP)

Basics	Overview								
Implementer: CedePesca and Society Nacional de Pesquerias (SNP) Stage: Stage 5 Progress Rating A Launch Year: 2017 FIP Volume: 4,086,699 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Fix End Market: Export Implementer Type: Industry and NGO	▪ This comprehensive FIP is trying to achieve MSC certification for the largest fishery in the world to prove to both domestic and international audiences that it is sustainable. ▪ The implementers have had policy and capacity-building success but must fill scientific knowledge gaps before they can reach certification.								
Fishery Issues	Motivation and Goals								
▪ The small- and medium-scale vessels do not adequately respect the fishery's harvest control rules. ▪ Bycatch impacts, especially on ETP species, are not well understood. ▪ The effect of climate change on the target stock is not well understood and could dramatically impact the fishery.	▪ The FIP aims for the fishery to be certifiable by 2028. The pressure for certification is not coming from the end market, but from the producers' desire to enhance their image and prove the fishery's sustainability. ▪ After passing fishery management regulations, the FIP is focused on determining ETP impact and incorporating those impacts into management decisions.								
History and Activities	CEA Assessment								
▪ The FIP has secured several policy wins, including the establishment of an individual quota system, a closed season, size limits, and gear restrictions. ▪ Given large population fluctuations of anchoveta, the FIP needed to implement harvest control rules that respond to changes in stock biomass. ▪ The FIP conducted capacity-building efforts within fishing companies to teach fishers about best practices on the water. ▪ These have focused on ETP species interactions, traceability usage, EM systems, fisheries science, and upholding the FIP's HRSR policy. ▪ The FIP has also conducted scientific analysis of the fishery's regulations to prove that the harvest control rules and quotas are sustainable and can adaptively respond to climate change. ▪ The FIP has installed vessel monitoring systems and other electronic monitoring systems to confirm that fishers are respecting minimum size limits. ▪ The FIP intends to shift into the MSC improver program to achieve certification	<table> <tr> <td data-bbox="813 1113 971 1142">Progress</td><td data-bbox="987 1113 1443 1293"> ▪ The FIP has made substantial progress in terms of fishery regulations and ensuring that fishers follow those regulations. These rules have been designed to account for the fishery's volatile stock fluctuations. </td></tr> <tr> <td data-bbox="813 1329 971 1383">Market context</td><td data-bbox="987 1329 1443 1446"> ▪ Downstream actors are not asking for this FIP; rather, the desire to improve the fishery's image is driving SNP to improve. </td></tr> <tr> <td data-bbox="813 1482 971 1537">Implementer effectiveness</td><td data-bbox="987 1482 1443 1663"> ▪ SNP is the primary implementer, with support from CedePesca. They have had success in implementing new rules for the fishery but are three years out and need board approval to enter the certification process. </td></tr> <tr> <td data-bbox="813 1698 971 1728">Funding</td><td data-bbox="987 1698 1443 1753"> ▪ Funding comes from both industry and philanthropy. </td></tr> </table>	Progress	▪ The FIP has made substantial progress in terms of fishery regulations and ensuring that fishers follow those regulations. These rules have been designed to account for the fishery's volatile stock fluctuations.	Market context	▪ Downstream actors are not asking for this FIP; rather, the desire to improve the fishery's image is driving SNP to improve.	Implementer effectiveness	▪ SNP is the primary implementer, with support from CedePesca. They have had success in implementing new rules for the fishery but are three years out and need board approval to enter the certification process.	Funding	▪ Funding comes from both industry and philanthropy.
Progress	▪ The FIP has made substantial progress in terms of fishery regulations and ensuring that fishers follow those regulations. These rules have been designed to account for the fishery's volatile stock fluctuations.								
Market context	▪ Downstream actors are not asking for this FIP; rather, the desire to improve the fishery's image is driving SNP to improve.								
Implementer effectiveness	▪ SNP is the primary implementer, with support from CedePesca. They have had success in implementing new rules for the fishery but are three years out and need board approval to enter the certification process.								
Funding	▪ Funding comes from both industry and philanthropy.								

Mahi mahi (WWF and Peru Mahi Alliance)

Basics	Overview
Implementer: World Wildlife Fund and Peru Mahi Alliance Stage: Stage 4 Progress Rating A Launch Year: 2013 FIP Volume: 60,856 MT Structure: Comprehensive Supply Chain Engagements: Top-down Condition: FixEnd Market: United States and domestic Implementer Type: NGO and Industry	■ This FIP aims to achieve certification of a complex, transboundary stock to fulfill downstream market actors' calls for MSC certification. ■ While the FIP has had some success with rulemaking, formalization, and coordination, gaps in the science and the fishery's complex nature have kept it from being certified.
Fishery Issues	Motivation and Goals
■ The fishery suffers from a high rate of IUU, especially among small-scale vessels. ■ The fishery is data-poor and has no stock assessments or recent report status. ■ Small-scale fishing organization have low administrative capacity. ■ The transboundary nature of the stock requires additional international collaboration on science and management.	■ The FIP is seeking to achieve MSC certification by 2027 to meet the demand from buyers in the US. ■ The FIP wants to be more price competitive than other mahi mahi suppliers and distinguish Peruvian mahi mahi from other sources that are less sustainable.
History and Activities	CEA Assessment
■ The FIP has helped establish the industry organization, Peru Mahi Alliance, and coordinates with producer orgs (SONAPESCAL) to ensure better coordination in the management of the mahi mahi stock. ■ The FIP successfully published an ROP in 2021 and has since updated it to implement harvest control rules, especially around ETP interactions. ■ The FIP has formalized many of the smaller-sized vessels in the fleet that were previously unregulated that were previously unregulated; many of these vessels were part of the formalization efforts for the Peruvian Giant Squid FIP. ■ The FIP is developing better understandings of both the stock and fishers' interactions with ETP. Improving understanding of these topics is necessary for certification. As part of these efforts, the FIP is creating an international working group for stock assessments. ■ The stock's transboundary nature continues to be a challenge for both sustainability and certification.	Progress ■ The FIP has had substantial progress in rulemaking, rule implementation, fleet formalization (with help from USAID Por la Pesca project), industrial coordination, and international management.
	Market context ■ Buyers in the United States are seeking MSC certified product
	Implementer effectiveness ■ WWF has led this FIP for over ten years but their efforts to certify it are hampered by ongoing IUU and the stock's transboundary nature. There are also gaps in the understanding of the stock status and the fishery's interaction with ETP species.
	Funding ■ The FIP is funded by both industry and philanthropy.

Asia

Indonesia

- Indonesia South Kalimantan shrimp – trammel net
- Indonesia blue swimming crab – trap and gillnet
- Indonesia Sulawesi day octopus – handline and spear
- Prospective Octopus FIP
- Indonesia Saleh Bay snapper and grouper – bottom longline and handline
- Inactive Indonesia Deepwater Groundfish – dropline, longline, trap, and gillnet
- Indonesia North Sulawesi skipjack and yellowfin tuna – purse seine
- Completed Indonesia Western and Central Pacific yellowfin tuna – handline/skipjack and yellowfin tuna – pole and line



Summary Reflections

Indonesia remains a global leader in FIP activity, with 23 active FIPs reporting on FisheryProgress. The country's FIPs span commodities, gear types, and market destinations. FIPs generate critical data to inform fisheries management rules, while local civil society organizations use these interventions to improve the well-being of the country's many small-scale fishers, and to future-proof their livelihoods. FIPs provide important inputs for under-resourced fishery agencies, especially at the provincial level.

- **FIPs collaborate with the provincial Ministry of Marine Affairs (MMAF) to provide data that can inform species-specific harvest control rules.** Indonesia's fisheries, 90% of which are small-scale, are relatively data-deficient, which makes it challenging to develop evidence-based harvest control rules. Data generated from the FIPs have helped the MMAF establish target reference points, develop harvest control rules, and capture insights on non-target species health. While the MMAF remains fairly engaged with the country's tuna FIPs, other commodities such as shrimp, snapper/grouper, and blue swimming crab see less government attention, which contributes to implementer and industry frustrations.

- **FIPs have provided a forum to help develop community-management plans and enshrine fisher tenure.** Insights from a handful of FIPs (e.g., BSC-gillnet, Sulawesi day octopus – handline and spear, prospective octopus FIP) suggest that FIPs have been critical to establishing community governance of the coastal fishing grounds and raising awareness about sustainability. Implementers are trying to leverage the FIP to secure more government recognition of fishers' tenure and community territorial rights as this is critical to driving comanagement, but report varying degrees of success.
- **The relationship between Indonesia's purse seine and one-by-one (e.g., handline, pole and line) fleets is contentious.** Given the highly migratory nature of tuna, purse seine vessels are moving farther from the country's EEZ and using fishing aggregation devices (FADs) to attract tuna. Indonesia's one-by-one fishers (e.g., handline, pole and line) blame the FADs for "blocking tuna," forcing them to travel further afield, endure longer fishing trips, and cope with higher costs. The combined pressures of distant water industrial fleets and rising bait expenses especially threaten the pole-and-line fishing tradition.

Figure 4.4 Indonesia (thousands of tonnes).

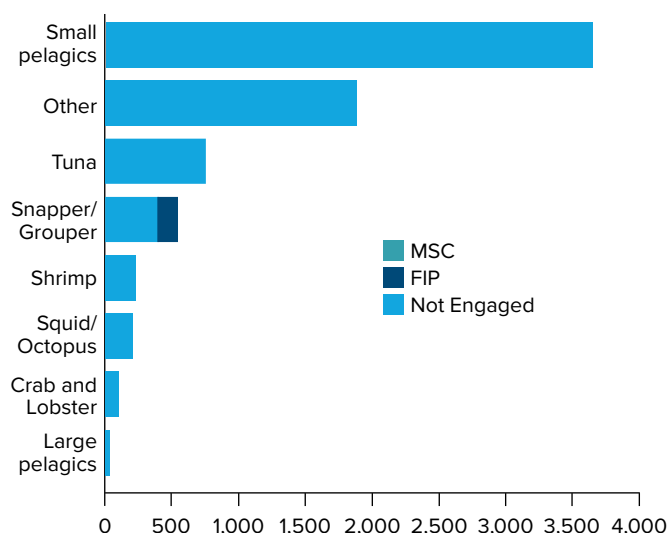


Table 4.6 Summary of FIPs in Indonesia.

Summary Data	
# FIPs on FP.org:	35
# Stage 4+ FIPs:	23 (5 inactive)
Sites visited:	8

Indonesia South Kalimantan shrimp – trammel net

Basics

Implementer: Kolektif
Stage: Stage 4 | Progress
 Rating A
Launch Year: 2021
FIP Volume: 600 MT

Structure: Comprehensive
Supply Chain Engagements:
 Bottom-up
Condition: Celebrate
End Market:
 Export to Western markets
Implementer Type: Consultant

Overview

- This celebratory FIP aims to enhance the availability of data on the status of the shrimp fishery's stock for better precautionary management and to achieve MSC certification.
- The FIP has leveraged industry collaboration to more effectively pressure unengaged government stakeholders into action.

Fishery Issues

- While the fishery appears to be healthy at present, there is not enough data to establish scientifically-backed precautionary management rules.
- The Ministry of Marine Affairs is not well-engaged on this fishery because wild-caught shrimp is not a priority for the government compared to tuna and farmed shrimp.

Motivation and Goals

- The FIP is seeking access to more lucrative markets in Europe, and they see MSC certification as necessary to gain access to these markets. The EU is the largest market for wild-caught shrimp.

History and Activities

- The FIP is trying to achieve MSC certification by 2026 by minimizing the fishery's environmental impact, promoting compliance with fishery regulations, promoting transparency of stock status and traceability, and strengthening community-based management systems.
- The FIP has been able to deliver better data, and the FIP's social responsibility work has enhanced financial literacy and landings tracking.
- Sekar Laut, the primary company behind the FIP, has engaged two other companies in the fishery to enhance their leverage and better advocate for harvest control rules with the government.
- FIP participants have felt frustrated that FisheryProgress does not reward them for their efforts; they had a C grade for a while in spite of what they felt was good progress.
- The FIP is also part of the MSC improver program.

CEA Assessment

- | | |
|----------------------------------|---|
| Progress | ▪ The FIP has made significant progress in terms of better data generation and fisher empowerment, but it is struggling to sufficiently engage the government to establish better management rules. |
| Market context | ▪ The FIP's goal is to export its product to higher-paying markets in the European Union, which they believe requires MSC certification. |
| Implementer effectiveness | ▪ Kolektif is an effective implementer in terms of data generation and local community engagement. |
| Funding | ▪ The FIP largely received funding from three companies and receives some supplementary funds from the MSC improver program. |

Indonesia blue swimming crab – trap and gillnet

Basics

Implementer: APRI
Stage: Stage 5 | Progress Rating A
Launch Year: 2012
FIP Volume: 50,520 MT

Structure: Comprehensive
Supply Chain Engagements: Bottom-up
Condition: Fix
End Market: United States
Implementer Type: Industry

Overview

- This more than a decade-long FIP is an example of slow but eventual change on the water, with restocking helping enhance crab stocks.
- However, economic benefits have not materialized, and encroachments from neighboring trawl fishers threaten the FIP's progress
- No traceability means the processor cannot differentiate FIP product.

Fishery Issues

- The FIP began with significant concerns about its stock health and poor fishing practices that included catching berried females and juveniles. Because of this, catches had been declining for years.
- In recent years, the fishery status has improved significantly, in large part due to the FIP's activities (see section below). However, invasions from neighboring trawlers threaten the work.

Motivation and Goals

- The FIP aims to achieve MSC certification to gain a foothold in the US market.
- The FIP was started at a time when annual catches were declining with the objective of improving management, practices, and stock health.

History and Activities

- This FIP has been operational for over a decade. Over that time, it has experienced verifiable success in improving the fishery's stock health.
- Changes to fishing practices (including not taking juveniles or egg-bearing females) and the protection of a nursery ground and hatchery have allowed crab stocks to recover, but fishery improvements have not resulted in price premiums for local fishers or APRI, which is a disappointment to locals.
- The FIP has implemented a community-based management plan to protect the nursery ground and is improving community awareness on sustainability.
- The FIP is establishing a traceability system, as the processing plant is not currently able to differentiate between FIP and non-FIP product.
- In recent years, neighboring fishers have begun to encroach on the fishery, and the provincial government is not enforcing the local community's territorial rights, which threatens the FIP's progress.

CEA Assessment

Progress	▪ The FIP has made significant progress in terms of fishing management and practices that have resulted in verifiable change on the water. However, traceability remains an issue.
Market context	▪ The FIP wants a larger foothold in the United States, although they already sell to US-based distributors through the NFI crab council.
Implementer effectiveness	▪ APRI has had significant success in terms of sustainability, although members have yet to see economic gains from their work. They also note that a lack of recent Stage 4/5 events reduced their ratings at one point, which was a cause of frustration.
Funding	▪ Industry is the primary funder. Member companies pay dues to APRI, which supports the FIP.

Indonesia Sulawesi day octopus – handline and spear

Basics

Implementer: Yayasan Pesisir Lestari (YPL), an offshoot of Blue Ventures
Stage: Stage 4 | Progress Rating B
Launch Year: 2022
FIP Volume: 369 MT

Structure: Basic
Supply Chain Engagements: Bottom-up
Condition: Celebrate
End Market: Europe
Implementer Type: NGO

Overview

- This basic FIP is working to improve data deficiencies in the already-healthy day octopus fishery. Data improvements, combined with enhanced tenure for local communities, can help protect the resource and improve government policies.
- FIP's works at the nexus of human rights and sustainability.

Fishery Issues

- An initial pre-assessment of the fishery determined it to have strong stock health, but the fishery is data deficient and lack sufficient monitoring and surveillance to ensure the stock remains healthy.
- Better data is needed to develop a robust community management plan and national harvest control rule.

Motivation and Goals

- The FIP was developed primarily to enhance the data availability in the octopus fishery so that longer-term management practices can ensure the stock's sustainability.
- The FIP aims to improve communities' well-being and tenure rights.
- The FIP is not aiming for MSC, which is viewed as too complicated and expensive.

History and Activities

- The FIP is working to strengthen comanagement actions by increasing community participation in fisheries monitoring and awareness. By improving comanagement, the FIP aims to reduce IUU fishing.
- As part of its efforts to ensure sustainability, the FIP is working to enhance government recognition of the fishers' tenure rights by establishing an OECD. The recognition of rights can help secure supply, achieve government recognition, and address seafood fraud.
- The FIP has helped generate data on the fishery, although it remains to be seen how these data will be connected back to fishers.
- The FIP's data has begun informing the government's stock assessments, with the aim that to eventually enact more sustainable management policies.
- The FIP is also working to mainstream human rights and social responsibility policies into the fisheries practices.

CEA Assessment

- | | |
|----------------------------------|--|
| Progress | ■ The FIP has made significant progress in enhancing data in the fishery. This progress has begun to filter up to the government level and inform community-based management practices. However, it is still too early to tell what broader progress the FIP can have. |
| Market context | ■ There is some market demand from the West, and one buyer has financially supported the FIP, but demand pressure is limited. |
| Implementer effectiveness | ■ YPL has had some initial success with data enhancement and the beginnings of community-based management, but it is still too early to definitively assess their long-term efficacy. |
| Funding | ■ Industry is the primary funder, with Octopus Consortium members paying a fee to support the FIP. RLF supported the FIP's social work. |

Prospective Octopus FIP

Basics	Overview								
Implementer: JARI and MDPI Stage: Stage 0 Progress Rating N/A Launch Year: 2021 FIP Volume: 4 MT Structure: TBD Supply Chain Engagements: Bottom-up Condition: Celebrate End Market: Europe Implementer Type: NGO	▪ This prospective FIP seeks to demonstrate how community management can improve fish stocks and generate new data. ▪ The FIP has additional environmental benefits through its effort to plant mangroves.								
Fishery Issues	Motivation and Goals								
▪ The current stock is healthy, and landings have been increasing, although a formal stock assessment is still needed. ▪ Despite the healthy stock, there have historically been some unsustainable fishing practices (e.g., bombs, poison) and a lack of closed seasons that need to be mitigated to ensure long-term longevity of the stock.	▪ MSC Indonesia identified this as one of the fisheries with potential to meet the MSC standard. ▪ When MSC met with local suppliers, the businesses were persuaded by the claim that they could grow their client base and increase access to international markets.								
History and Activities	CEA Assessment								
▪ While the FIP itself is still prospective, the fisher group that would run the FIP has already made progress on improving the state of the fishery. The group has established open and closed seasons and a guide for fishers to determine if their catch is the proper color. ▪ Anecdotally, the fisher group believes their efforts have led to the fishery's increased landings, which more than doubled between 2023 and 2025. ▪ Encroachment from other fishers is an emerging issue that threatens recent successes of the fisher group. ▪ The fisher group has improved data on fishery catches as well, although fishers themselves seek more transparency into how data is used. ▪ The fishers have also planted mangroves to promote ecotourism and prevent abrasion/flooding.	<table><tr><td>Progress</td><td> ▪ While not yet a formal FIP, the fisher group has already improved stocks by establishing closed seasons and training fishers on sustainable practices. </td></tr><tr><td>Market context</td><td> ▪ The product is sold both locally and for export, and fishers have substantial autonomy in their ability to set prices. </td></tr><tr><td>Implementer effectiveness</td><td> ▪ It is too early to judge the implementer's efficacy in the context of a formal FIP, but the implementer has already made significant environmental progress in the prospective FIP context. </td></tr><tr><td>Funding</td><td> ▪ This project could receive funds from the MSC Improver program. </td></tr></table>	Progress	▪ While not yet a formal FIP, the fisher group has already improved stocks by establishing closed seasons and training fishers on sustainable practices.	Market context	▪ The product is sold both locally and for export, and fishers have substantial autonomy in their ability to set prices.	Implementer effectiveness	▪ It is too early to judge the implementer's efficacy in the context of a formal FIP, but the implementer has already made significant environmental progress in the prospective FIP context.	Funding	▪ This project could receive funds from the MSC Improver program.
Progress	▪ While not yet a formal FIP, the fisher group has already improved stocks by establishing closed seasons and training fishers on sustainable practices.								
Market context	▪ The product is sold both locally and for export, and fishers have substantial autonomy in their ability to set prices.								
Implementer effectiveness	▪ It is too early to judge the implementer's efficacy in the context of a formal FIP, but the implementer has already made significant environmental progress in the prospective FIP context.								
Funding	▪ This project could receive funds from the MSC Improver program.								

Indonesia Saleh Bay snapper and grouper – bottom longline and handline

Basics	Overview								
Implementer: Rekam Nusantara Stage: Stage 4 Progress Rating C Launch Year: 2021 FIP Volume: 3 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic, aiming for export Implementer Type: NGO	▪ This small-scale FIP demonstrates how training local fishers can improve environmental conditions on the water. ▪ Enhanced data generation is supporting better fishery regulations. ▪ The FIP's motivation includes both local fishers' desire for international market access and buyers' desire to source MSC-certified fish.								
Fishery Issues	Motivation and Goals								
▪ Fish stocks are currently overfished. ▪ Many fishers use compressors to catch the snapper and grouper, which can be harmful to the local habitat. ▪ The fishery is relatively data deficient, and the government needs better data to enact harvest control rules.	▪ Local fishers are seeking access to international markets ▪ There is some interest amongst international retailers and hospitality groups that want to source from FIPs as part of larger efforts to meet consumer demand for sustainably-sourced product.								
History and Activities	CEA Assessment								
▪ The FIP has conducted trainings with local fishers to discourage the use of compressors. Anecdotal information suggests that this has been successful and has led to habitat rehabilitation, and fishers have seen improvements in biomass. ▪ The FIP has generated better data collection by having Bali Sustainable Seafood, the primary purchaser and local distributor of the snapper and grouper product, measure the catch which they purchase. ▪ The data generated by the FIP are filtering up to government agencies to inform regulations on the fishery. ▪ Based in part on data from the FIP, the provincial government created a decree that announced the creation of a snapper and grouper management plan. ▪ While some buyers seek MSC, the high cost is a significant barrier to the FIP.	<table> <tr> <td data-bbox="816 1104 992 1276">Progress</td><td data-bbox="1000 1104 1453 1276"> ▪ The FIP has improved data collection in the fishery and reduced the use of harmful fishing gear, and both local government representatives and fishers say that the biomass is improving. </td></tr> <tr> <td data-bbox="816 1287 992 1459">Market context</td><td data-bbox="1000 1287 1453 1459"> ▪ The fishery predominantly sells domestically, especially to hospitality, but fishers the FIP and MSC certification will lead to more access to the international market. </td></tr> <tr> <td data-bbox="816 1470 992 1669">Implementer effectiveness</td><td data-bbox="1000 1470 1453 1669"> ▪ Rekam Nusantara has conducted effective fisher trainings that have shifted gear use and developed the infrastructure for better data generation and use of that data in fishery management decisions. </td></tr> <tr> <td data-bbox="816 1680 992 1759">Funding</td><td data-bbox="1000 1680 1453 1759"> ▪ The FIP receives funding from the MSC Improver Program. </td></tr> </table>	Progress	▪ The FIP has improved data collection in the fishery and reduced the use of harmful fishing gear, and both local government representatives and fishers say that the biomass is improving.	Market context	▪ The fishery predominantly sells domestically, especially to hospitality, but fishers the FIP and MSC certification will lead to more access to the international market.	Implementer effectiveness	▪ Rekam Nusantara has conducted effective fisher trainings that have shifted gear use and developed the infrastructure for better data generation and use of that data in fishery management decisions.	Funding	▪ The FIP receives funding from the MSC Improver Program.
Progress	▪ The FIP has improved data collection in the fishery and reduced the use of harmful fishing gear, and both local government representatives and fishers say that the biomass is improving.								
Market context	▪ The fishery predominantly sells domestically, especially to hospitality, but fishers the FIP and MSC certification will lead to more access to the international market.								
Implementer effectiveness	▪ Rekam Nusantara has conducted effective fisher trainings that have shifted gear use and developed the infrastructure for better data generation and use of that data in fishery management decisions.								
Funding	▪ The FIP receives funding from the MSC Improver Program.								

Inactive Indonesia Deepwater Groundfish – dropline, longline, trap, and gillnet

Basics	Overview								
Implementer: YKAN, an offshoot of TNC Indonesia Stage: Stage N/A Progress Rating N/A Launch Year: 2019 FIP Volume: Unknown MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Fix End Market: Domestic Implementer Type: NGO	▪ The FIP is currently inactive. Lack of government engagement and COVID contributed to the loss of momentum. ▪ The FIP implementer and one local buyer are interested in relaunching the FIP to increase access to domestic hotel markets as well as Western export markets.								
Fishery Issues	Motivation and Goals								
▪ Fish stocks were overfished at the FIP's outset, and the FIP was started in large part to help these stocks recover. ▪ The habitat within the groundfish fishery was poorly managed at the FIP's outset. ▪ The FIP was broadly focused on all demersal fisheries in the country, which had similar management issues.	▪ The FIP was started by TNC to improve data conditions in the fishery and generate a management control strategy for groundfish in Indonesia. While the FIP was not expressly started through market pressure, buyers were supportive of the endeavor.								
History and Activities	CEA Assessment								
▪ The FIP's work was focused on developing the enabling conditions necessary for effective harvest control rules on all groundfish fisheries in Indonesia. ▪ This work included data collection, stock assessments, and the development of an institutional framework to engage the government and fishery participants in developing a fisheries policy. ▪ The FIP also hoped to coordinate industry engagement in policy and management by developing a formal consultative panel. ▪ This FIP's efforts led to the creation of a national snapper/grouper harvest strategy. ▪ The FIP went inactive due to minimal support from the government.	<table> <tr> <td data-bbox="808 1102 971 1144">Progress</td><td data-bbox="987 1102 1443 1270"> ▪ The FIP went inactive, but not before it achieved fisheries improvement through data generation and the development of the national snapper/grouper management strategy. </td></tr> <tr> <td data-bbox="808 1291 971 1354">Market context</td><td data-bbox="987 1291 1443 1417"> ▪ The FIP was not started by market pressures, and most of the product was sold domestically, but international buyers supported the FIP. </td></tr> <tr> <td data-bbox="808 1438 971 1501">Implementer effectiveness</td><td data-bbox="987 1438 1443 1585"> ▪ While ultimately not effective enough to generate government buy-in to reach completion, YKAN successfully improved governance of the fishery. </td></tr> <tr> <td data-bbox="808 1606 971 1648">Funding</td><td data-bbox="987 1606 1443 1709"> ▪ The FIP received a blend of funding from the national government, USAID, and philanthropy. </td></tr> </table>	Progress	▪ The FIP went inactive, but not before it achieved fisheries improvement through data generation and the development of the national snapper/grouper management strategy.	Market context	▪ The FIP was not started by market pressures, and most of the product was sold domestically, but international buyers supported the FIP.	Implementer effectiveness	▪ While ultimately not effective enough to generate government buy-in to reach completion, YKAN successfully improved governance of the fishery.	Funding	▪ The FIP received a blend of funding from the national government, USAID, and philanthropy.
Progress	▪ The FIP went inactive, but not before it achieved fisheries improvement through data generation and the development of the national snapper/grouper management strategy.								
Market context	▪ The FIP was not started by market pressures, and most of the product was sold domestically, but international buyers supported the FIP.								
Implementer effectiveness	▪ While ultimately not effective enough to generate government buy-in to reach completion, YKAN successfully improved governance of the fishery.								
Funding	▪ The FIP received a blend of funding from the national government, USAID, and philanthropy.								

Indonesia North Sulawesi skipjack and yellowfin tuna – purse seine

Basics	Overview								
Implementer: Kolektif Stage: Stage 2 Progress Rating N/A Launch Year: 2023 FIP Volume: 8,500 MT Structure: Comprehensive Supply Chain Engagements: Top-down Condition: Fix End Market: US and Europe Implementer Type: Consultant	▪ The FIP seeks to ensure stable stock status for skipjack and yellowfin tuna harvested by the domestic purse seine fleet. ▪ APSI is a newly formed association of purse seine vessel owners and processors that are supporting the FIP.								
Fishery Issues	Motivation and Goals								
▪ The skipjack and yellowfin stocks are not considered overfished, but government agencies noted potential stock declines related to purse seines. ▪ The use of FADs among purse seine fishers remains controversial, with some claiming this is preventing tuna from approaching nearshore and forcing handline and pole-and-line fishers to travel further.	▪ Buyers in the EU market generated demand for the FIP, although MSC certification is not necessarily a requirement. ▪ Interviewees suggested that being in a FIP is good enough to meet buyer demand for sustainable purse-seine tuna product in the EU, although this could change in the future.								
History and Activities	CEA Assessment								
▪ The FIP aims to strengthen purse seine vessels' data collection and compliance with the Purse Seine Tuna Fishery's code of conduct. Efforts include the establishment of target reference points, compliance with harvest strategies, and the use of logbooks/observer coverage. ▪ The FIP is also working to improve data on non-target species and develop actionable protocols to ensure those species are caught sustainably. ▪ The FIP also aims for all fishers in the FIP to be aware of their rights, understand safe working practices, and have access to safety at sea. ▪ Because the FIP is still in Stage 2, there has not been substantive action on any of the priorities outlined above.	<table> <tr> <td data-bbox="816 1104 974 1182">Progress</td><td data-bbox="982 1104 1461 1182"> ▪ It is too soon to assess this FIP's progress. </td></tr> <tr> <td data-bbox="816 1192 974 1329">Market context</td><td data-bbox="982 1192 1461 1329"> ▪ The FIP exports most of its product to the US and Europe, and European buyers demand FIP-produced product to meet sustainability requirements. </td></tr> <tr> <td data-bbox="816 1339 974 1417">Implementer effectiveness</td><td data-bbox="982 1339 1461 1417"> ▪ It is too soon to assess this implementer's effectiveness. </td></tr> <tr> <td data-bbox="816 1428 974 1518">Funding</td><td data-bbox="982 1428 1461 1518"> ▪ APSI, an industry association of purse seiners, pays for the FIP. </td></tr> </table>	Progress	▪ It is too soon to assess this FIP's progress.	Market context	▪ The FIP exports most of its product to the US and Europe, and European buyers demand FIP-produced product to meet sustainability requirements.	Implementer effectiveness	▪ It is too soon to assess this implementer's effectiveness.	Funding	▪ APSI, an industry association of purse seiners, pays for the FIP.
Progress	▪ It is too soon to assess this FIP's progress.								
Market context	▪ The FIP exports most of its product to the US and Europe, and European buyers demand FIP-produced product to meet sustainability requirements.								
Implementer effectiveness	▪ It is too soon to assess this implementer's effectiveness.								
Funding	▪ APSI, an industry association of purse seiners, pays for the FIP.								

Completed Indonesia Western and Central Pacific yellowfin tuna – handline / skipjack and yellowfin tuna – pole and line

Basics	Overview								
Implementer: AP2HI, IPNLF, MDPI Stage: Stage 6 Progress Rating N/A Launch Year: 2018 FIP Volume: 26,955 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Fix End Market: North America and Europe Implementer Type: NGO	▪ This group of one-by-one tuna FIPs in Indonesia all achieved MSC certification following the adoption of sustainability best practices, greater efficiencies, and data generation among fishers.								
Fishery Issues	Motivation and Goals								
▪ While stocks are healthy at the RFMO level for skipjack and yellowfin, there are some signs that volumes are decreasing and the size of average catch is declining at the FMA level. ▪ The use of purse seine gear is adversely impacting pole-and-line fishers.	▪ The FIPs started to secure access to Western markets, in the EU and US. ▪ MSC and Fair Trade certifications are important for companies to maintain EU market access and meet buyer requirements. Having both certifications ensures access								
History and Activities	CEA Assessment								
▪ The FIP worked to ensure that one-by-one fishers better adhered to sustainability best practices, including for the use of bait. The FIP generated better data to enhance harvest control rules. ▪ Adhering to the above policies not only enhanced the sustainability of the fishery, but the FIP was able to enhance product quality by training fishers on product handling best practices. Further, by training fishers in more efficient practices, fishers were able to enhance their profit margins. ▪ Following the FIP's efforts and their campaigns to prove the sustainability of the one-by-one tuna fishery, the various fisheries involved in these FIPs were all certified by MSC. ▪ The yellowfin handline fishery in North Buru and pole and line fisheries in Bitung also received Fair Trade certification. ▪ The FIPs also benefitted from the associated work of the Tuna Consortium to push forward a national harvest strategy for tuna.	<table> <tr> <td data-bbox="813 1136 971 1171">Progress</td><td data-bbox="987 1136 1450 1262"> ▪ These FIPs made significant progress to the point where all three fisheries achieved MSC certification, and two of them achieved Fair Trade certification. </td></tr> <tr> <td data-bbox="813 1289 971 1346">Market context</td><td data-bbox="987 1289 1450 1381"> ▪ The FIPs were driven by significant European market demand for both MSC and Fair Trade certifications. </td></tr> <tr> <td data-bbox="813 1409 971 1472">Implementer effectiveness</td><td data-bbox="987 1409 1450 1570"> ▪ AP2HI, IPNLF, and MDPI were able to successfully generate certifications for these one-by-one tuna fisheries through a combination of fisher training and data generation to improve management. </td></tr> <tr> <td data-bbox="813 1591 971 1627">Funding</td><td data-bbox="987 1591 1450 1738"> ▪ This project is paid for by a combination of industry (through membership dues and tonnage fees) and philanthropic funding. </td></tr> </table>	Progress	▪ These FIPs made significant progress to the point where all three fisheries achieved MSC certification, and two of them achieved Fair Trade certification.	Market context	▪ The FIPs were driven by significant European market demand for both MSC and Fair Trade certifications.	Implementer effectiveness	▪ AP2HI, IPNLF, and MDPI were able to successfully generate certifications for these one-by-one tuna fisheries through a combination of fisher training and data generation to improve management.	Funding	▪ This project is paid for by a combination of industry (through membership dues and tonnage fees) and philanthropic funding.
Progress	▪ These FIPs made significant progress to the point where all three fisheries achieved MSC certification, and two of them achieved Fair Trade certification.								
Market context	▪ The FIPs were driven by significant European market demand for both MSC and Fair Trade certifications.								
Implementer effectiveness	▪ AP2HI, IPNLF, and MDPI were able to successfully generate certifications for these one-by-one tuna fisheries through a combination of fisher training and data generation to improve management.								
Funding	▪ This project is paid for by a combination of industry (through membership dues and tonnage fees) and philanthropic funding.								

Asia

Taiwan

- Pacific Ocean tuna longline – TTLA
- Pacific Ocean tuna longline – Cheng Hung Seafood Frozen Produce Co. Ltd.
- Pacific Ocean tuna longline – Fue Shin Fishery
- Indian Ocean tuna longline – Fue Shin Fishery



Summary Reflections

Taiwan has become an emerging hub for tuna FIP activity, driven by growing demand from the US, EU, and Japanese markets for responsibly sourced product. Local capacity to support FIPs is developing quickly, and is centered on distant-water industrial tuna fleets focused on improving tuna stock health, reducing ETP bycatch, and mitigating human rights risks.

- **Taiwan boasts an increasing number of tuna longline FIPs initiated by diverse actors.** Some of these projects are trader-led while others are bottom-up efforts led by vessel owner longline associations. Trader-led FIPs offer a secure market, but vessel owners are forced to be price-takers. In contrast, association-led FIPs allow vessel owners autonomy in setting their prices and selecting buyers.
- **All Taiwanese longline FIPs are seeking access to Western markets (US and EU), in addition to Japan.** These FIPs are racing to get MSC certified first in the hope of securing first-mover price premiums and strong relationships with buyers. This window will soon close as more FIPs in Taiwan achieve MSC certification. To this end, FIPs are experimenting with a range of tools, such as electronic reporting/monitoring and full-chain traceability, to help distinguish their product in the global market.
- **Taiwanese FIPs continue to face challenges due to misalignment between government and MSC requirements.** While the Taiwanese Fisheries Agency allows vessels to catch and sell shark bycatch, MSC requires fishers to release sharks. These discrepancies have caused frustration and confusion among FIP participants. Nevertheless, FIPs report that there has been a marked decrease in bycatch as vessel owners and fishers participate in trainings and have switched gear (e.g., changing to “J” hooks) that reduces the risk of catching ETP species.

Figure 4.5 Volume of product in Taiwan across MSC, FIP, and non-engaged fisheries.

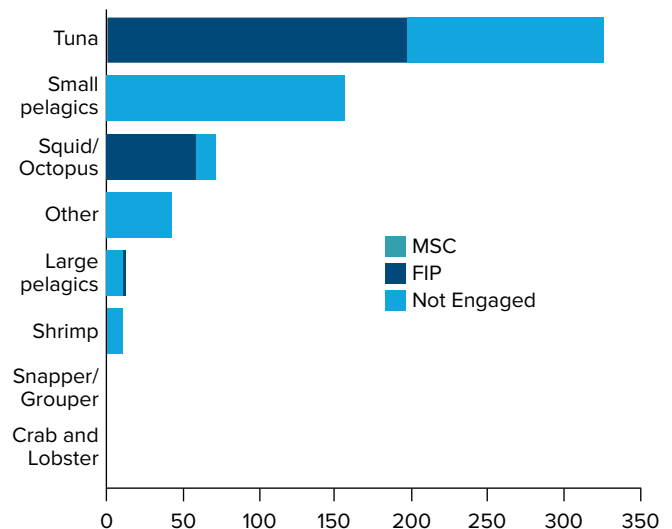


Table 4.7 Summary of FIPs in Taiwan.

Summary Data	
# FIPs on FP.org:	8
# Stage 4+ FIPs:	7
Sites visited:	4

Pacific Ocean tuna longline – TTLA

Basics	Overview								
Implementer: Ocean Outcomes and Taiwan Tuna Longline Association Stage: Stage 2 Progress Rating N/A Launch Year: 2024 FIP Volume: 7,500 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Celebrate End Market: US, Europe, and Japan Implementer Type: NGO and Industry	▪ This FIP presents a “challenger” to the tuna longline FIPs started by traders. It was established to provide vessel owners with more autonomy over their sales than other longline FIPs. ▪ Like the other FIPs, it aims to achieve MSC first so its members can receive first-mover advantages (including hoped-for price premiums) in export markets.								
Fishery Issues	Motivation and Goals								
▪ The Pacific stocks of albacore and bigeye are not overfished, but they lack robust precautionary management rules; while the RFMO that oversees these stocks has made some progress on these rules, they are not yet implemented. ▪ ETP bycatch, especially of sharks, remains a problem, as it is allowed by the Taiwanese government but not permitted under the current MSC standard.	▪ The FIP hopes to achieve certification before the other Taiwanese longline tuna FIPs. By doing so, they believe that they will achieve first-mover price premiums and access to preferential markets in the West and Japan.								
History and Activities	CEA Assessment								
▪ The FIP was founded in response to the other Taiwanese tuna longline FIPs. Vessel owners felt that the other Taiwanese longline FIPs limit their ability to price shop by locking them into offtake contracts with traders. This FIP allows the fishers to sell to whomever they wish. ▪ The FIP is trying to achieve MSC certification by October 2029 through improvement of fishing regulations at the RFMO and flag states, where they will promote an ecosystem-based management approach. ▪ The FIP is testing electronic monitoring on some vessels, as MSC requires a higher rate of observer coverage. ▪ The FIP is also improving social conditions, including providing crew access to Wi-Fi, clear and translated wage slips, fairer contracts, adequate rest assurance, monitoring capacity for labor conditions, medical supply access, and clear disciplinary procedures.	<table> <tr> <td data-bbox="813 1115 959 1142">Progress</td><td data-bbox="987 1115 1433 1173">▪ The FIP is too new to have achieved significant progress.</td></tr> <tr> <td data-bbox="813 1205 959 1264">Market context</td><td data-bbox="987 1205 1433 1295">▪ The FIP aims to achieve first-mover price premiums by selling to Western and Japanese markets.</td></tr> <tr> <td data-bbox="813 1327 959 1386">Implementer effectiveness</td><td data-bbox="987 1327 1433 1417">▪ It is too early to tell, but the TTLA has been pleased with support from Ocean Outcomes to date.</td></tr> <tr> <td data-bbox="813 1449 959 1476">Funding</td><td data-bbox="987 1449 1433 1598">▪ The FIP is funded entirely through the TTLA, although there may be some subsidizing of Ocean Outcomes' time through the general operating support grants it receives from philanthropy.</td></tr> </table>	Progress	▪ The FIP is too new to have achieved significant progress.	Market context	▪ The FIP aims to achieve first-mover price premiums by selling to Western and Japanese markets.	Implementer effectiveness	▪ It is too early to tell, but the TTLA has been pleased with support from Ocean Outcomes to date.	Funding	▪ The FIP is funded entirely through the TTLA, although there may be some subsidizing of Ocean Outcomes' time through the general operating support grants it receives from philanthropy.
Progress	▪ The FIP is too new to have achieved significant progress.								
Market context	▪ The FIP aims to achieve first-mover price premiums by selling to Western and Japanese markets.								
Implementer effectiveness	▪ It is too early to tell, but the TTLA has been pleased with support from Ocean Outcomes to date.								
Funding	▪ The FIP is funded entirely through the TTLA, although there may be some subsidizing of Ocean Outcomes' time through the general operating support grants it receives from philanthropy.								

Pacific Ocean tuna longline – Cheng Hung Seafood Frozen Produce Co. Ltd.

Basics	Overview								
Implementer: Ocean Outcomes Stage: Stage 4 Progress Rating C Launch Year: 2022 FIP Volume: 1,400 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Celebrate End Market: US and Europe Implementer Type: NGO	■ This FIP is one of the primary Pacific Ocean tuna longline trader FIPs in Taiwan. It wants to be first to receive MSC certification to secure buyer partners in Western markets. ■ CHSF is a vertically integrated company with its own vessel fleet and processing capabilities. It is also seeking the MSC Chain of Custody certification as it purchases raw material from other suppliers.								
Fishery Issues	Motivation and Goals								
■ Like the other Pacific Ocean Taiwanese longline FIPs, the CHSF longline FIP operates in a fishery where stocks are fluctuating around BMSY, but where robust precautionary management is still needed. ■ Like the other Taiwanese longline FIPs, bycatch, especially of sharks, remains an issue.	■ The FIP aims to achieve MSC certification by 2027 to achieve first-mover price premiums in Western and Japanese markets. The FIP also hopes to achieve MSC Chain of Custody certification. ■ The FIP wants to establish more widespread use of EM on its vessels to mitigate ETP bycatch issues.								
History and Activities	CEA Assessment								
■ The FIP has conducted some lobbying with IATTC to establish minimum EM standards, which will be necessary to ensure better management of ETP species, especially sharks. ■ The FIP is also working to educate vessel owners and fishers about the need to mitigate bycatch of ETP species. However, this is a source of frustration among many fishers, as the Taiwanese government allows them to catch and sell sharks, which are lucrative in the Chinese market. ■ Like the TTLA FIP, this FIP is also improving social conditions, including crew access to Wi-Fi, clear and translated wage slips, fairer contracts, adequate rest assurance, monitoring capacity for labor conditions, medical supply access, and clear disciplinary procedures.	<table> <tr> <td data-bbox="816 1104 974 1251">Progress</td><td data-bbox="982 1104 1461 1251"> ■ The FIP has achieved some initial progress on ETP issues through education and initial lobbying efforts at the IATTC, but results have been slow. </td></tr> <tr> <td data-bbox="816 1251 974 1367">Market context</td><td data-bbox="982 1251 1461 1367"> ■ The FIP aims to secure market partnerships by achieving MSC and selling to Western markets. </td></tr> <tr> <td data-bbox="816 1367 974 1482">Implementer effectiveness</td><td data-bbox="982 1367 1461 1482"> ■ Ocean Outcomes is a trusted partner in the field, but CHSF is frustrated by the FIP's slow progress and cost. </td></tr> <tr> <td data-bbox="816 1482 974 1644">Funding</td><td data-bbox="982 1482 1461 1644"> ■ CHSF pays for all of Ocean Outcomes' time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies. </td></tr> </table>	Progress	■ The FIP has achieved some initial progress on ETP issues through education and initial lobbying efforts at the IATTC, but results have been slow.	Market context	■ The FIP aims to secure market partnerships by achieving MSC and selling to Western markets.	Implementer effectiveness	■ Ocean Outcomes is a trusted partner in the field, but CHSF is frustrated by the FIP's slow progress and cost.	Funding	■ CHSF pays for all of Ocean Outcomes' time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies.
Progress	■ The FIP has achieved some initial progress on ETP issues through education and initial lobbying efforts at the IATTC, but results have been slow.								
Market context	■ The FIP aims to secure market partnerships by achieving MSC and selling to Western markets.								
Implementer effectiveness	■ Ocean Outcomes is a trusted partner in the field, but CHSF is frustrated by the FIP's slow progress and cost.								
Funding	■ CHSF pays for all of Ocean Outcomes' time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies.								

Pacific Ocean tuna longline – Fue Shin Fishery

Basics	Overview								
Implementer: Ocean Outcomes Stage: Stage 4 Progress Rating A Launch Year: 2020 FIP Volume: 2,500 MT Structure: Comprehensive Supply Chain Engagements: Bottom-up Condition: Celebrate End Market: US and Europe Implementer Type: NGO	▪ As the oldest of the Pacific Ocean longliner FIPs, this FIP is working toward certification on the earliest timeline and has seen the most progress over its lifetime. ▪ ETP bycatch and adequate buy-in from tuna purchasers remain a challenge.								
Fishery Issues	Motivation and Goals								
▪ Similar to the other Pacific Ocean Taiwanese longline FIPs, the FSF longline FIP operates in a fishery where stocks are fluctuating around BMSY, but where robust precautionary management is still needed. ▪ ETP bycatch, especially of sharks, remains an issue.	▪ FSF is aiming to achieve MSC certification by 2026, which makes it the most aggressive timeline of all the Taiwanese FIPs racing for certification. ▪ Achieving certification before the other Taiwanese longliners could help FSF secure first-mover price premiums.								
History and Activities	CEA Assessment								
▪ The FIP is educating vessel owners and fishers about the need to mitigate bycatch of ETP species. However, this is a source of frustration among many fishers, as the Taiwanese government allows them to catch and sell sharks, which are lucrative in the Chinese market. ▪ FSF is also participating in and funding an EM pilot for its longliners, with the aim of mitigating ETP interactions. FSF is trying to bring on other companies to share the cost. ▪ The FIP is struggling to help its buyers understand the FIP’s full cost and the effort it requires. ▪ Like the TTLA and CHSF FIPs, this FIP is also conducting social improvements, including crew access to Wi-Fi, clear and translated wage slips, fairer contracts, adequate rest assurance, monitoring capacity for labor conditions, medical supply access, and clear disciplinary procedures.	<table><tr><td>Progress</td><td> ▪ FSF noted that the Pacific Ocean has achieved substantial progress in terms of sustainability, and Ocean Outcomes has conducted effective trainings with fishers on bycatch. </td></tr><tr><td>Market context</td><td> ▪ The FIP aims to achieve first-mover price premiums by achieving MSC and selling to Western markets. </td></tr><tr><td>Implementer effectiveness</td><td> ▪ Ocean Outcomes is an effective implementer, and FSF has said that vessel owner trainings have been effective. </td></tr><tr><td>Funding</td><td> ▪ FSF pays for all of Ocean Outcomes’ time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies. </td></tr></table>	Progress	▪ FSF noted that the Pacific Ocean has achieved substantial progress in terms of sustainability, and Ocean Outcomes has conducted effective trainings with fishers on bycatch.	Market context	▪ The FIP aims to achieve first-mover price premiums by achieving MSC and selling to Western markets.	Implementer effectiveness	▪ Ocean Outcomes is an effective implementer, and FSF has said that vessel owner trainings have been effective.	Funding	▪ FSF pays for all of Ocean Outcomes’ time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies.
Progress	▪ FSF noted that the Pacific Ocean has achieved substantial progress in terms of sustainability, and Ocean Outcomes has conducted effective trainings with fishers on bycatch.								
Market context	▪ The FIP aims to achieve first-mover price premiums by achieving MSC and selling to Western markets.								
Implementer effectiveness	▪ Ocean Outcomes is an effective implementer, and FSF has said that vessel owner trainings have been effective.								
Funding	▪ FSF pays for all of Ocean Outcomes’ time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies.								

Indian Ocean tuna longline – Fue Shin Fishery

Basics

Implementer: Ocean Outcomes
Stage: Stage 4 | Progress Rating A
Launch Year: 2023
FIP Volume: 3,247 MT

Structure: Comprehensive
Supply Chain Engagements: Bottom-up
Condition: Celebrate
End Market: US and Europe
Implementer Type: NGO

Overview

- While operating in a similar market and regulatory context as the Pacific Ocean FIPs, the Indian Ocean longline FIP has a slightly worse fishery condition, which requires better ecosystem-based management controls.

Fishery Issues

- Yellowfin tuna in the Indian Ocean was assessed as overfished in 2014; however, the most recent stock assessment showed the stocks had been rebuilt.
- Catch limits have been established, which signal progress in fisheries management.

Motivation and Goals

- FSF initiated this FIP to secure preferential access to buyers in Europe and North America by achieving MSC certification before the other longliner FIPs.
- To secure this, the FIP will need to prove that stocks are fluctuating around BMSY.

History and Activities

- The FIP aims to ensure that catches of tuna and other primary species in the fishery remain below FMSY through 2028.
- At the same time, the FIP is working to promote ecosystem-based approaches to fisheries management; they aim for these to be taken up by Flag States, the RFMO, and the fishery by 2028.
- Like the Pacific Ocean FIPs, the misalignment between the Taiwanese government and MSC on ETP bycatch allowances has proven a challenge, with fishers struggling to reconcile the difference between the two different authorities.
- This FIP does not have a social work component.

CEA Assessment

- | | |
|----------------------------------|--|
| Progress | While this FIP has not achieved the same degree of progress as FSF's Pacific Ocean FIP, Ocean Outcomes has had some success with vessel owner education. |
| Market context | The FIP aims to achieve first-mover price premiums by achieving MSC and selling to Western markets. |
| Implementer effectiveness | Ocean Outcomes is a respected and effective implementer, although they have had less progress in the Indian Ocean than the Pacific. |
| Funding | FSF pays for all of Ocean Outcomes' time on the FIP, but this may be subsidized by general operating support to Ocean Outcomes from philanthropies. |

Asia

Maldives

- Yellowfin tuna – handline



Maldives Summary Reflections

The Maldives traditional one-by-one tuna fisheries have participated in responsible seafood programs for over two decades, including FIPs, MSC, and Fair Trade certifications. Skipjack pole and line fishery received MSC certification in 2012 (the first Indian Ocean fishery to achieve MSC certification) and yellowfin tuna pole-and-line and handline fisheries were certified in 2014. However, changes in Indian ocean yellowfin tuna stock biomass resulted in the loss of the yellowfin certification in 2016. The current FIP seeks to regain certification for the yellowfin tuna handline fishery.

- The Indian Ocean Tuna Commission (IOTC) is the RFMO that oversees management of the yellowfin tuna stock for this FIP. Advocacy efforts from FIP participants have led to positive changes, but progress has been slow, in part due to significant power imbalances between the small island developing state and larger nations fishing in international waters and impacting the shared stock.
- The Maldivian government, in partnership with IPLNF, has historically played a significant role in supporting fishery improvement and certification. This includes data capture and fisher training on handling best practices to improve quality. It also includes setting a floor price to help stabilize fisher incomes; while this benefits the fishers, it has decreased the competitiveness of Maldivian tuna on the international market, creating challenges for the fishery overall.
- Awareness of the FIP among fishers is low, and declines in the number of fishers across the sector have led to efforts by the Ministry of Fisheries, Marine Resources, and Agriculture (MoFMRA) to initiate education and training programs to attract the next generation of traditional small-scale fishers to the tuna fisheries.
- Efforts to recover the yellowfin tuna stock appear to have succeeded with the last stock assessment showing the stock status to be rebuilt.

Figure 4.6 Volume of product in MSC, FIPs, or not engaged.

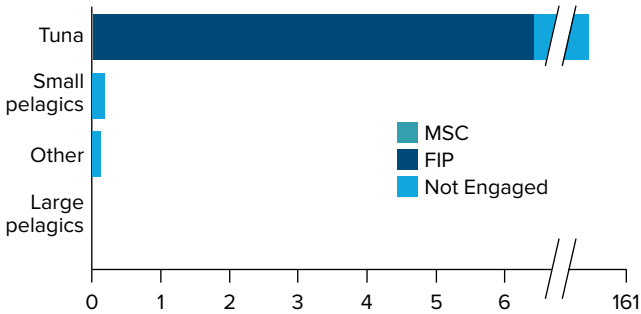


Table 4.8 Summary of FIPs in Maldives.

Summary Data	
# FIPs on FP.org:	1
# Stage 4+ FIPs:	1
Sites visited:	1

Maldives yellowfin tuna – handline

Basics

Implementer: Maldives Seafood Processors and Exporters Association (MSPEA), IPLNF
Stage: Stage 5 | Progress Rating A

Launch Year: 2021

FIP Volume: 19,540 MT

Structure: Comprehensive
Supply Chain Engagements:
Condition: Fix
End Market: North America and Europe
Implementer Type: NGO

Overview

- This FIP encompasses the entire yellowfin handline tuna fishery in the EEZ of the Maldives. FIP participants seek to rebuild the yellowfin tuna stock through engagement at the RFMO level and establish harvest control rules and better management for the live bait fishery upon which the tuna fishery depends.

Fishery Issues

- When launched, the yellowfin tuna stock in the Indian Ocean was below BMSY.
- There is a lack of harvest control rules for yellowfin.
- The live bait fishery used by the yellowfin tuna handline fishery needs a more robust management strategy.
- Better monitoring and mitigation of ETP interactions is needed.

Motivation and Goals

- The FIP was launched with the primary goal of improving market demand and market access for Maldivian one-by-one handline yellowfin tuna.
- The FIP seeks MSC certification to support better access to Western markets by 2026.
- The FIP works to enhance awareness of human rights and social responsibility among fishers.

History and Activities

- FIP participants, especially MSPEA, MSPEA, advocated at the RFMO level for stronger regulations, especially around FAD usage and successfully secured several Conservation management Measures (CMMs).
- In February 2025, the most recent stock assessment of the Indian Ocean yellowfin stock demonstrated the stock is above BMSY and considered rebuilt.
- The FIP continues to work to advance harvest control rules through improved data collection measures.
- The Maldives government is working to develop a live bait management plan to support the fishery.

CEA Assessment

- | | |
|----------------------------------|--|
| Progress | ■ The FIP is making steady progress, but pressuring the RFMO to act remains a challenge. |
| Market context | ■ The FIP is looking to improve market demand from the US and EU, which has fallen off since 2020. |
| Implementer effectiveness | ■ IPNLF has supported Maldivian seafood companies as they advocate for management reforms within the RFMO, but power dynamics disadvantage the Maldives compared to other countries, slowing progress. |
| Funding | ■ A combination of industry (through membership dues and tonnage fees) and philanthropic funding supports this project. |

Asia

India

- Palk Bay blue swimming crab – gillnet



India Summary Reflections

The number of FIPs in India continues to grow, with a diversity of industrial and small-scale fisheries currently engaged across shrimp, small pelagics, and other species. The expansion of FIPs coincides with an upward trend in investments into fisheries and aquaculture by the Indian government.

- The Indian federal government launched the Pradhan Mantri Matsya Sampad Yojana (PMMSY) scheme in 2020 to advance fisheries production in the country. Critiques of the scheme note a heavier focus on aquaculture, deep-sea fisheries and industrial fisheries, and an exclusion of small-scale coastal fisheries from the benefits.
- Investigative journalism reports in 2024 ⁽¹⁾ uncovered significant human and labor rights violations within India’s shrimp processing sector, casting doubt across the wider seafood sector’s current human and labor rights conditions.
- The majority of India’s FIPs are focused on export commodities (shrimp, small pelagics, squid, blue swimming crab) and have suffered from the Trump administration’s tariffs.
- Conflict over competing resource exploitation between traditional gillnet fishers in the blue swimming crab FIP and industrial trawlers has been a significant barrier to progress in this fishery.

Figure 4.7 Volume of product in FIPs, MSC, and not engaged in India.

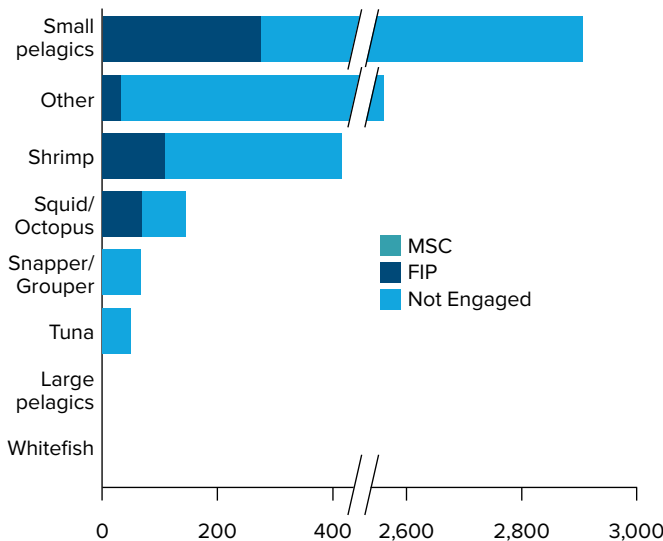


Table 4.9 Summary of Indian FIPs.

Summary Data	
# FIPs on FP.org:	9
# Stage 4+ FIPs:	4 (1 inactive)
Sites visited:	Palk Bay Blue Swimming Crab

¹ Hidden Harvest: Human Rights and Environmental Abuses in India’s Shrimp Industry, Corporate Accountability Lab (March 2024), <https://corpaccountabilitylab.org/hidden-harvest>.

India Palk Bay blue swimming crab (BSC) – gillnet

Basics

Implementer: Crab Meat Processing Association (CMPA)
Stage: 4, Grade A
Launch Year: 2019
FIP Volume: 4900 MT

Structure: Comprehensive
Supply Chain Engagements: Top-down
Condition: Fix
End Market: United States
Implementer Type: Industry

Overview

- The FIP consists of small-scale gillnet fishers of Palk Bay, Tamil Nadu.
- The fishery is suffering from overexploitation and habitat loss.

Fishery Issues

- The BSC stock is overexploited because of a lack of harvest control rules and harvesting of undersized and berried females.
- The shrimp trawl fleet is causing habitat loss and bycatch.
- Unsustainable coastal development is degrading nearshore ecosystems.

Motivation and Goals

- The FIP is one of several blue swimming crab FIPs in Asia supported by members of the US's National Fisheries Institute's Crab Council.
- The FIP is seeking MSC certification, originally with the goal of reaching assessment by 2025.
- The FIP seeks to support improved management and formalization of the fishery.

History and Activities

- The FIP has focused on education and awareness among fishers to reduce catch of undersized crab and berried females.
- The rural location and diffuse coastal population has made it difficult to conduct outreach and engage fishers in the FIP process. Most fishers interviewed did not know what a FIP was or that they were part of one.
- Conflict over resource use and access is preventing progress. The shrimp trawl fleet operates in the same habitat as the BSC gillnet fishery and negatively impacts the BSC fishery by destroying fishers' nets/gea, damaging habitat, and catching BSC as bycatch, undermining the sustainability objectives of the FIP.

CEA Assessment

- | | |
|----------------------------------|--|
| Progress | <ul style="list-style-type: none"> ▪ The FIP has made limited progress, despite its Stage 4 ranking. Many fishers said they continue to harvest small crabs and berried females in order to increase the weight of their catch, especially since the trawl fleet would take these crab if they did not. |
| Market context | <ul style="list-style-type: none"> ▪ The FIP is part of the NFI's Crab Council's efforts to improve sustainability of BSC fisheries in Asia. |
| Implementer effectiveness | <ul style="list-style-type: none"> ▪ The top-down approach of the FIP is unable to effectively reach and engage fishers and does not appear to be addressing competition from the trawlers. |
| Funding | <ul style="list-style-type: none"> ▪ Industry pays for this FIP via the NFI Crab Council model. |

Chapter 5



Appendices

- A1. Methods and approach
- A2. Key informant interviews and site visits
- A3. Literature review
- A4. Alternative models
- A5. FIP progress questions and quantitative methods for findings
- A6. Bibliography

A1. Methods and approach

Overall approach

CEA employed an approach similar to that of our research in 2019. Three methods were utilized in the research: (1) desktop research (literature review and data analysis), (2) key informant interviews, and (3) site visit interviews, focus groups, and observations.

In 2025, we replicated the 2019 approach of a descriptive, mixed-methods strategic review of the FIP landscape, focusing on changes in environmental progress, funding, market incentives, fisheries management, and social- and market-related outputs, as well as key implementation factors. This study includes assessment of longitudinal changes in the FIP model, focused on trends in FIP objectives, implementation, funding structures, fishery governance, and non-environmental goals, especially those related to social responsibility. In addition, this study analyzed alternative models to FIPs that have prevailed over the last five years.

CEA used multiple methods to collect qualitative and quantitative data related to FIPs to answer our core research questions. Data analysis and statistical tests relied on public datasets (FisheryProgress and FIP DB) that allowed us to draw summary inferences on what effects FIPs have on target fisheries and what factors have contributed to change events. Interviews, focus groups and site visits allowed us to test our research hypotheses and findings. Site visits were selected based on a balance of repeat sites from past reviews, diversity of FIP geographies and types, logistical constraints, and support of FIP implementers and consultants. For our review of relevant public materials, we scanned the growing body of literature associated with FIPs, including ten peer reviewed papers, as well as gray literature, including implementer reports and other FIP-related documentation in service of answering our research questions.

CEA interviewed 140 individuals and consulted with 115 organizations, visiting 25 FIPs across seven countries. Some sites were revisited from the 2019 study, while others were new. Interview guides and focus group discussion questions for site visits were developed based on preliminary findings from desktop research and interviews.

Methods: Overview of sources

Table A1 List of data sources that contributed to each of the five research questions.

Key Research Questions	Data Sources				
	Data analysis	Literature review	Key informant interviews	Site visits	Survey
1. How is the FIP landscape evolving?	X	X	X	X	
2. What kind of impacts are FIPs generating and how are these measured?	X	X	X	X	
3. What are the factors that contribute to FIP progress and success?	X	X	X	X	
4. What is the current landscape and impact of social responsibility work in FIPs?		X	X	X	
5. What is the current finance landscape and associated challenges and opportunities for sustainable financing of FIPs?	X		X	X	X

Methods: Overview, Part 1

Quantitative data analysis

Our data analysis used the publicly available data sources FisheryProgress and FIP DB. Statistical tests to determine correlations between stage achievement and FIP factors (e.g., industry leadership, comprehensive vs. basic) relied on FIP DB. FIP DB was also used to explore trends in FIP demographics since 2018 (e.g., how the makeup of FIPs by region has shifted since 2018). We explored pre-2018 trends using CEA's proprietary FIP database, which includes FIPs that did not publicly report.

Our analysis of Stage 5 attribution relied on a database of manually transcribed data from FisheryProgress.org. To develop this database, we manually recorded every Stage 4 and Stage 5 event on FisheryProgress.org. To analyze changes in FIP grades over time, we utilized data reports from FishChoice, the company behind FisheryProgress.org. For our analysis of FIP costs and the associated analysis of which actors are paying for those costs, we used publicly available budget data on FisheryProgress.org.

Literature review

We reviewed relevant public literature, based on desk-based queries of Google Scholar and recommendations from our advisors, philanthropic funders, and other NGOs, practitioners, and academics in the seafood markets and FIP community. Our review of these documents helped us to better understand the FIP landscape, its broader context, how it has evolved, the limitations of the FIP model, as well as which additional experts we would interview.

Key informant interviews

CEA created phone interview guides from the list of research questions and our previous experience from the 2015 FIP review. CEA utilized a structured interview guide for phone and a semi-structured site visit guide that allowed specific questions to be addressed in interview and/or focus group discussion format, while providing flexibility for new insights to shape the interview. The majority of interviews lasted an hour, and site visits typically lasted one day per FIP.

CEA built upon our 2015 key informant interview list and updated it based on professional experience and knowledge of the space as well as recommendations from foundations, advisors, and other experts in the field. We conducted interviews in person and through video and audio calls.

CEA took typed notes, which were not recorded and transcribed. Notes were cleaned and merged (when needed), uploaded, and coded in Dedoose.

Methods: Overview, Part 2

Site visits

CEA determined that a convenience sample approach — selecting sites based on particular criteria — was best because it provided us the opportunity to accomplish the following goals: collect longitudinal data, visit the most sites, focus on key projects and regions, and minimize burden on implementers. Additional selection considerations included: 1) priority countries for the Packard, Walton, and Moore foundations, 2) availability of FIP implementers, hosts, interpreters, and key stakeholders, 3) seasonal considerations, 4) religious holidays, and 5) distance and flying time. CEA developed a site visit guide based on the phone interview guide and previous FIP site visit experience. Site visits were coordinated with FIP implementers and in-country consultants to interview relevant FIP stakeholders. During site visits, FIP implementers joined CEA during most in-person meetings, providing interpretation as needed, or other interpreters were utilized for consecutive and simultaneous interpretation. Detailed written notes were typed, merged, and uploaded and coded in Dedoose.

Qualitative data analysis

Key informant interviews and site visit interviews were uploaded in Dedoose. Once reviewed, excerpts were tagged with relevant codes and themes to help answer our research questions and reflect trends in the FIP space. We also used Mural boards to visually group qualitative data by thematic trends and identify themes; literature was only coded in Mural, not Dedoose.

Methods: Key informant interviews

Key informant interview guide development

CEA created video conference and phone key informant interview guides from the list of research questions and our previous experience from earlier FIP Global Landscape Reviews. CEA utilized a structured key informant interview guide for phone and site visit interviews to allow specific questions to be addressed while providing flexibility for new insights to shape the interview. Interview guides were developed for each of the major types of FIP participants: NGO/implementers; supply chain/industry partners; and experts/infrastructure providers.

Key informant interview methods overview

Key informant selection: CEA built upon our 2019 interviewee list and updated it based on professional experience and knowledge of the space as well as recommendations from foundations, advisors, and other experts in the field. CEA focused initial calls with known senior leaders in the field to provide high-level context, before turning to experts on certain geographies, FIPs, and topics. **Key informant interview method:** We conducted video calls when possible and audio calls when needed. Interviews were one- or two-person semi-structured interviews with a series of prewritten questions to structure the conversation, but CEA interviewers were charged with guiding the interviews in the best direction. Key informant interviews lasted between thirty minutes and two hours, with the majority of interviews lasting approximately sixty minutes. CEA took typed notes that were later transcribed. Notes were cleaned and merged (when needed), uploaded, and coded in Dedoose. Interview guides can be provided upon request.

Methods: Site visit interviews, focus groups, and observations

Site visit selection

CEA collaborated with our advisors to determine the appropriate approach for selecting site visits for this review. We determined that a convenience sample approach — selecting sites based on particular criteria — was best because it provided us the opportunity to accomplish the following goals:

Collect longitudinal data

CEA revisited sites from previous studies, which provided a unique longitudinal data collection opportunity. Part of our mandate was to reflect on what has changed in FIPs over the last ten years; revisiting sites was thus essential, including visiting some sites that have gone inactive in order to understand factors contributing to FIP inactivity.

Focus on key projects and regions, going deeper and getting fisher perspective

Our assignment was influenced by historic philanthropic support and continued areas of interest to the major sustainable seafood funders. This led us to visit many sites in key countries such as Indonesia, Mexico, and Peru. In addition, for this iteration, we spent more time on our qualitative research to gain fisher and fishworker perspectives.

Minimize burden on implementers

Site visits were hosted by key individuals. The flexibility of a convenience sampling approach allowed us to work with willing hosts to visit projects that were within the limits of our travel capacity and budget. Additional selection considerations included: 1) availability of FIP implementers, hosts, interpreters, and key participants, participating in FIP Communities of Practice when applicable 2) seasonal considerations, 3) religious holidays, and 4) distance and flying time.

Site visit data collection based on local perspective

We coordinated in advance with lead FIP implementers in-country and requested opportunities to speak with relevant FIP participants such as fishers, supply chain participants, and government agencies. In advance of the visit, CEA reviewed FisheryProgress documents, such as pre-assessments, scoping documents, workplans, and participant lists, as well as 2015 and 2020 CEA FIP review notes, where available. During site visits, FIP implementers joined CEA during most in-person meetings, providing interpretation as needed, or other interpreters were utilized for consecutive and simultaneous interpretation. Detailed written notes were typed, merged, and uploaded to our qualitative data analysis software, Dedoose, to be reviewed and for excerpts to be tagged with relevant codes and themes.

CEA relied on FIP implementers and/or consultants to help coordinate in-person meetings with FIP stakeholders we requested and they suggested. In-person site visit interviews included one to two CEA team members utilizing a focus group discussion format with a series of prewritten questions to provide structure. CEA interviewers were charged with guiding the interview in the best direction. CEA took typed notes and did not record and transcribe interviews. Notes were cleaned and merged (when needed), uploaded, and coded in Dedoose.

Methods: Limitations

Table A2 Summary of limitations associated with the research approach.

Topic	Description
CEA as a research entity	CEA has conducted research on the sustainable seafood movement for more than 15 years and on FIPs since 2012. We have been commissioned by funders and FIP practitioners to provide research and analysis to guide decision-making. While we bring a wealth of expertise and experience on this topic, we acknowledge the pre-existing knowledge, opinions, and biases we bring into this research.
Methods and process	- CEA has consulted with an advisory panel representing the broad experiences and interests of the FIP field. We aim to validate our methods and interpret findings in a statistically rigorous and scientifically sound manner. - Similar to the previous editions, the 2025 FIP Review is meant to serve as strategic research piece, not as a formal evaluation of the FIP field. Our methods, approach, and recommendations reflect this intended purpose.
Key informant interviews	- CEA developed the list of key informant interviewees based on lists from previous FIP reviews, internal knowledge and experiences of the FIP landscape, and recommendations from a broad range of expert informants. Because key informants were not selected through a random sample, their perspectives may not be representative of or generalizable to the entire FIP community. Nevertheless, CEA aimed to curate an interviewee list that reflects the diverse opinions and experiences of the FIP field at large. - Contradictions were numerous across interviews, reflecting the broad range of sectors, levels of expertise, geographies, and life experiences of the FIP actors we interviewed. We aimed to accurately reflect these various perspectives as much as possible. - While we strove to capture detailed written notes from the interviews, we may not have captured all details or nuances. We did not record or digitally transcribe interviews.
Site selection approach	- Site visits were chosen based on a set of criteria (see page 17) determined by the CEA team and the funders. The site selection criteria included (but was not limited to): relevance to funder priorities, availability of FIP implementers and other key actors, and distance/flying time. There may be additional FIPs that did not meet this criteria that would still be important to visit to better understand the FIP landscape. - To capture the diversity of the landscape, CEA visited FIPs ranging in species, gear types, progress ratings, and listing statuses. - FIP implementers and other stakeholders may have perceived that they were being “evaluated,” and behavior may have changed as a result. - Due to capacity constraints, CEA was only able to visit a limited number of FIPs compared to the previous FIP reviews. We aimed to mitigate this limitation by increasing the number of key informant interviews we conducted virtually and attending FIP Communities of Practice conferences to get a range of observations on FIPs from a wide range of participants.

Methods: Limitations

Table A2 Summary of limitations associated with the research approach, continued.

Topic	Description
Site visit interviews	- CEA relied on FIP implementers to provide real-time interpretation services and to build trust with site visit key informants. We took detailed written notes during the site visit interviews and observation, but we may not have captured all details and nuances from the interviews. - For both virtual and in-person interviews, CEA was somewhat constrained by the language skills of its research team. As a result, in cases where no interpretation was available, CEA conducted interviews in English or Spanish. There are FIP actors with important contributions that could not be consulted due to CEA's language constraints.
FIP budget survey	We had a limited number of responses (11) to the FIP budget survey deployed to FIP implementers. We recognize the survey findings may reflect the biases of those respondents. Given the limited sample size, the findings of the survey are not necessarily representative of or generalizable to all FIPs. For this reason, the results were only used sparingly as supplemental to our analysis, rather than as primary data.
Quantitative research and data analysis	- FisheryProgress does not assess whether changes made in a FIP are attributable to the actions of the FIP. CEA assessed the relationship between changes made in a FIP and FIP actions by reviewing available documentation, consulting with key informants, and leveraging internal knowledge and experience. - The analyses completed have used FisheryProgress FIP stage and principal indicator changes reported by FIP implementers. These are proxies for changes to the fishery, and we assume that more reported changes and higher stage achievement reflects fisheries improvement. - CEA's ability to correlate fisheries management and governance contexts with FIP success factors was constrained by limited public, current information on fisheries management; the Fisheries Management Index has not been updated since 2016, and the Global Fishing Index since 2021. As a result, CEA no longer has a robust reference for fisheries management and governance in different country contexts. - CEA aimed to have a rigorous and complete picture of the global landscape of all FIPs, resulting in reference to and analysis of three separate FIP data sources: CEA's proprietary database that has not been updated since 2019, FisheryProgress records, and SFP's FIP DB database. CEA used FIP DB as the primary database. Where appropriate, CEA also used FisheryProgress for analyses related to prospective FIPs, as FisheryProgress and FIP DB have different listing criteria for FIPs. CEA's database included prospective FIPs that have not been captured in public sources. Limited and/or inconsistent FIP reporting across these different sources may hinder understanding of and accounting for the full landscape of all FIPs.

Methods: Data analysis

Our data analysis sought to answer several questions about FIP progress, effectiveness, impact, and drivers of impact and relied primarily on multivariable regressions. To ensure replicability, we used only publicly available data sources, primarily FIP DB.

We mapped data sources to our research questions with help from advisors and replicated many analyses from the 2019 version of this report. For most of the statistical tests, we used both FIP DB (developed by the University of Washington) and a FisheryProgress stage change dataset (tabulated by CEA from FisheryProgress) to run analyses of variance and multivariable tests. The results indicated whether several characteristics, including country development status, commodity, implementer, or participants, are correlated with progress and impact. More specific methodology is detailed in the "Progress, impact, and effectiveness" subsection.

Note on reporting cumulative FIP counts

Because FIP DB did not start until 2018, the annual FIP counts throughout the report are sourced from both CEA's historical FIP database (for years before 2018) and FIP DB (for 2018 and beyond). CEA's database included FIPs that did not report publicly, but FIP DB only counts FIPs that report publicly, so the CEA database has a systematically higher number of FIPs in than FIP DB. The apparent drop in numbers between 2019 and 2020 is not due to a decrease in the number of active FIPs, but a difference in methodologies between the CEA database (pre-2020) and FIP DB (2018 and beyond). For overlap years, both data sources are listed for comparison.

For years before 2018: FIP count for a given year is not based on the number of FIPs active in that specific year, but instead follows this equation:

$$\text{FIP Count} = (\# \text{ Completed FIPs to date} + \# \text{ Active FIPs}) - \# \text{ FIPs that have gone inactive to date.}$$

For example, the six FIPs represented in 2007 include the two FIPs from the previous year, plus four additional FIPs started in 2007 that have since remained active or were completed. But if a FIP began in 2014 and went inactive in 2016, then it is not counted as part of the FIP count for 2014 or 2015 and instead is included in the inactive FIP count. FIPs that started but have since gone inactive are designated in the inactive count beginning in the start year. This means, for example, that if a FIP began in 2014 and went inactive in 2016, it is not represented as active in 2014 or 2015; it is counted among inactive FIPs starting in 2014. In this way, the number of active FIPs represented for each year underestimates the total number of FIPs that were active in that year, because multiple projects active that year have likely since gone inactive and are therefore counted in the inactive count in our data.

For years 2018 and beyond: Active and completed FIP counts were determined by utilizing the number of FIPs listed as "active" or "complete" in the given database version year of FIP DB. For instance, in the 2023 version of FIP DB, 196 FIPs were listed as active, which is the value used for active FIPs in 2023. Unlike pre-2018 data, this required no calculation from CEA.

Key data sources overview

To answer questions about progress, effectiveness, and impact, CEA analyzed the following quantitative datasets:

- **Fishery Improvement Projects Database (FIP DB):** Created by Sustainable Fisheries Partnership (SFP) and now managed in tandem with the Hilborn lab at the University of Washington, FIP DB contains information about historical and active FIPs, the fisheries where FIPs operate, and the implementing organizations of the FIP.
- **FIP budget information:** CEA pulled all publicly available FIP budgets from FisheryProgress.org in August 2025. CEA then merged these budgets into a single database to perform quantitative and statistical analyses on FIPs' annual operating budgets, costs, and sources of funding.
- **CEA database of FIPs:** Created by CEA using FisheryProgress data and information about FIPs shared directly with CEA by FIP implementers, this database contains much of the same information as FisheryProgress, in addition to a few other dimensions such as bottom-up/top-down classification and information on FIPs that did not report publicly. The database was last updated in early 2020.
- **FisheryProgress datasets:** Overseen by an advisory committee and managed day-to-day by FishChoice, the Conservation Alliance for Seafood Solutions developed the guidelines that are the foundation for the dataset. FisheryProgress tracks the stages and progress of FIPs, historical and active. CEA used the following three subsets of data from FisheryProgress:
 - **Fishery profiles dataset:** This dataset provides the most updated publicly available information on the Stage and self-reported progress of FIPs.
 - **Performance indicator change dataset:** FisheryProgress tracks the rationale for each performance indicator change reported by FIPs. These changes equate to Stage 4 or 5 achievements, depending on the indicator. While this data is available on FisheryProgress, it is not exportable. CEA manually transcribed the data from FisheryProgress into a usable dataset on May 12, 2019, and updated this database in January 2025.
 - **Progress rating database:** SFP collects a dataset on monthly progress ratings of each of its FIPs, allowing users to examine changes in ratings over time. These data are then shared with staff at FisheryProgress, who ultimately shared the data with CEA.

Methods: Known limitations with data analysis

Our ability to attribute change to FIP actions is based solely on professional judgment.

This limitation specifically relates to our analysis of whether improvements on the water could credibly be attributed to FIP activities. We utilized FIPs' documentation of claimed environmental improvements, in combination with activities from their workplans, to determine if it is likely that the activities could have led to the claimed change on the water, but these analyses are limited by the information provided by the FIP, our own knowledge of fishery dynamics, and our understanding of the FIP's relative role within that fishery. Because we are not directly on-site nor working at a granular level for each individual FIP and the fishery in which that FIP operates, our knowledge base on which we make these judgements is limited.

We assume self-reported progress on FisheryProgress maps to actual progress within the fishery.

The analyses in this report have used FisheryProgress FIP Stage and performance indicator changes reported by FIPs. These are proxies for changes in the fishery's environmental conditions, and we assume that more reported changes and higher-stage achievement represent improving fisheries. Comprehensive FIPs now require third-party assessments every three years, which helps ground-truth self-assessments in those fisheries, but our analysis does suggest that reported progress does not always map to actual progress within the fishery. Compounding this issue is that data quality and consistency varies considerably across fisheries and FIPs.

Lack of FIP budget transparency and sharing increases the margin for error of finance-related analyses and biases toward certain FIPs.

Our finance analysis was limited to budgets from FIPs that chose to report their expenses and budgets publicly, which biases our analysis if there are any trends in the budgets of FIPs that choose not to report. For example, if FIPs that do not report their budgets publicly are systematically more expensive than FIPs that do publish, our budget estimates would be lower than true budgets. However, we have no evidence to suggest that such bias exists. Additionally, CEA's budget survey only yielded five results with clear quantitative data (see page 170), so we were unable to substantively add to our pool of budget data or conduct a proper comparative analysis between publicly available budgets and those from our survey.

Methods: Qualitative data tagging in Dedoose

To maintain methodological consistency with previous versions of this report, we utilized the Dedoose software to analyze phone and site visit interviews. Dedoose is a web-based application for managing and analyzing qualitative and mixed methods research.

Dedoose allowed us to use named codes to tag excerpts from key informant interview and site visit notes, helping us better analyze FIP-related themes to answer our research questions. We identified the following codes and sub-codes based on our core research questions and other themes that emerged throughout the project.

Table A3 Dedoose codes used for analysis.

Case study	FIP finance	FIP impacts	FIP landscape evolution	
- Case Study, Asia-Pacific - Case Study, Latin America	- Budgets - Costs - Economic status - Funding mechanism - Government funder - Industry funder - NGO Funder - Philanthropic funder - Re-grantor funder - Sustainable finance - Transparency - Unexpected costs	- Data availability - Durability - Economic impacts - Environmental impacts - Fisheries sustainability - Market access for FIPs Product - Market demand for FIP Products - Off-ramps/end goals - Perverse Incentives - Policy/Regulatory Change (Environmental) - Policy/Regulatory Change (Social) - Social impacts - Traceability - Value-adds - Value-detract	- Artisanal FIP - Basic FIP - Climate change - Commodity Type - Comprehensive FIP - Country development status - End Goal - FIP+ - fishworkers' perspectives - Geography - Africa - Asia - Europe - Middle East - North America - South and Central America	- Implementer Type - Inactive/Stalled/ Failed FIPs - Industrial FIP - Industry priorities - Market access for FIPs - Market demand for FIPs - Market Orientation - Roles of different actors - Technology/gear - Top down vs. bottom up - Progress rating
FIP success factors		Other	Social responsibility	
- Accountability mechanisms - Age/duration of FIPs - Community engagement - Country development status - Definition of success - Engaged vs. not-engaged markets - External influences - FIP Stage - Fix problem vs. celebrate good fishery - Fleet type - Funding availability - Geography - Government capacity for fishery management		- Alternative models - Limits of FisheryProgress/FIP infrastructure - Role of philanthropy	- Contextual equity - Corporate accountability/transparency - CSR/ESG commitments - Distributional equity - Environmental equity - Financial literacy - Food security - Gender equity - Grievance mechanism - Incentives for social improvement - Labor conditions - Legal and technical assistance - Livelihoods - Management equity - Motivations for local participation - Procedural equity - Resource access & tenure - Responsible buyer practices - Social responsibility infrastructure - Type of social responsibility work - Worker organizing models - Worker-driven social responsibility approach	

Methods: Budget survey

As part of our analysis of FIP costs and funding, CEA developed a survey for FIP implementers to disclose their budgets for different elements of FIP implementation and the funder types contributing to their FIP. However, this survey yielded few results, and those that were received were of limited quality, so this survey was ultimately not used for quantitative analysis.

Budget survey materials and process

We utilized a Google form that could be accessed by any implementer with a link. The survey was developed in both English and Spanish to maximize respondents. Respondents were allowed to provide data in any currency they wished; all values were converted to USD during the analysis phase.

The survey was distributed to the Conservation Alliance for Sustainable Seafood's listserv and the FIP Community of Practice. Responses were automatically compiled into a Google Sheets spreadsheet. The survey was live for approximately two months, after which time the data were moved into an Excel spreadsheet, cleaned, and analyzed. Because the number of responses was so low (n=11) and fewer than half had robust quantitative data (n=5), the survey was not used for quantitative analysis.

Budget survey question summary:

The questions below summarize all the questions asked in the survey for the sake of brevity. The actual questions in the survey were more granular to elicit specific, quantitative results.

1. What is the name and type of your organization?
2. How many total FIPs does your organization financially support, and what is the total annual budget for your organization's FIP work?
3. Please link to your FIP's FisheryProgress page or, if it does not have a page, provide descriptive information about landings, species, host country, implementers, vessel composition, and FIP type.
4. What is the total annual FIP cost for the following elements?
 - a) Staff
 - b) Research/assessment/monitoring
 - c) Operations
 - d) Human rights and social work
 - e) Hardware and other technology
 - f) Other
5. What percentage of your FIP budget is supported by the following sources, and what activities do these sources support?
 - a) Core organizational budgets
 - b) Philanthropic grants
 - c) Industry

A2. Key informant interviews and site visits

Key informant site visit interviews: Demographics

Completed interviews: **140**

Countries visited: **7**

Regions represented: **10**

Total number of interviewees: **>150**

FIPs visited: **25**

Organization types represented: **12**

Organizations consulted: **115**

FIPs interviewed remotely: **30**

Implementers interviewed: **40**

Table A4 Different types of organizations and geographies engaged in interviews.

Organization type	# of interviews	Geography of work	# of interviews
Alternative model	5	East Asia	11
Consultant	7	Global	29
FIP infrastructure	12	Global South	8
Fishworker	9	Latin America	26
Foundation	2	North Africa	1
Government	6	North America	11
Industry	30	South East Asia	47
NGO	21	Sub-Saharan Africa	3
Other	4	Western Europe/North Sea	2
Implementer – NGO	27	Oceania	2
Implementer – Industry	5		
Implementer – Consultant	12		

FIP implementers interviewed

Table A5 FIP Implementers interviewed.

Organization	Type	Region of work	Organization	Type	Region of work
APRI	Industry	Southeast Asia	MRAG Americas	Consultant	North America
Asosiasi Perikanan Pole & Line and Handline Indonesia (AP2HI)	Industry	Southeast Asia	Ocean Outcomes	NGO	Global
Atlantic Groundfish Council	NGO	North America	Olvea Group	Industry	North Africa
CeDePesca	NGO	Latin America	Poseidon Aquatic Resource Management	Consultant	Global
Comunidad y Biodiversidad, A.C. (COBI)	NGO	Latin America	Pronatura Noroeste A.C.	NGO	Latin America
Conservation International	NGO	Latin America	Qingdao Marine Conservation Society	NGO	East Asia
Conservation Mahi Mahi	NGO	Latin America	SmartFish Mexico	NGO	Latin America
Control Union	Consultant	Global	Sustainable Fisheries Partnership	NGO	Global South
Cox's Wholesale Seafood	Industry	North America	Umito Partners	Consultant	East Asia
FIP Community of Practice	Consultant	Southeast Asia	Verifact/Verifish	Consultant	Western Europe/ North Sea
For Sea Solutions	Consultant	North America	Wholefish Strategies	Consultant	Global South
Future of Fish Argentina	NGO	Latin America	Wren Fishing	Consultant	Oceania
Hong Ngoc Seafood	Industry	Southeast Asia	WWF Ecuador	NGO	Latin America
International Pole & Line Foundation (IPNLF)	NGO	Southeast Asia	WWF Philippines	NGO	Southeast Asia
Kolektif	Industry	Southeast Asia	YKAN (TNC Indonesia)	NGO	Southeast Asia
			YPL	NGO	Southeast Asia

A3. Literature review

Sources consulted for literature review

Table A6 Summary of literature review for FIP research.

Year	Lead author	Title
2020	Alexander Ford	Fishery Improvement Projects: In the Context of Small-Scale Fisheries Value Chains, Post-Harvest Operations, and Trade
2020	Jorn Schmidt	Social networks and seafood sustainability governance: Exploring the relationship between social capital and the performance of fishery improvement projects
2020	Kendra Travaile	The utility of fishery improvement projects (FIPs) for governing fishery transitions toward sustainability
2021	Allegra La Ferr	Fishing for Success: A review of best practices and benefits offered by cooperatives
2021	Mohamed Samy-Kamal	Fishery Improvement Projects (FIPs): A global analysis of status and performance
2021	Alexia Morgan	Have Fishery Improvement Projects (FIPs) adequately addressed key needs to monitor and mitigate fishery impacts on endangered, threatened, and protected (ETP) species? A review, with recommendations to the supply chain
2021	Stephanie Bradley	New Platform Helps Build Local Capacity for Fisheries Improvement
2021	Katina Roumbedakis	Sustainability Toolkit for Cephalopod Fisheries
2021	International Pole and Line Foundation (IPNLF)	Sustainability through Ecolabels: FIPS for MSC
2022	A. Flores-Guzman	Análisis de la pesquería de cinco especies de escama marina capturadas con línea de mano en Guaymas, Sonora, México, en el marco de un Proyecto de Mejora Pesquera (Fishery analysis of five species of marine flake caught by hand line in Guaymas, Sonora, Mexico, within the framework of a Fishery Improvement Project)
2022	Andre Standing	Certifying the unsustainable: The Fisheries Improvement Project in Mauritania
2022	Fish Focus	Project UK Round 1: The Story So Far
2022	Laurenne Schiller	Evaluating the roles and reach of philanthropic foundations in sustainability efforts for tuna
2022	Sofia Kall	Reeling in private governance approaches for sustainable fisheries: A study of Fishery Improvement Projects
2022	Sofia Kall	From good intentions to unexpected results: a cross-scale analysis of a fishery improvement project within the Indonesian blue swimming crab

Bold indicates a peer-reviewed piece

Table A6 Summary of literature review for FIP research, continued.

Year	Lead author	Title
2023	Chris Williams	Fishery improvement projects: A voluntary, corporate “tool” not fit for the purpose of mitigating labour abuses and guaranteeing labour rights for workers
2023	Conservation Alliance for Seafood Solutions	Guidelines for Supporting Fishery Improvement Projects
2023	Emiliano Garcia Rodriguez	From bottom to up: Effects of fishery improvement projects on the stock status of multispecific small-scale fisheries from Mexico
2023	FIP-CoP	FisheryProgress Feedback Working Group Calls: Feedback & Recommendations for FishChoice
2023	Melissa Aronson	Fisheries Improvement Fund: A Global Financing Model with the Goal of Reversing Fisheries Decline
2023	Open Seas	Failure of the Scampi Fishery Improvement Project
2023	Wakamatsu Hiroki	Can Sustainable Fisheries Management Add Value in Japan? The Case of Bigeye Tuna
2024	Elena Finbeiner	Insights from a community of practice: Integrating human rights in fisheries improvement
2024	Jennifer Rasal	Drivers of success, speed and performance in fisheries moving towards Marine Stewardship Council certification
2024	Michelle Carrere	Certificación de sostenibilidad pesquera ignora información y favorece a Industriales en Chile
2024	World Wildlife Fund	Global Fisheries Improvement Fund Supports First Project in Chile with Industry and Philanthropy Contribution
2025	Scaling Blue, LLC	Bottom-Up Fishery Improvement Project Impacts
2025	Urs Baumgartner	Certifying ‘not yet sustainable’ fisheries — The uncertain journey to global best practice

Bold indicates a peer-reviewed piece

A4. Alternative models

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (1 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs.

Model	Summary	Key differences from FIP model
MSC Improvement Program	▪ The MSC Improvement Program provides a structured, time-bound path to achieving MSC certification. ▪ Entering fisheries must first be independently assessed by a conformity assessment body (CAB) to confirm its eligibility for the program. The fishery is subject to CAB assessment to verify claims of progress against its workplan. ▪ Participating fishers are expected to enter MSC assessment within five years of entering the Improvement Program. Some participants may receive additional funding from MSC's In-Transition to MSC (ITM) fund. ▪ Participating projects are required to report on a private platform managed by MSC.	▪ The MSC Improvement Program complements the FIP model. FIP fisheries can still participate in the MSC Improvement Program. ▪ While all FIPs are required to undergo an independent audit every three years, MSC Improvement Program fisheries are subjected to a CAB assessment each time it reports progress against its workplan. ▪ While FIPs in today's landscape are not generally time bound, participants in MSC's Improvement Program are expected to enter MSC assessment within five years. ▪ Products from fisheries in the MSC Improvement Program may carry a statement on the back of packaging if they meet certain conditions. ▪ MSC Improvement participating fisheries are not required to report on FisheryProgress.
MarinTrust Improver Programme	▪ The MarinTrust Improver Programme is a structured, time-bound process through which marine ingredient production facilities sourcing from improving fisheries (e.g., FIPs) can gain recognition of their product within five years. ▪ Facilities must provide evidence that raw materials are sourced from fisheries either approved under the MarinTrust Fishery Assessment or from Fishery Improvement Projects (FIPs) with MarinTrust-approved workplans, with accepted FIPs undergoing a gap analysis to inform their improvement workplan. ▪ Participating FIPs are subject to yearly third-party peer review conducted by the MarinTrust Improver Programme Committee. The participating facilities are subject to a yearly audit.	▪ The MarinTrust Improver Programme complements the FIP model. Fisheries participating in FIPs can still participate in the MarinTrust Improver Programme. ▪ The unit of certification for this program is the product facility. ▪ The Marin Trust Improver Programme provides some market recognition for participating facilities. The sourcing policies for big marine producers, such as BioMar, Cargill, and Skretting include product from the MarinTrust Improver Programme. ▪ Accepted FIPs under the MarinTrust Improver Programme are not required to report on FisheryProgress. ▪ While FIPs are not generally time-bound, participating FIPs in the Improver Programme are expected to complete their workplans within five years. ▪ Certification is not necessarily the end goal for FIPs participating in the MarinTrust Improver Programme; completed FIPs receive approval to supply to MarinTrust accredited production facilities.

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (2 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs, continued.

Model	Summary	Key differences from FIP model
Community Catch	▪ The Community Catch Standard was specifically developed for small-scale fisheries. Participants in the program are required to demonstrate compliance with eight principles covering: animal welfare, biodiversity, climate change, recognized species, worker health and safety, governance, labor rights, and community development. ▪ Interested parties (e.g., fishers, cooperatives, or other supporting organizations) evaluate their fishery's compliance with the standard using an open-access self-assessment tool. Participants undergo a formal evaluation by a conformity assessment body (CAB) that assesses the fishery's compliance with the standard. ▪ Participating fisheries must demonstrate compliance with the standard's minimum requirements to be recognized as a Community Catch FIP. Fisheries that meet all target requirements are eligible for the Community Catch certification. ▪ The Community Catch Standard was released in May 2025 and has undergone 19 trials in small-scale fisheries around the world.	▪ Community Catch complements the FIP model. Fisheries participating in FIPs can still participate in the program. ▪ The program is open to all small-scale, wild-capture fisheries. Industrial fisheries are not eligible. ▪ Five of the standard's eight principles are focused on fisher and fishworker safety, well-being, income security, working rights, and development. ▪ Fisheries interested in being recognized by the Community Catch Initiative must first undergo the self-assessment against the standard and then proceed with a formal evaluation conducted by a CAB. ▪ Community Catch FIPs are required to report publicly against progress on the Community Catch and FisheryProgress platforms. ▪ Individuals and businesses in the supply chain are required to join Community Catch as a member, with annual fees ranging from £200 for small organizations, to a maximum of £10,000 for the largest.
Fair Trade	▪ Producers in the Fair Trade program must meet six progressive standards covering structural requirements, empowerment and community development, human rights, fair wages, working conditions, resource management, and transparency. ▪ To incentivize compliance, Fair Trade establishes groups such as Fair Trade Fishing Associations and creates plans to distribute Fair Trade premiums, which are extra payments made above the Fair Trade price. The premiums are deposited into a community development fund that can be used to finance projects at the discretion of participating fishers.	▪ The MarinTrust Improver Programme complements the FIP model. Fisheries participating in FIPs can still participate in the MarinTrust Improver Programme. ▪ The unit of certification for this program is the product facility. ▪ The Marin Trust Improver Programme provides some market recognition for participating facilities. The sourcing policies for big marine producers, such as BioMar, Cargill, and Skretting include product from the MarinTrust Improver Programme. ▪ Accepted FIPs under the MarinTrust Improver Programme are not required to report on FisheryProgress. ▪ While FIPs are not generally time-bound, participating FIPs in the Improver Programme are expected to complete their workplans within five years. ▪ Certification is not necessarily the end goal for FIPs participating in the MarinTrust Improver Programme; completed FIPs receive approval to supply to MarinTrust accredited production facilities.

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (3 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs, continued.

Model	Summary	Key differences from FIP model
Community FIPs (C-FIPs)	▪ C-FIPs adapt the traditional FIP model for small-scale coastal communities. ▪ Fisheries entering into C-FIPs are subject to a needs assessment integrating environmental, social, and financial components. The results of the assessment inform the development of a holistic improvement plan focused on securing basic needs for participants before engaging in environmental improvements. ▪ All C-FIPs are bottom-up and driven by the engagement of local, coastal fishing communities. Many projects do not have international market leverage; the C-FIP program uses a suite of alternative incentives (e.g., data strengthening, domestic market development, capacity enhancement) to encourage continued community participation.	▪ The C-FIP program draws on many core aspects of the FIP model, such as continuous improvement and common frameworks (e.g., the Social Risk Assessment). ▪ The C-FIP model was designed for and exclusively address challenges facing small-scale communities. Industrial fisheries are not participating in the model. ▪ Participating fisheries are subject to an integrated needs assessment framework that combines environmental factors with social and financial components. ▪ In contrast to many top-down or bottom-up efforts within the traditional FIP model, C-FIPs often do not leverage international market demand to incentivize engagement.
Blue Ventures	▪ Blue Ventures aims to support small-scale coastal communities in leading ocean protection and securing their futures. ▪ Communities that participate in Blue Ventures programs are given access to funding to build local capacity, trainings to develop their knowledge, and digital tools to help fishers and local partners strengthen local governance. ▪ Blue Ventures' interventions focus on advancing fisher-led data collection in small-scale fisheries. Participants receive access to digital tools that allow communities to track their catches and generate evidence to inform fisheries management decisions, build financial literacy, and support local advocacy.	▪ Blue Ventures' model complements the FIP model. Fisheries participating in FIPs may also participate in Blue Ventures' programming. Blue Ventures is currently leading the Southwest Madagascar octopus diving and gleaning FIP. ▪ Blue Ventures was designed for and exclusively address challenges facing small-scale communities. Industrial fisheries are not participating in the model. ▪ In contrast to many top-down or bottom-up efforts within the traditional FIP model, C-FIPs often do not leverage international market demand to incentivize engagement.

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (4 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs, continued.

Model	Summary	Key differences from FIP model
ABALOBI	- ABALOBI aims to develop sustainable small-scale fishing communities through financial inclusion, social enterprise, and community-led data collection. - The model is built on continuous co-design with local communities; all products and services offered reflect the needs of fishers and fishworkers. - Communities participating in the ABALOBI model receive training, capacity-building, and access to financial/insurance protections. - ABALOBI embraces a fisher-led approach to data collection and transparency; fishers are trained to collect data and digitally record catch. Each catch can be traced with a QR code, giving buyers full insight into the supply chain.	- ABALOBI's model complements the FIP model. Fisheries participating in FIPs may also participate in the program. ABALOBI is currently leading the South Africa yellowtail amberjack handline FIP. - ABALOBI was designed for and exclusively address challenges facing small-scale communities. Industrial fisheries are not participating in the model. - ABALOBI's "Fish With a Story" platform allows consumers to purchase product directly from small-scale fishing communities. ABALOBI offers a price premium to its source fisheries as a financial incentive.
Blueyou	- Blueyou partners with local, small-scale fishing communities to advance sustainable fisheries management and ocean conservation while safeguarding fisher livelihoods. - Partnering fisheries receive a suite of capacity-building trainings and tools to improve handling practices and help fishers earn a higher price from buyers. Blueyou has equipped its partners with electronic traceability systems, facilitated gear changes, and provided marketing/business plan support to help fishers increase their revenues.	- Blueyou's model complements the FIP model. While the organization does not lead or coordinate any FIPs, it has provided value creation and capacity-building support for fisheries in active or completed FIPs, such as the Mexico Yucatan octopus FIP and the Maldives yellowfin tuna handline FIP. - Blueyou has a business-to-business (B2B) and business-to-consumer (B2C) product line of materials sourced from the fisheries in which it works. Blueyou offers a price premium to its source fisheries as a financial incentive.
SmartFish	- SmartFish is a commercial enterprise that sells sustainably sourced, caught, and processed marine products sourced from small-scale fishing cooperatives in Mexico. By serving as the first buyer and then directly selling product to consumers, SmartFish reduces the number of intermediaries between fishing cooperatives and negotiates prices directly with cooperatives, enabling cooperatives to earn up to 300% more than prevailing market rates. - SmartFish equips its partners with trainings and tools to help fishers recover and retain value through improving quality, improving business processes, and shortening commercial chains through local processing.	- SmartFish's model complements the FIP model. The business works closely with the SmartFish A.C. NGO, which leads four active FIPs in Mexico. SmartFish sells the products from the FIP directly to consumers. - SmartFish was designed for and exclusively address challenges facing small-scale communities. Industrial fisheries are not participating in the model.

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (5 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs, continued.

Model	Summary	Key differences from FIP model
Monterey Bay Aquarium Value Chain Assessment	■ To complement its Seafood Watch program, Monterey Bay Aquarium is exploring conducting value chain assessments to develop domestic market demand for high-priority export fisheries. In so doing, the aquarium seeks to help fishers earn a higher, more consistent income from their catches. ■ The aquarium conducted a pilot value chain assessment for the Philippines Blue Swimming Crab (BSC) fishery, identifying opportunities for BSC fishers to sell their product to the mid- to high-end hotel, restaurant, and catering sectors. ■ The assessment identified domestic market development opportunities by leveraging domestic sustainability standards, hyper-local and national sales channels, and standardized BSC product requirements.	■ While still in its pilot phase, the value chain assessment and development program could potentially complement the FIP model. For example, the Philippines BSC fishery in the Visayan Sea is the subject of this assessment and participates in an active FIP. ■ While Monterey Bay Seafood Watch is concerned with the environmental health of the national fishery, this value chain assessment is specifically focused on developing domestic market demand to support fisher livelihoods.
Managed Access with Reserves	■ As part of its work with coastal communities to establish and manage Other Effective area-based Conservation Measures (OECMs), Rare has developed Managed Access with Reserves (MA+R). ■ This fisheries management system consists of two components: 1) Managed access areas that are mapped and managed cooperatively between local government and fishers for use and; 2) reserve areas where fishing is prohibited to allow habitats and fish populations to regenerate. ■ To finance the MA+R approach, Rare is piloting SSF impact bonds that will formalize and strengthen participating microbusinesses.	■ While FIPs leverage market incentives such as gaining preferential market access to drive community participation, MA+R projects rely on alternative incentives, such as business development opportunities made possible by the SSF impact bonds. ■ FIPs are typically focused at the individual fishery level, whereas MA+R projects emphasize an ecosystem-based management approach. ■ Given their overlapping goals, there is potential for FIPs to operate within a broader MA+R system.

The landscape of sustainable seafood models has grown increasingly diverse, reflecting the varied pathways for achieving environmental and social progress (5 of 6)

Table A7 Details on alternative models currently complementing or competing with FIPs, continued.

Model	Summary	Key differences from FIP model
Jurisdictional Initiatives	▪ Jurisdictional initiatives (JIs) are integrated landscape approaches that aim to address social, economic, and ecological objectives across actors and sectors with strong engagement from the government and market. ▪ JIs are designed to be long-term engagements (approximately 8-30 years) that drive systemic change through policy reform, market engagement, and trust-based community engagement. ▪ Participating jurisdictions undergo a tripartite assessment system, using the SRA tool to evaluate social risks, the MSC benchmark to evaluate environmental progress, and a financial rapid assessment tool to identify the level of economic support needed to sustain the program. ▪ JIs focus strongly on locally driven and locally defined solutions that can address a wide spectrum of social, governance, economic, and ecological challenges facing communities, particularly smallholders.	▪ JIs complement the FIP model, as it is possible for FIPs to be part of a JI. For example, the Pacific Albacore JI also has a C-FIP focused on the South Pacific albacore stock in Samoa. ▪ Market-based incentives are part of a suite of interventions used by JIs. These initiatives aim to apply environmental and human rights compliance at a seascape level to provide assurance to buyers. ▪ JIs are an ecosystem-based management approach and often address issues at scales larger than single-species fisheries. ▪ Areas participating in JIs are not necessarily bound to a particular timeframe for completion; successful jurisdictional initiatives often range from eight to 30 years.
Ethical Charter Implementation Program (ECIP)	▪ ECIP was created for produce growers and floral producers to align on social responsibility compliance and reporting across buyers. ▪ Participants of the program use the ECIP Lab, a digital platform with self-assessments and resources for suppliers and growers to assess their progress and align with the Ethical Charter on Responsible Labor Practices. ▪ The buyer version of the ECIP Lab dashboard displays every participating supplier's progress against the charter's principles; buyers use this information to make their sourcing decisions.	▪ The ECIP program is focused on the produce and floral industries. EFI is exploring applying this program to seafood. ▪ ECIP is focused on driving continuous improvement at the farm level; when farms demonstrate credible progress toward one of the charter's 13 principles, they are rewarded with an engagement star. Farms are not penalized for slow or stalled progress. ▪ Given ECIP's current scale (over 63 farms with 10,000 farm workers are participating), there are no auditing requirements to verify ECIP participant progress. Credible engagement is measured through self-assessments.

A5. FIP progress questions and quantitative methods for findings

Table A8 Findings and associated analyses conducted.

Question	Data	Dependent variable	Independent variables	Finding
What characteristics are there of FIPs that are reached Stage 4, 5, or 6? (i.e., change in policy)	FIP DB	Binary FIP Stage (≥ 4 , < 4)	- Continent - Country development status - Comprehensive/basic - Commodity - Small-scale/Industrial - Implementer type - Volume - Governance efficacy - Age	- Statistically significant correlation with industry presence ($P=.016$) - Statistically significant positive correlation with being comprehensive ($P=.0000000063$) - Statistically significant positive correlation with having tuna as the commodity ($P=.003$) - Statistically significant negative correlation with having shrimp as the commodity ($P=.025$) - Statistically significant positive correlation with age ($P=.000000382$)
What characteristics are there of FIPs that are reached Stage 5 or 6? (i.e., change in management)	FIP DB	Binary FIP Stage (≥ 5 , < 5)	- Continent - Country development status - Comprehensive/basic - Commodity - Small-scale/Industrial - Implementer type - Volume - Governance efficacy - Age	- Statistically significant positive correlation with being comprehensive ($P=.000000025$) - Statistically significant positive correlation with age ($P=.0000339$)
What characteristics are there of FIPs that are reached MSC certification?	FIP DB	Binary FIP Stage (6, < 6)	- Continent - Country development status - Comprehensive/basic - Commodity - Small-scale/Industrial - Implementer type - Volume - Governance efficacy - Age	- Statistically significant negative relationship between number of participants and achieving MSC ($P=.0297$) - Statistically significant positive relationship with development status ($P=.0013$) - Statistically significant positive correlation with being comprehensive ($P=.0031$) - Statistically significant positive correlation with being in Oceania ($P=.00038$) - Statistically significant positive correlation with Age ($P=.00000257$)

Statistical analyses and findings for factors correlated with FIP progress

Methods and findings on FIP progress

Table A8 Findings and associated analyses conducted, continued.

Question	Data	Dependent variable	Independent variables	Finding
Does the number of participants in a FIP contribute to performance?	FIP DB	FIP Stage	Number of participants	▪ Statistically significant correlation with maximum Stage (P=.0086)
	FIP DB	Binary FIP Stage (>4, <=4)	Number of participants	▪ Statistically significant correlation with achieving change on the water (P=.0068) ▪ Statistically significant negative correlation with achieving MSC certification (P=.030)
Does the number of industry participants in a FIP contribute to performance?	FIP DB	FIP Stage	Number of industry participants	▪ No statistically significant correlation
	FIP DB	Binary FIP Stage (>4, <=4)	Number of industry participants	▪ Statistically significant correlation with achieving MSC Certification (P=.027).
Does industry participation influence FIP performance?	FIP DB	FIP Stage	Binary industry participation	▪ Statistically significant correlation (P=.016).
	FIP DB	Binary FIP Stage (>4, <=4)	Binary industry participation	▪ Statistically significant correlation with achieving MSC Certification (P=.0065).
Does the number of NGO participants in a FIP contribute to performance?	FIP DB	FIP Stage	Number of NGO participants	▪ No statistically significant correlation
	FIP DB	Binary FIP Stage (>4, <=4)	Number of NGO participants	▪ No statistically significant correlation
Does NGO participation influence FIP performance?	FIP DB	FIP Stage	Binary NGO participation	▪ No statistically significant correlation
	FIP DB	Binary FIP Stage (>4, <=4)	Binary NGO participation	▪ No statistically significant correlation

Methods and findings on FIP progress

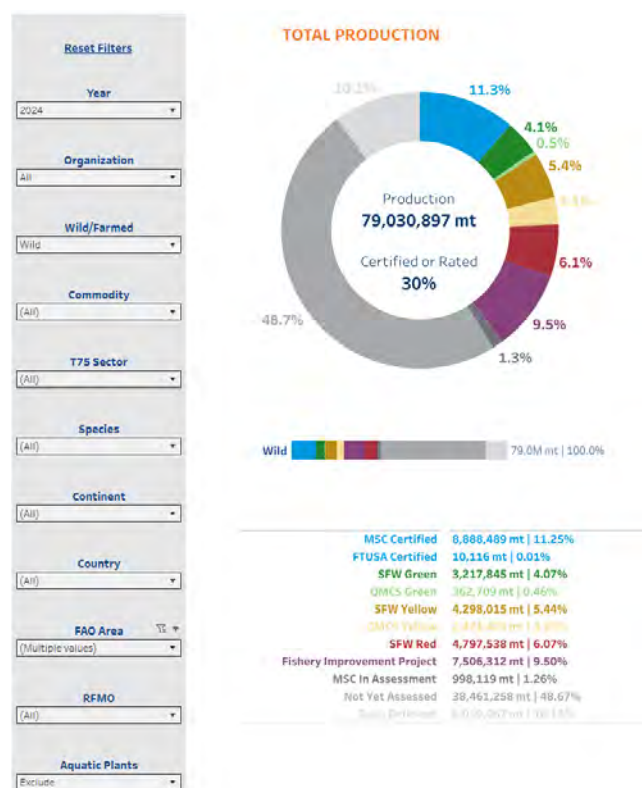
Table A8 Findings and associated analyses conducted, continued.

Question	Data	Dependent variable	Independent variables	Finding
Does governance capacity of a FIP's country influence progress?	FIP DB	FIP stage	World Bank Governance Efficacy Index	▪ Not correlated with statistical significance
	FIP DB	Binary FIP stage (>4, <=4)	World Bank Governance Efficacy Index	▪ Not correlated with statistical significance
Does the scope of a fishery (single fishery, national, multinational)	FIP DB	FIP stage	Scope of the fishery	▪ No statistically significant difference between Stages of single- and multi-national FIPs
	FIP DB	Binary FIP stage (>4, <=4)	Scope of the fishery	▪ No statistically significant difference between likelihood of achieving COTW between single- and multi-national FIPs
Is participation in a Supplier Roundtable correlated with progress?	FIP DB	FIP stage	Binary participation in a Supplier Roundtable	▪ Statistically significant relationship between being in an SR and not achieving MSC, even holding constant for number of implementers

Calculation of total FIP and MSC landings

CEA utilized the **Certifications and Ratings Environmental Data Tool** to calculate the percentage of global landings that is engaged with FIPs and MSC, as utilized on page 42, page 73, and all country summary reflection pages. CEA utilized the settings as shown in the image at right and as described below:

1. Data year: 2024
2. Organization: All
3. Wild/Farmed: Wild only
4. Commodity: All
5. T75 Sector: All
6. Species: All
7. Country: All
8. FAO Area: Inland Waters removed
9. RFMO: All
10. Aquatic Plants: Exclude
11. Data Deficient: Include



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