



Summary Report

Do MarinTrust activities lead to improved or protected environmental parameters?

PRESENTED TO:

MarinTrust

PREPARED BY:

**Natural Justice
Consulting**

ABOUT THE IMPACT EVALUATION

Natural Justice Consulting is pleased to present the report resulting from our independent Impact Evaluation conducted between June 2023 and February 2024 on the impact made by MarinTrust. This Impact Evaluation examines the impact made through the (1) MarinTrust Factory Standard (version 2.0, 2017) and the (2) MarinTrust Improver Programme. Adhering to the recommendations on good practices of the ISEAL Impacts Code (version 2.0, December 2014), this in-depth evaluation aims to provide MarinTrust with insights into the extent to which their activities catalyse the desired environmental changes, while also uncovering underlying factors influencing whether they succeed or not. Central to our evaluation is the testing of the hypothesis:

“MarinTrust activities lead to improved or protected environmental parameters”

The next pages of this Summary Report of the Impact Evaluation will outline

- Data Collection
- Limitations to this Impact Evaluation
- Findings on improvements through MarinTrust activities
- Findings on unintended effects of MarinTrust Certification
- Findings on motivations and drivers for and barriers to MarinTrust activities
- Recommendations for future Impact Evaluations

ACKNOWLEDGEMENTS

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LEARN MORE?

This Summary Report offers an overview of the approach and key findings from the Impact Evaluation. It encapsulates the essence of the evaluation insights into the observed impact made by MarinTrust activities. Should you seek further insight or a more comprehensive understanding of MarinTrust and the Impact Evaluation, the provided links direct you to supplementary resources. This summary aims to offer a concise yet informative glimpse into the evaluation process and outcomes to support the accessibility of the evaluation.

[Link to full Impact Evaluation Report.](#)

Learn more about the [MarinTrust Factory Standard](#) or the [MarinTrust Improver Programme](#).

About the author ([Eva van Heukelom](#), on behalf of [Natural Justice Consulting](#)).

To substantiate the hypothesis and fulfil the project objectives, the following data was collected:

- A. Quantitative data from **surveys** conducted among the three survey groups*;
- B. **Quantitative data** on all MarinTrust Certified Sites and Improver Programme Sites;
- C. Qualitative data through **interviews** with a selected subset of survey participants in the three survey groups;
- D. Review of **legal requirements** pertaining to IUU-fishing, traceability of raw materials and emissions for (selected) respondents;
- E. Review of **market preferences** for MarinTrust Certification and Improver Programme, i.e. sourcing by feed producers and pet food producers.

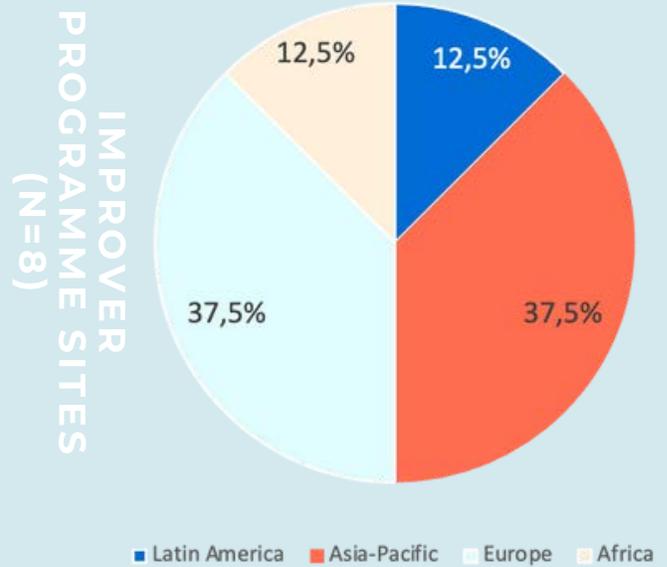
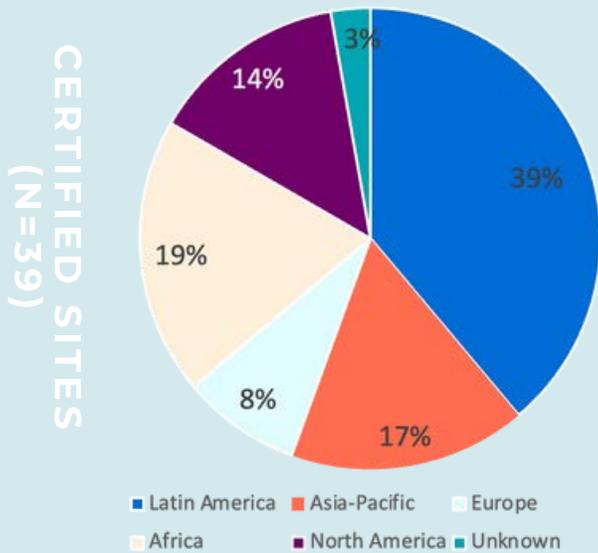
By combining quantitative and qualitative methodologies and analysing legal requirements and market dynamics, this methodology supports a holistic comprehension of the environmental impact of MarinTrust activities. The methodology is designed to establish correlations, causation, and any unintended effects.

**Three distinct survey groups were: MarinTrust Certified Sites (1), MarinTrust Improver Programme Sites (2) and Non-Engaged Sites (3). The latter group refers to sites that currently do not engage with MarinTrust through the Factory Standard or the Improver Programme.*

Limitations to consider in the review of this Impact Evaluation are as follows:

- **Limited ability to analyse survey data on basis of commonalities:** Total number of respondents is 47 site representatives. This small sample size poses a challenge in discerning commonalities among factories and the potential influence on findings, as many factors (country, size, company structure) influence responses.
- **Improver Programme Sites Sample Size:** Only 8 respondents participated in the Improver Programme survey group.
- **Non-Engaged Sites Sample Size:** Efforts to include respondents from Non-Engaged Sites only resulted in 2 responses. Given this limited response rate, the insights gained through their responses are not statistically significant.
- **Barriers to participation could not be adequately assessed:** The fact that all respondents represent either a Certified Site or Improver Programme Site (see previous limitation), means there are no responses from those who have been unable to overcome barriers like costs or capacity.
- **Sites offering both Certified and improver Programme materials:** Improver Programme materials are not the same as certified materials, but it is possible that a site offers both certified and Improver Programme materials.
- **Difference in starting year of Certification and Improver Programme:** MarinTrust's Certification has been available since 2009 (then: IFFO RS), while the Improver Programme was introduced in 2015. May influence pre-intervention baseline.
- **Evolution of certification requirements:** Depending on the time of the initial certification, the pre-intervention baseline of Certified Sites may differ.

WHO PARTICIPATED? RESPONDING SITES



IMPROVEMENTS MADE THROUGH MARINTRUST ACTIVITIES

This section explores key findings in the context of improvements made following “MarinTrust activities”. With these activities, we refer to both the Factory Standard (Certification) and the Improver Programme. A large majority (80%) of Certified Sites and of (71%) Improver Programme respondents (strongly) agreed with statement that their site improved on responsible sourcing, traceability, responsible manufacturing and procedures to become certified or an Improver Programme participant.

Responsible sourcing of fishery materials and traceability are areas where most Certified Site respondents (strongly) agreed improvements were made (81-94% of Certified Sites and 71% of Improver Programme site respondents). Validation for the notion of improvement was confirmed in interviews, where also those critical to some elements of MarinTrust’s activities indicated that becoming certified supported in reinforcing their environmental parameters. Notably among 47 participants for this Evaluation one was identified where the MarinTrust Certification was reported to not have had any positive impact on environmental parameters.

Minimising negative impact of fishery on species’ habitat and on ETP-species are areas where least impact was made through MarinTrust activities, with approximately 67% indicating improvements were made to a (very) large extent.

Respondents agreed their site made improvements in multiple areas:

71-80%

Most frequently indicated as area of improvement:

- 1. TRACEABILITY & RESPONSIBLE SOURCING**
- 2. RESPONSIBLE MANUFACTURING**
- 3. FORMALISED PROCEDURES FOR SOURCING**
- 4. FORMALISED PROCEDURES FOR EMISSIONS**

Reviewing the reported improvements through a **geographical perspective** reveals notable divergences in scoring across continents. North American and African sites stand out with the highest number of improvements made to become MarinTrust-certified or an Improver Programme participant, reporting on average that improvements made for criteria related to responsible sourcing and traceability of raw materials meant that the site has improved to “a very large extent”. Furthermore, a mean of 7.12 out of the required 9 formal policies and procedures were added following MarinTrust activities.

In contrast, Europe, reporting fewest changes made due to MarinTrust activities, report on average that improvements were made “to a large extent” and that 4.67 formal policies and procedures were added. It can therefore be deducted that sites consider that becoming MarinTrust Certified has brought about improvements in the context of responsible sourcing and traceability to a large extent in all areas, but that sites in North America and Africa consider these changes to be even more significant than in other areas.

Finally, reported improvements were **compared to legal requirements** on eradicating IUU-fishery materials, emissions, waste and discharge to water. Generally, it can be found that many countries and/or regions have taken some measures in the context of emissions and waste mitigation, ranging from stringent limits to initiatives to incentivise more responsible practices through cap-and-trade or tax emission schemes. Besides significant legislative efforts by the EU, US and some RFMOs [1], legal requirements for traceability and avoiding IUU-fishery materials with proven effectiveness seem to depend primarily on private initiatives. **This seems to confirm the findings that traceability and IUU-fishery materials are areas MarinTrust Certification made most contributions to improved or protected environmental parameters.**

“**[Becoming MarinTrust-certified] allowed us to train our collaborators and crew to put elements of responsibility into practice**”

Contributions to eradicating IUU-fishing materials in marine ingredients

This section made clear how improvements were made in the context of responsible sourcing. Most noteworthy observations did not explicitly address the impact on eradicating illegally, unreported and unregulated (IUU) fishing materials. Given that this is one of the core goals of the MarinTrust Standard (see MarinTrust website), some key findings related to IUU-fishery materials should be highlighted. According to 75% of respondents, a procedure to demonstrate the legal catch of fishery materials, was added to obtain MarinTrust Certification or become an Improver Programme participant. It can cautiously be inferred that only 1 in 4 factories had an IUU-policy in place prior to becoming MarinTrust-certified. Similarly, 72% of respondents indicated that obtaining MarinTrust Certification impacted their ability to demonstrate that their sourced fishery materials are legally caught. This finding suggests that, following traceability, the eradication of IUU-fishing materials is an area where respondents believe becoming MarinTrust-certified has made contributions.

UNINTENDED EFFECTS OF MARINTRUST CERTIFICATION

This section only includes findings on the Certified Sites as the list of Unintended Effects relates to effects following MarinTrust Certification.

MarinTrust maintains a list of Unintended Effects as part of their Monitoring, Evaluation and Learning system (MEL). The Unintended Effects included reference to outcomes or impacts not directly defined within MarinTrust's Theory of Change and can be negative, positive or neutral in nature. The effects are not part of the 'intended path' that MarinTrust wishes to take to achieve the desired impacts. MarinTrust's identified Unintended Effects relating to environmental parameters were included in the self-assessment of this Impact Evaluation, asking respondents whether the Unintended Effect had occurred and testing outliers on their correct understanding of the Unintended Effect. Any Unintended Effect with a purple line beyond the white 50% mark occurs regularly. Results of the self-assessment were as follows:



MOTIVATIONS AND DRIVERS FOR MARINTRUST ACTIVITIES

For the review of motivations and drivers, influences through customer asks, (other) stakeholders and internal factory motivations are explored. Survey respondents provided insight in the **amount of customers (in volume) asking for MarinTrust-certified and Improver Programme materials**. For certified materials, this revealed a range from 25% to 100%, with on average 71% of customers (by volume) asking for MarinTrust materials. In contrast, for the MarinTrust Improver Programme materials, the range included 0% to 100% with an average of 47% of customers (by volume) asking for Improver Programme materials.

Beyond the demand of their customers, a broader context of influences was understood by asking respondents to **express the degree of influence, ranging from no influence to a very large influence**. Stakeholders that were included were government, customers, suppliers, NGOs, local community, direct competitors, workers, and shareholders (if applicable). Main influences on the decision to become **MarinTrust-certified** were customers, followed by shareholders as the second main influence and direct competition as the third main influence. Notably, the lowest influence was attributed to the government, with 57% of respondents indicating there was no influence and 20% only attributing some influence to the government. Influence on the decision to become a **MarinTrust Improver Programme** participant shows a similar picture, with customers and direct competitors as stakeholders with most influence. Main differences can be found in the fact that less sites have shareholders, and that local community was never reported as a stakeholder with any influence on the decision to become a participant. Finally, the influence by workers is notably lower, which may be attributed to the fact that the countries reporting that workers had a large influence are not represented in the Improver Programme Sites.

Market research was conducted among aquaculture feed (aquafeed) producers and pet food companies. A sample was taken of 20 petfood producers and 18 aquafeed producers, representing at a minimum the top 10 largest producers. These customers were selected because 50-51% of respondents indicated they have petfood producers as customers and 87.5-92% respondents have aquafeed producers as customers. The range in the percentage of follows a separate measuring of Improver Programme respondents and Certified respondents.

% of customers (in volume) requesting MarinTrust-materials

CERTIFIED MATERIALS



IMPROVER PROGRAMME MATERIALS



Stakeholder influence, from most to least influential

- 1. CUSTOMERS**
- 2. SHAREHOLDERS**
- 3. DIRECT COMPETITORS**
- 4. SUPPLIERS**
- 5. NGOS**
- 6. WORKERS**
- 7. LOCAL COMMUNITY AND GOVERNMENT**

4/20

Reviewed petfood producers rely on MarinTrust for their sourcing, representing 48% market share.

7/18

Reviewed aquafeed producers rely on MarinTrust for sourcing, representing 46-60% market share.

Motivations to become MarinTrust-certified

Respondents unanimously believe that MarinTrust certification will aid in acquiring and retaining customers, with a large majority also seeing it as a competitive advantage. Moreover, a significant majority (97%) consider it the right thing to do, and 80% would retain the certification even without customer demand. Even among those with seemingly lower motivation, there's recognition of substantial environmental improvements with MarinTrust Certification. One Certified respondent expressed a lack of perceived benefit and no intention to retain the certification. **Improver Programme respondents** not yet certified expressed their motivation to attain MarinTrust certification in the future, with all respondents indicating this goal and none perceiving it as lacking benefits. Approximately 40% of respondents noted that participation in the Improver Programme reduces the urgency to become certified. However, it's unclear if these respondents are aware that the Improver Programme is time-limited and doesn't offer a permanent alternative to MarinTrust Certification.

“**MarinTrust Certification has become a requirement to enhance the value of our materials and be able to attract more demanding clients.**”

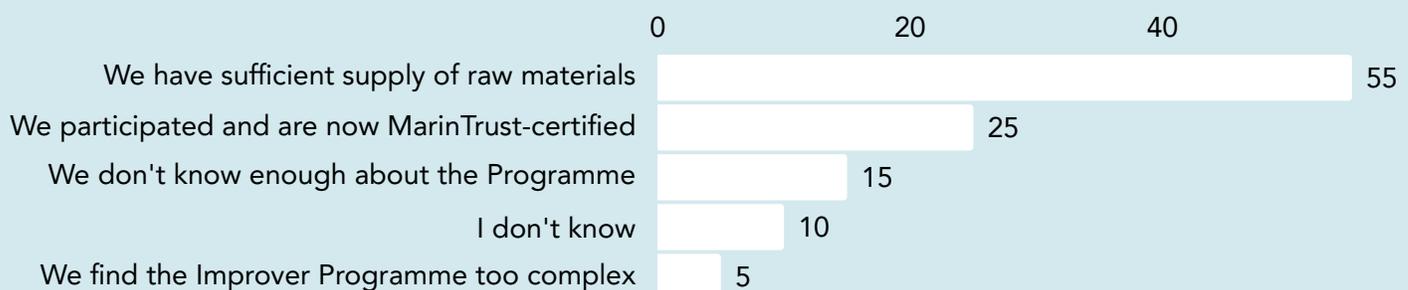
Motivations to participate in the Improver Programme

All respondents were surveyed on their motivations for (not) participating in the Improver Programme, with the availability of MarinTrust-approved responsible raw materials being the most commonly cited reason for both joining and abstaining. Additionally, a belief in the programme's goals was selected as frequently as the availability of raw materials, suggesting an inherent dedication to responsible sourcing among participants. Finally, responses in this context indicated a possible misunderstanding of the Improver Programme, which was also confirmed by various comments and interview responses. Notably, most misunderstanding were expressed by respondents located in a country without Improver Programme sites.

Why do you participate in the Improver Programme? (n=19)



Why don't you participate in the Improver Programme? (n = 20)



BARRIERS TO MARINTRUST ACTIVITIES

Generally, the assessment of barriers to participating in MarinTrust activities faces challenges in measurement, given that the findings predominantly reflect the perspectives of Certified Sites and Improver Programme Sites, entities already surmounting potential obstacles like financial constraints or organizational capacity. Nevertheless, some conclusions may still be drawn regarding barriers to participate in the Improver Programme as well as to become MarinTrust-certified after being an Improver Programme participant.

In terms of barriers to participating in the Improver Programme, multiple Certified respondents (15%) indicated they had insufficient knowledge about the Improver Programme. A smaller percentage (5%) considered the Programme overly complex. Finally, one respondent identified a perceived challenge due to what they perceived as a heavy reliance on government management within the Improver Programme.

Regarding potential barriers for Improver Programme Sites transitioning to MarinTrust Certification, the tested barriers primarily included financial implications and meeting certification requirements. Although none of the respondents cited cost as a barrier for obtaining MarinTrust Certification, one respondent did express concerns regarding the cost structure associated with Improver Programme participation.

While a minority (28%) voiced apprehensions regarding the stringency of MarinTrust Fishery Assessment criteria, these same respondents maintained optimism about achieving certification through participation in the Improver Programme. Notably, no further barriers were elaborated upon in comments or interviews.

For additional details regarding the costs associated with MarinTrust Certification or Improver Programme participation, interested parties are directed to refer to the MarinTrust website [here](#).



RECOMMENDATIONS

Finally, this page outlines the recommendation for future Impact Evaluations of MarinTrust. Insights are gained through the experience of this initial Impact Evaluation conducted by Natural Justice Consulting.

Continuously build on understanding legal requirements

- 1 A continuous building on legal knowledge in the main target countries is expected to support future Impact Evaluations, as well as support outreach and communications regarding MarinTrust Certification and the Improver Programme.

Capture improvements made during the Certification Process or Improver Programme onboarding

- 2 Non-conformities corrected during the auditing process are not included as data in this Impact Evaluation. However, examining these site-level data could uncover improvements due to MarinTrust activities if reviewed on an ongoing basis.

Work with multiple evaluation cycles

- 3 Despite limitation of scope to environmental parameters, the scope was still rather wide. Considering the ambition to include social parameters in future evaluations, it is suggested to set up designated Impact Evaluations and feedback mechanisms for different data elements to increase the value and depth of gained insights.

Build a feedback loop

- 4 Regular interaction beyond Impact Evaluations with Certified or Improver Programme factories is crucial to maintain goodwill. Prompt responses to feedback are essential to avoid risking future evaluations. Explicitly addressing implemented improvements or providing reasons for maintaining current practices is recommended.

Continue to work with multiple languages

- 5 Surveys were offered in English, Spanish, French, Vietnamese, and Thai, while interviews were in English and Spanish. This likely boosted engagement, aligning with MarinTrust's global focus. Digital tools could streamline multi-language data collection and analysis.

Increased outreach to customers of sites

- 6 Customer feedback indicates potential to increase MarinTrust adoption among marine ingredient purchasers, including pet food and aquaculture feed producers. Understanding why some don't inquire about MarinTrust remains unclear. Direct engagement or utilising collaboration platforms recommended.