

FY2020 Trends in Fisheries

FY2021 Fisheries Policy

Summary

This document is a report on fisheries trends and the policy implemented during FY2020 in accordance with the provisions of Article 10, paragraph (1) of the Fisheries Basic Act (Act No. 89 of 2001) as well as the fisheries policy to be implemented in FY2021 in accordance with the provisions of paragraph (2) of said Article.

## SUSTAINABLE DEVELOPMENT GOALS



In order to indicate the relationship between fisheries and SDGs, the icon of the goal that has an especially deep connection with fisheries is attached. (Not all related goals.)

# Table of Contents

## FY2020 Trends in Fisheries

### Special Issue: Transform Fisheries into a Growth Industry with the Market-in Approach

Section 1 Situation of Fishery Markets in Japan and Abroad .....	1
(1) Situation of Demand for Fish and Fishery Products in the World .....	1
(2) Conditions of Supply and Demand of Fishery Products in Japan .....	2
(3) Rise in the Awareness of Food Safety and Sustainable Fisheries and Aquaculture in Japan and Abroad .....	3
(4) Problems Involved in Making Market-In Efforts .....	4
Section 2 Market-in Efforts in Fisheries .....	4
(1) Efforts to Grasp Needs .....	4
(2) Providing Fishery Products According to Needs .....	5
(3) Efforts to Identify Latent Needs .....	6
(4) Efforts for Food Safety and Sustainable Fisheries and Aquaculture .....	7
Section 3 Promotion of Market-in Efforts to Transform Fisheries into a Growth Industry .....	8
(1) Need for Further Promotion of Market-in Efforts .....	8
(2) Direction of Market-in Efforts .....	8
(3) Efforts of Government to Promote Market-in Efforts .....	8

### Trends in Japan's Fisheries Since FY2019

#### Chapter 1 Trends in the Supply-Demand and Consumption of Fish and Fishery Products in Japan

(1) Supply-Demand Situation in Fish and Fishery Products .....	9
(2) Status of the Consumption of Fish and Fishery Products .....	9
(3) Approaches to Ensuring Information Provision to Consumers and to Protecting Intellectual Property .....	10
(4) Trends in the Trade of Fish and Fishery Products .....	11

#### Chapter 2 Trends in Japan's Fisheries

(1) Trends in Fisheries and Aquaculture .....	12
(2) Trends in Fishery Management .....	12
(3) Trends in Fishers .....	14
(4) Trends in Fisheries Working Environment .....	14
(5) Development and Utilization of Technologies for Promoting Smart Fisheries .....	15
(6) Trends in Fisheries Cooperatives .....	15
(7) Trends in the Distribution and Processing of Fish and Fishery Products .....	16

## Chapter 3 Trends in Fisheries Resources and the Fishing Ground Environment

(1) Fisheries Resources in the Waters around Japan .....	17
(2) Japan's Fisheries Resource Management .....	17
(3) Approaches to Practical, Effective Resource Management .....	20
(4) Measures to Actively Enhance Fisheries Resources .....	21
(5) Trends in Fishing Ground Environment .....	22
(6) Damage to Fisheries Caused by Wildlife and Mitigation Measures .....	23

## Chapter 4 International Situation Surrounding the Fisheries Industry

(1) Production of World Fisheries and Aquaculture .....	24
(2) International Situation Surrounding the Trade of Fish and Fishery Products .....	25
(3) International Resource Management .....	25
(4) Developments Concerning Whaling .....	27
(5) Overseas Fishery Cooperation .....	27

## Chapter 5 Development of Safe and Dynamic Fishing Communities

(1) Current Status and Role of Fishing Communities .....	28
(2) Development of Safe Fishing Communities Where People Can Live in Peace .....	28
(3) Activation of Fishing Communities .....	29

## Chapter 6 Current State of Reconstruction That Have Passed 10 Years After the Great East Japan Earthquake

(1) Conditions of the Restoration/Reconstruction from the Earthquake Damage in the Fisheries Industry .....	30
(2) Response to the Impact of the Accident at TEPCO's Fukushima Daiichi Nuclear Power Plant .....	32

## Structure of "FY2021 Fisheries Policy"

# Special Issue: Transform Fisheries into a Growth Industry with the Market-in Approach



○For Japanese fisheries to develop in the future while coping with depopulation and lifestyle changes, it is necessary to promote appropriate resource management toward recovery of living aquatic resources, while at the same time working to improve value and expand the market of fish and fishery products also under the impact of the spread of COVID-19. A factor of special importance for promotion of this movement is the approach called “market-in.”

## Market-in and Product-out

### Market-in

- Approach to identify demands and problems of consumers/customers and provide products and services that meet the needs

Example:

Fishermen improve the quality of fisheries products based on the demands of consumers and customers.

### Product-out

- Approach to produce and provide better products/services from the viewpoint of the provider

Example:

Fishermen and fishery processors provide products with a focus on quality based on their idea of quality fish for consumers.

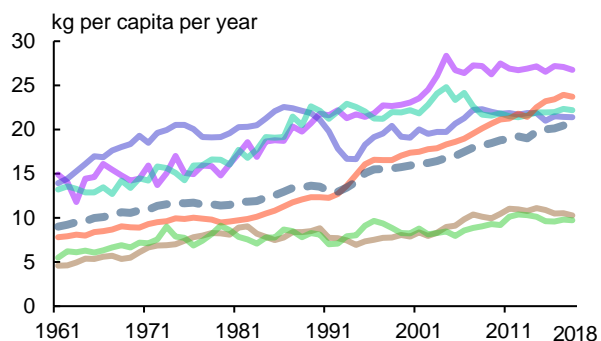
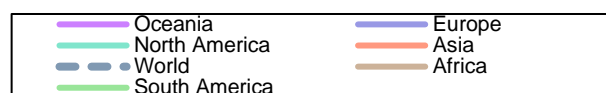
## Section 1 Situation of Fishery Markets in Japan and Abroad

### (1) Situation of Demand for Fish and Fishery Products in the World

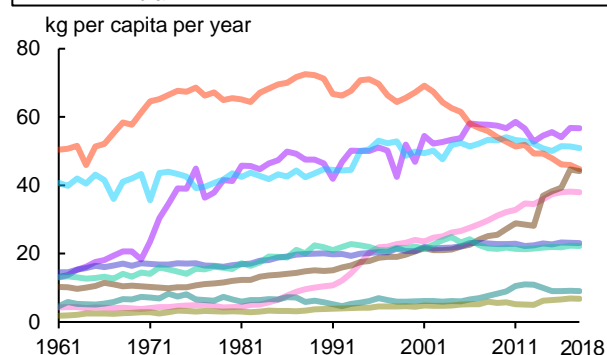
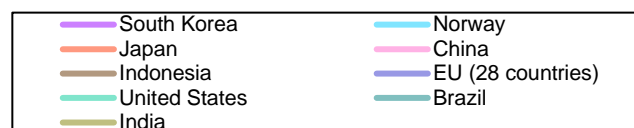
- The world's per capita seafood consumption doubled in five decades, whereas Japan's per capita seafood consumption fell to the level of about 50 years ago.
- Global aquaculture production and fishery product trade have expanded with the increase in demand for fishery products.
- Mobility limitation, etc. to address the spread of the COVID-19 is harsh conditions for Japan's export of fishery products, which had been supported by eating out demand abroad.

### Trends in the World's Annual Per Capita Seafood Consumption (gross food based)

<By region>

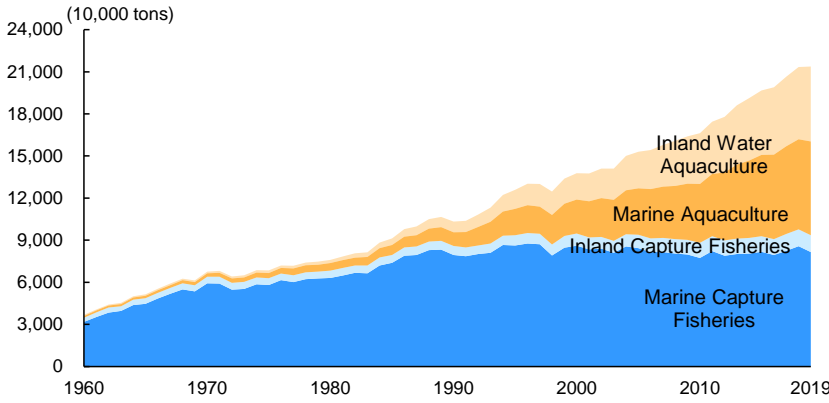


<By country and region>



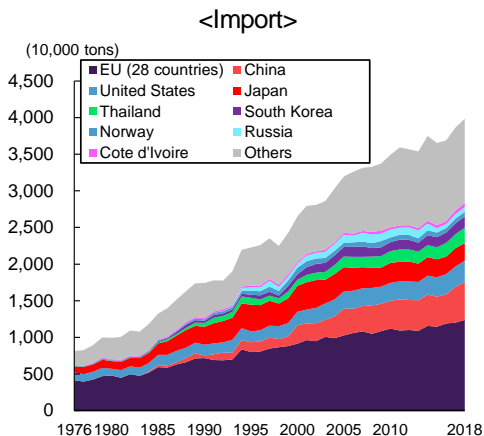
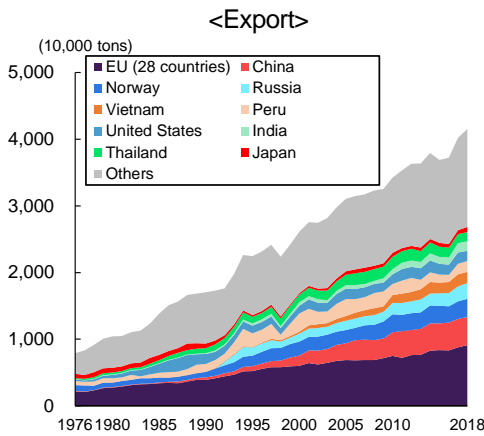
Sources: “FAOSTAT (Food Balance Sheets)” (FAO) and “Food Balance Sheet” (The Ministry of Agriculture, Forestry and Fisheries)  
 Note: “Gross food” refers to the quantity of seafood including disposal volume.

## Trends in the Production of World Fisheries and Aquaculture



Source: Prepared by the Fisheries Agency, based on the Fishstat (Capture Production, Aquaculture Production) (FAO) (without Japan), Fisheries and Aquaculture Production Statistics (the Ministry of Agriculture, Forestry and Fisheries) (Japan)

## Trends in the Trade Volumes of Fish and Fishery Products

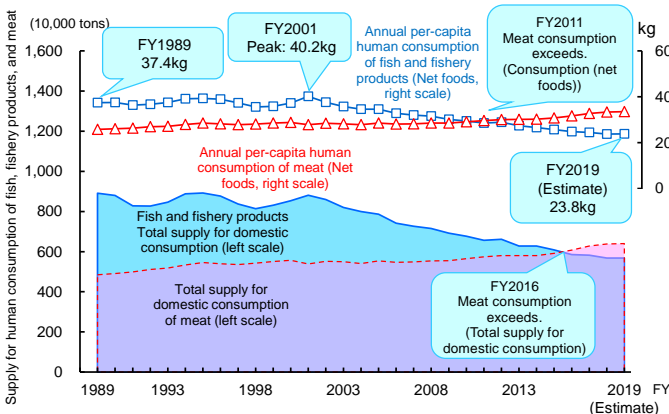


Source: Fishstat (Commodities Production and Trade) (FAO)  
 Note: The volume of EU imports and exports includes the volume of trade within the EU.

## (2) Conditions of Supply and Demand of Fishery Products in Japan

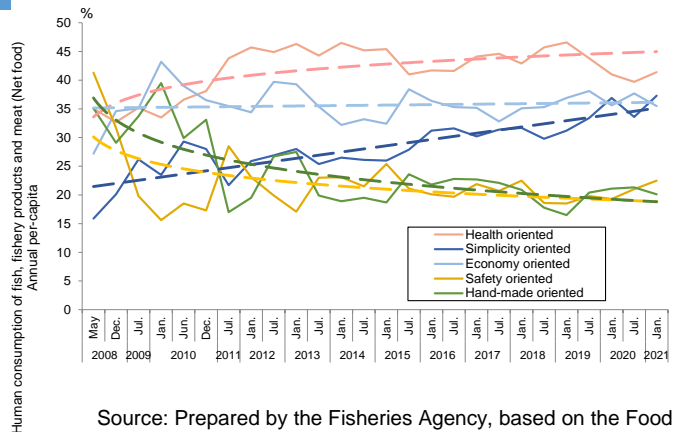
- Per capita seafood consumption in Japan has been on the decrease from the peak of 40.2kg in FY2001 to 23.8kg (estimate) in FY2019.
- Causes of continued decrease of fishery product consumption include high prices and cooking difficulty, etc. With increasing health consciousness, about 60% of consumers say they want to eat more fish more frequently in the future, but there are also changes in diet orientation, including a simplified diet due to the increase of dual-career families.

### Change of Supply for Domestic Human Consumption of Fish and Fishery Products and Annual Consumption per Capita



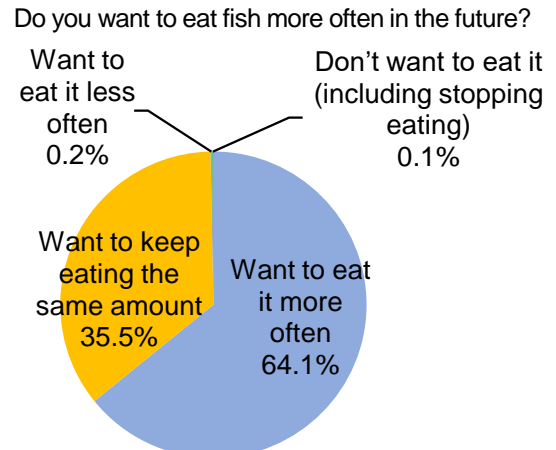
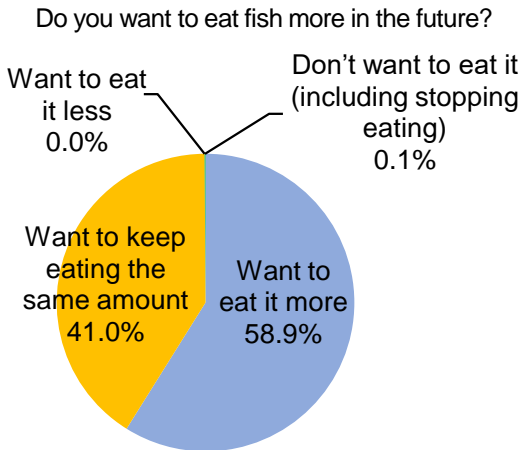
Source: Food Balance Sheet (the Ministry of Agriculture, Forestry and Fisheries)

### Trends of Consumers' Current Food Preferences (Top)



Source: Prepared by the Fisheries Agency, based on the Food Orientation Survey (Japan Finance Corporation)  
 Note: The dashed line is an approximate curve or line.

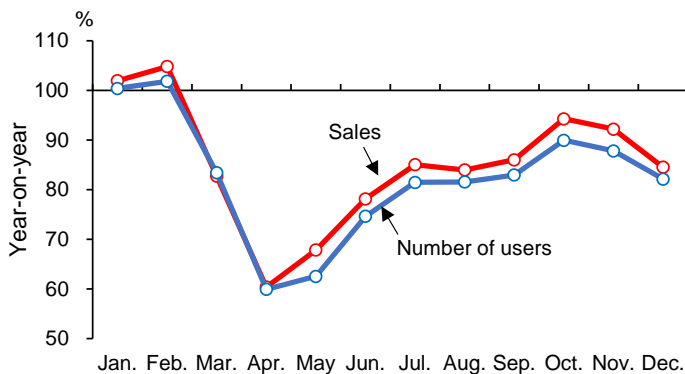
### Intention regarding quantity and frequency of eating seafood



Source: Survey on attitudes/intentions toward food, agriculture and fisheries (the Ministry of Agriculture, Forestry and Fisheries) (conducted on 987 consumer monitors from December 2019 to January 2020 with a response rate of 90.7%)

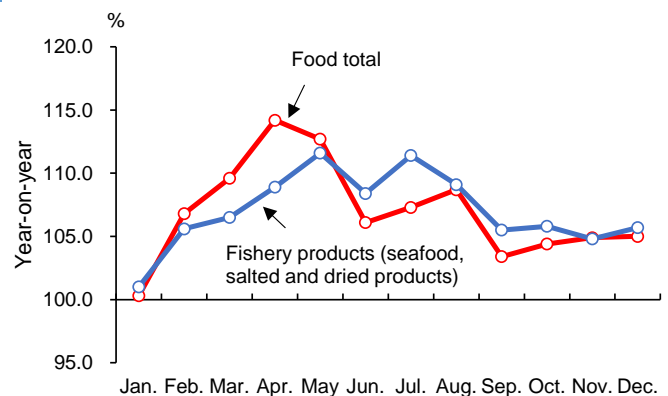
- Eating out greatly decreased since March 2020 owing to the expansion of the COVID-19.
- Increase of eating at home (eating in) on the other hand, led to an increase in purchases at supermarkets and other retail stores and through websites as well as use of delivery services and takeout from restaurants.

### Year-on-year Comparison of Total Sales and Number of Users of the Food Service Market (2020)



Source: Survey of Market Trends in Eating and Drinking Services (Japan Foodservice Association)

### Year-on-year Comparison of Total Sales of Supermarkets (2020)



Source: Current Survey of Supermarket Sales (National Supermarket Association of Japan, the Japan Supermarket Association and the All Japan Supermarket association)

## (3) Rise in the Awareness of Food Safety and Sustainable Fisheries and Aquaculture in Japan and Abroad

- The United Nations adopted Sustainable Development Goals (SDGs) in 2015 and companies introducing SDGs in their goals and strategies are increasing in number in Japan and abroad.
- In this context, the use of the Marine Eco-Label is globally spreading to inform consumers and customers that the labeled products are produced with consideration to sustainable use of resources and to the environment.

## Marine Eco-Label Certificates mostly used in Japan

Certificates from foreign countries

## MSC Certificate



<UK>  
[Number of certificates in Japan]  
10 fisher organizations  
-Scallop (Hokkaido Pref.)  
-Skipjacks (Miyagi and Shizuoka Prefs.)  
-Albacore (Miyagi and Shizuoka Prefs.)  
-Oyster (Okayama Pref.), etc.  
300 enterprises (distributors and processors)

Fisheries

## MEL Certificate



<Japan>  
[Number of certificates in Japan]  
7 fisher organizations  
-Salmon (Hokkaido Pref.)  
-Chub mackerel, spotted mackerel (Fukushima Pref.)  
-Shijimi freshwater clam (Aomori Pref.)  
-Red queen crab (Tottori Pref.), etc.

Certificate from Japan

## ASC Certificate



<Netherlands>  
[Number of certificates in Japan]  
13 aquaculture organizations (68 fish farms)  
-Oyster (Miyagi Pref.)  
-Japanese yellowtail (Miyazaki, Oita, Kagoshima and other Prefs.)  
-Purplish amberjack (Kagoshima Pref.), etc.  
151 enterprises (distributors and processors)

Aquaculture

41 aquaculture organizations  
-Greater amberjack (Ehime and Kagoshima Prefs., etc.)  
-Japanese yellowtail (Kumamoto, Kochi and Kagoshima Prefs., etc.)  
-Red sea bream (Mie, Ehime and Kagoshima Prefs., etc.)  
-Silver salmon (Miyagi and Tottori Prefs.)  
-Yellowtail amberjack (Ehime and Kagoshima Prefs.), etc.

58 enterprises (distributors and processors)

\*The number of certificates is that as of March 31, 2021 (according to Fisheries Agency).

## (4) Problems Involved in Making Market-In Efforts

- Circumstances around the market of fishery products in Japan and the world continue to change. Recently, consumers' lifestyles are changing due to the impact of the spread of the COVID-19. In order to improve the value of fishery products and expand their sales under the circumstances, it is important to take the market-in approach, which takes advantage of regional strengths based on the regional conditions.
- Market-in activities face the following problems: 1) insufficient grasping of needs; 2) insufficient efforts to provide fishery products according to needs, and; 3) work for initiatives to identify latent needs of consumers.
- Considering the expected rise in the awareness of food safety and sustainable fisheries and aquaculture in Japan and abroad, efforts for food safety, including the implementation of HACCP and acquisition of Marine Eco-Label certification, are also required.

## Section 2 Market-in Efforts in Fisheries

## (1) Efforts to Grasp Needs

- For market-in activities, it is most important to grasp market needs. In addition to information gathering through information media including newspapers, television and the Internet, it is also necessary to obtain information through communication with related parties through sales promotion to consumers, business activities to customers, and business meetings, for example.

Case Example

## An example in offshore trawl net fishery (Karo, Tottori Prefecture)

Tottori Fishery Cooperative in collaboration with Karo Fresh Fish Brokerage Association and Karo Central Seafood Market worked for high-freshness distribution of offshore trawl net catch (from FY2008 to FY2013). Specifically, responding to the needs of brokers who valued freshness and color, catch was cooled with crushed ice, and tags of ships with high-freshness treatment were attached to the fish boxes. As a result, the price of fresh queen crab increased from 2,907 yen/kg to 4,256 yen/kg, and the price of Japanese sand fish increased from 269 yen/kg to 290 yen/kg. Furthermore, the initiative generated demand for higher-priced sashimi-quality Japanese sand fish, fathead flounder and other fish that used to be purchased only for boiling/processing.



Name tag of ships with high-freshness treatment



**Case Example Changing business model to grasp needs (De Mer Corporation)**

Before the Great East Japan Earthquake, a fishery processing company named De Mer of Hachinohe (Aomori Prefecture) used to leave the marketing of its products to wholesalers. After the disaster, however, the company radically changed its business model in order to regain the lost market. It grasped retailers' needs by building good relationships through visits to their shops, etc., and used the obtained information for product development.

In spring 2016 the company developed a pickled mackerel product based on a proposal by a mass retailer and sold the product in a package incorporating appeal points based on hints from consumer response. The product won the MAFF Minister Award at the 27th national examination meeting of comprehensive quality of processed fishery products.



Products that won the MAFF Minister Award at the 27th national examination meeting of comprehensive quality of processed fishery products

**Case Example Change in The Way of Thinking to Find Needs for Okinawa Fish in Overseas Markets (Kizasu Corporation)**

The main business of Kizasu is direct selling of fresh fish from Okinawa to restaurants in Singapore, Taiwan, Thailand, Hong Kong, etc. In Japan, most people think fatty fish from the northern sea is tastier. Moreover, fish species around Okinawa are little known in Japan northward from Kyushu and, therefore, difficult to sell outside Okinawa. For this reason, the company paid attention to overseas markets southward from Okinawa. People in Southeast Asia are familiar with fish species from Okinawa and appreciate the tastiness of fatty fish near their northern limit. Thanks to rising needs for tasty foods in Asian countries, export sales of the company have rapidly increased.



Cooking miibai (Malabar Grouper)  
Picture provided by Kizasu Corporation

**(2) Providing Fishery Products According to Needs**

○One of the important factors that consumers and customers demand from fishery products is tastiness. To respond to the needs, various efforts to maintain freshness, which include icing, blood draining, spinal cord removal and quick freezing are widely made in fisheries and aquaculture industries.

**Case Example Aquaculture Production According to Demand (Uwajima Project Corporation)**

Uwajima Project of Uwajima city (Aichi Prefecture), jointly with local fish farmers and Ehime Research Institute of Agriculture, Forestry and Fisheries, developed and branded Mikan Buri, which combines citrus and cultured fish that are both local resources, pursuing attractiveness for food service industries and consumers, including a reduction of the fishy smell and addition of citrus flavor in addition to prevention of browning of dark red meat. Because surveys found favorable response, especially from women, the company further developed Mikan Bream and Uwajima Salmon (mikan silver salmon) targeting women.

These products are directly sold to domestic food-service chains and other customers. The products are also exhibited at overseas food exhibitions with high evaluation from visitors.

In 2016 the project obtained the first halal certification in Japan for cultured tuna and black skipjack with the aim of developing a market in the Middle East. The project invited buyers of local restaurants interested in Uwajima Salmon and other products to visit Japan for better understanding of the products through observation of aquaculture production and processing, and it established a system to ship the products in the quantity according to needs. Producers also visited the customers to understand market needs.



Cultured fish favorably received for its citrus flavor in Japan and abroad  
Photo provided by Uwajima Project Corporation

**Case Example Sell Biwako's treasure "Biwa Trout" with Cooperation of Friends Across the Country! (The new active group improving the fishery industry of Lake Biwa "BIWAKO STYLE")**

Biwa Trout is an endemic species of Lake Biwa. It is said to be very tasty with high-quality fat in summer, which is its best season. Because most producers used to sell the fish only to specific customers in a limited area, it was little known in other parts of Japan. In this context, its prices fell due to the spread of the COVID-19.

To address this situation, interested people across Japan launched the new active group improving the fishery industry of Lake Biwa "BIWAKO STYLE" and reinforced retail sales on its website and E-commerce websites. The group developed high-quality frozen filet products through blood draining, spinal cord removal and liquid freezer freezing. The products are highly regarded by customers and the group rapidly attracted attention.

As a result of the activities, the group increased the sales by 300 to 400% compared to the fishing season of the previous year and is improving fishery processing facilities toward business expansion next year.



Biwa Trout – endemic species of Lake Biwa – most delicious in summer

**Case Example** **Selling Local Fish Abroad through Processing According to Needs (SOL JAPAN Corporation)**

SOL JAPAN of Shimane Prefecture is a fish processing company that processes fish and fishery products of the prefecture and sells them in Japan and abroad. Responding to requests from its exporting customers, the company provides products of seasonal fish purchased in the local market, cut for sashimi, vacuum sealed in individual trays and quickly frozen.

This way SOL JAPAN can provide very fresh sashimi in the needed amount when needed in overseas markets.

Toward revitalization of the local fisheries and further taking-in of market needs, the company is trying to develop frozen sashimi of deep-sea porgy in its original shape because prices of the fish tend to be low due to unstable catch.



Vacuum-sealed and frozen sashimi slices of yellowtail amberjack (Photo provided by SOL JAPAN)

**Case Example** **Efforts in set net fishery to make catch according to demand (Manazuru Town Fishery Cooperative)**

In set-net fishery of Manazuru Town Fishery Cooperative in Kanagawa Prefecture, daily catch fluctuated due to the characteristics of the fishing method and fish prices fell at big catches. Japanese jack mackerel, Japanese common squid and other fish species are highly demanded in direct sales stores in the prefecture and direct sales to restaurants outside of the prefecture, but the cooperative sometimes could not fill orders due to unstable catch. It was a challenge to balance demand and supply.

To address the challenge, the cooperative undertook a reform including review of places to set nets. As a result, the ratio of much demanded fish species increased from 14% to 33% and frequency of direct sales also increased. In addition, by installing fish preservation nets in set nets to preserve live fish for shipping adjustment at the time of big catch, the cooperative maintained stable supply and increased the average price of catch from 98 yen/kg to 233 yen/kg.

**(3) Efforts to Identify Latent Needs**

- In recent years, supermarkets and other players aiming to create distinctive sales corners are making efforts to expand sales of domestic seafood.
- Concrete examples are: people familiar with seafood cooking providing an opportunity to eat tasty fish according to needs through face-to-face selling; providing local fresh seafood under the slogan of local production and local consumption; and online sales through e-commerce and other websites in response to the spread of the COVID-19.

**Case Example** **Communicate Real Tastiness of Fish to Consumers by Strengthening Procurement and Face-to-face Sales (Kakujoe Gyorui Holdings Co., Ltd.)**

Kakujoe Gyorui Holdings has gained popularity also in inland areas where people eat less fish and is increasing sales by selling a variety of highly fresh fish at affordable prices. Fresh fish procured by experienced buyers at markets in the morning are delivered to stores around the noon of the day. Store personnel explain how to eat the fish and provide pretreatment service through face-to-face selling. In this way, the company provides opportunities to eat tasty fish according to consumer needs.



Corner for face-to-face selling of fresh fish

**Case Example** **Expanding EC Service for Business to EC Service for Consumers in Response to the Spread of the COVID-19 (Haneda Market Corporation)**

Haneda Market provided fish and fishery products with ultimate freshness through air transportation to retailers and restaurants. However, when the food-service industry was affected by the spread of the COVID-19, the company lost almost all sales around April 2020.

To break through the situation, the company launched an e-commerce website to sell products for business to consumers, in May of the same year. The site became widely known through the Internet and SNS. The project fit in with eating-in demand and greatly recovered its sales.

**Case Example** **"Pride Fish" – an Efforts Initiative to Identify Latent Needs (JF Group)**

Since FY2014 the JF Group has been selecting "Pride Fish"—fishery products that fishermen recommend with confidence—for each region and season and disseminating the information. The Group holds fairs in supermarkets, department stores and restaurants across the country, Fish-1 Grand Prix and other PR events. A variety of information for expansion of consumption of domestic fishery products, which include local restaurants providing Pride Fish and a variety of contents, is disseminated through the Internet. Pride Fish is also sold at "JF Osakana Marche Gyogyo Ichi", a site that opened in February 2020 for direct selling.



Website of Pride Fish

## Case Example

**Producers Trying Mail Order Business of Fresh Fish in Response to the Spread of COVID19-(Fisherman Japan)**

Fisherman Japan is a group of young fishermen and distributors active in Miyagi Prefecture. They experienced a great decrease in sales for food services due to the spread of COVID19. Recognizing that the increase in demand for eating in is an opportunity to communicate the taste as well as how to cut and enjoy high-quality fish, they started consumer mail-order business in April 2020 to sell assortments including high-quality and high-price fresh fish that had been sold to restaurants, etc.

Orderers receive instruction on how to cut fish through online meeting application. The group also distributes internet videos for popularization of fish dishes. The efforts proved effectual to maintain good sales.



Mail order of fresh fish accompanied by an online video on fish preparation (Photo provided by Fisherman Japan)

**(4) Efforts for Food Safety and Sustainable Fisheries and Aquaculture**

- In recent years many seafood businesses are implementing initiatives to respond to HACCP in order to extend their market. In fishing ports that serve as a logistic base of fishery products, cargo handling and other places for high-level hygiene management have been developed.
- Increasing number of production sites are obtaining the Marine Eco-Label. In recent years fisheries and aquaculture businesses not necessarily aimed at export, retailers and restaurants are also obtaining the certificate.

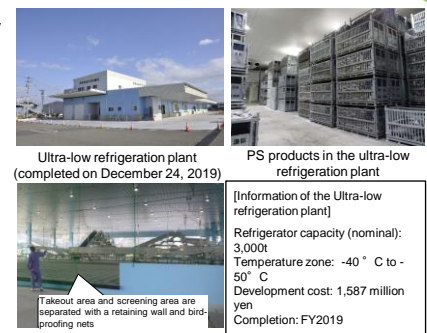
## Case Example

**Constructing a Supply System Toward Export of High-quality Fishery Products (Yaizu fishing port)**

At Yaizu fishing port, where catches are landed by overseas purse seine fishing vessels, there has been development of deep piers to accommodate large fishing vessels, high level sanitary control facilities to handle fishery products, and freezing/refrigerating facilities to store PS products\* with the aim of expanding export.

As a result, the landing quantity of PS products has increased and products for export are secured. In addition, EU・HACCP certified facilities have also increased in the Yaizu area, which is expected to contribute to export expansion.

\*PS products: Products for eating raw that are produced through quick freezing of very fresh bonito, etc. by immersing in thick salt water of minus 20 degree Celsius and storing at an ultra-low temperature



Examples of measures implemented at Yaizu fishing port

## Case Example

**Efforts Toward Sustainable Edomae Fishery (Kaiko Bussan Corporation)**

Kaikobussan at Funabashi city (Chiba Prefecture) sells and distributes fresh fish caught in Tokyo Bay.

The company, in collaboration with Daidenmaru and Nakasenmaru, which are companies engaged in fishing boat fishery, is working on resource management including the collection of catch information of purse sein fishery targeting sea bass. In April 2018 the company obtained MEL certification for both production and distribution processing.

The company is communicating fishing activities in schools with the aim of transmitting the traditions and culture of Edomae fisheries to the next generation, while at the same time working to introduce catch traceability using ICT toward the balancing of resource management and value creation.



Round haul netters collaborating with Kaikobussan

## Case Example

**Retailers, etc. obtaining Marine Eco-Label****(1) AEON Co., Ltd.**

AEON obtained CoC certification of MSC in 2007 and CoC certification of ASC in 2014. The 2020 Goals formulated by the company in April 2017 include a goal for all general merchandise store and supermarket companies of the group to obtain CoC certification of MSC/ASC. In FY2019 over 80% of the stores of the group obtained CoC certification. MSC/ASC certified fish species and items (including domestic fish and fishery products) sold by the group are expanding.



Sushi role of MSC-certified scallops from Hokkaido (Photo provided by AEON RETAIL Co., Ltd.)

**(2) Ito-Yokado Co., Ltd.**

Ito-Yokado Co., Ltd., together with producers of original brand products of domestic cultured fish, is working to obtain CoC certification of MEL. In March 2020 the company became the first major retailer obtaining CoC certification of MEL in Japan. Its stores nationwide started sales of Japanese yellowtail (from Kumamoto), Greater amberjack (from Kagoshima), red sea bream (from Mie) and flounder (from Mie) with the MEL logo.



Original brand products with the MEL logo (Photo provided by Ito-Yokado Co., Ltd.)

## Section 3 Promotion of Market-in Efforts to Transform Fisheries into a Growth Industry

### (1) Need for Further Promotion of Market-in Efforts

- It is expected that the world's fish and fishery product consumption will increase and their prices will remain high, but in Japan, fishery product consumption has been decreasing due to orientation to a simplified diet and other factors. Recently, however, lifestyles are changing under the impact of the spread of the COVID-19.
- Under such circumstances, fishery businesses, including fishermen and fishery processors, are working to grasp and respond to consumer and customer needs in Japan and abroad.
- In order to transform Japan's fisheries into a growth industry, it is necessary to ensure a balance of price and quality as demanded by consumers and customers in Japan and abroad by market-in activity, while at the same time giving extra consideration to food safety and sustainability of products for export.

### (2) Direction of Market-in Efforts

#### [Fisheries]

Compared with aquaculture, production planning is relatively difficult for fisheries, on the other hand, fisheries produce natural fish and shellfish including mass-catchable pelagic fish. However, by keeping live mass-catchable pelagic fish caught in large quantities in fish reservation nets, it is possible to provide such fish in the needed quantity when needed, for example. Fishermen need to make efforts with awareness that they are part of the value chain.

#### [Aquaculture]

Maximizing the advantages of aquaculture, which can provide products of steady quality in a steady quantity, regularly and at steady prices, it is necessary to realize market-in aquaculture by ensuring scheduled production based on the demand and production cycle by proactively obtaining information of aquaculture items, utility form, quality and quantity according to demand.

#### [Processing and distribution]

In order to respond to changes in lifestyle due to the spread of the COVID-19 and other factors, it is important to utilize the Internet and SNS to directly sell processed or prepared products that save time of preparation.

#### [Fish and fishery product export]

It is necessary to shift the entire value chain from production to sales to market-in form, professionally and sustainably produce and export fish and fishery products of the specifications demanded in overseas markets and develop a system to pioneer sales channels in all possible ways.

#### [Obtain certification]

For market expansion in Japan and abroad, it is necessary to actively obtain HACCP certification in response to the rise in food safety awareness, and Marine Eco-Label certification in response to the movement to expand sustainable fisheries and aquaculture.

### (3) Efforts of Governments to Promote Market-in Efforts

- It is important that businesses proactively carry out market-in activities, but governments provide the following support for necessary activities:
  - ① "Seashore Revitalization Plan" to support unified efforts of fishing communities
  - ② Promotion of shift to "Market-in Aquaculture" by aquaculture
  - ③ Acceleration of efforts for fishery product distribution that fits in with needs
  - ④ Promotion of activities to execute "The Strategy to Realize Export Expansion of Agricultural, Forestry, Fishery and Food Products"
  - ⑤ Measures in response to the changes in lifestyle, etc. caused by the expansion of the COVID-19