

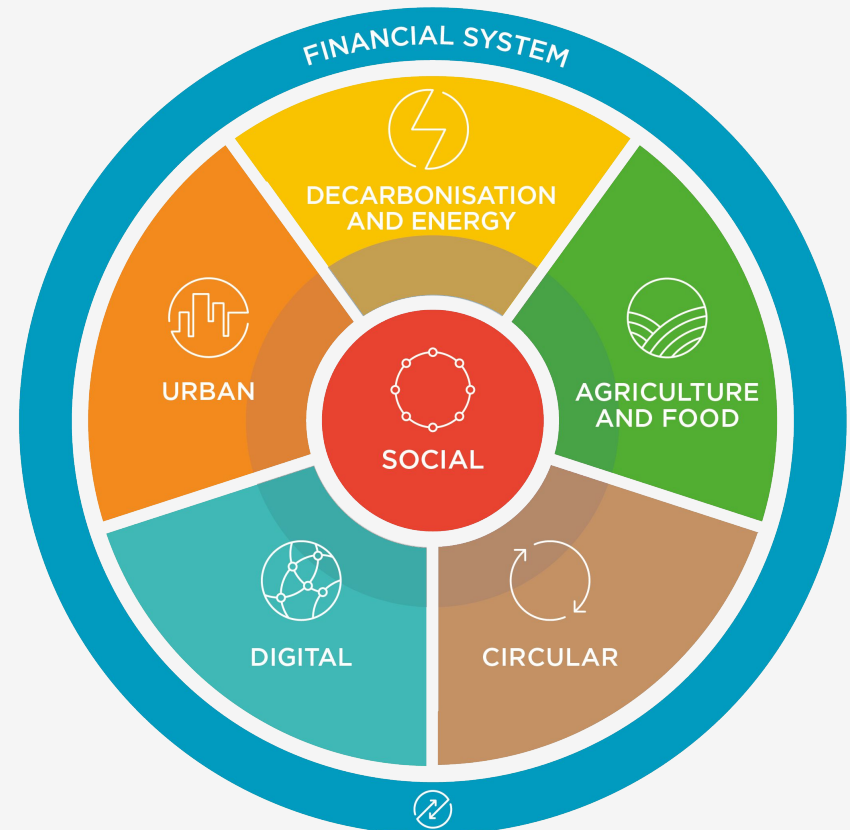


# Measuring and ranking the world's 30 most influential seafood companies

Join our movement to drive sustainable performance, transparency and impact of the seafood industry

# Benchmarking for a better world

- Urgent action is needed to put the world on a more sustainable and resilient path.
- SDGs can only be achieved through transformational change.
- Recognises the interconnected and interdependent nature of the SDGs and requires active involvement of all stakeholders.
- In 2023 we have published a series of free, publicly available benchmarks assessing 2,000 of the most influential companies across all areas of transformation.





# Seafood spotlight as a part of the Food and Agriculture system transformation





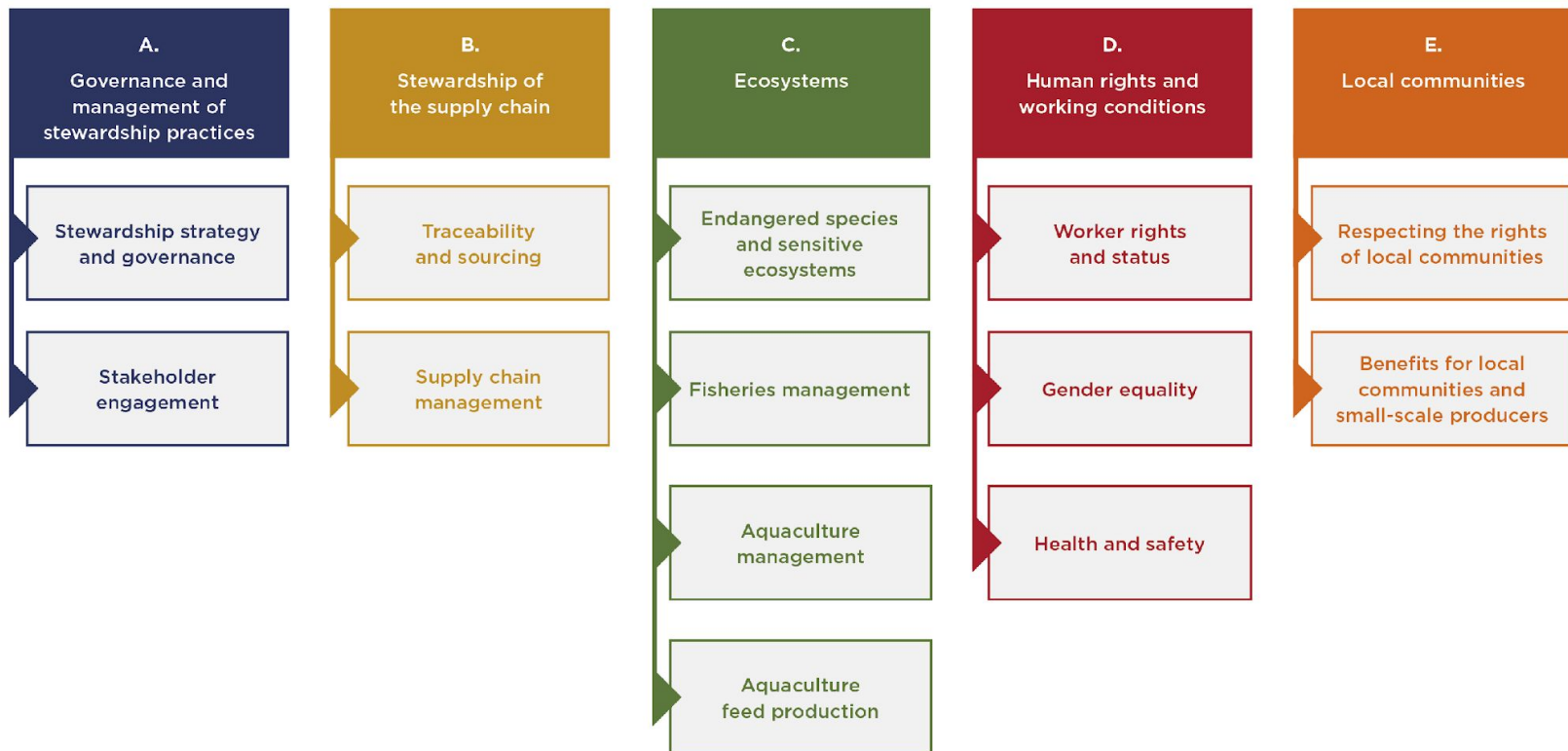
# Measuring the world's 30 most influential 'keystone' seafood companies

- Keystone companies have a disproportionate influence on the structure and functioning of the systems in which they operate. They **dominate, control, connect** and **influence**.
- A small number of companies have a big influence in global seafood production and trading.
- Their significant influence on the world's seafood industry means that they can accelerate positive change. Leading the move towards a sustainable seafood industry.
- Benchmarking recognises leadership and creates accountability for those that continue to lag behind.



# Benchmarking 30 seafood companies

The WBA Seafood Stewardship Index presents an overall ranking based on the results in five measurement areas. These areas reflect where stakeholders expect corporate action, pinpointing where companies can have the most



# Ranking

1	Thai Union Group	<div><div></div></div>	2.70 / 5
2	Mowi	<div><div></div></div>	2.42 / 5
3	Charoen Pokphand Foods	<div><div></div></div>	2.32 / 5
4	BioMar Group	<div><div></div></div>	2.22 / 5
5	Nueva Pescanova	<div><div></div></div>	2.04 / 5
6	Cargill Aqua Nutrition	<div><div></div></div>	1.87 / 5
7	Nutreco (Skretting)	<div><div></div></div>	1.86 / 5
8	Mitsubishi Corporation	<div><div></div></div>	1.79 / 5
9	Parlevliet & Van der Plas	<div><div></div></div>	1.72 / 5
10	Austevoll Seafood ASA	<div><div></div></div>	1.70 / 5
11	FCF Co., LTD.	<div><div></div></div>	1.53 / 5
12	Nomad Foods	<div><div></div></div>	1.51 / 5
13	SalMar	<div><div></div></div>	1.50 / 5
14	Labeyrie Fine Foods	<div><div></div></div>	1.36 / 5
15	Royal Greenland	<div><div></div></div>	1.33 / 5

16	Bumble Bee Foods	<div><div></div></div>	1.27 / 5
17	Nippon Suisan Kaisha (Nissui)	<div><div></div></div>	1.19 / 5
-	Tri Marine Group	<div><div></div></div>	1.19 / 5
19	Dongwon Group	<div><div></div></div>	1.17 / 5
20	Marubeni Corporation	<div><div></div></div>	0.87 / 5
21	High Liner Foods	<div><div></div></div>	0.84 / 5
22	Maruha Nichiro	<div><div></div></div>	0.83 / 5
23	Kyokuyo	<div><div></div></div>	0.76 / 5
24	Pacific Seafood Group	<div><div></div></div>	0.49 / 5
25	Cooke	<div><div></div></div>	0.41 / 5
26	Wales Group (Sea Value & Sea Wealth)	<div><div></div></div>	0.34 / 5
27	Red Chamber Group	<div><div></div></div>	0.23 / 5
-	Trident Seafoods	<div><div></div></div>	0.23 / 5
29	Yokohama Reito (Yokorei)	<div><div></div></div>	0.12 / 5
30	Shanghai Fisheries Group Co., LTD.	<div><div></div></div>	0.06 / 5

# Key findings

## Most companies are serious about sustainability.

28 of the companies we measured made reference to their responsibilities towards sustainability. 15 have published forward-looking corporate sustainability strategies.

## Complexity of seafood operations and supply chains increases environmental and social risks.

Who owns the company? Who is overseeing the company's seafood operations? Who is responsible for implementing the sustainability strategy? Many of the companies we examined were part of complex and diverse company structures.



# Key findings

## Companies can do more to tackle illegal fishing.

IUU fishing represents up to 26 million tonnes of fish caught annually. 83% of the benchmarked companies are committed to excluding IUU fish in their operations and demonstrate that they have procedures in place to address IUU risks. Only a third of the companies show that they conduct risk assessments for IUU fisheries specifically.

## Companies are stepping up on human rights commitments.

22 of the 30 companies we measured have human rights commitments in place. However, they have to turn their commitments into procedures. For example, only 20% could demonstrate that they have a remediation mechanism in place.

### Health & safety

83%

### Grievance mechanisms

56%

### Remediations

20%



# Key findings

## **Urgent need for more transparency on sustainable seafood.**

28 of the 30 companies benchmarked told us that they work with sustainability certification programmes. Nonetheless, certification and sustainability activities are not clear due to a lack of public disclosure.



# 100+ Alliance



The number of Allies continues to grow, find out the latest online.





# Measuring and ranking the world's 30 most influential seafood companies

Join our movement to drive sustainable performance, transparency and impact of the seafood industry



P10: ESG投資家の評価

Sustainable Seafood Index のインパクト

The Impact of Sustainable Seafood Index

---

株式会社 大和総研 調査本部 研究主幹

河口真理子

Kawaguchi, Mariko

Senior Principal, Daiwa Institute of Research

Nov 7<sup>th</sup>, 2019

## 1 ギャップを埋める: 海(水産業) vs 才力(資本市場、消費者)

- 水産業に対する認識 : 持続可能性と水産業を結びつける発想が乏しい。Vs サプライチェーンがグローバルに広がり、環境・人権問題が発生。しかも陸上の活動に比べて透明性が低い。
- 世界における日本の水産業の位置 (30社中、日本企業が6社)

## 1.Bridging the Gap: Ocean(Seafood industry) vs Land (Consumers, Financials)

- Recognition of Seafood Industry: Few connects seafood with sustainability vs Seafood has long global supply chains, causing environmental and social issues.
- The high exposure of Japanese companies within the industry(6 out of 30).

(出所) 外務省「我々の世界を変革する:持続可能な開発のための2030アジェンダ」 仮訳  
[http://www.kantei.go.jp/jp/singi/sdgs/entakukaigi\\_dai1/siryou2-2.pdf](http://www.kantei.go.jp/jp/singi/sdgs/entakukaigi_dai1/siryou2-2.pdf)

## 2 ステークホルダの行動変容を促す: Influencing stakeholders

### 日本の消費者

- 魚好きな日本人: 水産資源の持続可能性の社会的認識: きわめて低かった。
- SDGsへの関心の高まりで、持続可能性全般についての関心増 × 水産業の現状についての情報増 = 社会全体の危機感増加、特に投資家は個人としても反応。

### Japanese Consumers

- Japanese consumers love seafood but had little knowledge about seafood sustainability
- SDGs triggered sustainability consciousness × Increased information about seafood industry =
- Social awareness toward seafood crisis rises as well as individuals including investors

### 投資家

- ESG投資への関心が急拡大。E(環境)、S(社会)、G(ガバナンス)を投資判断材料として考慮する投資家が増加。
- 2018年の世界市場は3300兆円(30.7兆ドル)、2年で34%拡大。 日本市場は 230兆円(2.2兆ドル)で、2016年から4.1倍に。
- 市場拡大に伴い、考慮するESGの個別テーマが増加。Eのテーマは脱炭素につづき自然資本(生物多様性)にも焦点が。
- 人間の生存には、自然(生物多様性)が生み出す生物や動物(生態系サービス)が不可欠。自然=資本、利子=生態系サービス。資本の健全性をチェック維持することは、投資家として当たり前。水産資源は、魚好き日本人に重要な自然資本。

### Investors

- Growing ESG Investment Market :More investors consider environment, social and governance issues in their investment process.
- Global ESG investment market in 2018 reached \3300tril(US\$30.7tril) up34% from 2016
- vs Japanese market \ 232tril(US\$2.2tril)rose 4.1time since 2016.
- As market grows, investors are now seeking various ESG issues. Regarding environmental issues, natural capital is now gaining more attention next to decarbonization.
- For human kind to survive, off springs(ecosystem service) from the nature (ecosystem, biodiversity)are essential. Nature= capital, Off springs = interest rates
- For investors, checking soundness of capital is necessary condition.
- Seafood is the crucial natural capital for Japanese.
- vs



### 低い結果： 最高でも2.7(5点満点)

- SDGsのゴール達成にむけて、持続可能な水産業にむけての早急の大改革が必要。
- 金融と消費者の理解と協力が必要。そのために彼らを巻き込むエンゲージメントが大事

### Very low result. Highest score is only 2.7 out of 5

- To achieve SDGs goals, rapid and drastic development of sustainable seafood practice is urgent necessity
- Stakeholder involvement is essential and engaging financials and consumers will be important

地球の直径: 約1万3,000km

Earth's diameter: 13000 km



地球上の総水量: 13億8000万km<sup>3</sup>

直径にすると約1,400km

Total water : 1.38bil km<sup>3</sup>

Diameter: 1400km



地球上の淡水: 3,600万km<sup>3</sup>

直径にすると約400km

Fresh water: 36mil km<sup>3</sup>

Diameter: 400km



地球上の飲料水: 18万km<sup>3</sup>

直径にすると約70km

Drinking water: 0.18bil km<sup>3</sup>

Diameter: 70km



(出所) 山本良一編『みずものがたり』ダイヤモンド社(2008年) pp.18-20 より大和総研作成

御清聴ありがとうございました

本資料は投資勧誘を意図して提供するものではありません。

本資料記載の情報は信頼できると考えられる情報源から作成しておりますが、その正確性、完全性を保証するものではありません。また、記載された意見や予測等は作成時点のものであり今後予告なく変更されることがあります。

(株)大和総研の親会社である(株)大和総研ホールディングスと大和証券(株)は、(株)大和証券グループ本社を親会社とする大和証券グループの会社です。

内容に関する一切の権利は(株)大和総研にあります。無断での複製・転載・転送等をご遠慮ください。