

## Analysis of agricultural land use

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### Progress in accumulation of rice fields by the large-scale enterprise layer

The share of rice fields of 5ha or greater (hereinafter, the “rice field share”) among the total rice fields managed by agricultural management entities as a whole has increased from 42.9% in 2015 to 53.1% in 2020 on average in each prefecture, with the accumulation of rice fields by larger enterprises showing steady progress.

Figure 1 shows the share of rice fields by area as of 2020 by regional block and by commercial farm household/organized management entity for managed fields of 5ha or more. Five regions (Tohoku, Hokuriku, North Kanto, Tokai, and North Kyushu) have a rice field share of 5ha or more exceeding 50%, of which four regions (excluding North Kanto) have a high rice field share of 20% or more in the “30ha-or-more” bracket. In all regions, the rice field share of organized management entities exceeds the prefectural average (13.3%). In other words, most areas in which the share of rice fields in the 5ha-or-greater bracket exceeds 50% are in areas where the accumulation of rice fields by large organized management entities of 30ha or more is underway. Furthermore, for Tohoku, Hokuriku, and North Kanto, the total share of rice fields held by farmers in the “5-10ha” and the “10-30 ha” brackets, the majority of which are composed of commercial farm households, exceeds the prefectural average.

However, between Tozan and Shikoku, the share of rice fields in the “5-10ha” bracket is low, and the share of rice fields sold by farmers in the “10-30ha” bracket is also low, at less than 10% in each region of Kinki, San’yo, San’in, and Shikoku. The share of rice fields in the “30ha-or-more” bracket of organized management is also lower than the prefectural average, except in Tokai.



Figure 1. Share of rice fields in the 5ha-and-larger bracket (2020)

Source: Independently compiled from Census of Agriculture and Forestry survey data.

Note: For the “5-10ha” bracket, the share of commercial farm households in the area of managed rice fields was 93.3% as a prefectural average, so commercial farm households and organized management entities are not listed separately.

## Regional differences in trends in rice field accumulation by organized management entities

Trends in rice field accumulation by organized management entities vary by region. Table 1 shows the change in the rice field share of organized management fields among the total managed fields of agricultural management entities from 2010 to 2020, by regional block. Looking at the prefectural averages, the share of organized management entities in the rice field has been increasing annually, from 13.1% in 2010 to 21.8% in 2020. The rice field share of corporate entities also increased from 5.3% to 17.1% over this period, and the share of those “with permanent employees” increased from 2.4% to 7.6%. This trend is evident across all regions, although regional differences are also observed.

Firstly, the regions of Hokuriku, Tozan, Tokai, San'in, and San'yo have consistently shown a higher share of corporate entities and corporate entities “with regular employment” than the prefectural average from 2010 to 2020. In many cases, these areas established community farming organizations early on, and as the number of members decreased and the population aged, they seemingly faced the need to secure labor through incorporation or the introduction of permanent employment.

In contrast, in Tohoku, the rice field share of corporate entities and corporate entities “with regular employment” was below the prefectural average between 2010 and 2020. Additionally, while North Kyushu's share of rice fields owned by organized management entities consistently exceeds the prefectural average, the share of rice fields owned by corporate entities is below it. Moreover, the share of corporate entities “with regular employment” is the second lowest in North Kanto and South Kanto, even as of 2020. Tohoku and North Kyushu are regions where many “branch management” community farming organizations were established from the impact of the policy initiated in 2007, in which individual farmers continue their conventional farming activities within an organization. For this reason, even in 2020, individual farmers tend to maintain their own farming operations within organizations, and these regions seemingly have not yet reached the stage where they face the need to secure labor by incorporating their organizations or introducing regular employment, as in Hokuriku, Tozan, Tokai, San'in, and San'yo.

(Analysis by MAGAKI, Wakaba)

Table 1. Changes in the share of rice field area of organized management entities (Prefectures, 2010–20)

	Organizational management entity total			Of which, corporate entities			Of which, those with regular employees		
	2010	2015	2020	2010	2015	2020	2010	2015	2020
Prefectures	13.1%	17.5%	21.8%	5.3%	10.4%	17.1%	2.4%	5.5%	7.6%
Tohoku	13.4%	17.0%	21.0%	3.4%	7.8%	14.7%	1.6%	4.1%	7.0%
Hokuriku	20.1%	25.5%	32.4%	12.5%	19.4%	28.2%	4.7%	9.8%	11.6%
North Kanto	6.5%	8.5%	10.6%	2.5%	5.5%	8.0%	1.5%	3.0%	3.7%
South Kanto	4.2%	7.7%	10.5%	2.5%	6.1%	9.4%	1.1%	3.2%	4.4%
Tozan	15.4%	18.6%	21.1%	6.8%	15.6%	18.8%	3.8%	8.9%	10.6%
Tokai	13.0%	19.6%	26.9%	8.3%	16.1%	23.8%	5.5%	12.3%	14.1%
Kinki	9.4%	16.1%	21.7%	4.5%	10.3%	17.5%	2.4%	4.3%	7.3%
San'in	14.0%	20.4%	28.7%	8.3%	16.6%	25.4%	2.7%	7.6%	9.4%
San'yo	10.3%	17.2%	22.6%	8.3%	16.0%	21.8%	2.4%	7.1%	8.9%
Shikoku	6.1%	9.7%	12.0%	3.1%	6.1%	11.0%	1.7%	3.1%	5.3%
North Kyushu	21.7%	25.6%	27.5%	3.4%	7.0%	16.4%	1.3%	3.1%	4.9%
South Kyushu	2.8%	5.5%	9.1%	2.3%	4.9%	8.6%	1.4%	3.8%	5.6%

Source: Independently compiled from Census of Agriculture and Forestry survey data.

Note: Numbers in excess of the prefectural average are shaded.