# STAKEHOLDERS IN THE SEAFOOD SECTOR

## PRIMEFISH SUMMER SCHOOL, BREMERHAVEN, 6 AUGUST 2018

**Rosa Chapela, CETMAR,**

# Title

## Content

- Stakeholders in seafood value chain
- PrimeFish's Industrial reference Group
- Introduction to participatory approach
- PrimeFish strategy to engage stakeholders

Perishable
Health issues
Depending on sea
conditions or
producers
Supply

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**OMEGA-3**

Good For:

www.allaboutdryeye.com
@allaboutdryeye
Facebook.com/allaboutdryeye

ALL ABOUT DRY EYE

Designed by @ateyrace

**Found In:**
grams of omega-3 per 3oz serving of popular fish

Sardines 1.3-2g
Salmon 1.1-1.9g
Swordfish 0.97g
Tilefish 0.90g
Shark 0.83g
Halibut 0.60-1.12g
Flounder 0.48g

**Helps you fight:**
Cancer Cardiovascular
Depression Alzheimer's
Parkinson's Psoriasis
Dry Eye Disease Arthritis

**Pregnancy Benefits:**
Neurological and early visual development
Reduces risk of allergies
Prevents pre-term labor and delivery
Increases birth weight

Only 1 in 3 Americans include it in their daily food intake
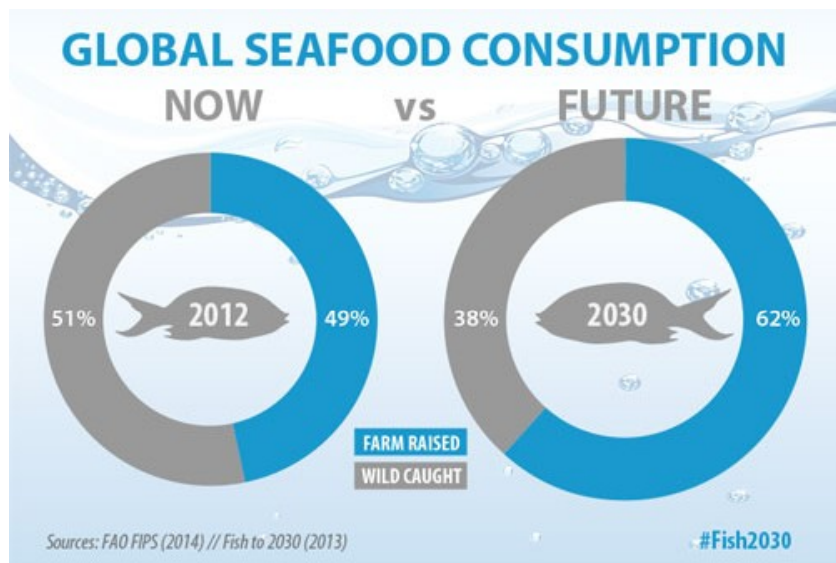
**Prevents and treats Dry Eye:**
A higher dietary intake of Omega 3's is associated with a decrease incidence of Dry Eye Disease in women*

*Miljanovic B, Trivedi K, Dana M, Gilbard J, Buring J, Schaumberg D (2005). "Relation between dietary n-3 and n-6 fatty acids and clinically diagnosed dry eye syndrome in women".

GLOBAL SEAFOOD CONSUMPTION

NOW vs FUTURE

51% 2012 49%

38% 2030 62%

FARM RAISED
WILD CAUGHT

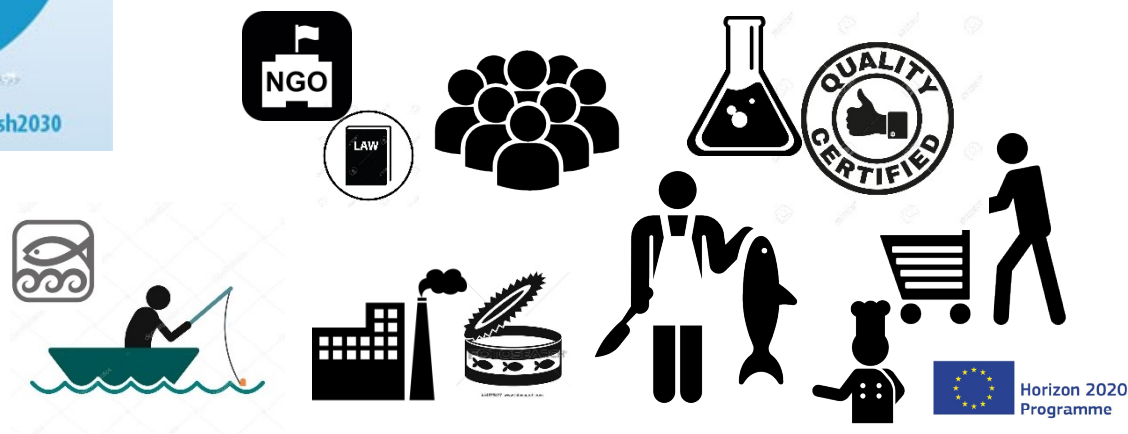Sources: FAO FIPS (2014) // Fish to 2030 (2013)

#Fish2030

©wikipedia
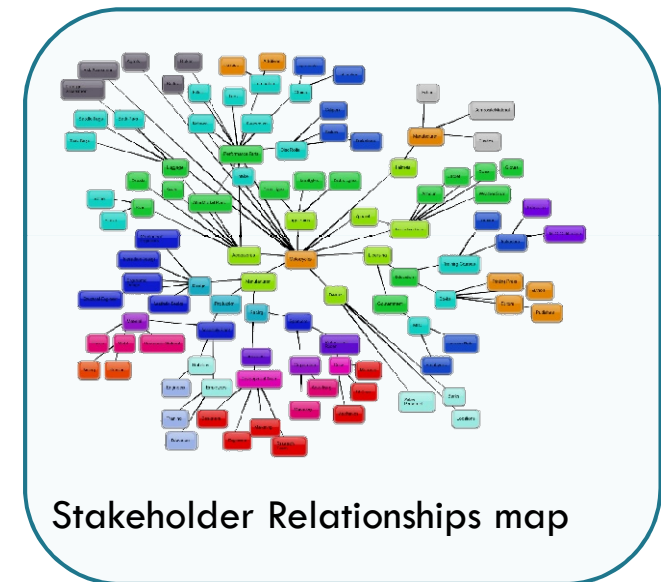
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# Setting the scene

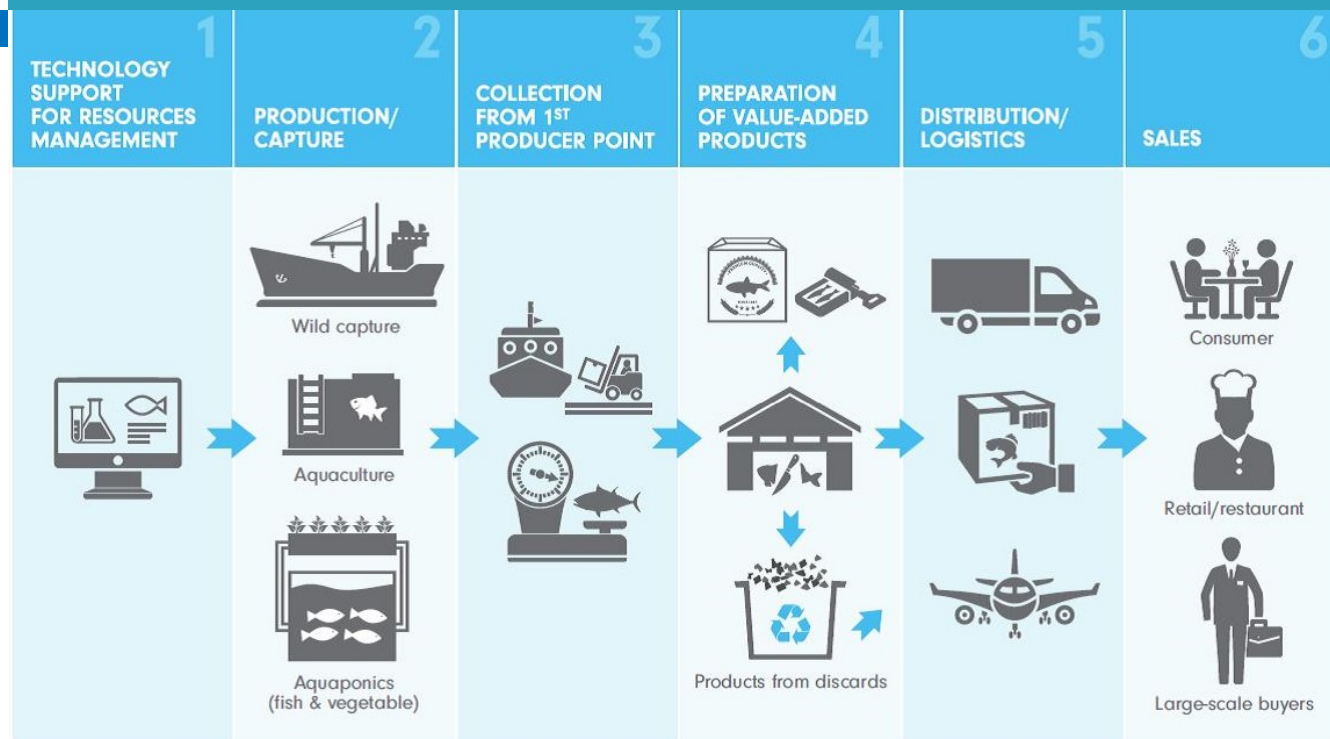Everybody uses the word **stakeholders**, but what does it mean?

Generally, a person with an interest or concern in something

For PrimeFish, any group, association or individual who uses, depends, is affected by, or able to affect Seafood at an European context.



Stakeholder Relationships map

Governance: policy makers, public authorities

NGOs

| 1 TECHNOLOGY SUPPORT FOR RESOURCES MANAGEMENT | 2 PRODUCTION/ CAPTURE | 3 COLLECTION FROM 1ST PRODUCER POINT | 4 PREPARATION OF VALUE-ADDED PRODUCTS | 5 DISTRIBUTION/ LOGISTICS | 6 SALES |

Wild capture

Aquaculture

Aquaponics (fish & vegetable)

Products from discards

Consumer

Retail/restaurant

Large-scale buyers

Manta Consulting Inc., 2013

Scientist, general society

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# Main stakeholders in PrimeFish project

In particular:

- Fishing sector
- Aquaculture
- Processor
- Consumers
- Policy-makers
- Environmental NGOs….

BUT ALSO the scientist are stakeholders.

SPECIAL ATTENTION TO THE INDUSTRY REFERENCE GROUP

Seafood industry is driven by consumers choices and decisions

Many factors that help such decisions:

- Eco-labeling, accreditation schemes
- Government/fishing policy/health policy
- Production/harvesting practices
- Discards and food waste
- Food security
- Retail strategies….etc.
- Even media….

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SFP: Walmart agrees to publicize seafood sourcing data; Nueva Pescanova strengthens sustainability ties

By Madelyn Kearns
November 13, 2017

Walmart has joined the Ocean Disclosure Project (OCP), pledging to reveal more details regarding the way it sources seafood via a public portal on the project's website, the Sustainable Fisheries Partnership (SFP) announced on 8 November.

The data to be hosted on the OCP portal could include the locations where Walmart sources its wild-caught seafood, as well as the gear types used to acquire that catch. Fisheries management information, environmental impacts, certifications, and fishery improvement project data could also be featured on Walmart's OCP public profile page, said SFP.

Walmart, which is considered to be the world's third-largest employer by number of employees (2.1 million), is excited to take part in the project, according to Laura Phillips, Walmart's senior vice president of sustainability.

"We are proud of our efforts to make the seafood we sell more sustainable and joining the Ocean Disclosure Project is one more way we can show our passion and commitment for sustainability and transparency," Phillips said. "ODP provides an





Risk of mad cow disease from farm fish?

Reuters Staff

NEW YORK (Reuters Health) - Three U.S. scientists are concern ab potential of people contracting Creutzfeldt Jakob disease — the hum "mad cow disease" — from eating farmed fish who are fed byproduc from cows.

Mad cow disease, also called bovine spongiform encephalopathy is a disease in cattle, which scientists believe can cause Creutzfeldt Jako humans who eat infected cow parts.

# The Fish Site

Events   Newsletter   Shop

Find species, diseases, articles...   Breeding & genetics   Farm management   Health & welfare   Nutrition   Environment   Post-harvest   Technol

• ENVIRONMENT   • SUSTAINABILITY

## Seafood sustainability schemes gain momentum

the Fish Site Editor
26 April 2017, at 1:00am

The Marine Stewardship Council (MSC) and the Aquaculture Stewardship Council (ASC) hosted their annual Seafood Futures Forum at Seafood Expo Global in Brussels today.

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Spring Genetics

HALAMID®
THE UNIVERSAL DISINFECTANT

MSD Animal Health

Biomin

## WALMART

Great Value?
NET WT 16oz

Walmart, the world's largest retailer, gets failing grades for its destructive fishing practices that kill thousands of marine animals every year, including already vulnerable sharks and sea turtles.

**take action**



FISH MARKET

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MAKE THE BEST SEAFOOD CHOICES FOR YOURSELF AND THE ENVIRONMENT

Seafood WATCH

Monterey Bay Aquarium Seafood Watch®

Seafood Watch recommendations are science-based, peer reviewed, and use ecosystem-based criteria. Here are the Monterey Bay Aquarium Seafood Watch's science-based sustainability rankings:

BEST CHOICE — Abundant, well-managed & caught in environmentally-friendly ways.

GOOD ALTERNATIVE — Some concerns with how caught or health of habitat due to other human impacts.

AVOID — Presently caught in ways that harm other marine life or the environment.

NOT YET RATED — Not yet rated.

AP/ Rick Bowmer

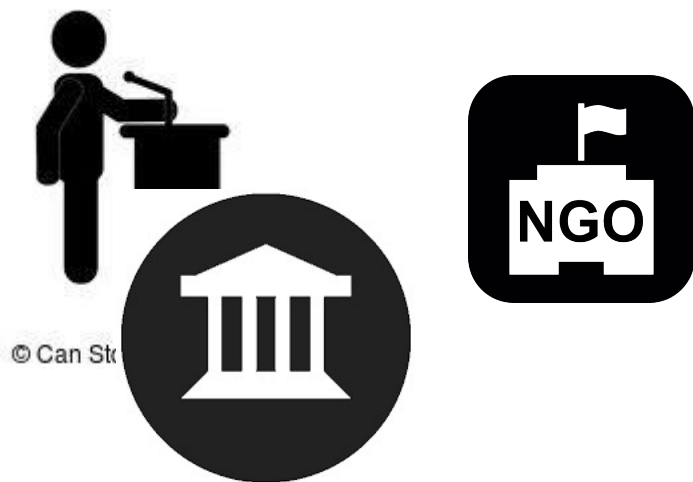Walmart
Save money. Live better.

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# Policy makers and NGOs

NGOs focused on sustainability and environmental issues

Policy makers establish the rules and regulations of the play:
Governance
legislation

Policy makers are focused on both economic and environmental sustainability

NGO

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# Wholesalers & Distributors

- Influence the consumer preferences
- Can promote sustainability by ensuring their products are sourced from sustainable fisheries
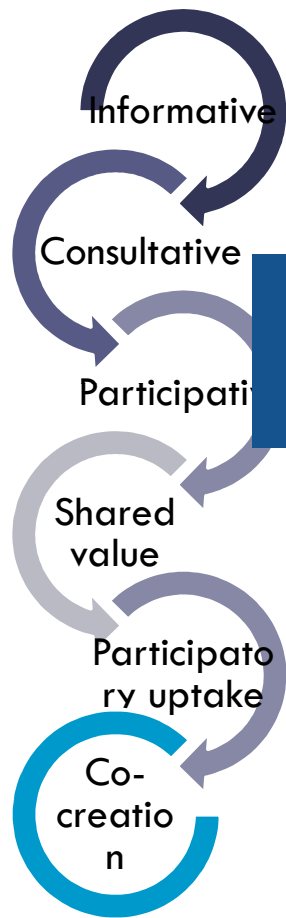
Power of decision
Prices
Purchase concentration

# Retailers

Direct contact with consumers
Increasing power of decision
Distribution channels

SUPERMARKET
NEW
SALE

NGO
LAW
QUALITY CERTIFIED

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# Producers



Less influence power
Increasing influence
(quality
brands, direct
sales, ITCs

GETTING THE PARTICIPATION RIGHT & GET THE RIGHT PARTICIPATION

Informative

Consultative

Participati...

Shared value

Participatory uptake

Co-creation

Scientific validity: well-founded & accurate

Policy impact: useful for action

Socially robust: applicable & acceptable

Wide experience in social innovation

ClimeFish

PrimeFish

MareFrame

FarFish

EcoFishMan

SAF|21

- Participation of stakeholders in fisheries management is a key for instance of the ecosystem approach,
- But what happen with seafood value change or seafood competitiveness?

- Art. 3 CFP: "The CFP shall be guided by the following principles of good governance: …f) appropriate involvement of stakeholders in particular Advisory Councils, at all stages from conception to implementation of measures."

MEMBERS OF THE EXECUTIVE COMMITTEE 2018

| SECTOR | | ORGANISATION |
|---|---|---|
| **Representatives of Value Supply Chain (60%)** | | |
| Primary producers catching sector | 1 | EAPO |
| | 2 | EUROPECHE |
| | 3 | COPA-COGECA |
| | 4 | VisNed |
| | 5 | LIFE |
| Primary producers sector (aquaculture) | 6 | FEAP |
| | 7 | EMPA |
| Processors, traders, supplies and retailers | 8 | AIPCE |
| | 9 | CEP |
| | 10 | EUFISHMEAL |
| | 11 | EUROCOMMERCE |
| | 12 | FRUCOM |
| | 13 | CONXEMAR |
| | 14 | ANFACO-CECOPESCA |
| Workers (trade unions) | 15 | ETF |
| **Other interest group (40%)** | | |
| Environmental or development non-governmental organisations (NGOs)-Consumers organisations-Others | 1 | CFFA |
| | 2 | MSC |
| | 3 | OCEANA |
| | 4 | WWF |
| | 5 | Danish Society for a Living Sea |
| | 6 | EJF |
| | 7 | Good Fish Foundation |
| | 8 | - |
| | 9 | - |
| | 10 | - |
| **TOTAL** | | **25** |

The Market Advisory Council is a stakeholder-led organization that provides the European Commission and EU Member States with recommendations on matters relevant for the EU market of fishery and aquaculture products and within the tasks defined in Article 44 of Regulation (EU) No 1380/2013.

The MAC is composed of representatives of more than 55 members from 11 Member States, representing the whole value chain from both sector organizations and
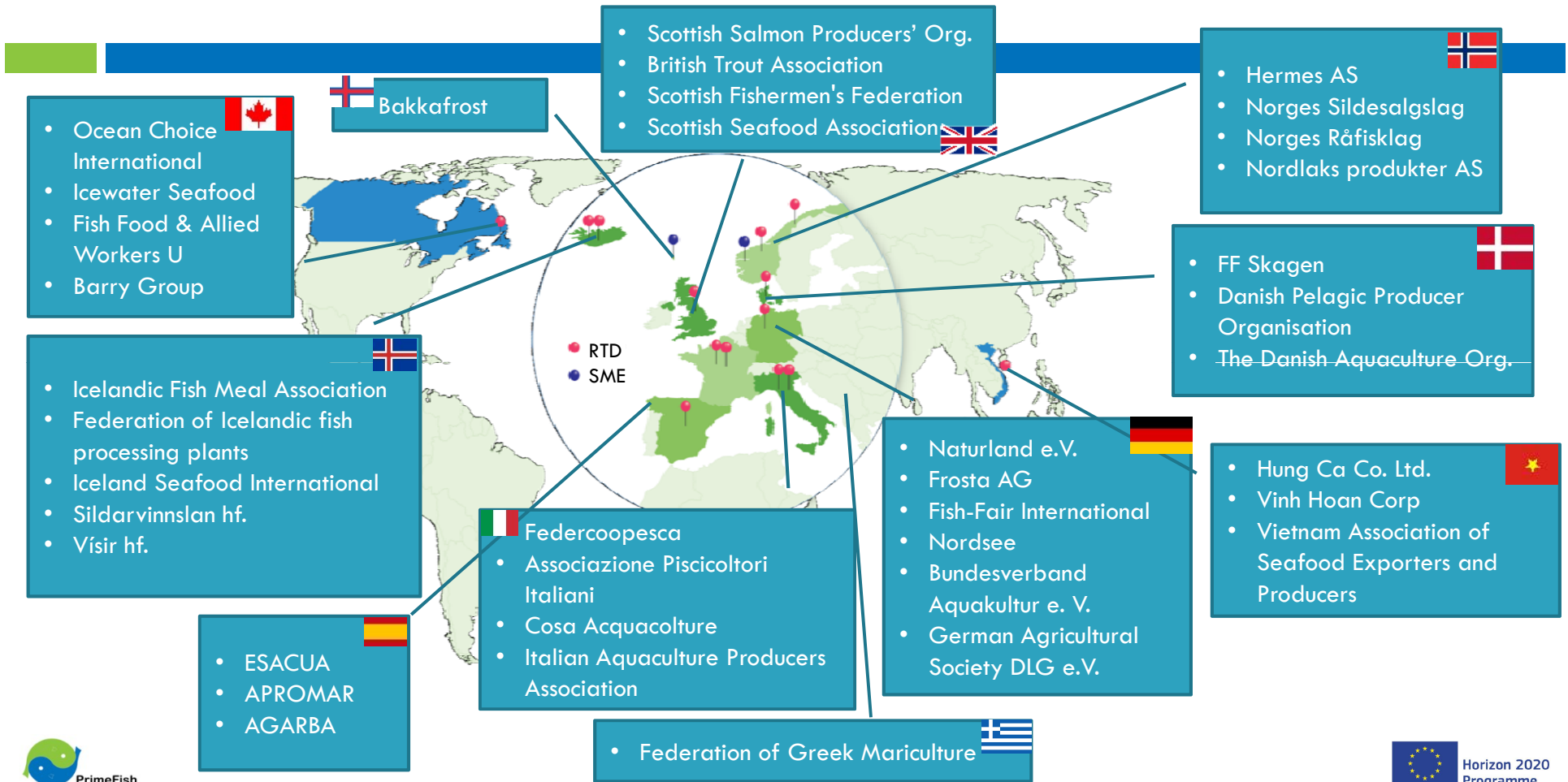
other interest groups.

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# Finding out the stakeholder interest in seafood value chain

- Once you have mapped the interests of your stakeholders you need to prioritise them in order of importance.

- This step will drive your stakeholder engagement strategy. Different methodologies suggest different ways of analysing stakeholders.

- A common approach is to map the interest and power or influence of each stakeholder group on a quadrant (Bryson 1995).
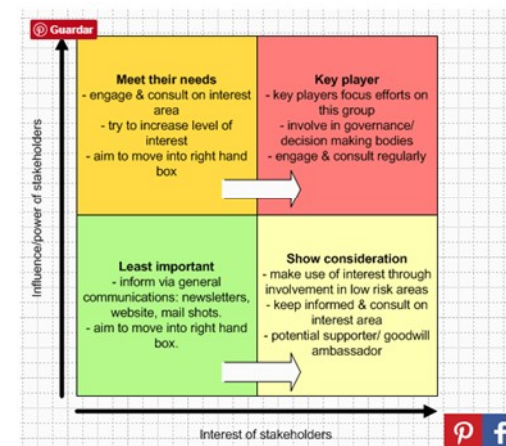
Source: Stakeholder Analysis | BEST way to analyse
Stakeholders https://www.stakeholdermap.com/stakeholder-analysis.html



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# PrimeFish stakeholders

- Scottish Salmon Producers' Org.
- British Trout Association
- Scottish Fishermen's Federation
- Scottish Seafood Association

Bakkafrost

- Hermes AS
- Norges Sildesalgslag
- Norges Råfisklag
- Nordlaks produkter AS

- Ocean Choice International
- Icewater Seafood
- Fish Food & Allied Workers U
- Barry Group

- FF Skagen
- Danish Pelagic Producer Organisation
- The Danish Aquaculture Org.

- RTD
- SME

- Icelandic Fish Meal Association
- Federation of Icelandic fish processing plants
- Iceland Seafood International
- Sildarvinnslan hf.
- Vísir hf.

- Naturland e.V.
- Frosta AG
- Fish-Fair International
- Nordsee
- Bundesverband Aquakultur e. V.
- German Agricultural Society DLG e.V.

- Hung Ca Co. Ltd.
- Vinh Hoan Corp
- Vietnam Association of Seafood Exporters and Producers

Federcoopesca
- Associazione Piscicoltori Italiani
- Cosa Acquacolture
- Italian Aquaculture Producers Association

- ESACUA
- APROMAR
- AGARBA

- Federation of Greek Mariculture

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☐ **Measures to identify and map end-users and relevant stakeholders:**

- ☐ **Surveys**

- ☐ **Informal conversations**

- ☐ **Structured face-to-face stakeholder interactions (e.g. co-creation)**

- ☐ **Grouping profiles (e.g. Industry Reference Group)**

- ☐ **Remote interactions (e.g. Skype)**

- ☐ **On line audience analysis**

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# For instance:

Internal reporting in parallel to WPs activities

| Date | Who person & organization | Brief summary | Needs & interests identified (and/or concerns) | Potential user of | Liaison to WP / Tasks |
|------|---------------------------|---------------|-----------------------------------------------|-------------------|-----------------------|
| *Bi-monthly request* | | | Needs: identified problems or weaknesses which are affecting their daily activity (e.g. competitiveness)<br><br>Interest: aspects of the project which could overcome or address their needs (e.g. improves picture of value chain) | ❑ PrimeDSS<br>❑ PrimeDSF | ❑ WP2<br>❑ T2.1<br>❑ T2.2<br>❑ WP3<br>❑ T3.1<br>❑ WP4<br>❑ WP5<br>❑ WP6<br>… |

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# Survey + qualitative weighting

| | | Saecdata | FAO | Regione Sici| Rongcheng J | Latvian Natic | Fi |
|---|---|---|---|---|---|---|---|
| **Interest & relevance (Stakeholder profile)** | Do you use intelligence market tools? | 1 | 5 | 1 | 1 | 1 | |
| | Is the company a leader firm or Market represe | 1 | 1 | 1 | 1 | 1 | |
| | Is the company spezilized in a specific(s) marke | 1 | 1 | 1 | 4 | 1 | |
| | The attitude regarding the project is positive | 3 | 5 | 1 | 3 | 4 | |
| | *Assessment of the interviewer* | 2 | 4 | 1 | 3 | 3 | |
| | | 3 | 12 | 1 | 6,75 | 5,25 | |
| **Scope/Influence (PrimeDSS / PrimeDSF relation** | PrimeFish product/specie/market | 1 | 36 | 1 | 1 | 1 | |
| | Competing PrimeFish product/specie/market | 1 | 4 | | | | |
| | Their decision affects to PrimeFish directly | 3 | 4 | | | | |
| | Influence of PrimeDSS/PrimeDSF for the stakeh | 3 | 5 | | | | |
| | *Assessment of the interviewer* | 3 | 3 | | | | |
| | | 6 | 36,75 | | | | |
| Interest on PrimeD! | Success & failure stories | 2 | 5 | | | | |
| | Competitive position analyser | 2 | 5 | | | | |
| | Value Chain analyser | 2 | 5 | 0 | 5 | 5 | |
| | Growth risk analyser | 2 | 5 | 0 | 5 | 5 | |
| | Price development prediction | 2 | 5 | 0 | 5 | 5 | |
| | Prioduct Success Check | 1 | 5 | 0 | 5 | 5 | |

SCALE
From 0 (no relevant)
to 5
(major interest/relevance)

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STAKEHOLDERS CONSULTATION

Seminars
Workshops
Conferences
Demostrations
Show cases
Trade Fairs

# End-users and Stakeholder Classification



Identification of KEY Stakeholder
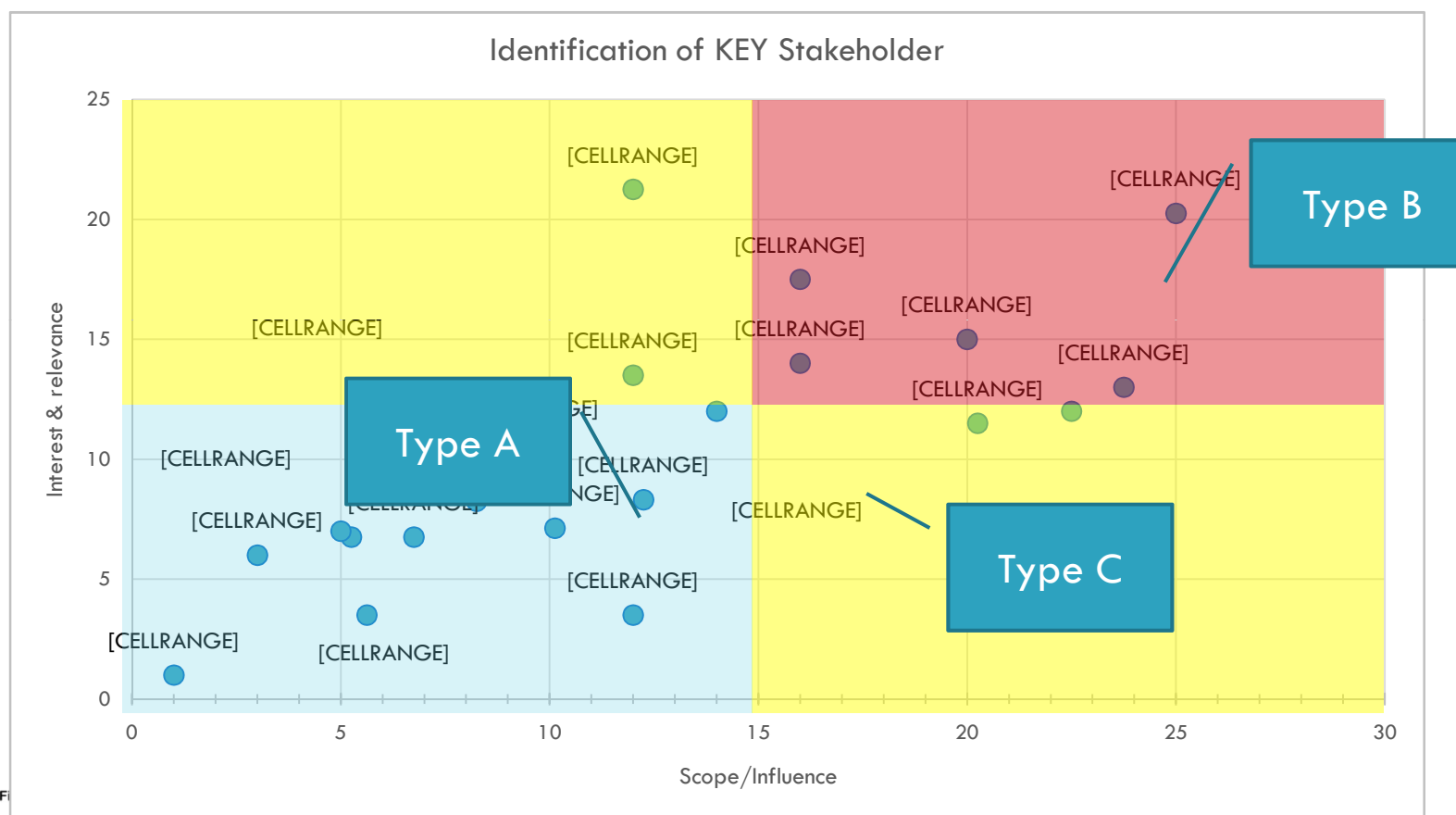
# Identification of adequate promotional content



Interest on PrimeDSS

Categories: Success & failure stories, Competitive position analyser, Value Chain analyser, Growth risk analyser, Price development prediction, Prioduct Success Check

Legend: Isidro de la Cal, Pescanova, Culmarex, Marine Harvest, EU Commission

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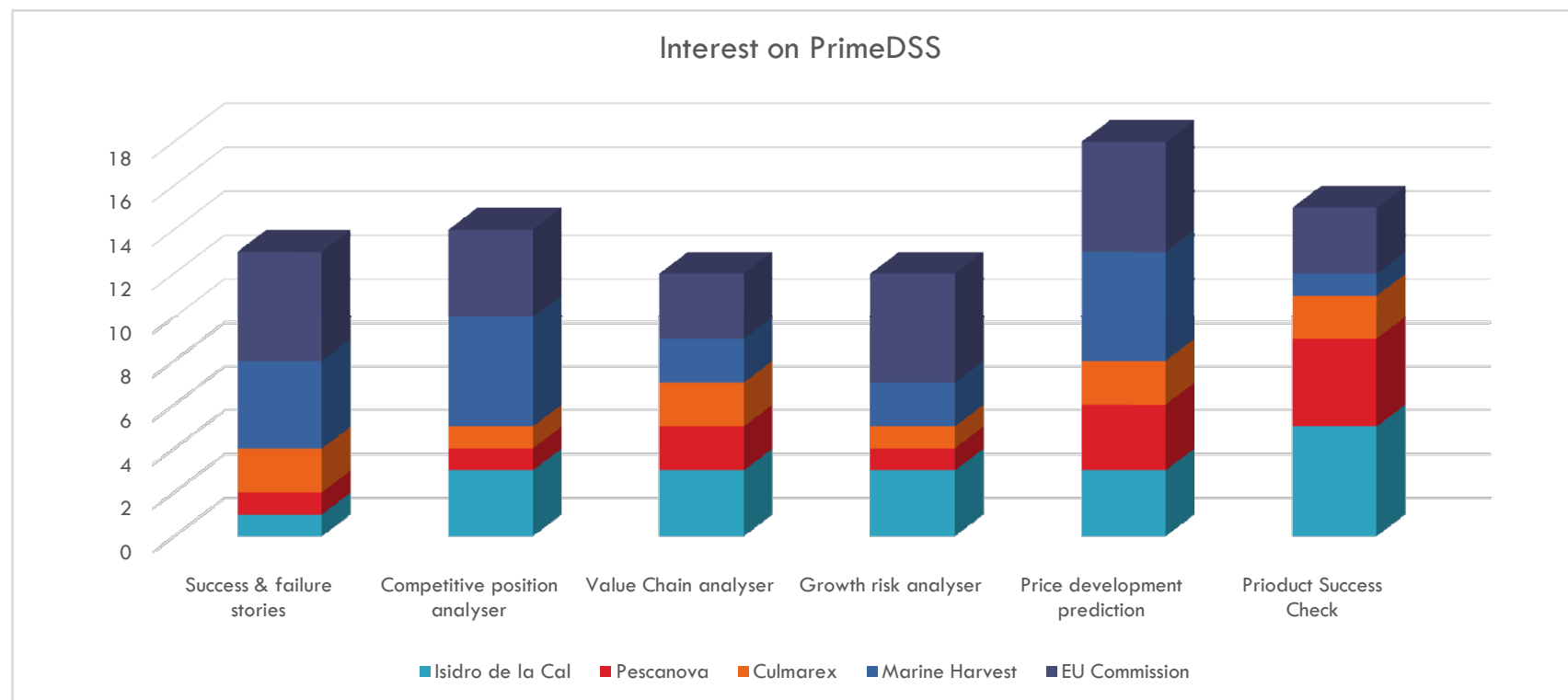
- ❑ Printed material

- ❑ Events

- ❑ Social media & on-line channels

- ❑ Training

# Printed (or printable) material

# For instance

- ☐ **Tailored for the different groups of end-users resulted from the mapping of publics (content, timing, language ...)**



Industrial actors
Policy-makers
Scientists
Societal actors

Type A
Type B
Type C

Reports
Scientific pub.
Fact-sheets
...

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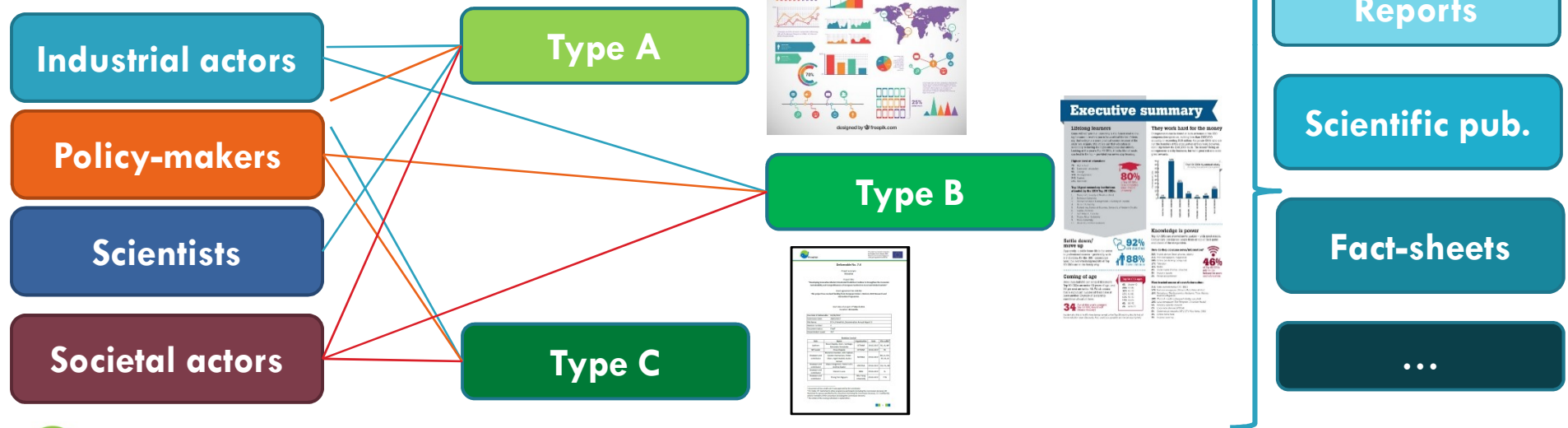
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**Fisheries Socioeconomic Department, CETMAR**

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