

XIII Distribution and the Food Industry

Explanation

This part contains statistics on the marketing of agricultural, forestry and fishery products, mainly surveyed by the Statistics Department of the Ministry of Agriculture, Forestry and Fisheries (hereafter MAFF).

Brief explanations for respective statistics are as follows:

1 Trends of the food industry

This part contains the results of the "Status Survey on Recycling of Circulating Food Resources" conducted by the Statistics Department of MAFF, the "Input-Output Table for Agriculture, Forestry and Fisheries, and Related Industries" conducted by the Information and Policy Evaluation Division, Minister's Secretariat of MAFF, the "Overview of Capital Investment Trends by Companies in Food-Related Industries" conducted by the General Food Policy Bureau of MAFF, the "Census of Manufacturers" and the "Census of Commerce" conducted by the Research and Statistics Department, Economic and Industrial Policy Bureau, Ministry of Economy, Trade and Industry, and the "Estimated Scale of Food Service Markets" conducted by the Foodservice Industry Research Institute.

(1) Structure of the food industry

The data for food manufacturers, wholesalers and retailers are from the "Census of Manufacturers" and the "Census of Commerce" both conducted by the Ministry of Economy, Trade and Industry.

Data about the food service industry is from the "Economic Census for Business Frame" conducted by the Statistics Bureau, Ministry of Internal Affairs and Communications.

Regarding capital investment in the food manufacturing industry and the food service industry, the results from a survey of capital investment by enterprises engaged in the aforementioned industries with actual figures for 2009, estimated figures for 2010 and planned figures for 2011 on a per-sector basis are listed.

(2) Recycling of circulating food resources

Of the enterprises subject of the "2009 Economic Census for Business Frame (as of July 1, 2009)" which fall under the food industry (food manufacturing, food wholesale, food retail and food services), the enterprises other than those that belong to corporations (with 100 tons and more of annual food wastes generated) that submitted regular reports based on Article 9, Paragraph 1 of the Act Concerning Recycling of Circulating Food Resources (Act No. 116 of 2000, hereafter Food Recycling Act) were surveyed. This section contains the estimated results derived from the results of the statistical survey on annual amount of food wastes generated, recycled amount, etc. by sector and the results of the regular reports based on the act.

The figures for fiscal 2008 show the estimated results derived from the compiled results of the statistical survey excluding the data of enterprises with 100 tons and more of annual food wastes generated and the results of the regular reports.

The definitions of major terms are as follows:

a Food waste

"Food waste" refers to the following:

- (a) Waste from products served as food or from products not served as food and disposed (leftovers, product scraps, etc.).
- (b) Food products obtained secondarily in the course of processing or cooking that are not edible (vegetable peelings, fish bones, etc.).

b Circulating food resources

"Circulating food resources" refers to the food waste recycled as fertilizer or ingredients for animal feed.

c Generation control

"Generation control" refers to the control of food waste before being generated by such measures as procuring goods in accordance with manufacturing (sales) volume in the procurement process, producing of small lots in the production/cooking process, improving packing and wrapping methods in the transport and storage process,

and discounting products that are approaching their expiration dates in the sales process.

d Reduced amount

"Waste reduction" refers to the reduction of the discharged volume of food waste generated to outside the workplace by the enterprise through dehydration, drying, fermentation and carbonization.

e Recycled amount

"Recycling" refers to the amount of food waste used as circulating food resources, by an enterprise itself or subcontracted to an outside enterprise, for ingredients for fertilizer, animal feed, etc., or the amount of those transferred for said uses.

(a) For fertilizers

"For fertilizers" refers to the recycled amount shipped for processing into fertilizers.

(b) For feeds

"For feeds" refers to the recycled amount shipped for processing into feeds.

(c) For methane

"For methane" refers to the recycled amount shipped for using gas produced by fermented garbage as energy.

(d) For oils and fats, and oil and fat products

"For oils and fats, and oil and fat products" refers to the recycled amount shipped for processing into soaps, detergents, BDF ("biodiesel fuels using for putting automobiles, etc. in motion), etc.

(e) For carbonized fuels and reducing agents

"For carbonized fuels and reducing agents" refers to the recycled amount shipped for processing into alternative fuels such as coal and coke.

(f) For ethanol

"For ethanol" refers to the recycled amount shipped for extracting ethanol by fermentation, distillation, etc.

(g) Others

"Others" refers to the recycled amount shipped for other than (a) to (f) above, and unknown cases.

f Amount of heat recovery

"Amount of heat recovery" refers to the use of heat or of heat converted into electricity as generated by the incineration of circulating food resources based on Article 2, Paragraph 6 of the Food Recycling Act. It includes heat recovery by subcontracting to an outside enterprise, other than that using an enterprise-owned incinerator.

Under the Food Recycling Act, if the criteria in (a) and (b) below are met, heat recovery can be applied as one form of recycling.

(a) Standard 1: Recycling is not possible due to the location of recycling facility or due to issues in accepting materials (Must meet one or the other conditions)

(i) No recycling facility exists within 75 km of the enterprise.

(ii) A recycling facility exists within 75 km of the enterprise, but if said facility were to accept the circulating food resources from the enterprise, it would exceed processing capacity, so the enterprise cannot send said resources to be recycled.

(iii) A recycling facility exists within 75 km of the enterprise, but due to the type and nature of the circulating food resources (e.g., highly acidic or possessing high concentrations of salt, etc.), the facility cannot accept it, so the enterprise cannot send said resources to be recycled.

(b) Standard 2: Use of energy equivalent to or exceeding the efficiency of methanation

This refers to a volume of heat or converted electricity that is equal to or exceeds 160 megajoules/ton (or 28,000 or more megajoules for waste food oil or equivalent).

(3) Trends of imputed price and imputed ratio of food and drink expenses by sector from final use

The figures are from the "Input-Output Table for Agriculture, Forestry and Fisheries, and Related Industries" created by the Information and Policy Evaluation Division, Minister's Secretariat of MAFF.

2 Quantity of Inspected Domestic Rice, Wheat and Barley

This part contains the data regarding the inspected quantity of domestic rice, wheat and barley obtained from the materials and survey results prepared by the Agricultural Production Bureau of MAFF.

3 Marketing quantity and price of vegetables, fruits and flowers

Data are prepared from the results of the "Statistical Survey on Crops", the "Survey on Vegetables and Fruits Wholesale Markets", the "Survey on Food Prices at Various Stages of Distribution" and the "Survey on Trends of Price and Sales of Perishable Food" as regularly conducted by the Statistics Department of MAFF.

(1) Shipment quantity by major commodities

Shipment quantity of 69 major commodities (vegetables; 40, fruits; 14, flowers; 15) in one year is compiled. As for the time reference of annual production of vegetables, see the explanation on P158.) Shipment quantity of fruits is compiled for each year, in principle, but when a shipment term lasts over the year end, the quantity is compiled according to the commodities' main harvest season. Shipment quantities of flowers are compiled for each calendar year (starting January and ending December of the same year).

Shipment quantity of vegetables refer to quantity sold for fresh food or processing, but exclude quantity consumed by producers and sold for seed and feed.

Shipment quantity of flowers refer to quantity sold for ornaments, but exclude that which is sold for food.

National total figures for shipments of the following vegetables (excluding those in 2007 and 2010) are estimated:

"Japanese radishes", "carrots", "potatoes", "taros", "Chinese cabbages", "cabbages", "spinaches", "lettuce", "welsh onions", "onions", "cucumbers", "eggplants", "tomatoes" and "sweet peppers"

National total figures for shipments of the following vegetables (excluding those in 2007 and 2010) are estimated:

"Turnips", "edible burdocks", "lotus root", "yams", "komatsuna", "qing-geng-cai", "butterbur", "honestwort", "shungiku", "Potherb mustard", "celery", "asparagus", "cauliflower", "broccoli", "chinese leeks", "garlic", "pumpkins and squashes", "sweet corns, green", "kidney beans, green pod", "peas, green pod", "broad beans", "soybeans, green", "ginger", "strawberries", "melons" and "watermelons"

National total figures for shipments of fruits other than pineapples (excluding those in 2009) are also estimated.

Shipment of vegetables and fruits in 2011 exclude those with no harvest due to the impact of the TEPCO Fukushima Dai-ichi Nuclear Power Plant accident and those that were harvested but the shipments of which were restricted or voluntarily restrained in the areas affected by the accident.

(2) Wholesale quantity, value and prices by major commodities

Wholesale quantity, value and prices of 65 major fruits and vegetables (vegetables; 31, fruits; 34) sold at all vegetable and fruit city markets in large and medium size cities nationwide are shown.

(3) Redirected quantity of vegetables and fruits

Data on the redirected quantity of vegetables and fruits from wholesale markets in large and medium major cities nationwide to other wholesale markets by intermediate wholesalers, etc. (82 commodities - vegetables; 48, fruits; 34) are shown.

(4) Wholesale quantity, value and price of domestic and imported vegetables

Data shown here compile the wholesale quantity, price, etc. of domestic and imported vegetables (vegetables; 49) which were dealt in wholesale markets in large and medium major cities nationwide.

(5) Marketing costs of vegetables and fruits

Data shown here are the results of the case survey on marketing costs at each distribution stage of vegetables and fruits, covering collectors/shippers in prefectures with large shipments to the superior central wholesale markets with wholesale quantity of vegetables and fruits of over 60 percent of national total figures (central wholesale markets located in Sapporo, Sendai, Tokyo, Yokohama, Nagoya, Gifu, Kyoto, Osaka and Fukuoka, hereafter "surveyed central wholesale markets"), middle agents located in the surveyed central wholesale markets, and retailers who purchase vegetables and fruits from such middle agents.

(6) Number of certifications of operators of organic agricultural products and grading status

This section shows the number of certified operators (production process managers, re-packers, and importers)

certified by certification organizations registered by the Minister of Agriculture, Forestry and Fisheries under the JAS Act (Japanese Agricultural Standards Act) . Also shown here is the actual quantity of organic agricultural products and organic processed foods, as graded or labeled for grading by such certified operators, in fiscal 2011, all compiled by the Food Safety and Consumer Affairs Bureau of MAFF.

- (7) Average price, sales quantity, and number of shops of domestic standard products, organic products, special products and imported products by commodity

The survey was conducted with the participation of 130 subjects, i.e. those self-service enterprises with POS systems installed, including affiliates of department stores/supermarkets that handle fresh produce and various food retailers (with 10 or more employees) and vegetable and fruit retailers (with 5 or more employees) in 15 cities in Japan (Sapporo, Sendai, Saitama, Chiba, Tokyo wards region, Yokohama, Kawasaki, Shizuoka, Nagoya, Kyoto, Osaka, Kobe, Hiroshima, Fukuoka and Kitakyushu). The surveyed average prices and sales quantities-per-shop of 21 fresh vegetables by domestic products (standard products, organic products and special products) and imported products by commodity are shown here.

4 Marketing quantity and price of meat, hen eggs and poultry

Statistics were prepared from the results of the "Statistical Survey on Slaughterhouse", the "Statistical Survey on Meat Marketing", the "Statistical Survey on Hen Eggs Marketing" and the "Statistical Survey on Poultry Marketing" as regularly conducted by the Statistics Department of MAFF.

- (1) Number of slaughtered animals and weight of dressed carcass by prefectures

The survey on meat is conducted at slaughterhouses, in accordance with the Slaughterhouse Act (Act No. 114 of 1953).

Number of slaughtered animals is the number of slaughtered animals marketed for meat, that is also the number of animals transacted in slaughterhouses in the prefecture.

Statistics on production of dressed carcasses are prepared by computing the annual total of monthly output of dressed carcass weight by prefectures, which are estimated by multiplying the dressed carcass weight per head by the number of dressed carcasses transacted by months and by prefectures.

- (2) Number of animals, dressed carcasses and prices transacted by meat wholesale markets

Number of animals, weight and price of dressed carcasses transacted in 28 markets are shown by kind of livestock.

- (3) Shipments and arrivals of hen eggs

Shipment quantities and arrival quantities of hen eggs are shown.

- (4) Shipment and slaughtered volumes of poultry

Shipment and slaughtered volumes of living broilers and culled chicken (unable to produce eggs) are shown.

5 Marketing quantity and prices of lumber and sawlogs

Statistics are prepared from the results of the "Statistical Survey on Lumber" and the "Statistical Survey on Lumber Production and Marketing" conducted by the Statistics Department of MAFF.

Price of lumber is national average price which was surveyed in prefectures that covered about 80 percent of consuming quantity of logs and dealing quantity of wooden products throughout the whole country by consuming stage and wholesale stage of logs. As for the figures of wholesale of wooden products, they are those in the 10 major prefectures for lumber distribution.

The prices here are calculated by the weighted average price using estimated consumption in 2005 as weight in the prefectures surveyed.

The "Survey on Distribution Structure of Lumber" is conducted every five years. The data shown here are the results of surveys about received quantity of lumber by supplier and shipment quantity of lumber by destination as of December 31, 2011, covering sawmills, plywood and veneer plants, laminated veneer lumber plants, pre-cut plants, laminated lumber mills, lumber auction markets, lumber sales dealers, and wood chipping plants.

6 Marketing quantity and prices of fishery products

Here shows the results of the "Survey on Food Prices at Various Stages of Distribution" and "2008 Census of Fisheries: Survey on Marketing and Processing" as regularly conducted by the Statistics Department of MAFF.

(1) Distribution costs of fishery products

Figures shown here are the results of the case survey on distribution costs at each distribution stage of fishery products, covering wholesalers in producing areas in relevant wholesale markets of the top 10 fishing ports of landings by surveyed item (10 items) (hereafter "surveyed wholesale markets in producing areas") of the wholesale markets in producing areas nationwide, shipping agents in producing areas who mainly purchase fresh fishery products from the surveyed wholesale markets in producing areas and ship them to the superior central wholesale markets with wholesale quantity of fishery products of over 60 percent of national total figures (central wholesale markets in Sapporo, Sendai, Tokyo, Yokohama, Nagoya, Osaka, Kobe and Fukuoka, hereafter "markets in consuming areas"), middle agents located in markets in consuming areas, and retailers who purchase fishery products from such middle agents.

(2) Facilities related to marketing

Figures shown here are the results of the survey on fish markets, wholesalers and purchasers of fishery products that dealt in fishery products mainly engaged in primary-stage trade during the past one year, frozen and cold storage plants that own ice-making, cold storage and refrigerating facilities of over 10 horsepower in major machines and which froze or refrigerated fishery products during the past one year, establishments that purchased fish, shellfish and seaweeds and processed them during the past one year, and fishery processing plants that own plants to process self-produced materials and conducted processing using full-time employees.