FISHERS & MARKETS
Lessons and Insights on How Markets can Create Incentives to Support Sustainable Coastal Fisheries
People are the cause

...but they are also the solution.
Behavior change is key
CENTRAL OFFICE: Arlington, VA, USA

REGIONAL OFFICES: Indonesia, China, Philippines, Brazil, Micronesia

TOTAL STAFF GLOBALLY: 150+

COUNTRIES WORKED IN: 56

OUR SPECIALTY: Behavior change + science, for conservation
The Pride Campaign

- Train and mentor local conservation leaders
- To shift human behaviors for sustainable development
- By designing and implementing integrated social marketing and conservation programs
300+ Pride campaigns launched to date in 56 countries…
Current Rare Sites

- Phils 1
- Phils 2
- Phils 3
State of Philippine Fisheries
1.6 million artisanal/small-scale fishers
6 million Filipinos depend on the ocean for food and livelihood.
Poverty incidence among fishers is at 31% (versus national ave. of 21.6%)
56% of Filipinos’ animal protein comes from fish.
Declining Catch Per Unit Effort (CPUE)

Average Fish Catch Since 1940, Philippine artisanal fishers:

1940: ~40 kg
1950: ~35 kg
1960: ~28 kg
1970: ~25 kg
1980: ~13 kg
1990: ~8 kg
2000: ~3 kg

Source: Fisherfolk using hook and line fishing gear from six provinces in the Philippines; Philippines Fisheries in Crisis
The Fish Forever Product

- Exclusive Access Area
- Fisheries Policy
- Community Support
- Fishery Management
- Links to Markets
- Exclusivity Access Privileges
- Fishery Replenishment Zones
- Monitoring & Evaluation
- Local Enforcement System
Marine Protected Areas or No-Take Zones

Monitoring and Data
Policy

National Fisheries Code
Local Government Code

Institutions

GOVERNANCE

Political Will
Enforcement
Catch monitoring
Fisher and boat registration
Gear restrictions
Harvest controls
Seasonal closures
Fishery mapping and zoning
Pilar Pride Campaign Slogan: “Sa saktong panagat SIKAT!”
Para Sa Ating Kinabukasan, Tayo'y Magtulungan!

FISHFOREVER
Tian in community pride campaign
Ang Sanktuaryo sa Hambongan (Diha sa Sinug-ang)

Ning-apil Naku Uban ta!

Sebreto nalang ug report ang Illegal Fishing

Ginadili ang pagpanagat
Ginadili ang pagpanguba ug kinhasan

Seaborne Hotline: 09176311963

RARE giz ACCLCoast
30% average increase in fish biomass
12% increase in abundance
Improved management effectiveness
2 days after Yolanda
Harnessing Markets to Secure a Future for Small-scale Fishers
A Global Development Alliance
FISH FOREVER
Sustainable Coastal Fisheries

**FISHERIES MANAGEMENT**
- 4 Behaviors
  - Register
  - Fish in right place, use right gear
  - Attend meetings
  - Report your catch
- Managed Access + Sanctuaries
- Policy
- Enabling Environment

**ECONOMIC INCENTIVES**
- Household Resilience Building
- Enterprise Building & Dev’t

**Reduced threat of overfishing**

**IMPROVED BIODIVERSITY**
FISH FOREVER
Sustainable Coastal Fisheries

FISHERIES MANAGEMENT

- Reduction of illegal and unsustainable gear
- Better harvest controls
- Mitigated effect of open access through legal tenure + Protected habitats
- Enabling Environment

ECONOMIC INCENTIVES

- Increased household income
- Reduced pressure on other species
- Investments in Income diversification
- Mitigate impacts of lost fishing days
- Reinforcement of sustainable behavior

Reduced threat of overfishing

IMPROVED BIODIVERSITY
Our Process

1. EMPATHIZE
   Research

2. DEFINE
   Frame and Scope

3. IDEATE Options

4. PROTOTYPE
   Rapid model

5. ITERATE/TEST
   Field test, feedback

6. LAUNCH
   Replicate
FOUNDATIONAL STUDIES

Learning from previous livelihood approaches and deepening understanding of markets and fisheries science
COASTAL LIVELIHOOD STUDIES

Landscape overview of livelihood projects in coastal communities over the last 20 years; in-depth follow-up with project managers of selected projects
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Landscape overview of livelihood projects in coastal communities over the last 20 years; in-depth follow-up with project managers of selected projects

STOCK ASSESSMENTS (A CRITICAL STEP BEFORE ENTERPRISE DEV’T)
Determine which species are viable for marketing, plus any measures that need to be in place to ensure sustainability

VALUE CHAIN STUDIES & PROCESS MAPPING
Identify market opportunities and areas for improved practices within the supply chain
WHAT WE LEARNED

LIVELIHOODS STUDY
Supply-driven
Low buy-in of target households
Focus on alternative livelihoods

STOCK ASSESSMENT
Some species still juvenile when caught
Impact of climate, both on species/seasonality and on data collection
Need to review current catch methods and policies to reduce fishing pressure for vulnerable species
Continuous catch monitoring needed
Before any enterprise....

HOUSEHOLD RESILIENCE
Based on the studies, we knew that...

• Fisher households are very vulnerable to crises and shocks, but very few assets to cushion the impact of these crises and shocks

• Social capital / network building is one of the strongest assets of a poor household

• Limited equity or investments on proposed income generating activities or livelihood projects
WHAT WERE WE ABLE TO DO?

Used a turnkey solution (Village Savings & Loan Associations) to build household financial assets

Mobilized more than PhP 14.5 million in savings over 22 months

Savings club approach enabled fishers to save, invest, and have social protection
Early outcomes: SAVINGS CLUBS
Fishers are able to use savings to support existing or new alternative livelihoods

Some fishers able to use savings to reduce negative impact of poor weather conditions on their daily subsistence

Saving members are able to build stronger social networks

Some LGU partners are able to tap savings clubs to support local initiatives and projects

Participation of women (70%)
WHAT ELSE NEEDS TO BE DONE?
Mobilize savings club members for collective action:
- Reduced fishing production costs
- Community support for sustainable fisheries
- Small catch consolidation
- Improved negotiation power in the market
Livelihoods vs. Enterprises
CONSERVATION-ALIGNED BUSINESS MODELS
Based on the studies, we knew that...

• Previous programs focused on alternative livelihoods

• Low value addition being done

• Low investment in building viable business models

• Low buy-in and equity from participants in business ventures

• Very supply-driven approach to livelihood development
WHAT WERE WE ABLE TO DO?

Organized enterprises with financial and ecological sustainability goals

Provided smart grants to support the business groups
WHAT WERE WE ABLE TO DO?

Business model was developed to reinforce 4 Fish Forever behaviors.
Early outcomes:

CONSERVATION ENTERPRISES
Organized 6 conservation enterprises with more than 120 fisher-household members

Sold more than PhP 500,000 worth of responsibly-sourced seafood products to local and premium market (from May 2017 to January 2018)

Higher quality standards applied—met premium market standards and 'halo' effect on locally-sold products
Early outcomes:
LINKS TO MARKET
WHAT WERE WE ABLE TO DO?

Partnered with mission-aligned market partners

Built capacity of business groups to meet the demand and quality requirements of the target market
Exploiting new market segments has led to 100-200% increase in price for certain species/product categories.

Partnership with private companies reduced the steep learning curve for fishers’ products to reach the market.

Efforts to improve were quickly rewarded, making the change ‘worth it’.
WHAT ELSE NEEDS TO BE DONE?

SUPPLY SIDE

Changing climatic patterns affect steady supply, so bigger network of sites needed

More capacity building support to run viable businesses

Additional investments in management systems and business assets
WHAT ELSE NEEDS TO BE DONE?

MARKETS SIDE

Product and market diversification

Connecting terrestrial and marine value chains to spread benefits

Reducing costs of supplying to markets outside the project areas

More consumer education

Additional investments to achieve quality certifications
COMPLEMENTARY INITIATIVES
IMPROVING POST-HARVEST PRACTICES

What have we learned?
Fishers are losing 25-30% of potential income due to poor postharvest practices

Inadequate access to critical inputs like ice and proper storage facilities increases postharvest losses
IMPROVING POST-HARVEST PRACTICES

What have we done?
Launched a campaign to increase consumer demand for responsibly-handled and sourced seafood

What else is needed?
Social marketing efforts should be supported by appropriate policy and infrastructure
BUILDING LOCAL CAPACITY

What have we learned?
Local limited capacity to support growth-oriented enterprise development

What have we done?
Organized local markets team; registered enterprises, linked to local support services

What else is needed?
Influence LGUs to rationalize local economic development
Increase access to business development services
Mobilize local livelihood resources to support conservation enterprises
How did the GDA support reduction in fishing effort?
Increasing value of the fishers’ catch by connecting them to better markets and improved handling practices

Reduction in household vulnerability through financial assets built and access to formal financial services

Enforcement of sustainable fishing behaviors and policies

Identified proper fisheries management practices to support conservation of target species
IMPLICATIONS OF THIS PROJECT ON OUR WORK IN COASTAL FISHERIES
FISH FOREVER
Sustainable Coastal Fisheries

FISHERIES MANAGEMENT
- Reduction of illegal and unsustainable gear
- Mitigated effect of open access through legal tenure + Protected habitats
- Improved Environment
- Better harvest controls

SOCIO-ECONOMIC INCENTIVES
- Investments in Income diversification
- Mitigate impacts of lost fishing days
- Increased household income
- Reduced pressure on other species
- Reinforcement of sustainable behavior

Reduced threat of overfishing

IMPROVED BIODIVERSITY
Importance of linking livelihoods interventions to sustainable fishing behaviors
There is a growing demand for responsibly-sourced, high-quality seafood.

3. Understanding the Market

4. Demand & Replication

10 other LGUs now implementing savings clubs. Concept has been incorporated into the design of Fish Forever 2.0
5. Ecosystem of Partners

NATIONAL GOVERNMENT
BFAR
SSS
DSWD-SLP

INTERNATIONAL AGENCIES
USAID

LGU
Infrastructure support
Technical assistance

NGOs
Negros
Women for Tomorrow
Pinoy ME

PRIVATE COMPANIES
FCI
Sustainable Seafood Week
Cantilan Bank

ACADEME
UP Visayas,
UP Los Banos
Stanford d. school
Harnessing Markets to Secure a Future for Small-scale Fishers

A Global Development Alliance