

## Insights from: 10 YEAR RETROSPECTIVE: ADDRESSING FORCED LABOR & HUMAN TRAFFICKING IN THE THAI SEAFOOD AND FISHING INDUSTRIES

In 2025, Humanity United and the Freedom Fund commissioned a study by PolicySolve to understand how, why, and under what conditions change happened over a ten-year period related to forced labor and human trafficking in the Thai seafood industry. Using a rigorous, causal-mapping methodology and engaging over 60 stakeholders and 130 reports, a story emerged about what enabled (and sometimes disabled) changes in Thailand and globally to protect workers on vessels and in processing. This paper contains key findings. The full report is available at: [www.policysolve.com/resources/retrospective](http://www.policysolve.com/resources/retrospective)

### Global Retailers' Response to Forced Labor and Human Trafficking in the Thai Seafood Industry

In the early 2010s, investigations revealed widespread human rights abuses in Thailand's seafood industry, **linking forced labor on fishing vessels, in peeling sheds, and in factories to seafood for sale in Western supermarkets.** The media storm that followed in the New York Times, Associated Press, and The Guardian created a crisis moment that demanded action from global retailers whose supply chains were implicated. Over the next decade, these retailers became both drivers of significant reform and, paradoxically, obstacles to more fundamental change. Understanding what worked and what didn't offers crucial insights for addressing labor exploitation in any global supply chain.



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#### Market Pressure Catalyzes Unprecedented Collaboration

The visibility of the 2014-2015 media storm created immediate reputational and financial risks for major retailers like Walmart, Costco, and others sourcing from Thailand as well as major suppliers from Thailand like Charoen Pokphand Foods (CP Foods) and Thai Union. The threat wasn't abstract: the U.S. government downgraded Thailand to Tier 3 in its Trafficking in Persons report, and the EU threatened (and later issued) a yellow card. The Thai government responded quickly, adopting a new legal framework, laws, regulations, and monitoring and enforcement infrastructure, though implementation has been uneven.

The response by the private sector was equally swift. In 2014, major global retailers formed the Seafood Task Force (STF), bringing together international buyers, Thai seafood companies, and civil society organizations – a significant cross-sector collaboration that became a primary vehicle for change. This wasn't altruism; it was an economic necessity. **International retailers were motivated by protecting their reputations and securing resilient supply chains.** For Thai suppliers the stakes were even higher – their economic survival depended on maintaining access to global markets.

### The Power and Limits of Compliance Tools

The results of the combined Thai government reform and private sector action were most significant in export-oriented processing facilities – operations closest to international markets and most responsive to retailer pressure. **Conditions in these facilities improved significantly**, with most workers by 2024 receiving minimum wage or better, holding work contracts, and experiencing far less forced labor. The latest research showed only 1% of seafood processing workers meeting the definition of forced labor, down from the extreme levels documented in 2014.

Yet fishing vessels told a different story. Despite the same compliance frameworks being applied, **fishing remained persistently high-risk**. Workers continued to report violence or threats of violence, identity documents were still frequently confiscated, and debt bondage persisted, with 18% of workers in forced labor. The tools that helped eliminate visible abuses in processing facilities were less effective at addressing deeper structural exploitation at sea.

**This divergence between processing and fishing revealed something important about market-driven compliance: it works best where visibility is highest and market pressure most direct.**

### The Fatal Flaw: Demanding Change Without Changing Purchasing Practices

Even as global retailers demanded that suppliers implement costly improvements – better wages, ethical recruitment, monitoring systems, grievance mechanisms – their purchasing practices remained essentially unchanged. They continued to make sourcing decisions based primarily on the lowest price, including shifting sourcing to neighboring competitors where abuses continue to exist without scrutiny, rather than rewarding verifiably more ethical products and creating market incentives in Thailand.

This put Thai suppliers in an impossible position. They faced requirements to invest in reforms while competing for contracts on price. As one 2019 report by Praxis Labs concluded, **“pushing social compliance initiatives onto suppliers and increasing production costs while sourcing decisions based on the cheapest price is incompatible with eliminating forced labor and human trafficking in the supply chain.”**

The lack of collective discussion about fair pricing became a core barrier to long-term change. While the STF created space for collaboration on traceability, audits, and codes of conduct, it didn't address the more difficult question of how to share the costs of improvements across the supply chain. Global retailers continued to place expectations on suppliers to implement required policies without providing financial assistance and suppliers absorbed costs, implemented what they could afford, and cut corners where pressure was lowest.

## Conclusion

The past decade demonstrates that external market pressure and cross-sector collaboration can drive rapid, meaningful change when reputational and financial stakes are high. The improvements in Thai seafood processing facilities are real – elimination of the worst abuses, formalization of employment, better wages and improved working conditions. This occurred because global retailers, Thai suppliers, governments, and civil society collaborated under intense scrutiny.

But the story also reveals a hard truth: **compliance tools reach their limits when retailers demand costly reforms while sourcing based solely on the cheapest price.** Durable change in global supply chains requires more than supplier compliance and third-party audits. It demands that buyers examine their own purchasing practices and role in perpetuating exploitation. **Until global retailers are willing to engage in collective discussions about fair pricing and share in the cost of genuine supply chain transformation, reforms will remain fragile, incomplete, and vulnerable to backsliding – particularly in the parts of supply chains furthest from market visibility.**