

FY2022 Trends in Fisheries

FY2023 Fisheries Policy

Summary

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FY2022 Trends in Fisheries

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(Appendix) Main KPIs for Fisheries Policy

FY2023 Fisheries Policy

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).

The maps shown in this document do not necessarily represent the territory of Japan in a comprehensive manner.

Special Issue: Food Security in Japan's Fisheries

Section 1 Japan's Fisheries Against the Backdrop of the Russia-Ukraine Situation

(1) Impact on the Import of Fish and Fishery Products, and Response

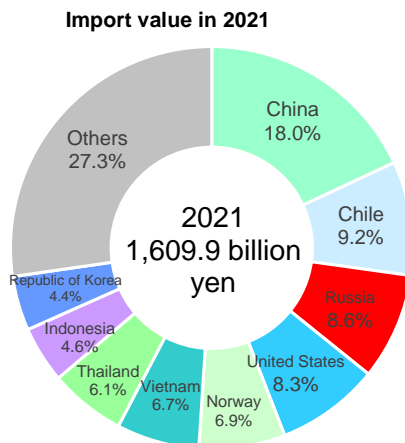
i. Current Situation Surrounding the Import of Fish and Fishery Products from Russia

- Japan's import volume of fish and fishery products in 2021 was 2.20 million tons. A major part of the total supply for domestic consumption of fish and fishery products consists of imports.
- Among Japan's import source countries for fish and fishery products, Russia ranks third in terms of import value. Major items in import percentage terms are cod roe; salmon roe, etc.; sea urchins; and crabs, etc.



Japan's Import Source Countries and Regions for Fish and Fishery Products, and Major Fish and Fishery Products Imported From Russia

<Import source countries and regions>

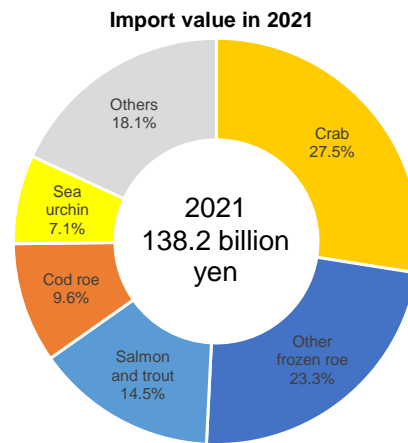


Source: Prepared by the Fisheries Agency, based on the Foreign Trade Statistics (for 2021; the Ministry of Finance)

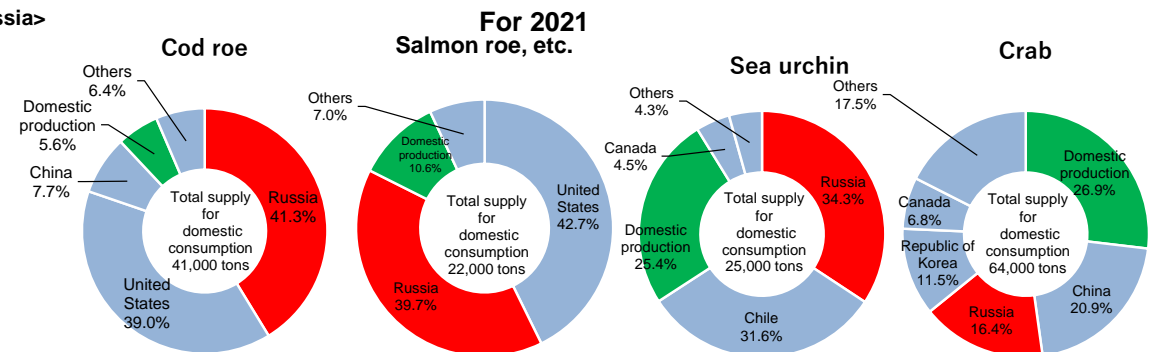
Notes 1) Processed crabs and processed salmon roe are included in "Others" (not in "Crab" or "Other frozen roe").

2) Since the figures less than the unit used are rounded off, the total in each of the breakdowns does not necessarily amount to 100%.

<Fish and fishery products imported from Russia>



Among Domestically Consumed Fish and Fishery Products, Major Items Imported From Russia in Import Percentage Terms



Source: Prepared by the Fisheries Agency, based on the Fisheries and Aquaculture Production Statistics (the Ministry of Agriculture, Forestry and Fisheries), the Foreign Trade Statistics (for 2021; the Ministry of Finance), and the SUISANBUTSU Power Data Book 2022 (regarding the domestic production volumes of cod roe (Alaska pollock roe) and salmon roe, etc.; Suisantsushin Co., Ltd.)

Notes 1) Total supply for domestic consumption is calculated by subtracting export volume from domestic production volume plus import volume. No increase/decrease in inventory is taken into consideration.

2) Domestic production in each of the graphs represents the value obtained by subtracting export volume from domestic production volume.

3) Import volume and export volume are calculated on a round-fish basis with processed products included.







4) Domestic sea urchin production does not include cultured sea urchins. Also, the domestic production of salmon and trout does not include those from land-based aquaculture or the marine aquaculture of rainbow trout, etc.

5) Since the figures less than the unit used are rounded off, the total in each of the breakdowns does not necessarily amount to 100%.

ii. Sanctions Against Russia on Fish and Fishery Product Imports

- As a sanction against Russia for its invasion of Ukraine, Japan has revoked the preferential tariff rates applied to fish and fishery products imported from Russia.

Raising of the Tariff Rates of Major Fish and Fishery Product Imports From Russia

	WTO bound rates (preferential tariff rate)	Tariff rate after revision		WTO bound rates (preferential tariff rate)	Tariff rate after revision
Crab 	4%	6%	Cod 	6%	10%
Salmon and trout 	3.5%	5%	Herring 	6%	10%
Other frozen roe (salmon roe, etc.) 	3.5%	5%	Herring roe 	8.4%	12%

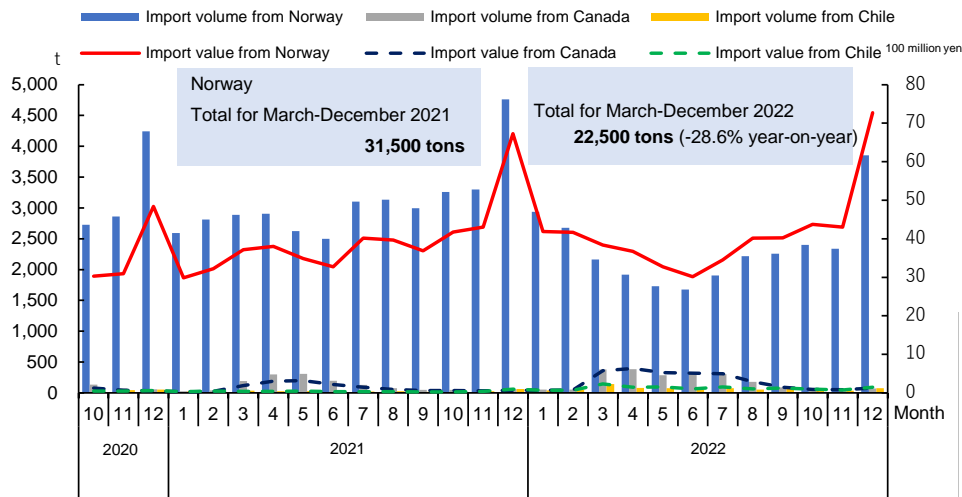
<Main sanctions of the G7 countries, etc.>

(US) Import ban on fish and fishery products produced in Russia
 (UK) Additional tariffs on the importation of white-fleshed fish, etc., produced in Russia
 (EU) Import ban on shellfish, etc., produced in Russia
 (Canada) Import ban on fish and fishery products produced in Russia, except for processed crabs, etc.

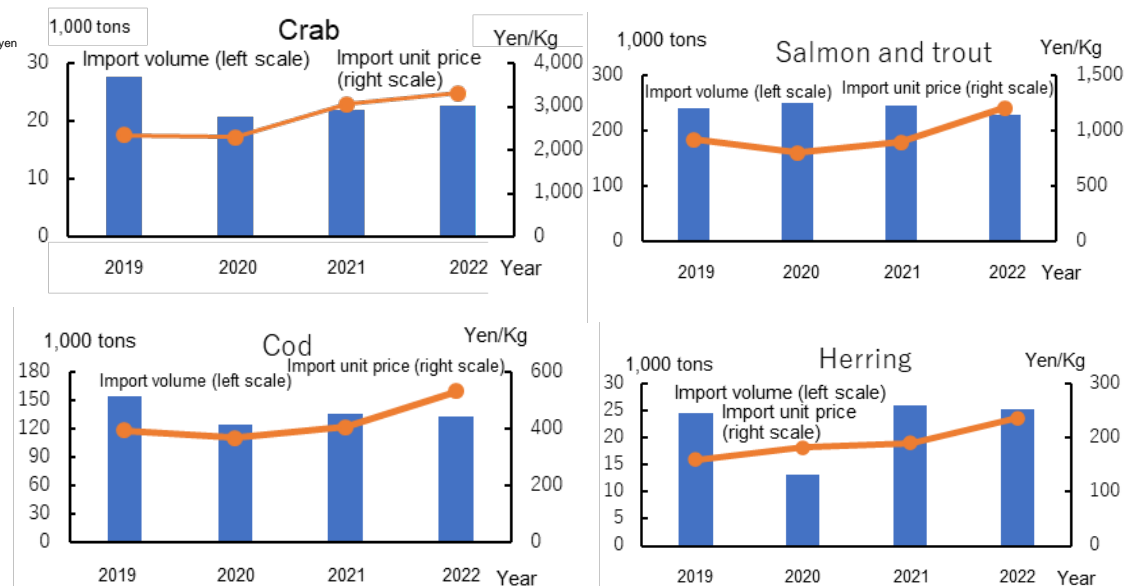
iii. Impact on Fish and Fishery Products Imported From Other Countries and Regions

- The importation of Norwegian fresh salmon has significantly declined.
- The prices of various fish and fishery product imports have further risen due to supply chain disruption caused by the Russia-Ukraine situation and rapid yen depreciation in addition to the recovery of economic activities from their global-scale stagnation attributable to COVID-19 infections.

Trends in the Import Volume and Import Value of Salmon and Trout (Fresh/Refrigerated) From Norway



Trends in the Import Unit Prices and Import Volume of Major Fish and Fishery Products Whose Prices Have Increased



iv. Measures to Price Increase in Fish and Fishery Product Imports

- Since it has been difficult to secure raw materials for processing due to increased import prices among other reasons, support is given to such initiatives as fishery processors' diversification of raw material suppliers.

Case Example Switching to Domestically Produced Raw Materials for Fishery Processing

OJI SALMON Co., Ltd. has switched its raw materials produced overseas to domestically produced ones. This is not only because the cost of procurement of salmon and trout imports as raw materials has increased due to, among other factors, the impact of the Russia-Ukraine situation, but also because its procurement volume of raw materials has declined due to, for example, sluggish air freight transportation, which results in concerns about inventory shortage affecting the stable supply of its products and poses a great risk in the future procurement of raw material imports.

While overseas salmon and trout are imported after having been frozen in the form of dresses or fillets, domestic ones are purchased as fresh fish. Accordingly, the company newly installed a chilled slicer and a vacuum modified-atmosphere packaging machine to process fresh raw materials and arranged a structure enabling chilled processing in a consistent manner across various processes such as smoking, slicing, and packaging. This has enabled the company to develop new products by processing fresh raw materials such that their freshness can be maintained at a high level, thereby expanding its sales channel.

The continuance of production in such manner has enabled the company to maintain its clients and also local jobs.



Products sliced by a chilled slicer

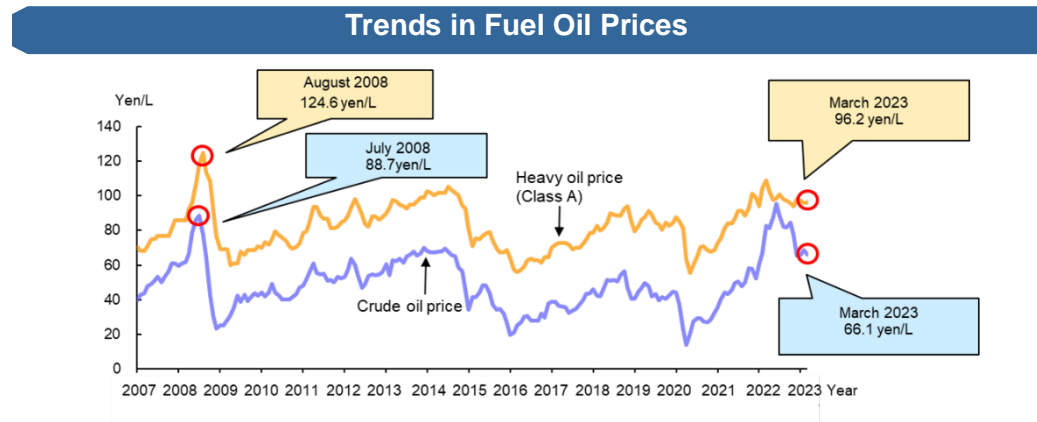


Products packed by a vacuum modified-atmosphere packaging machine

(2) Impact of Fuel Oil, etc., on Production Materials for Fisheries, and Response

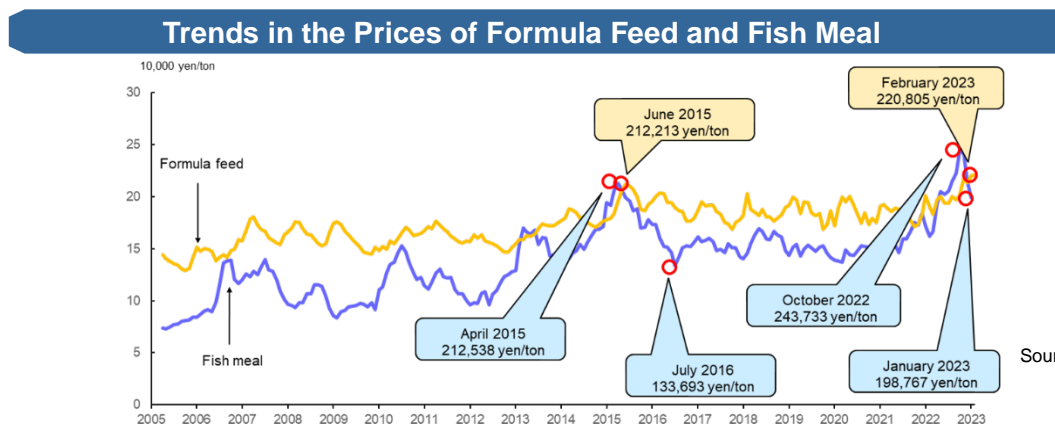
i. Fuel Oil

- Fuel oil prices remain at high levels with unstable fluctuations due to the impact of the Russia-Ukraine situation, etc., and rapid yen depreciation in addition to a sharp increase in fuel oil prices following the recovery of economic activities from their global-scale stagnation attributable to COVID-19 infections.
- Measures have been taken against sharply increasing fuel oil prices by increasing the reserve fund of the Fishery Management Safety Net Construction Project and supporting fishers in their introduction of energy-saving devices.



ii. Formula Feed for Aquaculture

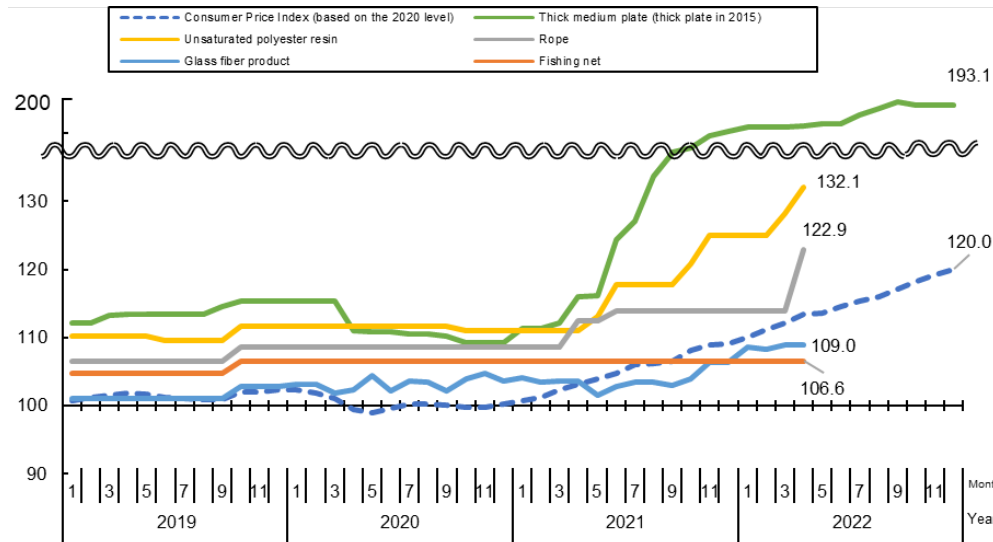
- While the price of fish meal has been on the increase with its demand growing in developing countries, the price of formula feed for aquaculture also shows an upward trend owing to the recovery of economic activities from their global-scale stagnation attributable to COVID-19 infections, the impact of the Russia-Ukraine situation, and rapid yen depreciation.
- Measures have been taken against the sharply increasing formula feed price, including the development of new formula feed for aquaculture with a low level of fish meal used and the Fishery Management Safety Net Construction Project.



iii. Other Production Materials for Fisheries

- The prices of production materials for fisheries have sharply risen due to the impact of the Russia-Ukraine situation and that of rapid yen depreciation in addition to the recovery of economic activities from their global-scale stagnation attributable to COVID-19 infections. By item, the prices of fishery ropes, steel plates (a building material for steel vessels), and unsaturated polyester resin (a building material for FRP vessels) have increased.
- In the Comprehensive Project for Japan's Fisheries Structural Reform, and in relation to the lease-based introduction of fishing vessels, fishing gear, etc., support has been given with the sharply increasing prices of materials taken into consideration.

Trends in the Price Index of Production Materials for Fisheries (2015 Level = 100)



Source: Prepared by the Fisheries Agency, based on price-related statistics published by the Bank of Japan

Notes: 1) The index for each month with the price level in 2015 as 100.
2) The collection of statistical data on fishing nets, ropes, unsaturated polyester resin, and glass fiber products was discontinued in May 2022.

(3) Relations with Russia in Japan's Fisheries in the Northwest Pacific Ocean

In the meeting of the Japan-Russia Fishery Committee held in December 2022 on the basis of the Japan-USSR Offshore Fishery Agreement for reciprocal fishing arrangement in the 200 nautical mile zone of Japan and in that zone of Russia, an agreement was reached on the operational conditions, etc., for 2023.

In the meeting of the Japan-Russia Joint Fishery Committee held in March 2023 on the basis of the Japan-USSR Fishery Cooperation Agreement in order to consult on the operational conditions, etc., of Japan's fishing vessels within Japan's 200 nautical mile zone in relation to Russian salmon and trout, an agreement was reached on the operational conditions, etc., for 2023.

Through private-sector negotiations held from May 2022 on the basis of the Kaigara Island Kelp Agreement, which is a civilian agreement for Japan's fishers to safely gather kelp around the Kaigara Island, an agreement was reached on the operational conditions, etc., for 2022.

With respect to the North Pacific Fisheries Commission, which aims to ensure the long-term conservation and sustainable use of fisheries resources on the high seas of the North Pacific Ocean, its annual meeting held in March 2023 agreed to set, among other matters, a TAC of saury on the high seas at 150,000 tons for 2023 and 2024 (25% reduction from 2022).

Section 2 New Trends Toward Food Security Regarding Fish and Fishery Products

(1) Current Initiatives Concerning Food Security

- The Basic Act on Food, Agriculture and Rural Areas provides, among other matters, that the State is to secure a minimum food supply required for the citizens even if there is any contingent event such as poor harvests or the disruption of import, and to implement specific measures for that purpose, in addition to its provisions on securing a stable supply of food.
- The Basic Act on Fisheries provides, in addition to its provisions on a stable supply of marine products, that food security under contingent circumstances is as provided for in the Basic Act on Food, Agriculture and Rural Areas.
- The Guidelines for Ensuring Food Security in Emergencies were formulated, which specify the details, etc., of the measures that the national government should implement in a situation in which contingent factors may affect the food supply. As responses in relation to fish and fishery products, these guidelines provide that the production of such products should be increased to an extent that can ensure the sustainable utilization of fisheries resources, and that the use of fisheries resources should be switched from their use for non-food fish and fishery products (such as feed for aquaculture) to their use for food products.

Basic Act on Food, Agriculture and Rural Areas (Extract)

(Securing of a Stable Food Supply)

- Article 2 (1)** Given the fact that food is essential for maintaining human survival and important for humans as a basis for a healthy and fulfilling lifestyle, a stable supply of high-quality food must be maintained into the future at a reasonable price.
- (2)** Given the fact that the world's food supply and demand and trade is unstable, a stable supply of food to the citizenry must be maintained by increasing domestic agricultural production as a basis for a stable food supply and by combining the supply with import and stockpiling of food.
- (3)** A supply of food must be maintained to meet the sophisticated and diversified public demand for food through achieving the sound development of agriculture and the food industry in a comprehensive manner, while encouraging an increase in agricultural productivity.
- (4)** A minimum food supply required for the citizens must be secured so that the stability in the citizens' lives and the smooth operation of the national economy will not be affected even when a domestic food supply shortage occurs or is likely to occur for a reasonable period of time due to contingent factors such as poor harvests or imports that have been stopped.

(Food Security in Emergencies)

Article 19 In the case prescribed in Article 2, paragraph (4), if the State finds it necessary to secure a minimum food supply required for the citizens, the State is to implement measures to increase the production of food, to restrict distribution and other necessary measures.

Basic Act on Fisheries (Extract)

(Maintaining a Stable Supply of Marine Products)

- Article 2 (1)** In light of the fact that marine products are an important part of a healthy diet and other healthy and fulfilling lives, a stable supply of quality marine products at reasonable prices must be ensured for the future.
- (2)** In supplying marine products, in view of the fact that marine resources are a limited component of the ecosystem, and in order to ensure their sustainable use, appropriate conservation and management of marine resources must be conducted based on the appropriate implementation of the United Nations Convention on the Law of the Sea, and the propagation and aquaculture of aquatic animals and plants are to be promoted while giving consideration to harmony with the environment.
- (3)** The stable supply of marine products to the public is to be secured by increasing Japan's fishery production, and appropriately combined with importing, while ensuring the sustainable utilization of marine resources, in view of the unstable state of supply and demand and trade of marine products worldwide.

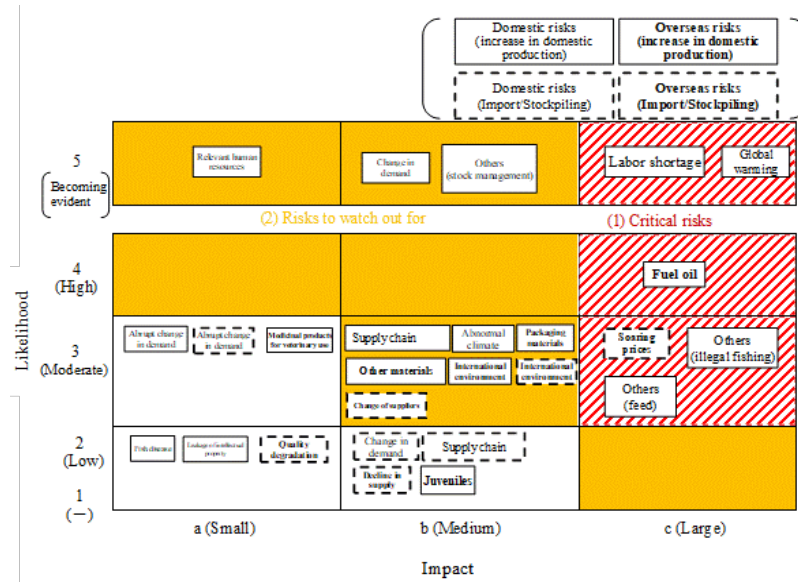
(Ensuring a Stable Supply of Marine Products as Food)

Article 12 Measures to ensure a stable supply of marine products as food are to be as set out in the Basic Law on Food, Agriculture and Rural Areas and in this Section.

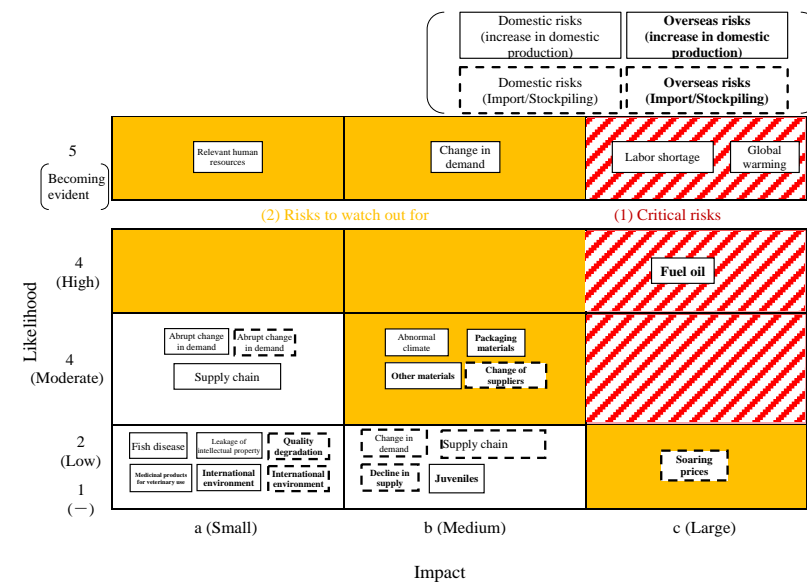
(2) Understanding the Situation Surrounding Food Security

- Amid mounting concerns about food security due to the emergence of new risks in recent years, such as the spread of COVID-19 infections and the invasion of Ukraine by Russia, the Ministry of Agriculture, Forestry and Fisheries identified and comprehensively examined the risks that would potentially affect the stable supply of food and published the results of this examination in June 2022 as the “Examination of Risks for the Stable Supply of Food (2022).”
- In this assessment of risks, each risk was analyzed in terms of its “likelihood” and degree of “impact” and categorized as a “critical risk” or “risk to watch out for.” For fish and fishery products, factors such as labor shortage, global warming, and declined fuel oil imports and soaring fuel oil prices were identified as “critical risks,” while factors such as change in demand, abnormal climate, and the declined import of materials such as packaging materials and their soaring prices were identified as “risks to watch out for.”

Risk Map for Fish and Shellfish



Risk Map for Marine Algae



(3) Upcoming Initiatives to Enhance Food Security Regarding Fish and Fishery Products

- Taking account of an increase in production volume owing to the steady implementation of resource management as well as initiatives, etc., based on aquaculture strategies and export strategies, the new Basic Plan for Fisheries formulated in March 2022 sets goals for the self-sufficiency rate in FY2032, which are 94% for fish and shellfish for human consumption, 76% for overall fish and shellfish, and 72% for marine algae.
- The “Plan for Creating Dynamism through Agriculture, Forestry, and Fishery Industries and Local Communities,” which is the grand design for policy reform to create dynamism in Japan’s agriculture, forestry, and fishery industries and local communities, was revised in June 2022, and also the “Guidelines for Policies to Enhance Food Security” were formulated in December of the same year to clarify the necessary measures to be continuously implemented for enhancing food security, and the targets of those measures.
- Since about 20 years have passed after the enactment of the Basic Act on Food, Agriculture and Rural Areas, it is essential to examine and review the Act in order to address issues for the future including the enhancement of food security. Accordingly, the study group on the review of the Basic Act, which was newly established under the Council for Policies on Food, Agriculture and Rural Areas, has actively conducted deliberations since 2022.
- In December 2022, structural shift measures, etc., aimed at enhancing food security were implemented to provide such types of support as the following: supporting fishery processors in ensuring a stable supply of raw materials; the development of formula feed for aquaculture with a low level of fish meal used; the domestic production of raw materials for formula feed; and the introduction of energy-saving fishing devices. Necessary measures will continue to be implemented in the future.