

FY2021  
Trends in Fisheries

FY2022  
Fisheries Policy

Summary

This document is a report on fisheries trends and the policy implemented during FY2021 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 FY2022 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.)

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# Special Issue 1: New Basic Plan for Fisheries



## (1) Previous Basic Plans for Fisheries

- The Basic Plan for Fisheries provides medium-term guidelines for comprehensively and systematically promoting the fisheries policy based on the “Fisheries Basic Act.”
- Since the formulation of the first Basic Plan for Fisheries in 2002, the Plan has been revised every five years, considering changes in situations surrounding fisheries and evaluation of the effectiveness of the policy.

### Previous Basic Plans for Fisheries

| Formulated in | Situation   | Policy  |
|---------------|---|---|
| 2002          | 200-nautical-miles, decrease in fisheries production, decline in self-sufficiency rate, etc.  | Promotion of resource recovery plans, introduction of HACCP, merger of fisheries cooperatives, etc.   |
| 2007          | Weakening of fisheries production structure, decreased interest in fish consumption, loss in unintentional seafood auction, multifunctional roles, etc. | Measures for structural reform of fisheries by fishing vessels, new business management stabilization measures, measures to promote the fulfillment of multifaceted functions, etc. |
| 2012          | Great East Japan Earthquake, balance between promotion of resource management and ensuring stable business management, etc.                             | Reconstruction from the Great East Japan Earthquake, resource management and fishery income compensation measures, sixth sector industrialization, etc.                             |
| 2017          | Weakening of fish and fishery product production system, decreased interest in fish consumption, etc.   | Transformation of fisheries into a growth industry, Seashore Revitalization Plan, advancement of resource management, etc.  |

## (2) New Basic Plan for Fisheries

- While promoting fisheries policy reform, the new Basic Plan for Fisheries was formulated in March 2022, considering changes in situations such as changes in marine environments and growing interest in a sustainable society.
- The policy is to be developed by focusing on three pillars: 1) steadily implementing fisheries resource management, taking into account changes in marine environments; 2) realizing the transformation of fisheries into a growth industry, taking into account increasing risks; and 3) promoting activation of fishing communities that support their respective regions.

### Outline of New Basic Plan for Fisheries

**Steady implementation of fishery resource management, taking into account changes in marine environments**

- **Enhancement of research into resources and stock assessment**  
- Enhancement of data collection, etc. through promoting digitization
- **Consistent promotion of new resource management**  
- To establish a new resource management system, formulate a resource management roadmap and consistently promote the included processes
- **Expansion of species subject to stock assessment**  
- 2020: 119 species → 2021: 192 species (Already reached about 2/3 species) → Future: Establishment of data on catches, etc., development of stock assessment system
- **Expansion of MSY-based TAC management**  
- Introduced for 8 species starting in the 2021 fishing season. 60% of catches are covered  
- Goal (2023): 80% of catches → Future: TAC species will be gradually expanded in line with the published in March 2022
- **Introduction of IU management in Minister-licensed Fisheries, in principle**  
- Starting in the 2021 fishing season. Medium- to large-scale purse seine fishery (mackerel) (Starting in the 2022 fishing season. Medium- to large-scale purse seine fishery (Japanese sandeel, bluefin tuna), etc.)  
- Future: IU management is planned to be gradually introduced in line with the roadmap
- **Adaptation to changes in marine environments**  
- steady understanding of the risk of changes in marine environments  
- Development of fishery management bodies that can adapt to stock dynamics  
- Promotion of shift of composite fisheries to a new form of operation  
- Development of international negotiations to protect the seas, fishery resources, and fisheries of Japan
- **Enhancing fisheries enforcement and surveillance capability/poaching monitoring system**

**Realization of transformation of fisheries into a growth industry, taking into account increasing risks**

- **Structural reform of fisheries, etc.**  
- For coastal fisheries, further promotion of efficient utilization of fishing grounds, mainly by the working generation  
- Promotion to add value through effective utilization of unused fish, etc.  
- For offshore fisheries, a stepwise shift to composite fisheries and review of the types of vessels and fishing methods  
- For distant-water fishery, consideration of new forms of operation and ensuring the diversity of markets including overseas markets, etc.
- **Transformation of aquaculture into a growth industry**  
- Promotion of market-in type aquaculture  
- Promotion of large-scale offshore aquaculture and introduction of notification system in land-based culture, etc.
- **Export expansion**  
- Based on the export strategies, expansion of the export value of fish and fishery products to 1.2 trillion yen by 2030 (priority export items: yellowtail, beam, scallops, and pearls), etc.
- **Human resource development**  
[Development and recruitment of new fishery workers, etc.]  
- Development and recruitment of new fishery workers, etc., including acquisition of ICT, etc.  
[Recruitment and development of ship officers]  
- Promotion of the initiatives for quick acquisition of ship officer's certifications  
[Acceptance and recruitment of human resources from abroad]  
- Development of the environment for accepting human resources from abroad, etc.
- **Measures to stabilize business management**  
- Consideration of ideal measures to stabilize fishery revenue, etc. while fully taking into account the impact of COVID-19 infection and management status of fishers, such as catch trends

**Promotion of activation of fishing communities that support the region**

- **Fishing Communities revitalization/activation**  
- Activation of fishing communities through activation of fisheries  
→ Reorganization and consolidation of facilities in major fishing ports, and further functional enhancement  
- Activation of fishing communities through incorporating industries other than fisheries, etc.  
→ Promotion of UMIGYO, etc. by utilizing fishing port facilities and environmental development of fishing ports and fishing communities  
→ Promotion of the interaction program and the initiative to secure human resources in the “Seashore Revitalization Plan” to boost incomes of fishers
- **Development of measures for processing, distribution, and consumption**  
[Processing]  
- Stable supply of domestic raw materials for processing  
→ Promotion of initiatives to equalize the supply of domestic raw materials for processing, etc.  
- Development of core fishery processors and utilization of human resources from abroad  
[Distribution]  
- To combat IUU fishing, proper implementation of measures based on international commitments, etc.  
- Under Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants, periodical check of numeric values to verify whether status of each fish species meets the criteria for the designation of species  
- Review of the designation of species as well as the criteria for the designation every two years or so  
[Consumption]  
- Expansion of consumption of domestic fish and fishery products  
- Promotion of the use of marine eco-labels, etc.
- **Measures for disaster prevention/mitigation and building national resilience**  
- Countermeasures for increasingly severe disasters due to climate change, etc.

Measures to be promoted in a cross-sectoral manner for sustainable development of fisheries, etc.

- **Strategy for Sustainable Food Systems: MeaDRi and fisheries policy**
- **Utilization of smart fishery technologies**
- **Response to carbon neutrality**  
- Preservation/creation of seaweed beds (blue carbon)
- **Measures against COVID-19 infection**
- **Reconstruction from the Great East Japan Earthquake**

System to predict formation of fishing grounds

Reduction in fuel use through efficient operations

Preservation/creation of seaweed beds (blue carbon)

Goals for the Self-Sufficiency Rate of Fish and Fishery Products

|   | FY2019 | FY2020 (Estimate) | FY2032 (Goal) |
|---|--------|-------------------|---------------|
| Fish and fishery products for human consumption | 55     | 57                | 94            |
| Overall fish and fishery products               | 53     | 55                | 76            |
| Marine algae                                    | 85     | 70                | 72            |

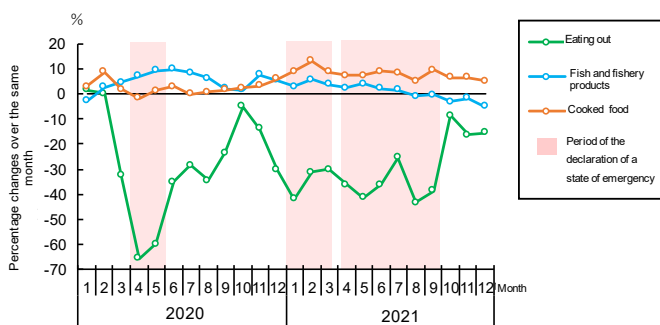
- Based on the resource management roadmap (4.44 million tons), Comprehensive Strategy for the Transformation of Aquaculture into a Growth Industry, and the export goal (1.2 trillion yen), the goals for the self-sufficiency rate are set to 94% for fish and fishery products for human consumption, 76% for overall fish and fishery products, and 72% for marine algae

(Unit: %)

## (1) Impact on the Demand for Fish and Fishery Products, and New Trends

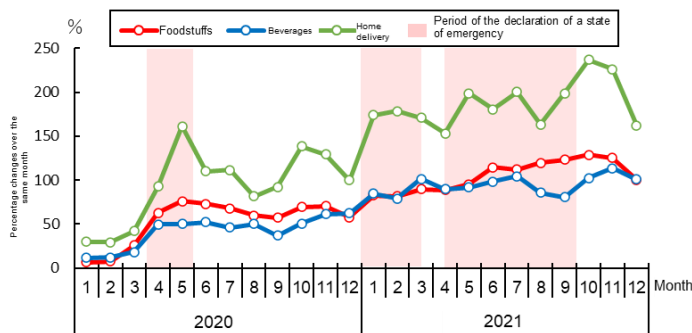
- Due to the impact of the spread of COVID-19 infections, lifestyles that avoid going out and crowding have become more common, and the demand for food has shifted from eating out to eating in.
- Opportunities for eating and cooking at home have increased, and the household consumption expenditure for eating out has significantly decreased since March 2020. Subsequently, it increased or decreased significantly depending on the status of the declaration of a state of emergency.
- With an increase in stay-at-home demand, the demand for household frozen food that can be stocked and is easy and convenient to cook has increased.
- While sales in the food service industry have declined significantly, sales of fish and fishery products in supermarkets has increased. In addition, food consumption through sales via the Internet has also increased.

### Percentage Changes in Monthly Expenditure per Household for Eating Out, Cooked Food, and Fish and Fishery Products Over Same Month of 2019



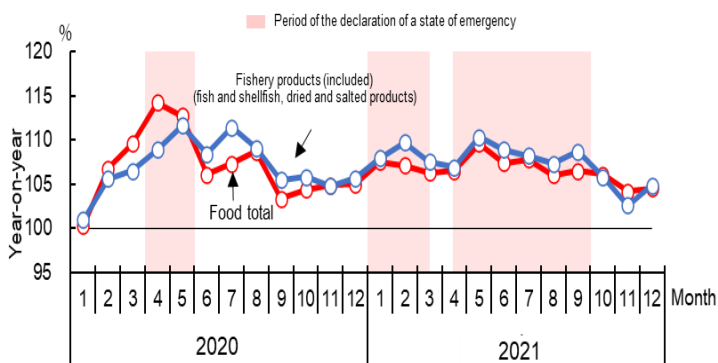
Source: Prepared by the Fisheries Agency, based on the Family Income and Expenditure Survey and the Consumer Price Index (the Ministry of Internal Affairs and Communications)  
 Notes: 1) Households with two or more people (Family Income and Expenditure Survey).  
 2) For the percentage changes for 2021, the effects of price changes are removed using the Consumer Price Index (2020-based).

### Percentage Changes in Food Expenditure Through Sales via the Internet Over the Same Month in 2019



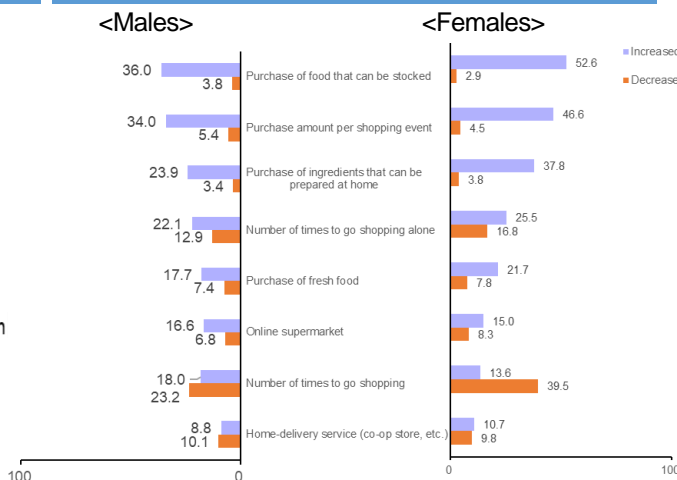
Source: Prepared by the Fisheries Agency, based on the Survey of Household Economy (Monthly) and the Consumer Price Index (the Ministry of Internal Affairs and Communications)  
 Notes: 1) Households with two or more people (Survey of Household Economy).  
 2) The effects of price changes are removed using the Consumer Price Index (2020-based).

### Comparison of Supermarket Sales (Food, Fish and Fishery Products) Over the Same Month in 2019



Source: Prepared by the Fisheries Agency, based on the Current Survey of Supermarket Sales (survey of 270 supermarkets dealing mainly in food products) (the National Supermarket Association of Japan, the Japan Supermarket Association, and the All Japan Supermarket Association)  
 Notes: 1) The figures for January and February 2021 are calculated by dividing the sales in the relevant month in 2021 by the sales in the relevant month in 2019.  
 2) The figures for March 2021 onwards are preliminary.  
 3) All sales stores in the same month of each year are compared to all stores in the relevant month.

### Changes in Food Purchasing Methods and Content



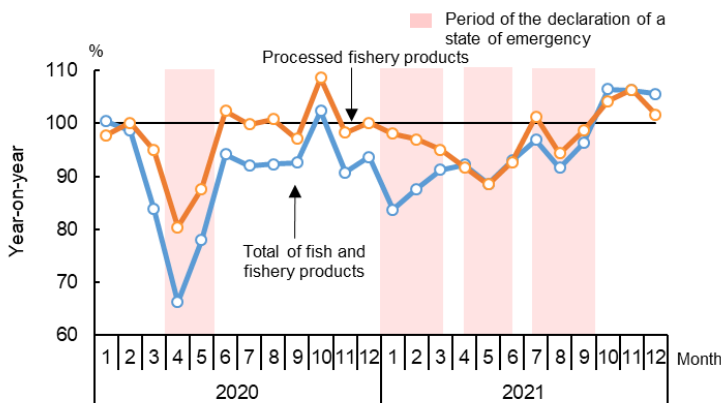
Source: Prepared by the Fisheries Agency, based on the Survey of Frozen Food Usage (questionnaire survey using the Internet, 1,250 males and females (625 each) aged 25 or older using frozen food "at least once a month," conducted on 20-22 February, 2021) (the Japan Frozen Food Association)  
 Note: The percentage of "increased" is the sum of the percentages of "increased greatly" and "increased somewhat," and the percentage of "decreased" is the sum of the percentages of "decreased very much" and "decreased somewhat."

## (2) Impact on the Supply of Fish and Fishery Products, and New Trends

### i. Impact on Market Prices and Markets and Developments Toward Maintaining/Expanding Markets

- While supermarket sales were strong with stay-at-home consumption, demand from hotels and restaurants decreased with reduced inbound demand and refraining from going out. As a result, the transaction amount of fish and fishery products distributed in markets dropped, mainly for high-grade fish. It has been on a recovery trend since October 2021.
- Increased trend in the sales of fish and fishery products via the Internet.
- With changes in demand for eating out in export destination countries and regions, etc., export of fish and fishery products decreased in 2020 and increased in 2021.

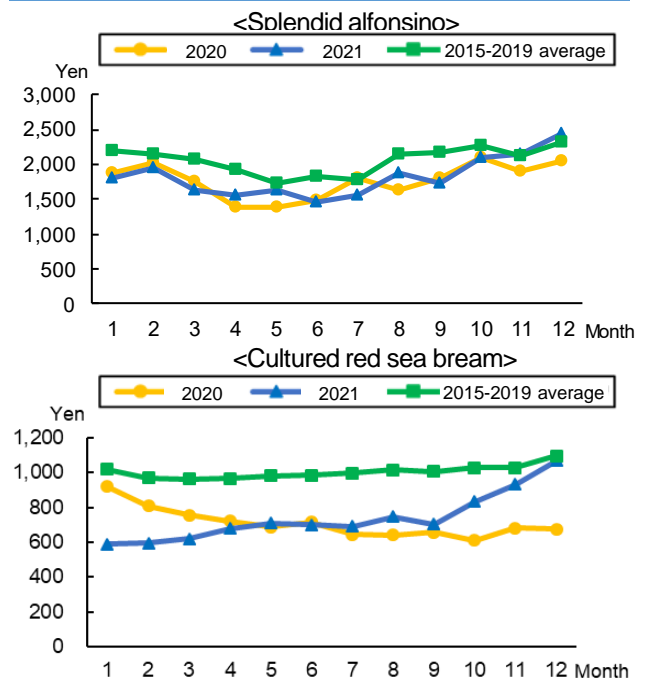
Comparison of Transaction Amount of Fish and Fishery Products in Toyosu Market Over the Same Month in 2019



Source: Prepared by the Fisheries Agency, based on Market Statistics (the Tokyo Metropolitan Central Wholesale Market)

Note: The period of the declaration of a state of emergency is the period during which the declaration of a state of emergency that included Tokyo as an area where emergency measures should be implemented was issued.

Trends in Average Sales Amount at Wholesale Markets (In Consuming Areas) By Fisheries Species

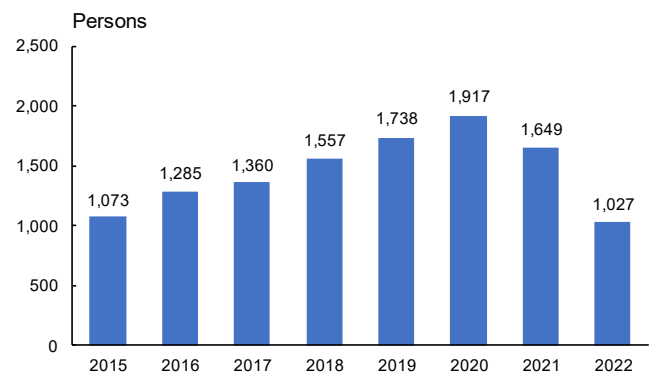


Source: Prepared by the Fisheries Agency, based on Market Statistics (the Tokyo Metropolitan Central Wholesale Market)

## ii. Impact of Entry Restrictions

- The entry restrictions on visitors from abroad associated with the spread of COVID-19 infections significantly affected management bodies that were expecting to make use of foreign people with the “Specified Skilled Worker” status of residence or planning to accept technical intern trainees.
- On the other hand, technical intern trainees who were planning to return their home countries after completing technical training had difficulty returning home. Those who had changed their status of residence to “Specified Skilled Worker” to work in fishing vessel fisheries, aquaculture, and fishery processing industry increased in Japan.

Number of Technical Intern Trainees (i) Residing in Japan (Fishing Vessel Fisheries) (As of March 1 of each year)



Source: Prepared by the Fisheries Agency



### (3) Response in the Fisheries Industry

#### i. Implementation of Emergency Economic Measures and Measures to Prevent the Spread of Infection

- To promote sales of fish and fishery products for which inventory backlogs and price falls were occurring, the government supported expenses for the provision for school lunch, shipping costs for Internet sales, and public relations activities, etc.
- To maintain and promote exports, the initiatives to develop overseas markets were supported.
- To address the labor shortage in management bodies engaged in fisheries and fishery processing due to the impact of entry restrictions, support was provided for securing human resources from other industries and continued employment of foreign crews. In addition, support was also provided for additional expenses when employing domestic human resources such as those with work experience.
- Support was provided for the initiatives for fishing ground conservation activities and research on fisheries resources conducted by fishers who were forced to suspend their business.
- Support was provided for the initiatives to install machinery/equipment for recovering/developing markets or continuing/converting business made by fishers while taking measures to prevent the spread of infection. In addition, financing support and compensation for fisheries revenue loss through fisheries insurance were provided. Furthermore, the initiatives in which fisher organizations purchased, froze, stored, and released/sold fish and fishery products with inventory backlogs were supported.
- Preparation of industry-specific business continuity guidelines by fisher organizations is supported.

#### ii. Response in Anticipation of Future Impact

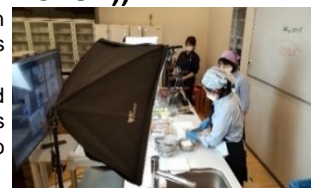
- The Fisheries Agency held a “meeting on the expansion of consumption of fish and fishery products in response to new lifestyles” to summarize the directions of measures toward the expansion of fish and fishery products, taking into account consumption trends in recent years and development of new lifestyles in the era of coexistence with COVID-19.
- The directions to address the negative characteristics of fish and fishery products, such as time and effort required for cooking, include: 1) “elimination of a sense of burden on cooks/purchasers,” such as development of time-saving, easy, and delicious recipes; 2) “development of new convenient and delicious products,” such as meal kits; and 3) “development of new ways to provide products to accelerate consumption,” such as enhancement of fish menus at online supermarkets.
- The directions to enhance opportunities to consume fish and fishery products include: 1) initiatives to “change consumption behavior,” such as original sales promotions using corporate ingenuity, provision of bargain menus, and establishment of event days; and 2) the initiatives to “reach young people through education and experience,” such as communicating positive aspects e.g. health improvement and good taste, and conducting fish-eating promotion activities with an experience element.

##### Case Example 1

#### Online Cooking Class for Local Fish Dishes (Hyogo Prefecture federation of fisheries cooperatives (SEAT-CLUB))

SEAT-CLUB, which belongs to the JF Hyogo Prefecture federation of fisheries cooperatives, started an online cooking class in October 2020 because they were unable to hold conventional cooking classes due to the impact of the spread of COVID-19 infections.

The participants purchased a set of cooking ingredients, including local fish, through the website, and on the day of the class, they accessed the online meeting system on tablets, etc. to receive instructions from the instructor and cooked at home. Many participated from outside the prefecture, helping to promote local fish of Hyogo Prefecture to people outside the prefecture.



##### Case Example 2

#### Seafood Mix Using Domestic Fish and Fishery Products (The nationwide federation of fisheries cooperatives, ABC Cooking Studio, Ito-Yokado)

The nationwide federation of fisheries cooperatives, ABC Cooking Studio, and Ito-Yokado launched the “Council for Promotion of Seafood Mixes of Domestic Fish” to expand the consumption of domestic fish and fishery products. To enable people to enjoy fish dishes easily and conveniently at home and thereby expand the consumption of domestic fish and fishery products, “Gorotto Domestic Seafood Mix,” a seafood mix using only domestic fish and shellfish, was developed and went on sale in November 2021.

Cooking videos using this product are distributed on the YouTube channel of Sakana-kun, and cooking methods, including use of the product in cooking classes at ABC Cooking Studio are also distributed.

