

# Seafood Stewardship Index

Report of the second Stakeholder Roundtable  
Tokyo, 22 February 2018



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## INTRODUCTION

**On 22 February 2018, Index Initiative organised its second Seafood Stewardship Index (SSI) roundtable in Tokyo, Japan, to engage stakeholders in the development of the SSI and to present the draft methodology outline. Participants were invited to actively provide feedback, share insights and expectations for the further development of the SSI. The event was hosted by the Embassy of the Kingdom of the Netherlands to Japan in Tokyo. This report summarises the main outcomes and valuable discussions with stakeholders during the roundtable meeting.**

The purpose of the SSI is to create clarity around what seafood companies can do and what they are actually doing to improve sustainability in seafood supply chains. The Index will measure the performance of 30 leading seafood companies against societal expectations and relative to their peers. It will assess the commitments of companies, the extent to which they are transparent about their policies and practices, and actual performance on a set of indicators which reflect stakeholder expectations. The United Nations [Sustainable Development Goals](#) (SDGs) provide the basis for the SSI and its methodology.

Prior to the roundtable meeting, participants received the SSI draft methodology outline provided in both English and Japanese. During the roundtable, participants were asked to reflect on the

most important sustainability topics in their work and their organisations, the methodology outline, the potential relevance of the SSI for their work and how the SSI can add value to the current landscape of sustainability initiatives.

Index Initiative would like to thank all participants for attending the roundtable meeting and for sharing their questions, feedback and recommendations. The team expresses genuine gratitude to all stakeholders for investing their time and spending the day together, and in particular the hosts at the Embassy of the Kingdom of the Netherlands to Japan in Tokyo for the organisation of the roundtable meeting.



# BACKGROUND



In September 2015, the 2030 Agenda for Sustainable Development and corresponding goals and targets were adopted by all 193 UN Member States. Success of the 2030 Agenda requires implementation by governments, but they are unlikely to succeed without broad societal participation and engagement of the private sector. With increasing globalisation, companies are now, more than ever, able to deliver a unique and significant contribution to the achievement of the SDGs.

The contribution of the private sector to the SDGs will differ from industry to industry. This creates the need to go beyond the term private sector and to move to an approach that is more industry or even company specific. By formulating clear expectations for each industry that align with their core business, contribution to the SDGs and progress can be monitored, allowing different societal stakeholders to hold companies accountable.

The concept of benchmarking companies' relative performance on areas of significant global need is a proven concept in the pharmaceutical, agricultural and food sectors, where the Access to Medicine Index, Access to Seeds Index, and Access to Nutrition Index have contributed to creating clarity on corporate performance. By highlighting best practices, an index stimulates learning across the industry and accelerates uptake of further improvements. It supports companies to improve their positive impacts and gives credit for strong performance.

Based on a [landscape study \(2015\)](#) and [feasibility study \(2017\)](#) conducted by Index Initiative, it was concluded that the seafood industry can make a particularly important contribution in achieving seven SDGs relevant to the industry's core business. Below we describe why these SDGs are relevant to the seafood industry and how companies can impact these.



**Why:** the seafood industry provides employment to millions of people and the export of seafood is an important source of income for communities involved and developing countries.  
**How:** invest in developing country economies and fishing communities.



**Why:** fish is a nutritious and vital source of protein and essential micronutrients. Over a billion people, mostly in developing countries, depend on seafood for their protein intake and livelihoods.  
**How:** secure and improve accessibility and utilisation of seafood products in developing countries, particularly in low-income, food-deficit countries.

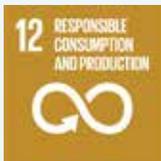


**Why:** women play an important role in the fisheries and aquaculture value chain, particularly in the processing and marketing of seafood.  
**How:** ensure gender equality and women's full and effective participation.

## BACKGROUND



**Why:** the seafood industry provides employment opportunities to 200 million people globally. The industry heavily relies on low-skilled and unskilled workers.  
**How:** provide conditions for decent work and create employment.



**Why:** responsible production ensures less waste and losses.  
**How:** ensure efficient use of natural resources and well-managed fish stocks and farms.



**Why:** overfishing is considered the second largest threat to oceans after climate change.  
**How:** ensure that seafood is sourced responsibly and traceable.



**Why:** aquaculture can impact terrestrial ecosystems.  
**How:** responsible use of inputs to prevent pollution, land degradation and biodiversity loss.

### About Index Initiative

Index Initiative is a non-profit organisation based in Amsterdam that develops indices that encourage and inspire companies to contribute to positive change. Through an extensive multi-stakeholder process, an index helps to clarify and reach consensus on societal expectations from leading industries in terms of their contribution to achieving the SDGs. The subsequent measurement process reveals to what extent individual seafood companies actually meet these expectations.

By comparing companies to each other, an index rewards good practice and provides a transparent and impartial means by which companies and stakeholders can monitor performance. By

identifying best practices and areas for improvement an index encourages companies to do more and spurs advancements in areas most needed. Indices have proven to be useful tools for e.g. investors, banks, governments, multilateral organizations, NGOs, academia and buyers.

Together with Aviva, the UN Foundation, and the Business and Sustainable Development Commission, Index Initiative is collaborating in establishing the World Benchmarking Alliance (WBA). We envision that the WBA would become a global institution that will develop, fund, house and safeguard publicly available, free corporate sustainability benchmarks aligned with the SDGs. Once the WBA is established, the SSI will be part of the WBA.

## BACKGROUND

In December 2016, Index Initiative organised the first Seafood Stewardship Index [roundtable meeting](#) in Jakarta. The aim of this roundtable was to discuss and identify relevant aspects of stewardship in the seafood industry as well as to identify what different stakeholders expect from leading seafood companies. Midway through 2017, Index Initiative started with extensive desk research and stakeholder consultations for the development of the SSI, resulting in the publication of the first draft methodology outline in January 2018. This draft methodology outline served as background document for the roundtable meeting in Tokyo. The preliminary company scope of the SSI can be found in Annex 1.

# ROUNDTABLE SUMMARY



The Tokyo roundtable for the Seafood Stewardship Index was a one-day meeting which brought together a range of different stakeholders including seafood companies, representatives from governments, academia and independent experts, retailers and non-governmental organisations (NGOs). Nine of the 30 companies in scope for the first benchmarking cycle of the SSI, together representing an estimated total seafood-related turnover of 24 billion US dollars in 2016, attended the meeting to participate. This included seven leading Japanese seafood companies.

In the morning, the background and objectives of the SSI were discussed, before moving on to consider the draft methodology outline and associated process. This was followed by a presentation from Aeon, Japan's largest retailer and 18th largest retailer in the world. Aeon has pioneered the promotion of sustainable seafood in Japan for over a decade. Mr. Yasuyuki Yamamoto from Aeon's Group Merchandising Strategy Department, described the value of sustainability to their business and how the disclosure of sustainability information has become more important. Aeon gradually learned about the pressure that the seafood industry puts on natural resources and how Aeon could help reversing that trend. The morning concluded with a lively Questions and Answers (Q&A) session.

# ROUNDTABLE SUMMARY



In the afternoon, the role of the private sector in achieving the SDGs was presented by Mr. Wim Leereveld, Chair of the Board of Index Initiative and founder of the Access to Medicine Index. The history of the Access to Medicine Index, first published in 2008, and its global impact were discussed. Also, experiences were shared on how companies are being assessed in the Access to Medicine Index and how other stakeholders use the Index in their work, such as the Bill and Melinda Gates Foundation and World Health Organization.

Participants were then split into two groups, each containing stakeholders from different stakeholder constituencies, for two parallel breakout sessions for the duration of the afternoon. [Chatham House Rules](#) applied so participants' individual opinions were not revealed. Participants raised questions and concerns in smaller groups, and then the next stages of consultation and data collection were considered. Then, participants reunited to hear the outcomes of the separate discussions and next steps, before ending the day with a summary of the roundtable meeting and a warm thank you to all participants. Many participants stayed afterward to ask specific questions and to continue networking with one another.

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



During the Q&A session in the morning and the breakout sessions in the afternoon, participants discussed and provided feedback on the draft methodology outline of the SSI and shared questions, concerns and recommendations with the SSI team. The questions and issues raised evolved around the following topics:

## Objectives of the SSI

Participants indicated that the objectives and focus (on stewardship) of the SSI are less specific compared to the Access to Medicine Index, which has a clear focus on improving the accessibility of medicines in developing countries. Index Initiative explained that the SSI will be the first Index in a new series examining companies' contributions to the SDGs across an industry.

Participants also pointed out that the objective to rank seafood companies might be too competitive for the Japanese business environment and that the approach of the SSI can feel uncomfortable for Japanese seafood companies. Applying a less competitive approach (e.g. measuring the sustainability performance of companies without ranking) could be more effective for Japanese companies and could encourage more active company engagement.

## SDG scope of the SSI

Participants were curious to know why the SSI focuses particularly on seven out of the 17 SDGs. Some stakeholders felt that seven

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



SDGs were too many while others considered seven too few. Whereas seafood companies can potentially also impact other SDGs (e.g. SDG 13 Climate Action or SDG 17 Partnerships for the Goals), building on the findings of the research and consultations with stakeholders, Index Initiative sees that the sector's contribution is most actionable and significant for these seven SDGs. This also ensures that the Index is focused on the most relevant issues for the industry. The SSI addresses only critical areas of impact in the seafood industry, rather than assessing companies on many different issues. Although not formally in scope, the SSI is an example of SDG 17 in action as the SSI is developed through a multi-stakeholder approach together with representatives from key stakeholder constituencies.

*"This initiative will help us to reach the SDGs, and I have a mixture of anxiety and excitement about it."*

## **Company scope of the SSI**

Participants raised questions about which criteria have been used for including companies in the SSI and how many companies will feature in the Index. The company scope of the SSI includes the leading companies that have significant influence in the seafood supply chain due to their large presence in catching and/or aquaculture and processing, both upstream and downstream in the

supply chains they are active in. Four criteria have been applied. First, companies with the highest annual seafood-related revenues are included in the SSI. Second, companies must be active in multiple segments of the seafood supply chain (e.g. fisheries, aquaculture, processing, trading) and include key species in their portfolio. Third, companies must have different international subsidiaries or offices and must be active (sourcing, trading and selling) on the global seafood market. Fourth, to what extent companies are represented in organisations or bodies through which they may advocate relevant policies and management measures.

Although the number of companies included could be increased, the current capacity of the SSI allows assessment of 30 companies while allowing thorough and high-quality analysis. Ideally the number of companies, as well as the composition of the group of companies included, will remain constant over time to monitor progress on stewardship performance continuously. However, reflecting changes in the seafood industry and stakeholder expectations, additional companies could be included, or sub-indices may be developed, focussing on specific segments (e.g. fish feed companies) or regions that are relevant for the seafood industry.

## **SSI and SeaBOS**

Some companies included in the preliminary SSI company scope are also members of the Seafood Business for Ocean Stewardship

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



Initiative ([SeaBOS](#)) and were interested to learn more about the similarities and differences between the SSI and SeaBOS. Both initiatives aim to promote ocean stewardship by seafood companies. SeaBOS facilitates a platform in which ten of the largest seafood companies engage in dialogue to work together for a global transformation towards sustainable seafood production and a healthy ocean. The SSI is a tool to monitor progress by seafood companies towards sustainability by assessing their corporate performance against the SDGs and stakeholder expectations every two years. Due to the similarities in objectives, SSI is seeking to align its efforts with the SeaBOS goals wherever possible. The Expert Review Committee (ERC) of the SSI also includes representation from the Stockholm Resilience Centre, which is currently serving as the interim secretariat for the SeaBOS initiative, ensuring continuous sharing of information and eliminating duplication in efforts. For the determination of the proposed company scope, Index Initiative has drawn on the same notion of “keystone actors” that has informed the SeaBOS initiative, namely that the largest companies have the largest impacts on the ocean “ecosystem” and the greatest potential to bend the trajectory of the entire seafood industry towards norms of more sustainable operations.

*“How can our company help to manifest the sustainability philosophy in Japanese society?”*

## **Expert Review Committee**

Participants noted that the Expert Review Committee (ERC) currently does not have any business representatives. The ERC is an appointed group of experts who provide advice and recommendations on the methodology and results of the SSI. From a company perspective it would be reassuring to have business representatives that know and understand the seafood industry from the commercial side. It was recommended to look at how the [Global Sustainable Seafood Initiative \(GSSI\)](#) developed where companies have voices at the table. This was received positively by the seafood industry. Index Initiative will take this recommendation into account.

## **Confidentiality**

Participants asked how confidential data submitted by companies will be protected and used. Wherever required, companies can provide data under a non-disclosure agreement (NDA). This data will then only be used for scoring purposes and will not be shared with others. Also, it will not be reflected in the Index’ reports. Some companies expressed concerns about sharing data because some organisations that have a seat in the ERC of the SSI have existing business relationships with other seafood companies. Index Initiative takes these concerns into account and will ensure confidentiality in the design of the data collection process.

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



## Aligning with existing programmes and standards

Participants noted that many companies in the seafood industry already base their reporting on standards and international guidelines such as the [Global Reporting Initiative](#), [Marine Stewardship Council](#) and the [Aquaculture Stewardship Council](#). Aligning with and building on existing guidelines, frameworks, programmes and standards is important for mutual recognition and strength. The methodology of the SSI builds on these existing efforts.

## Complexity of the seafood supply chain

Participants were concerned that a benchmark like the SSI would not address the context and complexity of seafood supply chains. Stakeholders were curious to know how the SSI will take differentiated practices and activities of seafood companies into account. While some of the leading companies are vertically integrated or publicly-held, others are not, which may also imply different approaches to handling data, transparency and traceability. This is factored into the SSI scope and methodology. Participants recommended to include an expert in the ERC that has a background in the seafood business who can reflect on these complexities in the sector, and to align with and actively involve academia in the methodology development.

## Subsidiaries

Participants discussed how the different subsidiaries of seafood companies should be taken into account in the SSI. It was noted that while some vertically integrated companies and subsidiaries perform very strong on sustainability, the adoption of a single sustainability agenda across a parent group with many different subsidiaries operating in many different segments is fairly uncommon. For example, Japanese companies have a structure where the parent company is often a holding company with operations and purchasing across the globe. Index Initiative is consulting stakeholders on the inclusion of subsidiaries. For example, the Index could take into account subsidiaries that are majority-owned (>50%) by the parent company. Index Initiative invites stakeholders to share their opinions on how to measure the performance of subsidiaries in the SSI, yet it seems fair to keep holding companies accountable for the companies they own, at least for those where they are the majority shareholder as this allows them to exercise significant control over the strategies and operations.

*"We buy seafood from everybody in the world with rules for control in the supply chain, but how to control for everybody on sustainability?"*

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



## Measuring company performance in the SSI

Stakeholders wanted to know more about how the performance of companies will be measured in the SSI. Company performance will be assessed in different measurement areas, with indicators falling in three categories: commitment, transparency and performance indicators. Commitments are considered the first step towards more responsible and sustainable practices, transparency of practices creates accountability for companies while performance shows what companies are actually doing with regard to sustainability.

One of the participants pointed out that for some measurement areas and themes as presented in the draft methodology outline, like human rights and working conditions, it can be difficult to define performance indicators that measure improvements. Another participant indicated that some companies have improved their performance on sustainability but do not necessarily make public commitments on sustainability. Index Initiative indicated that not all measurement areas and themes will have an equal distribution of commitment, transparency and performance indicators. In areas where company performance for instance is difficult to meaningfully assess, there will be more emphasis on commitment and transparency indicators. Index Initiative will develop the initial weighting of the indicators after which stakeholders will have the opportunity to provide feedback on this during the online public consultation phase which is expected to take place in Q3 of 2018.

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



## Stakeholder feedback and outreach

Participants stressed that it is important to ensure that the methodology is fair and that companies in scope have the opportunity to provide feedback on the methodology. Company engagement during the methodology development and design phase is key. Participants wanted to know how and when they can provide feedback on the methodology. Index Initiative invites all stakeholders to provide feedback on the draft methodology outline and share any other questions, concerns and relevant recommendations. Index Initiative offers opportunities to meet in person at the Seafood Expo North America (SENA) in Boston, 11-13 March 2018, and during the Seafood Expo Global (SEG) in Brussels, 24-26 April 2018. Feedback on the draft methodology outline (version as presented in Tokyo, 22 February) is welcome until 31 May 2018 after which an updated version will be developed, based on this roundtable discussion and additional engagement with stakeholders. After this, stakeholders are also invited to provide their feedback on the final draft methodology of the SSI which will be released in Q3 of 2018, so it can be taken into consideration before its finalisation.

Participants recommended that the SSI should actively reach out to companies to receive their feedback, for instance by organising webinars that take companies through the process and the draft methodology. For companies, it is helpful to receive clear guidance

on how to submit data. Participants indicated that for Japanese companies, communication in Japanese would facilitate greater and enhanced engagement. Index Initiative agrees that communication in different languages improves engagement and will take into account if future documentation can be translated into Japanese and other languages.

*“Over two years the idea of sustainability has become familiar but it’s still new to our company and group. There is concern about whether our participation in the index will be welcomed by the society at large. It will need to be sukoshi zutsu (slow and steady).”*

## Data collection process

Several participants stressed the importance of giving companies sufficient time to prepare and collect the required data. Also, company representatives had concerns that there will be a high number of indicators that will be difficult to address. Sample indicators were requested. Participants advised Index Initiative not to change the direction of the indicators over time and to focus on key issues in the SSI.

Index Initiative will prepopulate the questionnaire with data available from public sources such as annual reports, sustainability documents

# ROUNDTABLE QUESTIONS AND DISCUSSIONS



and company websites. Companies will also be requested to provide any additional information that is required. After all data is collected and analysed, scoring guidelines can be finalised and companies scored and ranked. Company-specific results of the assessment will be shared with the individual companies before publication of the Index. Participants indicated they would like to see some sample questions. The draft methodology outline includes a set of sample indicators. Please note these are not final yet.

One of the participants asked whether existing company data could be submitted, or whether information needs to be reformatted for the SSI, and whether it needs to be translated into English. Another participant wanted to know to what extent the SSI will consider self-reported data or also secondary and third-party data sources. The SSI will utilise all data provided by companies. Companies are encouraged to provide additional evidence that can be used to assess the indicators. For example, if a company states it sources seafood from sustainable sources, then the Index would require credible proof to assess this. Index Initiative invites stakeholders to provide feedback on how the Index should use different sources of data (self-reported, secondary and third-party data) for the assessment of companies. Data can be submitted in English; Index Initiative however will also explore the possibilities to submit data in other languages.

## **Stakeholder involvement**

Participants indicated that some important stakeholders were not present at the roundtable. For example, no representatives from the Japanese government attended the meeting. It was recommended to also involve the Japanese government in the consultation process. When the Japanese government supports the SSI, it will stimulate Japanese companies to actively participate in the development of the Index. Also, participants felt that financial institutions are an important stakeholder that would be able to provide valuable input to the consultation process. Furthermore, it was mentioned that retailers have a strong controlling power in the global seafood market and that these are therefore key stakeholders to include in the process.

## FOLLOW-UP AND NEXT STEPS



The input and feedback generated during this roundtable further guides the development of the methodology of the SSI. Outreach events are planned in March and April 2018 at the Seafood Expo North America in Boston (11- 13 March 2018) and the Seafood Expo Global in Brussels (24-26 April 2018). During these events, companies (both in and out of scope) and other stakeholders are actively encouraged to provide input on the methodology and reach out to Index Initiative for any questions, comments and suggestions. Feedback on the draft methodology outline is welcome until 31 May 2018. All stakeholder feedback then will be processed and will be reflected in the final draft of the methodology. This final draft will be reviewed by the ERC in late June 2018. The SSI methodology for the first cycle and publication in 2019 will be finalised following an eight week online public consultation in Q3 of 2018 which allows all stakeholders to provide feedback on the methodology prior to its publication. All participants of the Tokyo roundtable and those who have provided feedback will be informed about the starting date and link for the online consultation. Publication of the final methodology for the SSI is expected in Q4 of 2018.

Data collection is anticipated to start in Q1 of 2019, when companies will receive a request to provide additional data for assessment. All data will be analysed in Q2-Q3 2019, when individual company scorecards and the benchmark report will be prepared. The publication of the first SSI is expected late 2019.

Index Initiative welcomes stakeholder feedback, questions, concerns, and recommendations for the SSI. For more information about the SSI or to submit feedback contact Bas Geerts (Lead Seafood Stewardship Index) at [b.geerts@indexinitiative.org](mailto:b.geerts@indexinitiative.org).

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# ANNEX 1

## PRELIMINARY COMPANY SCOPE



	Name	Revenue in \$m (2016)	Country of Origin	Ownership
1	Maruha Nichiro	7,158	Japan	Public
2	Nippon Suisan Kaisha (Nissui)	5,707	Japan	Public
3	Thai Union Group	3,752	Thailand	Public
4	Marine Harvest	3,694	Norway	Public
5	Mitsubishi Corporation	3,400	Japan	Public
6	Dongwon Enterprise	3,163	South Korea	Public
7	Red Chamber Group	2,575	US	Private
8	Trident Seafoods	2,400	US	Private
9	Austevoll Seafood	2,186	Norway	Public
10	Kyokuyo	2,123	Japan	Public
11	Marubeni Corporation	1,900	Japan	Public
12	Sojitz	1,372	Japan	Public
13	Pacific Seafood Group	1,370	US	Private
14	Cooke Aquaculture & Cooke Seafood USA	1,339	Canada	Private
15	Nueva Pescanova	1,134	Spain	Public

	Name	Revenue in \$m (2016)	Country of Origin	Ownership
16	Tri Marine International	1,050	US	Private
17	SalMar	1,044	Norway	Public
18	Labeyrie Fine Foods	1,040	France	Private
19	Shanghai Fisheries General Corporation	1,038	China	State-owned
20	Royal Greenland	1,005	Greenland	State-owned
21	F.C.F. Fishery	1,000	Taiwan	Private
22	High Liner Foods	956	Canada	Public
23	Bumble Bee Foods	955	US	Private
24	Yokohama Reito (Yokorei)	940	Japan	Public
25	Wales Group (Sea Value & Sea Wealth)	896	Thailand	Private
26	Parlevliet & Van der Plas	848	Netherlands	Private
27	Nomad Foods	800	United Kingdom	Public
28	Hanwa Foods	799	Japan	Public
29	Bolton Alimentari	787	Italy	Private
30	Charoen Pokphand Foods	778	Thailand	Public