



# Methodological nationalism and labour justice in seafood supply chains

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## Abstract

Drawing on the seafood industry in Thailand as our point of departure, we argue that scholarship and advocacy in seafood supply chains have often been limited by inaccurate characterisations of the diverse ways that these supply chains are organised. Scholars and labour justice advocates often assume that seafood exports from Thailand and elsewhere are produced by the domestic fishing industry, rather than accounting for the way that most raw materials are imported from non-Thai fisheries that also employ transnational migrant workers. They also assume an undifferentiated national seafood production industry. This has left labour advocacy vulnerable to counter-campaigns based on more accurate accounts of seafood supply chains, including that launched by the National Fishing Association of Thailand during the past year. We explain these inaccuracies as partly a result of methodological nationalism and territorial trap thinking. This refers to analytical frameworks that orient researchers to take the nation-state and its territorial boundaries as the main unit of analysis, while neglecting transnational networks and internal differentiation. Additional reasons include a lack of transparency and complexity in seafood supply chains, and the way that transnational advocacy networks are organised so that links across global South producing countries are weak. We illustrate an expanded supply chain approach by conducting an analysis of the labour justice issues for seafood supply chains based in and passing through Thailand.

**Keywords** Labour justice · Seafood supply chains · Methodological nationalism · Territorial trap · Seafood processing

## Introduction

In this paper we examine how scholarship concerned with labour justice in seafood production could be expanded by more nuanced analyses of how seafood supply chains are territorially-embedded in distinct kinds of national spaces, and by more fully accounting for how many supply chains cross national borders. Our point of departure is the seafood industry in Thailand. This paper is motivated in part

by a common misconception regarding Thailand's seafood industry, namely, that Thailand's domestic fishing sector is the source of most of Thailand's seafood exports. Labour justice scholarship and advocacy have neglected to account for how Thailand is a global seafood processing hub in which large export-oriented processing companies import most of their raw materials from industrial fisheries located in oceans and coastal areas around the world, but especially the South Pacific for the tuna supply chains. They have also neglected to account for the implications of differences and conflicts among key seafood sectors in Thailand, and specifically, the way that the domestic fishing industry is largely oriented to domestic markets rather than exports.

We explain these inaccuracies in part as a result of the influence of what scholars in migration (e.g. Wimmer and Glick Shiller 2002) have labelled methodological nationalism, and what scholars in geography (Agnew 1994) have called the territorial trap. Our primary goal in this paper is to argue for a more nuanced and accurate account of seafood supply chains, that would provide a better guide for labour advocacy as well as scholarly research. We also

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draw on concepts in the literatures on Global Value Chains (GVC) and Global Production Networks (GPN). We invite researchers and advocates working in these areas to consider how our arguments might inform their work.

Since 2014, Thailand's fishing industry has been a focus of considerable international attention, provoked by evidence produced by NGOs and international media (AP, The Guardian, New York Times and more) of horrific labour abuses, often described as modern slavery (Chantavanich et al. 2016; Clark and Longo 2022; EJF 2015; Marschke and Vandergeest 2016; Thai 2018, 2020, 2021). This has been followed by critical attention to how the Thai government responded to these controversies, including the government response to EU pressure to curtail illegal and unregulated fishing (EJF 2019; ILO 2020, 2022; Kadfak 2024; Kadfak et al. 2023; Marschke and Vandergeest 2016; Vandergeest and Marschke 2021). These policy reforms are widely understood to be a response by the post-coup military government to how the scandals could negatively affect seafood exports to Europe and North America (Kadfak et al. 2023). The evidence is that the new labour regulations for fishing significantly improved working conditions for migrant workers (Vandergeest and Marschke 2021). At the same time, the new labour policies have been widely criticised for falling short with respect to key issues (Thai 2020, 2021) including excessive working hours, unsafe working conditions, ineffective inspections, and restrictions on workers' ability to leave bad employers (Fishers Rights Network 2024; Thai 2020). To compound these shortcomings, since 2024, a partially elected Thai government has been considering proposals that would roll back some of these reforms, in response to pressure by the National Fisheries Association of Thailand (NFAT). The proposed rollbacks would have negative implications for migrant workers in fishing, and for fishing sustainability more broadly. This campaign was surprisingly effective given how the reforms have been widely praised internationally and supported by the processing industry. The reasons for effectiveness of the roll-back campaign include the way that NFAT has argued that the domestic fishing industry is not export-oriented toward the EU, and the way that changing domestic political processes has provided members of this association with some leverage over the national government.

Most critiques of the labour reforms in the Thai seafood industry have assumed that Thailand's seafood exports are based on domestic fisheries. Reports and academic papers often start by repeating how Thailand is a major exporter of seafood, before moving on to working conditions in the domestic fishing sector, implying that the raw materials for these exports come from Thailand's fishing industry (e.g. Boles 2019; Chantavanich et al. 2016; Clark and Longo 2022; Issara and IJM 2017; Marschke and Vandergeest

2016; Stringer et al. 2022). Seafood Watch's Tropical Tuna Risk Profile for Thailand (Seafood Watch 2022) is an important example, because of its importance among seafood buyers. Unlike the many reports and publications that simply do not mention seafood imports, the Seafood Watch report on Thailand acknowledges that Thailand imports a significant amount of tuna for processing and export. Nevertheless, the bulk of their assessment concerns migrant workers in the domestic fisheries in Thailand, with some attention to workers in processing, but no sustained discussion of this sector. We show below that domestic fisheries are essentially not relevant as suppliers of raw materials for tuna exports. This means that it is also not relevant to assessing social risk for tuna exports from Thailand. What leads this widely used guide to ethical seafood to make this mistake, and why are similar misleading statements so common in scholarly and advocacy work on labour justice for seafood production in Thailand?

We argue that this misperception is the result of a number of methodological and empirical frameworks that shape research and advocacy around labour in seafood supply chains. The overarching reason is that research and advocacy have been guided by what scholars have variously called methodological nationalism (Chernilo 2011; Wimmer and Glick Schiller 2002) or the territorial trap (Agnew 1994; Glassman 1999). These frameworks orient researchers to take the nation-state and its territorial boundaries as the main unit of analysis, while often neglecting transnational networks. Additional and related reasons include first, the way that seafood labour-justice support organisations in many lower-income seafood and agrofood-exporting countries (Gearhart 2023) are nationally organised and thus tend not to extend their attention to labour justice to transnational seafood assembly lines, while most transnational support organisations are based in high-income seafood-importing countries. Second is the lack of available information due to non-transparency in supply chains, including supply chains for fisheries certified as sustainable by the Marine Stewardship Council (MSC) (Nakamura 2024). As a result, available data on supply chains is primarily in the form of national export-import data, that is, organised through a methodological nationalism, while standardised trade statistics lack species-level resolution that would facilitate the use of trade data for tracing seafood supply chains (Stoll et al. 2018). A final reason is the complexity of many seafood supply chains, which often pass through intermediaries before reaching the country where the seafood is consumed (Stoll et al. 2018; see also Crona et al. 2016). The intermediaries include major processing hubs like Thailand and China (Asche et al. 2022) where raw material sources become hidden through their assembly into consumer products in processing facilities.

While we focus on Thailand in this paper, we can add that similar misconceptions characterise discussions of seafood supply chains passing through other seafood processing hubs or through other kinds of intermediaries (Stoll et al. 2018). For example, seafood industry reports and academic research often cite the growing domestic demand for seafood in China as driving rising imports, when the data shows that most imports are destined for processing and re-export (Asche et al. 2022).

Moving away from methodological nationalism and territorial trap frameworks does not mean abandoning territorial states as units of analysis. The alternative approach to methodological nationalism would explore how production is embedded in state territorialities, posing this as a question rather than an assumption. This can lead to a number of new areas of concern for labour justice scholarship. The first is to engage with labour justice for the very large migrant workforce in the processing sector in Thailand. The second involves tracing transnational seafood supply chains to the fisheries that produce raw materials for the processing sector, as far as available information allows, to investigate how they are embedded in state territorialities of flag states, vessel ownership states, port states, and worker source states. The third is to account for the implications of how the domestic fishing industry in Thailand is not oriented primarily to exports, and thus does not share the processing industry's concern with Thailand's reputation with respect to labour and fishing management. We elaborate on these three areas of concern in this paper. Additional relevant areas that we do not elaborate in this paper include supply chains for the export-oriented shrimp aquaculture sector in Thailand,<sup>1</sup> and workers in less visible nodes of the supply chain, including port work. Our purpose in writing this paper is to draw attention to these missed connections and neglected workers, both for seafood supply chains passing through Thailand, and for seafood supply chains globally.

The rest of this paper is organised as follows: In the next section (Sect. [Concepts](#)) most importantly, scholarship on Global Production Networks (GPN) and Global Value Chains (GVC). In Sect. [Methodology](#) we briefly outline our research methods. In Sect. [Seafood supply chains](#) we describe seafood supply chains based in and passing through Thailand, focussing on the seafood processing industry in Thailand, the domestic fishing industry, and imported raw tuna. In Sect. [Labour justice](#) we discuss labour justice issues for these three sectors. Our discussion (Sect. [Discussion and conclusions](#)) reviews how methodological nationalism has organised scholarship and advocacy around labour justice

in seafood industries, and returns to our arguments for an approach to labour justice in seafood that traces for actual seafood supply chains and power relations among actors in these chains.

## Concepts

The term methodological nationalism was coined during the 1970s by sociologists including Giddens, Martins, and Smith as a way of describing how sociology and social sciences equate their main object of study with national societies (Chernilo 2011), at the expense of understanding more global processes and relationships. These arguments have been especially influential in migration studies, through Wimmer and Glick Schiller's (2002) elaboration of how methodological nationalism has shaped transnational migration scholarship. Wimmer and Glick Schiller identify various modes and components of methodological nationalism, among which the most useful for this paper are the idea that methodological nationalism refers to how nation-states continue to be the main unit of analysis, and how 'nationally bounded societies are taken to be the naturally given entities to study' (Wimmer and Glick Schiller 2002: 304). They argued that social scientists had become obsessed with describing processes inside territorial boundaries of the nation-state, while neglecting connections between national territories (Wimmer and Glick Schiller 2002: 307).

The concept of the territorial trap is similar to methodological nationalism; it was famously (for geographers) coined by Agnew (1994) to describe how international relations scholarship and political theory take the territorial state to be the primary actor in world politics and ignore other spatial processes including networks and flows. Glassman (1999) has usefully elaborated a political economy of the Thai state to show how territorial trap thinking precludes attention to what he calls the internationalisation of the state, which he defines as a process in which the state apparatus becomes increasingly oriented towards facilitating capital accumulation for the most internationalised investors, regardless of their nationality.

The critique of methodological nationalism has been particularly influential in migration studies. This critique could also be usefully applied to research and labour justice advocacy in transnational supply chains, including those for seafood. Labour justice analyses for seafood exported from Thailand have had a strong national focus, and neglected how seafood supply chains are globally organised. In addition, scholarship on labour in fishing, including both the Thai fisheries and the industrial fisheries that produce raw materials for the Thai processing industry, has often treated working conditions in fishing as uniform across national fishing

<sup>1</sup> The social and environmental impacts in Thailand of a rapid expansion of shrimp farming during the 1990s drew international attention, but these have largely dropped out of sight during the past ten years as the focus turned to working conditions in fisheries.

fleets, paying relatively little analytical attention to how working conditions can vary among components of national fishing fleets, and how these components produce raw materials for distinct supply chains. ‘The seafood industry’ in Thailand and elsewhere is not a monolith, but comprised of distinct segments whose interests may conflict. A political economy of fishing and seafood production that disaggregates this industry into sectors that are nationally-embedded on one hand, and those that are more transnational on the other, can better explain current developments in the industry in Thailand. This includes how the current government is considering rolling back some of the key post-2014 reforms that benefitted seafood migrant workers, especially those in fishing. In relation to Glassman’s argument (above), we will show how the internationalisation of the state is not a one-way process, and that domestic interests who are negatively affected by internationalisation can reverse these processes, as NFAT is aiming to do.

We use the term seafood supply chain because it is the most common term used in the seafood industry and among advocacy and labour justice groups. Our analysis of seafood supply chains is informed by scholarship in Global Production Networks (GPN) and Global Value Chains (GVCs). The GVC framework, grounded in international business literature, was developed in the 1990s and attends to how interfirm relations are shaped by the internal logics of sectors, such as the organisational structure and governance of specific industries (Gereffi 1994; Gereffi et al. 2005). In the early 2000s, a GPN framework emerged to investigate how places affect, and are affected by, the organisation of production (Coe et al. 2004; Henderson et al. 2002). In order to study the embeddedness of GPNs within multi-scalar structures and institutions of the global economy, geographers have adopted a network approach, rather than a chain approach, given the way that a network framing can encompass a wide range of interconnections across space and in place, as well as diverse actors (Kelly 2013).

An important theme in these literatures has been to examine power among actors in the production networks (Yeung and Coe 2015), and specifically, the power of ‘lead firms’ to shape the geographical movement of production and flows, including requiring their suppliers to demonstrate compliance with environmental and labour standards. For seafood, GPN/GVC researchers have examined the spread of sustainability certifications, most importantly, the Marine Stewardship Council (MSC) certification (Havice and Campling 2017; Campling and Havice 2019). A key question for labour justice is whether and how lead firms can also require adherence to labour standards, and how these requirements can play out in countries like Thailand where not all seafood producers are oriented to these buyers.

The GPN framework was developed in part to address criticisms that GVC scholarship had neglected the territorial organisation and embeddedness of production (Yeung and Coe 2015). This leads to a key point about the critique of methodological nationalism: that moving away from this framework does not mean neglecting how states’ exclusive authority over their territory remains the prevalent mode of final authority in the global political economy (Sassen 2013; also Havice 2018 with respect to fisheries). For seafood production, that means analysing the territoriality of fishing and transshipment vessels, maritime fishing zones, and land-based processing. The complex territorial embeddedness of migrant workers on ocean-going vessels (Bailey and Winchester 2012) is a theme that has been neglected in the growing literature on maritime territorialities, which has been oriented to state sovereignty over ocean spaces but not vessels (e.g. Hung and Lein 2022).

An approach that considers both transnational flows and territorial embeddedness also offers the potential for linking the dynamics of transnational production networks to the ways that the mostly migrant workers who produce seafood are embedded in livelihood and reproduction strategies that are place-based but stretch across state borders (Carswell and De Neve 2013; Clark and Longo 2022; Kelly 2013; Stringer et al. 2014)—from Thailand to Myanmar and Cambodia, and from East Asian flagged fishing vessels to Indonesia and the Philippines. In this paper we do not elaborate on this potential avenue of research but it does provide a background for our analysis of labour justice in supply chains.

## Methodology

Seafood supply chains that pass through Thailand are our analytical entry point for this analysis. We supplement our research on these supply chains with brief comments on applicability to seafood supply chains that move through China, in order to indicate how this approach can be generalised. While our analysis is meant to inform both labour justice scholarship and advocacy, we do not have space to include detailed discussion of the structure and activities of labour justice organisations that have sought to improve working conditions in these supply chains. We refer readers, instead, to Gearhart’s (2023) excellent description of how these networks are structured and some of what they have accomplished.

Three of the authors have been conducting field research in Thailand on work in fishing for about 10 years. Recent information on migrant work in fishing is based on interviews during November of 2022 with workers, vessel owners, industry organisations, migrant worker support

organisations, and government officials, and in January 2023 with port workers. Our information concerning workers in processing draws on eleven months of field research in Mahachai, during August 2022 to July 2023, by another author. Mahachai is the mega seafood processing centre in the province of Samut Sakorn near Bangkok. Interviews with migrant fish workers and support organisations in Taiwan and Indonesia conducted by two of the authors inform our comments in Sect. [Labour justice in tuna supply chains for Thai seafood processing](#) on workers in the international fishing fleets. Our discussion of labour in tuna supply chains is also informed by research published by Campling and Kim (2025), and industry reports and commentary (e.g. Industrial Economics 2023; Blaha 2021).

We use information produced by the many surveys of fish workers in Thailand to inform, triangulate, and quantify our qualitative research on work in fishing in that country. These include the three CSO surveys (Thai 2018, 2020, 2021) conducted by a coalition of NGOs. Three surveys of fish workers conducted by the International Labour Organization (ILO) are important for tracking changes in key aspects of working conditions. The analysis of seafood imports and exports are based on the FAO data base FishStatJ; on World Bank data; on an Industrial Economics (2023) report; and on Thai industry (e.g. Thai Tuna Industry Association) and international industry sources. Some of the information in this paper was included in an internal policy report written for Oxfam Asia.

## Seafood supply chains

### Seafood processing in Thailand

Seafood supply chains are highly diverse. They include large-scale, corporate driven, transnational seafood assembly lines producing seafood for consumers in mostly high-income countries (e.g. canned salmon and tuna, frozen shrimp); small-scale fisheries oriented to local markets; and high-value niche products (e.g. lobster, sea cucumber) traded internationally, often produced by small-scale fishers (e.g. Fabinyi 2016). Our focus here is on the first type, large-scale corporate seafood assembly lines.

As mentioned above, Thailand's largest processing centre is in Mahachai, in the province of Samut Sakorn, southwest of Bangkok. This global centre for seafood processing evolved from what had been a regional centre for landing, processing, and exporting seafood during the colonial era, as the area produced salted fish to export to Dutch and British colonies (Butcher 1996) during the early decades of the 20th Century. Colonial-era seafood exports were based on

the then rich fisheries in the inner Gulf of Thailand and the availability of cheap salt produced by local salt farms.

During the development era that followed direct colonialism, Mahachai's role as a seafood processing centre expanded rapidly. By the 1970s Mahachai was becoming a global centre for processing tuna and other marine animals, much of which were still fished by Thai fishing vessels. During the 1980s, Thai processing companies began importing large quantities of tuna from fisheries in the Indian and Pacific Oceans for canning and re-export. By the mid-1980s, Thailand was the world's largest exporter of canned tuna and a significant exporter of other processed seafood products such as canned crab (Crough 1987). The reasons given by industry analysts for why Thailand became a global centre for the processing of tuna and other seafood products include the availability of low-cost labour, at that time still sourced from within Thailand; the availability of industrial infrastructure linked to rapid industrial development more broadly; and its strategic location between the Indian and Pacific Oceans (Crough 1987).

Seafood processing in Thailand expanded even more during the 1990s with the boom of export-oriented shrimp farming and processing. Industrial shrimp farming was first introduced in the inner Gulf of Thailand through the conversion of intertidal salt farms into extensive shrimp farms. This was followed by intensification and geographical spread along Thailand's coastal zones. By the mid-1990s, Thailand had become one of the world's largest producers and exporters of shrimp as well as tuna.

Over the following decades, Thailand-based transnational seafood companies consolidated Thailand's position as a major global processing hub for seafood. By value, Thailand is the sixth largest seafood exporter in the world, with total exports a little less than USD 6 billion as of 2020 according to FAO data,<sup>2</sup> of which tuna exports amounted to over USD 2 billion. Over 1000 seafood processing facilities are now active in Mahachai, including hundreds of smaller unregistered firms that do outsourced tasks for larger firms, like shrimp peeling.<sup>3</sup> There are additional concentrations of seafood processing around other ports, especially those with port facilities that allow for raw material to be imported, such as Songkla, located in southern Thailand.

As a sector, seafood processing capital in Thailand is concentrated and internationalised—concentrated because the sector is dominated by a few very large companies, and internationalised because these companies operate transnationally and are oriented to international buyers. Industrial Economics (2023: 98ff) lists 26 members of the Thai Tuna

<sup>2</sup> See <https://www.fao.org/3/cc5688en/cc5688en.pdf>. Accessed 8 January 2024.

<sup>3</sup> Interview data, personal communication (see also Tang et al. 2020: 290).



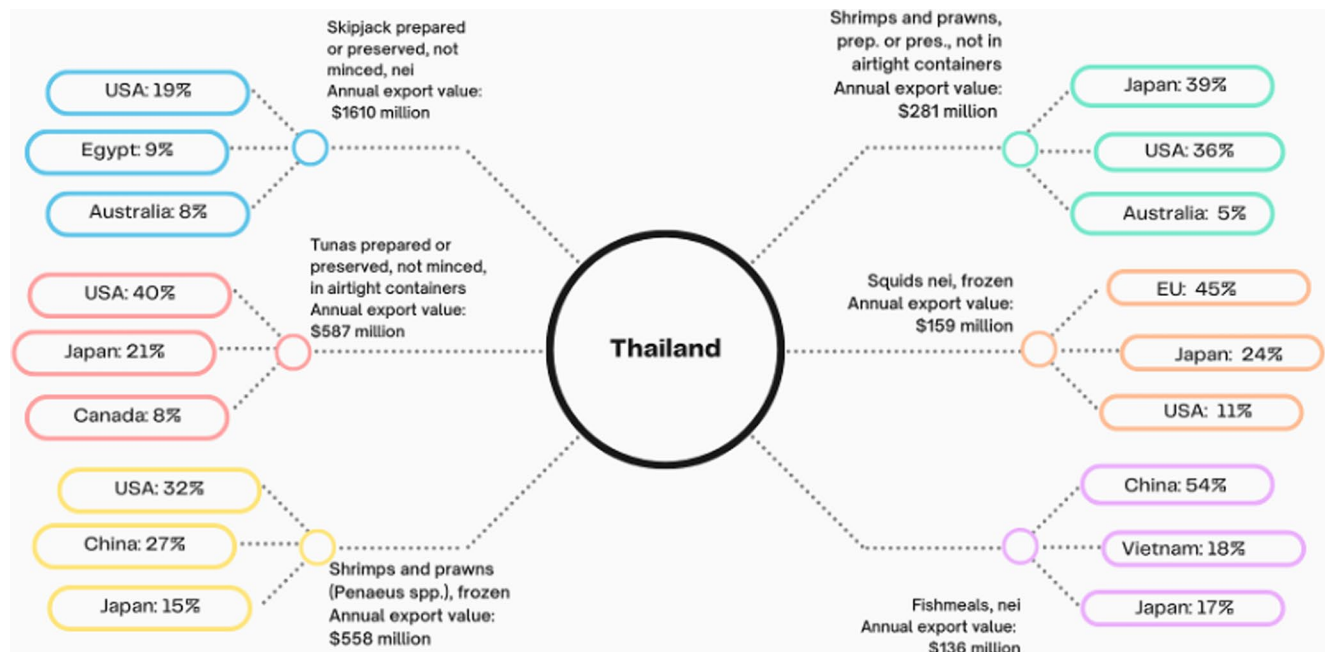
Industry Association with a total daily processing capacity of 4000 tonnes. Three companies—Thai Union with 1700 tonnes, Sea Value (Unicord and I.S.A. Value) with 1000 tonnes, and Chotiwat Manufacturing (based in Songkla province in the south of Thailand) with 400 tonnes—account for most of this capacity. All started as Thai companies and continue to be based in Thailand while operating transnationally through direct ownership of production facilities and tuna brands, or through partnerships with large trading companies such as Taiwan-based Fong Chun Formosa (FCF). Choeron Phokphand (CP) is another key player; it is a diversified transnational agrofood conglomerate active in many agrofood sectors in Thailand and in East and Southeast Asia. CP dominates the shrimp feed production in Thailand. CP, Thai Union and three other companies produce 80% of exported shrimp products (Rubel et al. 2019). Advertisements on their websites show that these companies import, process, and export not only tuna but also many other seafood products including salmon, mackerel, squid, herring, and sardines. The most recent boom is in the production of seafood-based pet food, comprising 40% of sales for one of these large companies, Sea Value, as of 2022 (Bangkok Post 2022). Annual export values for

all pet food (not just seafood-based) are reported as close to USD 3 billion in 2021, making Thailand the world's fourth largest global exporter.<sup>4</sup>

Figure 1 shows the highest value export species for the most recent years for which we have data, by country to where they are exported. Figure 2 shows the same data for imports.

A majority of exports go to high-income countries—the United States, Europe, Japan, Australia, Canada. Companies in the highly concentrated retail sector in these high-income countries along with the five companies who own the major tuna brands are the lead firms in tuna supply chains (Havice and Campling 2017; Campling and Kim 2025). They can squeeze processors by playing them off against each other, and they can impose quality standards including sustainability certifications. Despite their size, concentration, and transnational character, the Thailand-based processing sector is thus vulnerable to these buyers and thus to loss of markets if their products become associated with slavery scandals (Kadfak et al. 2023; Marschke and Vandergeest 2016).

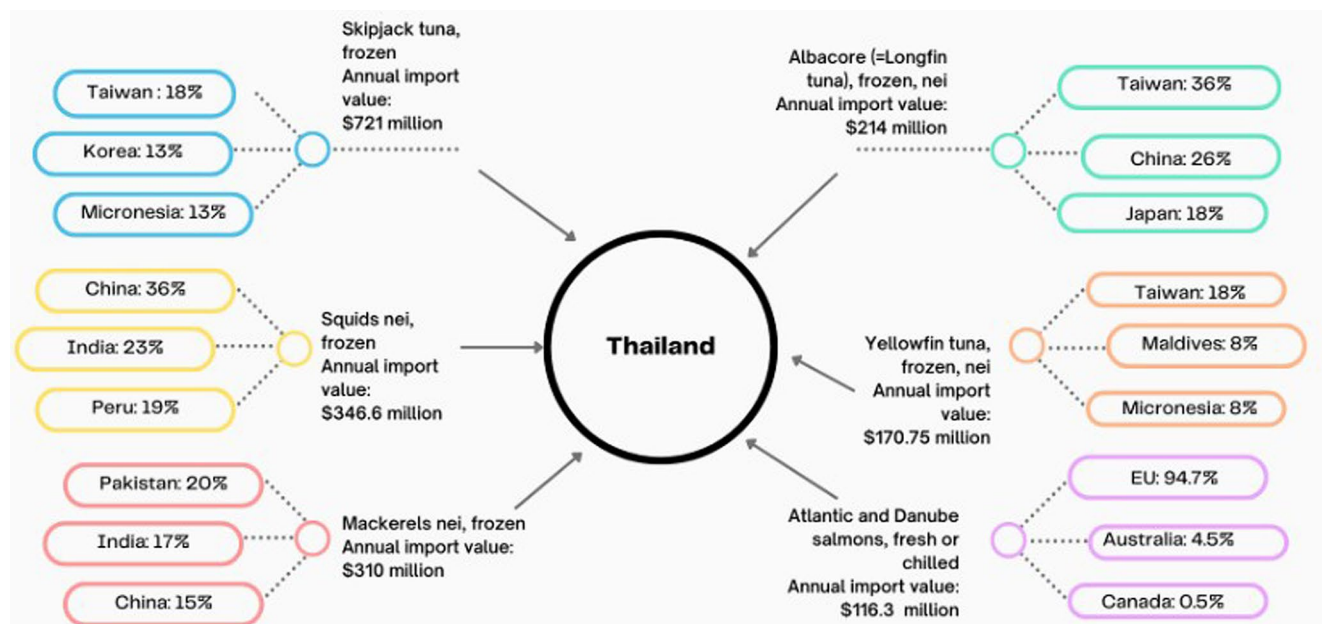
Almost all the raw tuna for processing is imported, as there are no significant Thailand-based tuna fisheries



**Fig. 1** Top seafood export destinations by species and value, Thailand Source: FishStatJ, based on average export values, 2019 and 2020.<sup>17</sup>

<sup>17</sup> FishStatJ, FAO's fisheries software, includes datasets on production, trade and consumption, including by partner countries. From the interface, we navigated to global fish trade statistics, which include both imports and exports, and filtered based on the reporting countries, and selected the partner countries. For this paper, we selected all partner countries. Next, we selected the commodities and imports and exports. Finally, we downloaded and analysed the data, selecting the top commodities of exports and imports listed by the reporting countries. Then for each commodity, we reported the top export and import partners of the reporting country for top exporting and importing commodities

<sup>4</sup> See [https://www.thailand.go.th/issue-focus-detail/001\\_03\\_391](https://www.thailand.go.th/issue-focus-detail/001_03_391). Accessed 9 March 2024.



**Fig. 2** Top seafood import sources by species and value, Thailand Source: FishStatJ, based on average import values, 2019 and 2020 (see Fig. 1 footnote 5)

(below). The most important canned tuna species are skipjack and yellowfin, 90% of which are imported from purse seine vessels fishing in the Pacific Ocean (Industrial Economics 2023: 102). A comparison of Figs. 1 and 2 shows that with the exception of shrimp, other significant seafood exports are also based on imported raw materials. For example, Thailand is now the third largest exporter of prepared or preserved salmon in the world.

The second most important seafood export by value is shrimp. Shrimp processors still source most of their raw shrimp from the declining domestic aquaculture sector. This sector has some dependence on domestic fisheries through the use of fishmeal as an important ingredient for shrimp feed, but that dependence is less than what it might seem if the different qualities of fishmeal are not disaggregated. Supply chains for fishmeal production are complex and poorly documented, with available data often inconsistent (Leadbitter 2019). It is often assumed that the fishmeal used for producing shrimp feed is manufactured in Thailand using feedfish (often called ‘trash fish’) produced by the Thai domestic fishing industry. In reality, the available data show a significant portion of the ingredients are imported. Thailand is also a significant exporter of fishmeal to other Asian countries (Fig. 1) while it also imports some fishmeal.<sup>5</sup>

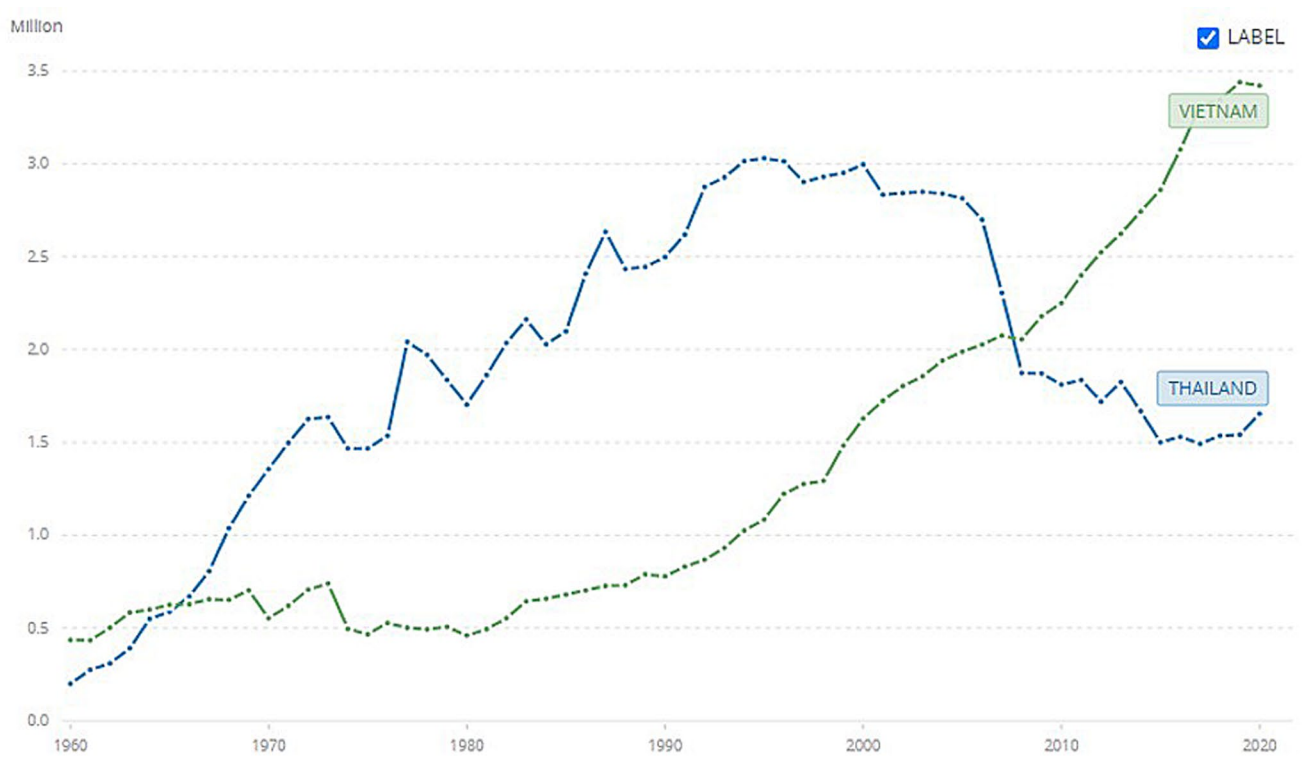
<sup>5</sup> Estimates of imports vary widely. IndexMundi data show imports as over 50,000 tonnes for the past 10 years (<https://www.indexmundi.com/agriculture/?country=th&commodity=fish-meal&graph=imports>), compared to exports of 100,000 tonnes, and total production of all fishmeal in Thailand of between 300 and 400 thousand tonnes annually during this period according to IndexMundi (see <https://www.indexmundi.com/agriculture/?country=th&commodity=fish-meal&graph=production-growth-rate>).

Fishmeal is manufactured in Thailand using a combination of byproducts from the seafood processing sector (trimmings), feedfish produced by the domestic fisheries, and possibly imported whole fish (Leadbitter 2019: 21). Farmed shrimp, however, require high grade fishmeal, while Thailand has had a reputation for low grade fishmeal, due to the low quality of the feedfish as an ingredient (Oxfam 2014; Leadbitter 2019), which may explain why Thailand has been importing some fishmeal. Recent analysis suggests a shift to higher quality fishmeal production in Thailand due to the increased use of trimmings from the processing sector, rather than feedfish from the domestic fisheries; these trimmings are in turn based on imported fish.

## Industrial fishing in Thailand

In contrast to the processing sector, Thai fishing capital is provincially- and domestically-embedded, organised nationally through the National Fisheries Association of Thailand (NFAT). Most fishing vessel owners live in ports along the coasts, from which they operate medium-size wooden fishing vessels—trawlers, purse seine vessels, and a few other types of vessels and gear types including gill nets and small squid vessels. Vessel owners are influential elites in many provincial fishing ports, where they have organised port-based fishing associations whose members can have friendly personal relationships with local government officials and politicians. A few influential owners operate larger vessels

[www.indexmundi.com/agriculture/?country=th&commodity=fish-meal&graph=production-growth-rate](https://www.indexmundi.com/agriculture/?country=th&commodity=fish-meal&graph=production-growth-rate).



**Fig. 3** Marine Fisheries Production (tonnes) Source: *The World Bank* using FAO data

and live in the major fishing ports. In our interviews during 2022, vessel owners complained that they are marginalised at the national level compared to the powerful seafood processing and exporting corporations, whom they believe are responsible for pushing the government into what they consider unreasonable labour and fishing management policies (author interviews 2022).

The military government's policy changes initiated in 2014 had a major negative impact on domestic fishing vessel owners. Prior to 2014, the Department of Fisheries rarely enforced fishing regulations, such as licences for gear, and it had no real policy concerning fishing vessels operating in the Exclusive Economic Zones (EEZs) of neighbouring countries. The reforms put an end to this *laissez-faire* approach to fishing management. The government also created a series of new labour regulations specific to fisheries, based on the ILO Work in Fishing Convention (ILO C-188).

A key element of the new fisheries policies was enforcement. All commercial fishing vessels are supposed to be inspected both leaving and entering ports on every fishing trip for compliance with fishing regulations, at Port-In and Port-Out (PIPO) inspection stations, located in 30 fishing ports as of 2022. The PIPOs are under the authority of the Navy's Maritime Enforcement Coordinating Centre (ThaiMECC), not the Department of Fisheries, and PIPO inspection teams include representatives from various government units including the Ministry of Labour. In recent

years, many of these inspections have transitioned to being done remotely (EJF 2019). In addition, the government required fishing vessels sized greater than 30 tonnes to carry vessel monitoring system (VMS) devices, effectively banned most fishing outside the Thai EEZ, and expanded at-sea inspections (EFJ 2019; author field research).

FAO data presented in Fig. 3 (below) shows that these changes had the effect of reinforcing the already steep declines in production over the previous decade. Parallel data for Vietnam showing continued rapid increases in capture fisheries highlights the severity of this decline in Thailand-based fisheries. The reduction in fishing effort and production may be even more dramatic than these figures suggest, as a reconstruction of Thailand's marine catch by the SeaAroundUs project shows that until about 10 years ago, this catch was probably many times higher than what was reported to the FAO by the Thai Department of Fisheries (Derrick et al. 2017).

The domestic fisheries are now largely oriented to domestic consumption, although some products continue to be exported, such as lobster and sea cucumber to East Asia. Feedfish is a significant component of domestic fisheries production, as discussed above. Processed products for human consumption that source from the domestic Thai fisheries include fish sauce, and dried, frozen, canned, smoked, and salted seafood (SEAFDEC, 2017). A portion of these processed products are exported, though their export



values are low compared to the major products listed in Fig. 1, and some of these exports are to markets (in Asia) with no supply chain labour or sustainability requirements. We do not have information on the contribution of domestically produced seafood to pet food exports, although we do know that seafood-based pet food is being produced by tuna canning companies that rely on imported raw materials.

During the first few decades of the tuna processing boom in Thailand, Thailand-based fisheries supplied up to 100,000 tonnes of longtail tuna per year (Chullasorn 1996), most of which was caught outside of Thailand's EEZ (Nootmorn 2015).<sup>6</sup> From about the year 2000, however, annual production dropped to less than 20,000 tonnes (Nootmorn 2015), while production inside the Thai EEZ was stable at less than 10,000 tonnes per year. We can thus expect that the annual longtail tuna catch is currently 10,000 tonnes or less.<sup>7</sup> Given that the daily tuna processing capacity is about 4000 tonnes (Industrial Economics above), or about 1,400,000 tonnes per year, we can conclude that the domestic fisheries in Thailand are currently not relevant as a significant source of raw material for the export-oriented tuna processing industry. This is why it is so perplexing to read the lengthy discussion of labour issues in the Thai domestic fishing industry in Seafood Watch's Tropical Tuna Risk Profile for Thailand.

The political economy of processing and fishing sectors that disaggregates this sector into the more domestic-oriented fishing sector and the internationalised processing sector helps to explain why the Thai government acted so forcefully against the domestic fishing industry starting in 2014, and why there is now a push to reverse many of the reforms that benefitted workers. The slavery scandal of 2014 and 2015 (Marschke and Vandergeest 2016) was a major problem for the processing conglomerates, who had to scramble to respond to demands from retailers and other seafood buyers in high-income countries to address this reputational crisis. At the same time, the largest processing companies were not dependent on domestic fishing for raw materials. The scandal broke out just after the military overthrew an elected government, providing the military rulers an immediate opportunity to legitimise the coup by demonstrating that, unlike what they described as the corrupt elected government that they displaced, they could act

quickly against local powers, that is, fishing vessel owners and their networks in fishing ports.

The balance of power between the internationalised processing industry and domestic fishing capital shifted again with the return of elections in 2019, and even more with the formation of a partially elected government in 2023. During periods of parliamentary semi-democracy, political parties need to work with local elites in provincial towns, as these local elites control vote gathering in these towns, with the most influential such 'godfathers' often using violence against rivals (Anderson 1990; Chambers et al. 2023). The elections thus enabled fishing vessel owners in provincial fishing ports to push the new government to reverse key elements of the reforms. They argued that the seafood produced by domestic fisheries is primarily for domestic consumption and not exported to those countries that are strengthening labour standards for imported seafood products (author interviews), so that there is no need to perform sustainability and labour justice for these markets. This argument was effective because of how labour advocates had leveraged seafood exports to push for labour reforms in Thai fisheries, as if exports were based raw material produced by the domestic fishing sector. The new government also adopted a populist nationalist agenda, arguing that they can make Thai fisheries 'great again' by policies that will increase fishing capacity, to return to the peak of productions in the 1990s.<sup>8</sup> This goal fails to account for how increasing production is impossible due to the ecological destruction of marine ecologies in the Thai EEZ, and to policies in neighbouring countries that would block Thai vessels from returning to their waters. As this paper is being written, we do not know the final outcome, as advocacy groups are mobilising and lobbying the government to reject these rollbacks (Ocharoenchai 2024), enlisting the transnational processing sector to support these efforts.<sup>9</sup>

### Imported raw materials: focus on tuna

The raw materials for Thailand's seafood processing industry are sourced from around the world (Fig. 2): tuna from Pacific and Indian Ocean fisheries, salmon from Norway, and so on. A supply chain approach to labour justice for seafood exports from Thailand needs to ignore the 'Product of Thailand' label that commonly appears on cans of seafood

<sup>6</sup> Some Thai fishing companies operated international fishing fleets up until the reforms in 2015, when most international fleets were banned.

<sup>7</sup> Data confirmed by documentation for the Fishery Improvement Project for the longtail tuna fisheries initiated in 2016, which has become inactive. See <https://fisheryprogress.org/fip-profile/thailand-longtail-tuna-purse-seine-0>. A key informant in the fishing industry in Songkla indicated that they occasionally catch a longtail tuna which they sell to the canning factories. We do not know whether these longtail tuna are processed separately and labelled as such, or whether it's used for producing pet food or other products.

<sup>8</sup> Long time observers of Thai politics around human rights in forestry and fishing will recognise a key proponent: it was Plodprasob who introduced the rollback to Thai MPs. See <https://www.youtube.com/watch?v=WXj3w1a1HgM>, accessed 24 January 2024.

<sup>9</sup> A coalition of NGOs and worker support organisations has been lobbying the government to reject these changes. A briefing written by the Migrant Working Group is available at <https://mwgthailand.org/th/pres/s/1720668732>. The Southeast Asia office of the Environmental Justice Foundation has been updating international allies by email.

processed in Thailand, and instead investigate where the fish is actually fished or farmed. For farmed products, this extends to where feedfish for salmon and shrimp is fished and processed—such as workers on vessels and in ports in Peru’s anchovy fisheries, and on vessels sucking up krill in the Antarctic to use for salmon feed. In this section we focus on the largest such supply chain, that for canned tuna. The canned tuna supply chain is less complex and better documented than many other industrial seafood products, given the industrial quantities and relatively few number of steps in the chain (see Campling and Kim 2025).

Most seafood supply chains are not transparent as they involve confidential corporate commercial relations. We thus need to rely on import-export data for information on supply chains for imported raw materials, which are organised through methodological nationalism in how they use countries as units of analysis. For movement of marine products from vessel to processor, the FAO and other sources of seafood trade data list the exporting country as the country where the fishing vessel is flagged—that is, where it is registered. In some cases, vessels may be owned and operated from one country—often an East Asian country—and flagged to another state—often the EEZ where the vessel is fishing.<sup>10</sup>

Figure 2 shows that Taiwan is the top source of raw materials for all species of tuna imported into Thailand for processing. China and Korea are also important, with most of the remainder made up of vessels flagged to Pacific Island or other Asian countries. Pacific Island exports usually involve vessels owned in East Asia and flagged to the Pacific Island country where they fish. The large fishing companies that own and operate the purse seiners that supply most of the raw tuna for canning operate internationally (Industrial Economics 2023: 67–68), with agents in ports near to the fishing areas to help arrange offloading of product, provision of supplies, re-crewing, and so on. Ownership of purse seiners is dispersed among hundreds of companies, with the number of vessels owned by a given company ranging from one vessel to several dozen (Campling and Kim 2025). In comparison, just five companies own the brands that encompass most of the North American and European markets, and the retail sector that sells most of this tuna to final consumers is also highly concentrated. Thus the canned tuna buyers can use their market power to pressure processors and fishing companies to reduce labour and other costs (Campling and Kim 2025). In other words, the fishing companies are not

the ‘leading’ corporations in the supply chain, but rather the least powerful.

A supply chain approach wary of methodological nationalism should avoid characterising a national fisheries as undifferentiated, and consider important differences that feed into distinct supply chains. Trade data shows that Japan is the largest buyer of tuna from Taiwanese flagged vessels by value, with Thailand second (FAO 2020). Exports to Japan are comprised mostly sashimi-grade tuna, caught by longliners. Large longliners are weakly regulated and monitored as they move across vast ocean spaces in search of suitable tuna species, and most of the problematic high seas transshipments involve longliners (Blaha 2021; Campling and Kim 2025). Most tuna destined for canning are caught by purse seiners, not longliners. An estimated 90% (Industrial Economics 2023: 102) of tuna imported into Thailand originates in the Pacific Ocean, most of which is fished in the areas managed by the Western and Central Pacific Fisheries Commission (WCPFC) (Blaha 2021; Havice 2018). Most transshipments for purse seiners operating in the western and central Pacific Ocean take place in or near ports as required by the WCPFC, and in a relatively controlled environment (Blaha 2021; Campling and Kim 2025), at least as compared to longliners.

Figure 2 shows that Thailand also imports significant quantities of albacore tuna, which are caught by longliners in both the Pacific and Indian Oceans. Although albacore make up a relatively small proportion of total imports, it deserves attention because working conditions on longliners can be particularly hazardous and difficult (MacDonnell and Vandergeest 2024; Campling and Kim 2025), as elaborated below.

## Labour justice

In this section we turn to how we can use a supply chain approach to understand labour justice in the seafood sector. We follow the same sequence as above, starting with labour justice issues in seafood processing in Thailand, then moving to domestic fisheries, then seafood imports with a focus on tuna.

### Labour justice in seafood processing

By sheer number of workers, Thailand’s processing sector should be at least as prominent as Thai domestic fishing for labour justice scholarship and advocacy in seafood processing. Thailand’s seafood processing industry is based on the availability of inexpensive and controllable labour. During the initial expansion of the processing industry most workers were internal migrants from poorer regions of Thailand,

<sup>10</sup> The raw materials are shipped from the fishing vessel to the processing hub by transshipment vessels, which are operated by one of three large tuna trading companies, one of which is FCF (Industrial Economics 2023: 52). Trade data displays the exporting country to be the flag state of the fishing vessel, or sometimes the country where the vessel is owned, but not the flag of the transshipment vessel.

but during the past several decades almost all workers have been international migrants, as Thai labour became scarcer and more expensive. According to Thailand's Foreign Workers Administration Office, as of February 2024, there were over 120,000 registered migrants working in the seafood processing industry. Among these workers, 95% originated from Myanmar and 4% from Cambodia (Foreign Workers Administration Office 2024). The Samut Sakhon Provincial Labour Office estimates that there are some 275,000 migrant workers in the province, the majority of whom are employed in seafood processing and related industries. Estimates of migrant workers employed directly by processing companies are smaller, around 65,000, as they do not account for all the workers in supporting activities (Samut Sakhon Provincial Labour Office 2023). Smaller but still significant numbers of workers are employed in other seafood processing centres, such as Songkla in the south. Both men and women work in seafood processing facilities, with the majority being women. In the third CSO survey (Thai 2021), the sample of workers in processing was comprised of 64% women, and the sample of workers in the broad pre-processing category was 68% women. The latter included both port work and outsourced work in processing such as shrimp peeling.

The Mahachai main market area is essentially a Myanmar enclave, often referred to as 'Little Burma', with goods and signs catering to the large and concentrated Myanmar population (authors' observations). Since the 2021 military coup and renewed repression in Myanmar, a new wave of refugees from that country has augmented the supply of exploitable seafood workers. The military in Myanmar has been enforcing conscription laws to support its ongoing wars against the resistance armies, which promises to further increase the supply of migrant workers (Al Jazeera 2024) for seafood processing, as entire families continue to flee Myanmar. Myanmar workers have also been more likely to bring their children to Thailand since the 2021 military coup and subsequent violence.

Working conditions in the seafood processing sector fall far short of meeting most basic ILO standards. Workers are paid on a daily basis, and because they often do not work every day (IOM 2023, author research), on average they make significantly less than a monthly living wage (Thai 2018, 2020, 2021). Women make less on average than men. The gender gap is largest in the broad pre-processing category, in which only 13% of women make a living wage, according to the 2020 CSO survey. Processing workers try to work overtime to increase incomes to a living wage; and some need to pay bribes to human resource personnel in the factory to get overtime (Wilhelm et al. 2024).

It is illegal for migrant workers in Thailand to participate in organising or leading unions. The Labour

Protection Act B.E. 2541 (1998) requires companies with 50 or more employees to establish Worker Welfare Committees (WWCs),<sup>11</sup> and these are supposed to take on roles that unions would undertake in unionised facilities, including channelling complaints to the employers. These have not been effective. Most processing workers interviewed by one of the authors of this article said they were not aware of a WWC in their factory, a finding that is consistent with other studies (Wilhelm et al. 2024). The key people conveying issues to supervisors are not the WCC, but translators who have language skills, have lived longer in Thailand, and understand the rules. Migrant workers also experience everyday racism living in Thailand, and the police often view migrants as a target for extortion (thus the photo of a sign held up by workers at a protest: We Are Not Your ATM! Seen by authors at a labour organisation office).

### Labour justice in domestic Thai fisheries

While we call for an expanded scope for labour justice in seafood supply chains in this paper, it is important to continue to emphasise labour justice in domestic Thai fisheries, especially given the past of brutal labour abuse, including murder (EJF 2015). An estimated 60,000 to 70,000 men were employed on commercial fishing vessels in Thailand as of 2021 (ILO 2020),<sup>12</sup> almost all migrant workers from Myanmar and Cambodia. Many workers live with their families in fishing ports and make work in fishing a career—in the 2019 CSO survey, over half had worked in fishing six or more years, which is consistent with our interviews.

A large but unknown number of migrant workers—men and women from both Myanmar and Cambodia—also work in offloading catch, sorting, and other pre-processing work in fishing ports. Many port-based work workers are women and are family with the men workers on the fishing vessels. Some do pre-sorting work in the middle of the night when boats arrive to off-load catch, and are paid in fish with minimal cash compensation (author field research). These workers have received almost no scholarly or labour justice advocacy attention to date, nor were they included in the government's labour policy reforms for the fishing sector.<sup>13</sup>

<sup>11</sup> Specifically, all companies with 50 or more workers are required to establish a WWC in accordance with Sect. 96 of the Labour Protection Act B.E. 2541 (1998). WWCs must include at least five employee representatives who are elected by workers, and there is no clause that says committee members have to be Thai citizens.

<sup>12</sup> The estimate of this number varies. For example, the Thai Department of Fisheries reports that 110,000 workers are classified as migrant workers in fishing and the fishing sectors, but it is not clear whether this refers only to work on fishing vessels or more broadly.

<sup>13</sup> Their situation will be more thoroughly addressed in a separate publication that includes some of the authors of this paper.

The post-2014 policy changes included new labour regulations specific to fishing that implemented provisions in ILO C-188, the Work in Fishing Convention. They also specified that workers must be paid the minimum wage calculated on a monthly basis, which is one of the provisions that the National Fisheries Association of Thailand (above) has campaigned to roll back. In our 2022 interviews, recent entrants reported that the monthly pay is partly what drew them to this sector, as pay in other sectors including construction or seafood processing is on a daily basis. Surveys of workers have found that wages in fishing rose substantially after 2014 (ILO 2020). In addition, workers reported that physical threats and extreme violence are much less common than in the past.

Although the policy reforms enacted after the 2014 slavery scandals brought significant improvements for fish workers, many problems remain, as mentioned in the introduction (Fishers Rights Network 2024; Thai 2018, 2020, 2021; author research). Our interviews confirm findings by NGO researchers that working hours often continue to violate the ILO C-188 standard of a minimum of 10 h rest per day (i.e. the 14 h work day in fishing), and that many health and safety issues remain. Our interviews also confirmed Environmental Justice Foundation (EJF) (2019) research that found that PIPO inspections are inadequate as a means for identifying violations of employment standards. While in-person inspections can protect workers from severe physical abuse or worse, workers do not feel safe to report violations of employment standards to PIPO inspectors for fear of reprisals. This is because these inspections are often carried out within sight of employers or captains (author observations), and workers are rightly concerned that the inspectors interact frequently with vessel owners. Another downside of frequent inspections is that fish workers are now intensely monitored by the government. All workers need to carry a complex and constantly changing combination of identity and legal-status documents (Kadfak 2024), including a seafarer book, health certification, and written contracts. Vessel owners hire brokers to navigate the various government offices and obtain the necessary documents for their workers, which they distribute to the workers before inspections, but otherwise retain. It is common practice for employers to demand that workers pay back the costs of obtaining these documents if they want to leave their employment.

### Labour justice in tuna supply chains for Thai seafood processing

A labour justice approach to the full supply chain for Thailand's seafood exports should address working conditions on the fishing vessels that produce the raw fish for Thai processors, with tuna comprising a large portion of these

inputs. The domestic Thai fisheries provide very little of the raw material for these exports and are thus less relevant to a supply chain approach to labour justice for seafood exports.

The purse seine vessels and albacore longliners that supply tuna to Thailand's processing sector are mostly crewed by migrant workers from the Philippines and Indonesia. The main reason that these workers seek employment in distant water fisheries (DWF) is to provide income for their families. The monthly wage (before deductions) for work on Taiwanese and Korean DWF fishing vessels is about USD 550 per month; wages on Japanese vessels are a little higher, and they are significantly lower on Chinese vessels. Workers thus appropriate only a small proportion of the value of what they are producing.

For the purpose of labour standards and regulations, all fishing vessels, including those in the distant water fisheries that supply most of the skipjack tuna to Thailand's processing industry, are an extension of the territory of the flag state. Other maritime territorialities are also relevant: port states (Bailey and Winchester 2012) have some rights to inspect foreign fishing vessels, including for labour standards if the port state has ratified the Work in Fishing Convention (ILO C-188); the EEZ state or regional fishing management organisations can mandate fishing management practices that shape working conditions (Havice 2018), and they are beginning to include labour standards as well (Haas et al. 2023; Campling and Kim 2025); and worker home states are active in regulating recruitment, crewing agencies, and contracts between crewing agencies and workers (Palmer et al. 2023). Most flag states exclude workers in the DWF fishing fleets from domestic labour laws and regulations, including national minimum wages and working hours, and instead issue labour standards that are specific to distant water fishing. DWF workers are also excluded from other employment standards that could have applied to them, including the widely ratified Maritime Labour Convention, which applies to all seafarers except those in fishing and navies. The specifics of how working conditions in the distant water fisheries are unacceptable have been widely documented (e.g. Greenpeace 2021)—extremely long working hours, hazardous work, low wages, confinement to vessels while in port, and debt to crewing agencies that ties workers to employers and prevents them from leaving abusive work situations.

The country-based approach to labour justice normally does not distinguish working conditions by type of vessel and fishery (e.g. Vandergeest and Marschke 2021) with a national fleet. Some aspects of working conditions are similar, especially those that are regulated by the national employment standards, including those issued for distant water fishing such as minimum wages and templates for contracts. This approach, however, does not account for the



important differences among vessel types and the location of the fisheries, and how these different fisheries supply raw materials for distinct seafood supply chains (Campling and Kim 2025). Working conditions on distant water longliners are particularly brutal—very long hours sometimes extending to more than 20 h a day, dangerous tasks, poor accommodation, and many months at sea without access to ports (MacDonnell and Vandergeest 2024; Campling and Kim 2025).

Working conditions on purse seiners operating in the Pacific are not as difficult as those on longliners (Campling and Kim 2025). Purse seine vessels are relatively closely observed and managed for sustainability, which provides opportunities for observing working conditions as well, even if those are not the main purpose of observation. Most tasks take place during the day, allowing for rest at night, the work is less physically dangerous and exhausting than on longliners, and the large size and recent construction of many purse seine vessels have relatively spacious accommodation and common facilities.

Governments are not the only entity involved in regulating employment standards for DWF vessels. A significant portion of all tuna destined for canning is being certified as sustainable in response to leading firm (retailer) requirements, with the Marine Stewardship Council (MSC) certification being the most important. However, MSC certifications are largely not traceable, and they do not include labour standards. This certification may have the perverse effect of doing more harm than good by drawing attention away from labour abuse by implying that the certification includes social standards (Nakamura 2024).

A promising development are the recent discussions and resolutions by Regional Fisheries Management Organizations (RFMOs) on labour standards for crew on fishing vessels.<sup>14</sup> The leading RFMO in this regard is the Western and Central Pacific Fisheries Commission (WCPFC), which regulates the fisheries that is a major source of raw material for the Thai seafood processing industry. In December of 2024, it adopted standards that will become mandatory in 2028 for labour conditions on authorised fishing vessels. The standards are based on forced labour indicators, and add provisions regarding safety, access to water and food, medical care, rest periods, opportunities for port disembarkment and more. Port states will be obligated to report violations to flag states and the RFMO secretariat, as well as allow vessels to enter ports and provide for disembarkment for crew that may be affected by forced labour; flag states will be responsible for investigation and enforcement; and both port and flag states will be required to cooperate with investigators from home states for crew. These mandatory

standards follow the prior adoption by the key advisory body for managing Pacific tuna fisheries, the Pacific Island Forum Fisheries Agency (FFA), of ILO C-188 standards in their harmonised conditions for vessels applying for licenses to fish in their collective EEZs (Haas et al. 2023). While the WCPFC standards lack specificity, and the major fishing countries remain unenthusiastic,<sup>15</sup> these standards are a starting point for including labour standards in fishing regulations. For the purse seine tuna fisheries specifically, the associated monitoring infrastructure could provide opportunities for improved enforcement of labour standards.

East Asian fishing fleets have been targeted by labour advocacy campaigns, such as the ‘Wi-Fi Now for Fishers’ Rights’ campaign which is lobbying for workers to have access to Wi-Fi while at sea (International Labor Rights Forum 2022). Greenpeace, EJP, and home country-based worker associations such as Serikat Buruh Migran Indonesia (SBMI) (Greenpeace 2021) have been active in advocating for improved labour and recruitment standards. To our knowledge there are no direct and active connections with labour advocacy groups targeting seafood production in Thailand, as these latter groups’ activities are largely limited to that country. There are indirect connections through global North-based organisations such as EJP and Global Labor Justice-International Labor Rights Forum.

## Discussion and conclusions

In this paper we have outlined how research, advocacy, and social risk assessments for labour justice in seafood supply chains have been organised through a methodological nationalism that often obscures key components of seafood supply chains. Influential programmes providing social risk assessments for seafood use this national approach, as do broader assessments of human rights such as the United States’ annual Trafficking in Persons report. A national approach also shapes much of the scholarship and advocacy work on labour justice in seafood supply chains. Methodological nationalism as a framework helps to explain why many scholars and advocacy groups erroneously assume that Thailand’s seafood exports are based in the Thai domestic fishing sector. The types of available information also reinforce methodological nationalism, as most quantitative data are national level production and trade statistics, while actual supply chains for seafood are difficult to trace because of their lack of transparency and complexity.

Our analysis is informed by scholarship in Global Production Networks (GPN) and Global Value Chains (GVCs).

<sup>14</sup> See <https://cmm.wcpfc.int/measure/cmm-2024-04>.

<sup>15</sup> See commentary by Blaha at <https://www.franciscoblaha.info/blog/2024/12/3/the-wcpfc-adopts-the-1st-cmm-for-crew-labour-standards-in-the-world>.

We show how methodological nationalism and/or territorial trap frameworks can lead to analysis that distorts or fails to trace actual production networks, and how the influence of methodological nationalism can also obscure the power GPN actors have in domestically-oriented supply chains. We also reinforce the argument that GPN analysis needs to account for the significance of states' territorial authority in shaping working conditions in production networks. In fishing, this is particularly complex because that means extending the analysis beyond terrestrial authority to examine fragmented state jurisdiction and authority on fishing vessels and transshipment vessels that move around the world, often in international waters and the national waters and ports of states that are not the flag state.

As a framework for understanding labour justice in seafood production in Thailand, methodological nationalism has a number of significant limits. First and most obviously, researchers or advocacy organisations do not follow the actual supply chains to the fisheries that supply the raw materials for the seafood, let alone the fisheries that produce feedfish for aquaculture. They sometimes mis-characterise the supply chain by assuming that the processing hub (Thailand, China), which is also the country that typically appears on the product label (as "Product of Thailand"), is also the country where the product is fished. Our examination of seafood supply chains passing through Thailand shows that following these supply chains to fishing vessels (or the aquaculture and feedfish operations) means exploring the complex territorialities of labour relations on distant water fishing vessels rather than the domestic fishing fleet.

Second, with respect to the seafood industry in Thailand, this framework has tended to direct the bulk of attention to migrant workers in fisheries, and relatively little attention to the much larger number of precarious migrant workers in the processing industry, a growing number of whom are effectively political refugees from Myanmar.

Third, lumping the entire seafood sector into one industry misses key distinctions, including those between the fishing and seafood processing industries in Thailand, and those among different types of fishing vessels for the East Asia-based tuna vessels. In Thailand, the rapid response to the slavery scandals starting in 2014 are best understood as a post-coup military government supporting a highly internationalised seafood processing industry that was no longer dependent on the domestic fishing industry. The current movement to roll back labour and fishing management reforms may seem perplexing in a global context of seafood importing countries tightening policies concerning environmental and human rights requirements in supply chains (Gearhart 2023). They do make sense, however, when we recognise that the Thai domestic fisheries industry is territorially embedded in the Thai national space not just

for fishing but also for the majority of their markets, and how their embeddedness in provincial ports gives them the ability to exert influence on political parties through their influence in national elections. This created an opening for a counter-campaign that aims to convince the government to partially roll back policy reforms that benefitted workers in fishing, as this campaign can argue that domestic fishing is not vulnerable to export markets that are demanding labour and sustainability standards.

Methodological nationalism has some advantages for labour justice advocacy. Implying that seafood exports are based in domestic fisheries allows advocacy groups to leverage importing countries' requirements concerning human rights in seafood supply chains against the reputation of the seafood exporting country, regardless of whether the raw materials for the exports are obtained from domestic fisheries or not. A more nuanced approach to seafood supply chains does not mean abandoning this leverage. The overall reputation of the country will continue to matter for export markets regardless of where the domestically-powerful seafood processors sourced their raw material (e.g. Seafish 2020; Seafood Watch 2022; U.S. Trafficking in Persons reports).

A key obstacle to a supply chain approach is the way that most worker organisations and support and advocacy groups in producing countries are primarily nationally organised (Gearhart 2023) and have limited capacity to extend their work transnationally. There are exceptions, especially for migrant worker organisations, as they have created networks that span and act across borders that divide migrant worker supplying countries on one hand, and countries where migrants work on the other hand (e.g. the NGO Migrant International for Filipino workers, and the migrant worker union SBMI for Indonesia). The ILO has also taken a regional approach, especially through its Southeast Asian-based Ship to Shore project which aims to document and promote improved migration and working conditions in seafood production.<sup>16</sup> Overall, however, networking across borders between Thailand as the seafood processor, East Asia as the home base for many of the vessels supplying raw materials to the Thai processing industry, and Indonesia and the Philippines as home countries for most workers on the fishing vessels, remains thin compared to more concerted national mobilisations, or international campaigns networked out from the global North. A seafood supply chain approach means acknowledging and addressing these obstacles through shifts in how advocacy organisations are networked, funded, and registered.

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<sup>16</sup> See their website: <https://www.ilo.org/shiptoshoreights>.

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## Declarations

**Competing interests** The authors have no competing interest.

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