

Analysis of Global Slavery Index 2018 fishing risk indicators by country

The 2018 Global Slavery Index, produced by the Walk Free Foundation (WFF), provides a country by country ranking of the number of people in modern slavery, as well as an analysis of the actions governments are taking to respond, and the factors that make people vulnerable.

In 2018 WFF, together with researchers from the Sea Around Us, at the University of Western Australia and the University of British Columbia, also produced an analysis of trade flows and data on risk factors in the fishing industry, and the prevalence of forced labour. They have determined a set of risk factors that are associated with modern slavery in fisheries at a global level. In the absence of local reporting, these risk factors enable the identification of likely areas of national risk. The report can be downloaded here: <https://www.globallslaveryindex.org/2018/findings/importing-risk/fishing/>

This Seafish briefing is a quick summary of the salient points of the Index.

What are the risk factors for modern slavery in the fishing industry?

Despite the recognition that modern slavery occurs in fishing industries in most parts of the world, reliable estimates of the prevalence of modern slavery across the sector are few. The occurrence of labour exploitation and modern slavery in the fisheries of some countries are well documented. The labour abuses seen in the fishing industry take place in a broader context that includes economic, social, and environmental factors.

To understand risk factors, data on fisheries and fishing management has been combined with data on the prevalence of modern slavery. The analysis indicates that the occurrence of modern slavery in major fish producing countries is associated with six risk factors, and two major sets of drivers:

National Fisheries Policy re a country's decision to build and, typically, subsidise distant water fishing fleets.

1. Fishing outside of the vessel's national waters (officially known as Exclusive Economic Zones or EEZs) where industry may be subject to fewer regulations.
2. A dependence on distant water fishing. Distant water fishing potentially increases the vulnerability of the crew to exploitation because of the remote fishing locations where vessels often remain for extended periods of time, limiting the ability for monitoring/oversight by authorities.
3. High levels of vessel and fuel subsidies provided by the national government. High subsidies indicate a lack of competitiveness in a country's fishing industry and suggest likely pressure to cut costs.

Wealth and Institutional Capacity. These are indicative of a country’s economic capacity to maintain decent working conditions and report on fishing activity.

1. Relatively low per capita GDP of the fishing country. This may reflect limited governmental capacity to monitor fleets and enforce fisheries standards and legislation and/or an increased likelihood that potential workers on fishing fleets are seeking work in an environment of limited economic opportunities.
2. Low average value of a fishery’s catch per fisher. Low productivity fisheries have a more pressing need to reduce labour costs, as these are one of the few remaining costs that are not externally fixed.
3. Large scale unreported fishing by a country’s fishing fleets. This represents weak fisheries governance and a lack of legal oversight. Illegal fishing, a major component of unreported fishing, causes billions of dollars in losses to economies around the world each year, and poorly managed fisheries are lawless markets.

Risk analysis

Based on the six risk factors above, the study considered the top 20 fishing countries, which combined provide over 80% of the world’s fish catch. Slavery in these nations’ fisheries would profoundly impact the degree to which slave-dependent seafood exists in the global supply chain.

● HIGH RISK	● MEDIUM RISK	● LOW RISK
China	Chile	Iceland
Japan	India	Denmark
Russia	Indonesia	Norway
Spain	Malaysia	United States
Korea, Republic of (South Korea)	Mexico	
Taiwan, China	Morocco	
Thailand	Peru	
	Philippines	
	Vietnam	

High risk countries

The analysis identified China, Japan, Russia, Spain, South Korea, Taiwan, and Thailand as being at high-risk of modern slavery in their respective fishing industries. These 'high risk' fishing activities are characterised by a high proportion of catch taken outside their own waters at a greater distance from home waters than average, by poor governance (high levels of unreported catch), and by higher than average levels of harmful fishing subsidies. Except for Spain, instances of serious labour abuses have been documented in the fishing industries of those countries identified or are strongly suspected as high-risk. Combined, these seven countries generate 39% of the world's catch.

Medium risk - smaller developing countries with primarily domestic or geographically local fisheries

Smaller developing countries with primarily domestic or geographically local fisheries include Chile, India, Indonesia, Malaysia, Mexico, Morocco, Peru, the Philippines, and Vietnam. They tend to be countries that fish at home and have low levels of harmful subsidies but also have low value catches, low GDP and high levels of unreported catch. These characteristics, in some cases, make them vulnerable to having forced labour in their own national fishing industries and also to being a source for fishers who become victims of modern slavery aboard foreign-flagged vessels that fish in their waters. Combined, these nine countries generate 31% of the world's catch.

Low risk of modern slavery in their national fisheries

Countries considered to be at low risk of modern slavery in their national fisheries include Denmark, Iceland, Norway, and the US and are characterised by low levels of unreported catch, high value catches, and high per capita GDP. Combined, these four countries generate 12% of the world's catch.

While country of origin is an indicator of risk, in reality seafood sold to consumers is typically a mix of domestic and imported product and it can be difficult to distinguish between the two. Analysis of seafood imports to Europe and the US suggests that when imported and domestically caught fish are combined in local markets, the risk of purchasing seafood contaminated with modern slavery increases approximately 8.5 times, compared with domestically caught fish.

To give a more encompassing perspective for countries assessed in the Global Slavery Index 2016, each fishing country has been rated according to each of the six risk factors. These ratings were transformed into a ranking of low, medium, or high vulnerability to modern slavery in the fishing industry, according to both National Fisheries Policy and Wealth and Institutional Capacity. A country's vulnerability on these two factors together represent their overall vulnerability to modern slavery within their fishing industry

Global Slavery Index 2018
Summary of social risk factors in fisheries
by country

Compiled August 2019

Country view of fishing industry vulnerability to modern slavery

Country	National Fisheries Policy	Wealth and Institutional Capacity	Country	National Fisheries Policy	Wealth and Institutional Capacity
Albania	●	●	Latvia	●	●
Algeria	●	●	Lebanon	●	●
Angola	●	●	Liberia	●	●
Argentina	●	●	Libya	●	●
Australia	●	●	Lithuania	●	●
Bahrain	●	●	Madagascar	●	●
Bangladesh	●	●	Malaysia	●	●
Barbados	●	●	Mauritania	●	●
Belgium	●	●	Mauritius	●	●
Benin	●	●	Mexico	●	●
Brazil	●	●	Montenegro	●	●
Brunei Darussalam	●	●	Morocco	●	●
Bulgaria	●	●	Mozambique	●	●
Cambodia	●	●	Myanmar	●	●
Cameroon	●	●	Namibia	●	●
Canada	●	●	Netherlands	●	●
Cape Verde	●	●	New Zealand	●	●
Chile	●	●	Nicaragua	●	●
China	●	●	Nigeria	●	●
Colombia	●	●	Norway	●	●
Costa Rica	●	●	Oman	●	●
Côte d'Ivoire	●	●	Pakistan	●	●
Croatia	●	●	Panama	●	●
Cuba	●	●	Papua New Guinea	●	●
Cyprus	●	●	Peru	●	●
Denmark	●	●	Philippines	●	●
Djibouti	●	●	Poland	●	●
Dominican Republic	●	●	Portugal	●	●
Ecuador	●	●	Qatar	●	●
Egypt	●	●	Republic of the Congo	●	●
El Salvador	●	●	Romania	●	●
Equatorial Guinea	●	●	Russia	●	●
Eritrea	●	●	Saudi Arabia	●	●
Estonia	●	●	Senegal	●	●
Finland	●	●	Sierra Leone	●	●
France	●	●	Singapore	●	●
Gabon	●	●	Slovenia	●	●
Gambia	●	●	Somalia	●	●
Georgia	●	●	South Africa	●	●

WFF Global Slavery Index 2018. Summary of social risk in fisheries by country.
<https://www.globalslaveryindex.org/2018/findings/importing-risk/fishing/>

Country view of fishing industry vulnerability to modern slavery contd

Country	National Fisheries Policy	Wealth and Institutional Capacity	Country	National Fisheries Policy	Wealth and Institutional Capacity
Germany	●	●	Spain	●	●
Ghana	●	●	Sri Lanka	●	●
Greece	●	●	Sudan	●	●
Guatemala	●	●	Suriname	●	●
Guinea	●	●	Sweden	●	●
Guyana	●	●	Syria	●	●
Haiti	●	●	Taiwan, China	●	●
Honduras	●	●	Tanzania, United Republic of	●	●
Iceland	●	●	Thailand	●	●
India	●	●	Timor-Leste	●	●
Indonesia	●	●	Togo	●	●
Iran, Islamic Republic of	●	●	Trinidad and Tobago	●	●
Iraq	●	●	Tunisia	●	●
Ireland	●	●	Turkey	●	●
Israel	●	●	Ukraine	●	●
Italy	●	●	United Arab Emirates	●	●
Japan	●	●	United Kingdom	●	●
Kenya	●	●	United States	●	●
Korea, Democratic People's Republic of (North Korea)	●	●	Uruguay	●	●
Korea, Republic of (South Korea)	●	●	Venezuela, Bolivarian Republic of	●	●
Kuwait	●	●	Vietnam	●	●
			Yemen	●	●

For further information on Seafish social responsibility work see

- **Seafish ethics in seafood web page.** See: <https://www.seafish.org/article/ethics-in-seafood>
- **Social responsibility in seafood – Seafish role. April 2019.** See: https://seafish.org/media/SeafishRole_SocialResponsibilityinSeafood_201904.pdf
- **Tools for Ethical Seafood Sourcing (TESS).** TESS is an online tool signposting users to numerous online resources and initiatives that support socially responsible business practices. See: <http://www.seafish.org/tess/>
- **Assessment of ethical issues in UK seafood supply chains.** See: <https://www.seafish.org/article/assessment-of-ethical-issues>

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This is an information service provided by Seafish for industry and key stakeholders. To the best of our knowledge this information is factually correct at the date of publication.

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