

**FY2015 Annual Report  
on Food, Agriculture and Rural Areas  
in Japan**

**Summary**

Ministry of Agriculture, Forestry and Fisheries

Japan, 2016

The FY2015 Annual Report on food, agriculture and rural areas in Japan is based on Items 1 and 2 of Article 14 of the Food, Agriculture and Rural Areas Basic Act (Law No. 106 of 1999).

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## ○FY2015 Annual Report on Food, Agriculture and Rural Areas in Japan

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- Numbers in figures and tables are rounded in principle and may not add up to the total.
  - Maps in this report may not necessarily indicate Japan's territories comprehensively.

## **Acronyms and abbreviations**

**CAA Consumer Affairs Agency**

**EU European Union**

**FAO Food and Agriculture Organization of the United Nations**

**IFAD International Fund for Agricultural Development**

**MAFF Ministry of Agriculture, Forestry and Fisheries**

**METI Ministry of Economy, Trade and Industry**

**MHLW Ministry of Health, Labour and Welfare**

**MIC Ministry of Internal Affairs and Communications**

**MOF Ministry of Finance**

**R&D Research and Development**

**US The United States**

**WFP World Food Programme**

## **Symbols**

**ha Hectare**

**a Are**

**kg Kilogram**

## Foreword

The Annual Report on Food, Agriculture and Rural Areas in Japan is a report on food, agriculture and rural area trends that is annually submitted to the Diet based on the Food, Agriculture and Rural Areas Basic Act.

The Trans-Pacific Partnership (TPP) negotiations in which Japan participated from July 2013 reached an agreement in principle in October 2015. TPP participating countries signed the agreement in February 2016. While the TPP has been expected to bring about various benefits for livelihoods and business operations in Japan, there exists the voice of concerns. Therefore, we must carefully explain the details of the TPP agreement and implement appropriate policy measures to keep sustainable production of agricultural, forestry and fisheries products, as well as develop the agriculture-forestry-fisheries sector into a powerful growth industry.

In this respect, this report starts with a special topic, “TPP agreements and relevant policies,” describing the background of TPP negotiations, outline of the agreement, impact assessment of TPP, the comprehensive TPP-related policy outline and other TPP matters.

This report describes trends in food, agriculture and rural areas in three chapters: (1) efforts for securing stable food supply; (2) efforts for creating strong, proactive agriculture; and (3) utilizing local resources to promote rural areas. For the first time, each chapter establishes priority themes to emphasize items that this report should communicate to the public. Specifically, this report takes up “trend of food self-sufficiency potential,” “promoting the export of agricultural, forestry and fisheries products, and expanding Japanese food and dietary culture overseas,” “agriculture structure changes” and “regional revitalization trend.”

Another chapter describes the restoration/reconstruction from the Great East Japan Earthquake, which struck five years ago.

This report also describes the implementation and effects of major policy measures to contribute to the steady promotion of measures based on the Basic Plan for Food, Agriculture and Rural Areas as decided by the Cabinet in March 2015.

While this report covers a wide range of topics, we have tried to introduce not only statistical data analyses and comments but also specific efforts taken throughout Japan for developing agriculture into a growth industry as much as possible in a bid to make this report easy to understand

We hope that this report will help people to understand Japan’s food, agriculture and rural areas.

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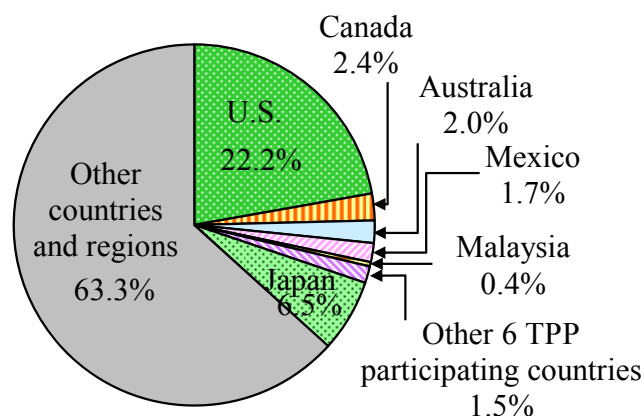
## TPP agreement and relevant policies

Twelve countries participated in Trans-Pacific Partnership (TPP) negotiations, reaching an agreement in principle in October 2015. The government will carefully explain details of the agreement and expand farm management stabilization measures for agriculture, forestry and fisheries to pursue proactive agriculture, forestry and fisheries, based on the outline of comprehensive TPP-related policy principles as decided in November 2015.

### 1 Background

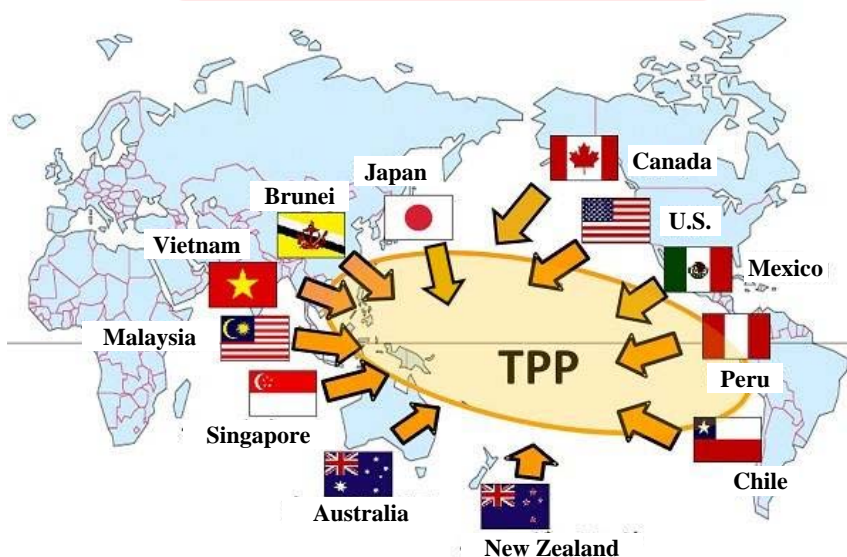
- Trans-Pacific Partnership (TPP) negotiations started in March 2010 among eight countries -- Singapore, New Zealand, Chile, Brunei, the United States, Australia, Peru and Vietnam. Later, Malaysia, Mexico, Canada and Japan joined the negotiations, bringing the total number of negotiation participants to 12. Those countries' gross domestic products combined account for as much as about 40% of global GDP.
- An agreement in principle was reached at a ministerial meeting of TPP negotiations in Atlanta, USA, on October 5, 2015. The agreement was signed in Auckland, New Zealand, on February 4, 2016.

TPP participating countries' shares of global GDP (2013)



Source: IMF, "World Economic Outlook Database April 2015"

TPP participating countries



Source: TPP Task Force, Cabinet Secretariat

## 2 Outline of the agreement

- Backed by the resolutions adopted by the Agriculture, Forestry and Fisheries Committees of the Houses of Representatives and Councillors, Japan negotiated tenaciously to prevent any negative impact on domestic agriculture, forestry and fisheries industries, and rural areas. As a result, Japan won the maintenance of the state trading system and existing out-of-quota tariffs, the creation of tariff quotas and safeguards, longer tariff reduction staging and other effective measures mainly for five sensitive products.
- As for tariffs on Japanese exports, Japan also won the elimination of tariffs on priority products (beef, rice, fisheries products, tea, etc.) for expanding agricultural, forestry and fisheries products and food exports.

### Details of agreement on 5 sensitive products

Product	Summary of agreement
Rice	The existing state trading system is maintained along with the existing out-of-quota tariff rate (341 yen per kilogram). In addition to the existing WTO quotas, country specific tariff rate quotas using SBS mechanism (simultaneous buy and sell tender system) are established against the United States and Australia.
Wheat and barley	The existing state trading system is maintained along with the existing out-of-quota tariff rate (55 yen per kilogram for wheat). In addition to the existing WTO quotas, country specific tariff rate quotas and TPP wide tariff rate quotas using SBS mechanism are established. The markup is set to be reduced by 45% by the ninth year.
Sweetening resource crops	The existing sugar price adjustment system is maintained for raw sugar and refined sugar. TPP wide tariff rate quotas are set for each sugar preparation. For starch, the existing sugar price adjustment system is maintained
Beef and pork	A tariff on beef is set to gradually be lowered from 38.5% at present to 9%. The elimination of the beef tariff is avoided, with a tariff reduction period being as long as 16 years. For pork, the existing differential tariff system is maintained and a tariff reduction period as long as 10 years is established. Moreover for beef and pork, the safeguard measure is established during the tariff reduction periods.
Dairy products	For skimmed milk powder and butter, the existing state trading system is maintained. New import quotas for the TPP participating countries are established. For whey which is likely to compete with skimmed milk powder, a tariff reduction period as long as 21 years is established along with the safeguard measure. Depending on the type of cheese, tariff treatment is different. Some are maintained as is. Some have a long tariff reduction period and the others have a conditional tariff-free quota established.

Source: MAFF



### 3 Decision on the comprehensive TPP-related policy principles

- TPP negotiations took five and half years to reach an agreement in principle, producing a giant economic bloc covering more than 800 million people in the 12 participating countries. While the TPP is expected to bring about various benefits for livelihood and business operations in Japan, there also have been concerns over the TPP. Therefore, the government must provide careful explanations on details of the TPP agreement and take comprehensive measures for allowing agricultural, forestry and fisheries products to be maintained and for developing strong agriculture, forestry and fisheries into growth industries.
- To this end, the TPP Task Force at its meeting in November 2015 decided the comprehensive TPP-related policy principles.
- Funds are earmarked in the FY 2015 supplementary budget for measures required to be urgently implemented.

#### Comprehensive TPP-related policy principles

- The economic partnership covers an economic bloc with an unprecedented size accounting for about 40% (3,100 trillion yen) of global GDP, producing a giant market with 800 million people. The TPP is a trump card for Abenomics.
- These Policy Principles clarify goals of policies necessary to link the effects of the TPP to Japan's economic and regional revitalization as well as policy to sweep away the concerns about the TPP's impacts among Japanese people.
- Major policies given in the principles, including existing ones, will be continuously checked and reviewed. Specific details of strategies to further develop agriculture, forestry and fisheries into growth industries, and policies to further promote overseas operations, business expansion and productivity improvement for Japanese industries will be prepared by the autumn of 2016.
- In conjunction with the principles, the government will try to provide the people with accurate, thorough explanations and information and will expend all possible means to sweep away insecurity and concerns about the TPP's impacts.

#### New big exporter

##### <Promotion of the TPP's utilization>

##### 1 Establishing a system to thoroughly provide information and counseling

- Raise awareness and proliferate information about the TPP
- Establish a counseling system for second-tier, medium and small-sized companies

##### 2 Supporting the development of new markets and the building of global value chains

- Drastically strengthen the mechanism to provide comprehensive support to second-tier, medium- and small-sized companies to help them develop new markets ("New big exporter" consortium)
- Promote the export of contents, services, technologies, etc.
- Strategically promote the export of agricultural, forestry and fisheries products, as well as foodstuffs
- Promote the export of infrastructure systems
- Improve business environments in countries where Japanese companies operate

#### Global hub

(International core base for trade and investment)

##### <Building a "robust economy" through the TPP>

##### 1 Measures to ensure that TPP-stimulated expansion of trade and investment leads to a rejuvenated domestic economy

- Ensure higher productivity through innovation and collaborations between companies or industries
- Promote foreign investment in Japan

##### 2 Boosting the "earning power" of regions

- Spread regional information
- Bring together and brand regional resources

##### < Food safety, intellectual property>

- Enhance a monitoring and guidance system for food imports, labelling of origin of ingredients
- Take measures required for patents, trademarks and copyrights
- Facilitate the utilization of copyrighted works

#### New agriculture policy age

##### <Agriculture, forestry and fisheries>

##### 1 Develop agriculture, forestry and fisheries into proactive industries (via measures to sharpen competitiveness)

- Nurture business persons with an excellent business sense to shoulder the next generation
- Promote innovation in internationally competitive production areas
- Promote a comprehensive project to enhance the profitability of the livestock raising and dairy sector
- Explore demand frontiers for the export of high-quality agricultural, forestry and fisheries products
- Enhance the international competitiveness of plywood and lumber
- Switch to sustainable, highly profitable business arrangements
- Enhance cooperation with consumers, reform regulations and the tax system

##### 2 Make preparations to ensure stable business management and supply (five key products)

- Rice (Review government-stockpiled rice)
- Wheat (Steadily implement farming income stabilization measures)
- Beef/pork, dairy products (Stabilize and expand the livestock raising and dairy sector)
- Sweetening resources crops (Subject the crops to adjustment money)

Source: TPP Task Force, Cabinet Secretariat

## 4 Economic impact analysis

- On December 24, 2015, the government released a macroeconomic impact analysis of TPP on Japan. The analysis includes the comprehensive economic efforts of tariff elimination, trade and investment promotion, cost reductions based on non-tariff-related measures, as well as the effect of increased productivity resulting from stimulated trade and investment.

### Economic Impact Analysis

#### Assessment for agriculture, forestry and fisheries

While the price decline caused by tariff reduction/elimination will decrease, production and farming family income will be continuously secured by domestic measures such as enhancement of competitiveness by both cost reduction and quality improvement and farm income stabilization. As a result, domestic production will be maintained.

**Agricultural, forestry and fisheries production value decline: about 130–210 billion yen**

**Impact on the food self-sufficiency rate (base year: FY2014):**

**39% in calories, 64% in production value**

**↓ Reflecting the assesment**

**39% in calories, 64% in production value**

#### Analysis results

GDP change:

+2.59% (+13.6 trillion JPY)

\*Real GDP at 524.7 trillion JPY (FY2014)

Labor supply change:

+1.25% (+795,000 workers)

\*Labor supply: 65.9 million

\*Number of employees: 63.6 million (FY2014)

Source: TPP Task Force, Cabinet Secretariat

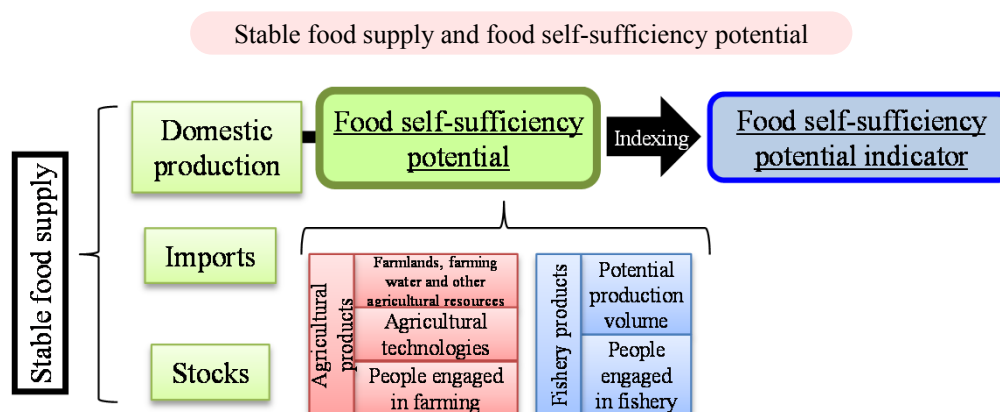
## Priority theme 1

## Food self-sufficiency potential trends

The Basic Plan for Food, Agriculture and Rural Areas decided by the Cabinet in March 2015 came up with the food self-sufficiency potential indicator for the first time. Japan's food self-sufficiency potential has been declining.

The food self-sufficiency potential indicates Japan's food production potential

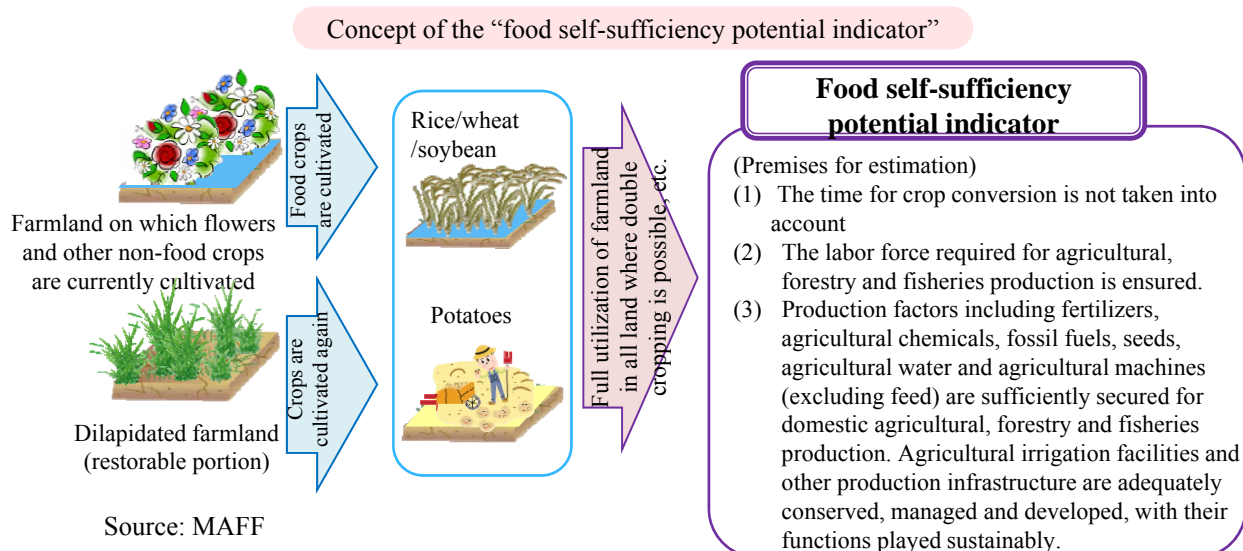
The food self-sufficiency potential indicates the food production potential of Japan's agriculture, forestry and fisheries sectors. The components of the food self-sufficiency potential for agricultural production are farmlands, farming water and other agricultural resources, agricultural technologies, and people engaged in farming. The components of the food self-sufficiency potential for fisheries production are potential production volume and people engaged in fishery.



Source: MAFF

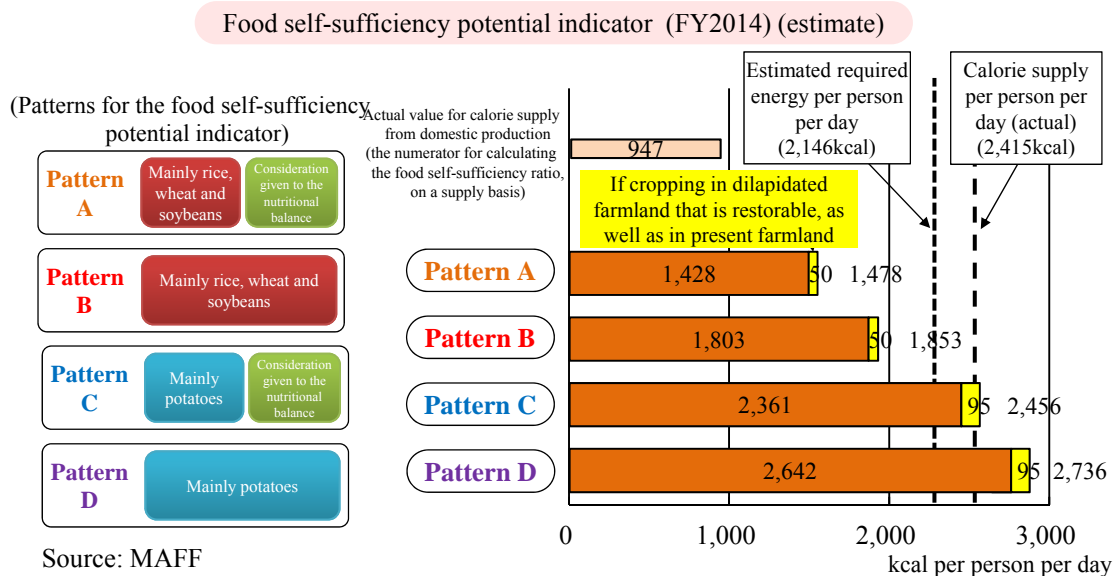
## Concept of the “food self-sufficiency potential indicator”

The food self-sufficiency potential indicator shows the amount of calories that could be supplied through the maximum utilization of production potential in the Japanese agriculture, forestry and fisheries sectors. It is estimated under the premise that mainly rice and potatoes are cultivated on all farmland, including that on which flowers and other non-food farm products are cultivated. Additionally, the estimation is based on some hypothetical premises: (1) the time for crop conversion is not taken into account and (2) the labor force required for agricultural, forestry and fisheries production is ensured.



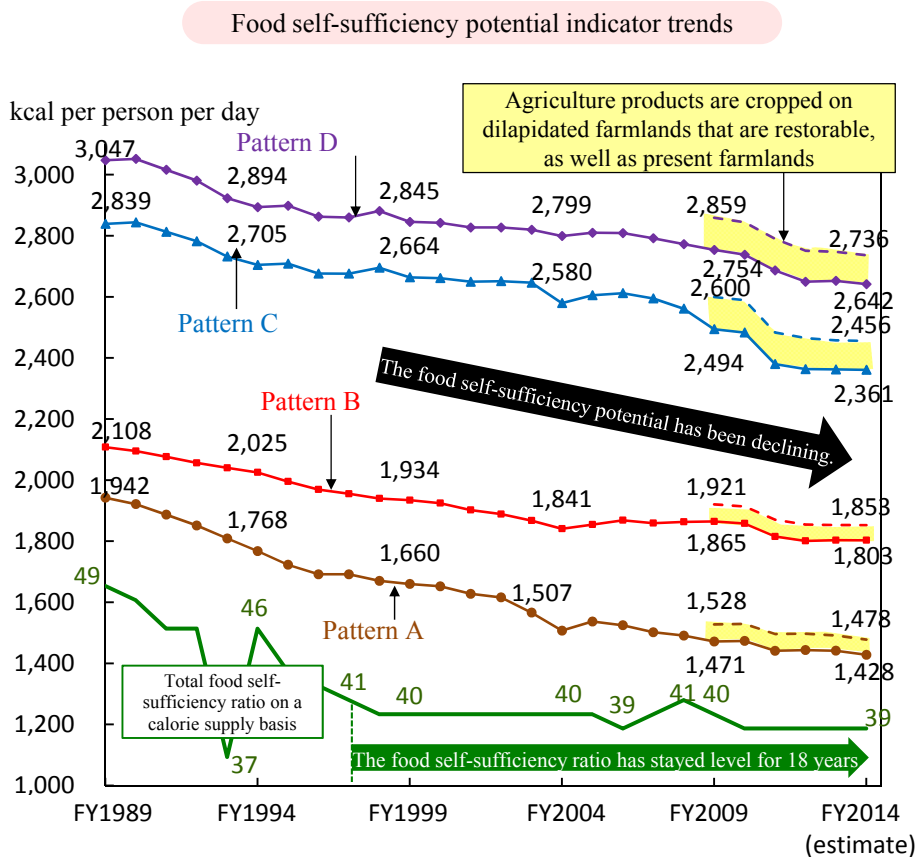
## The food self-sufficiency potential indicator has been declining

The food self-sufficiency indicator is estimated for four food production patterns. In the pattern where mainly potatoes are cultivated, the indicator exceeds the estimated required energy amount. In the more realistic pattern where mainly rice, wheat and soybeans are cultivated, the indicator slips far below the estimated required energy amount.



While the food self-sufficiency ratio has stayed level, the food self-sufficiency potential has been on a decline in recent years, raising concerns about the future food supply in Japan.

MAFF provides the food self-sufficiency potential indicator to contribute to discussions on food security with a view to promote policy measures securing stable food supply.



## Priority theme 2

### Export promotion and overseas dissemination of Japanese food and food culture

Japan's agricultural, forestry and fisheries products and food exports totaled 745.1 billion yen, posting a record high for the three consecutive years. At the Expo Milan 2015, the Japanese pavilion showed the attractiveness of Japanese food and food culture to many visitors to the pavilion. Registration under the Geographical Indication protection system has started to certify products utilizing regional characteristics.

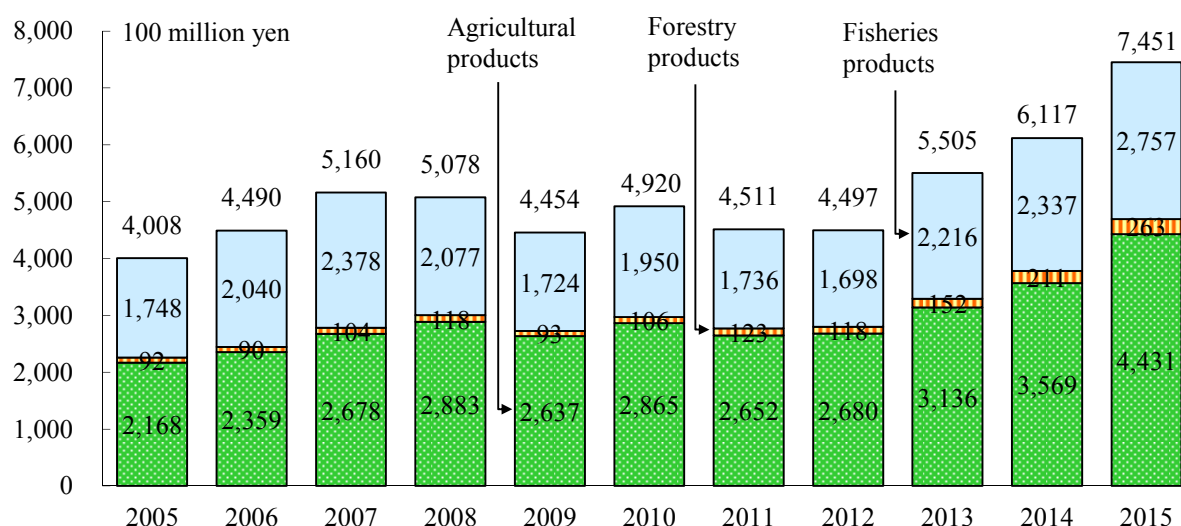
### Promoting the export of agricultural, forestry and fisheries products and foods

To realize the target of expanding agricultural, forestry and fisheries products and foods exports to 1 trillion yen in 2020, MAFF has drafted export strategies for each country and product. To steadily implement the strategies, product-by-product export organizations have been established under the Executive Committee for Export Promotion Strategy to promote the export of these products on an "all-Japan" basis. Product-by-product export expansion plans are prepared to annually check and update specific initiatives.

Based on discussions at the Executive Committee for Export Promotion Strategy, MAFF prioritizes and implements initiatives to resolve export challenges including import regulations involving radioactive materials, animal and plant quarantine talks and food safety regulations.

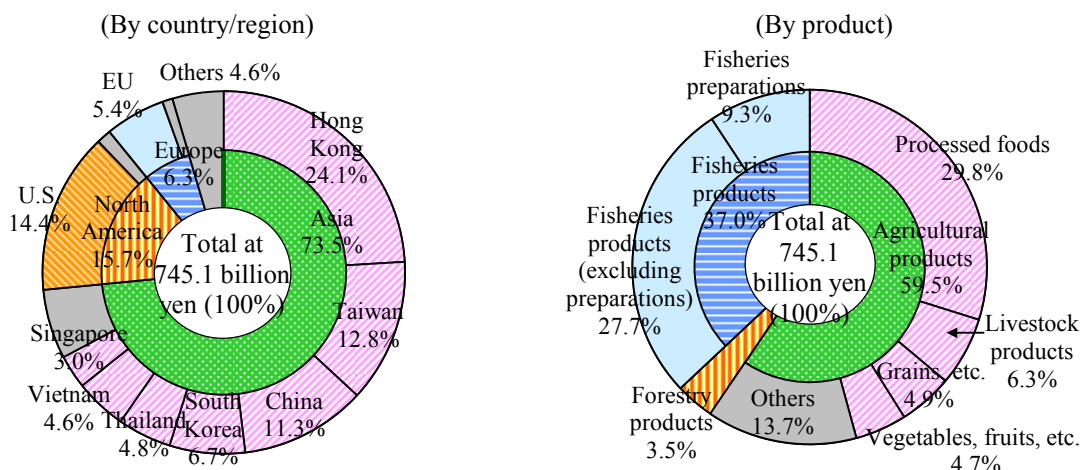
As exports have steadily increased, MAFF will promote initiatives to achieve the 1 trillion yen target ahead of schedule.

Trends of agriculture, forestry and fisheries products and foods exports



Source: Prepared by MAFF, based on MOF, "Trade Statistics"

Breakdown of exports by country/region and product (2015)



Source: Prepared by MAFF, based on MOF, "Trade Statistics"



## Strategic creation, exploitation and protection of intellectual property

It is important to exploit and protect intellectual property to cope with counterfeit products in overseas markets. Registration under the protected geographical indication system has started. Registered products under the system can be differentiated by the GI mark.

Products registered for geographical indication (At the end of March 2016)

- ・あおもりカシス、*Aomori Cassis*
- ・但馬牛、*Tajima Gyu*, *Tajima Beef*
- ・神戸ビーフ、*KOBE BEEF*
- ・夕張メロン、*YUBARI MELON*
- ・八女伝統本玉露、*Traditional Authentic YAME GYOKURO*
- ・江戸崎かぼちゃ、*Edosaki Kabocha*

- ・鹿児島壺造り黒酢、*Kagoshima no Tsubozukuri Kurozu*
- ・くまもと県産い草、*KUMAMOTO-RUSH*
- ・くまもと県産い畳表、*KUMAMOTO-RUSH-MATS*
- ・伊予生糸、*Iyo Raw Silk*
- ・鳥取砂丘らっきょう / ふくべ砂丘らっきょう、*Tottori Sakyu Rakkyou / Fukube Sakyu Rakkyou*
- ・三輪素麺、*Miwa Somen*



GI mark

Note: *Italic characters* is a reference.

## Overseas expansion of Japanese food culture

It is important to disseminate the attractiveness of Japanese food culture overseas to increase Japan's share of the growing world food market.

At the Milan Expo between May and October 2015, the Japanese pavilion campaigned for Japanese food culture, highly evaluated from around the world. The number of overseas Japanese food restaurants totaled 89,000 in July 2015, increasing about 1.6-fold in two years.

### Communicating Japanese food culture at the Expo Milan 2015

The Expo Milan 2015 lasted for 184 days in Milan, Italy, under the theme of "Feeding the Planet, Energy for Life." A total of 145 countries and three international organizations participated in the expo, with the number of visitors reaching 21.5 million. Under the theme of "Harmonious Diversity," the Japanese pavilion emphasized that initiatives, wisdom and skills involving the Japanese agriculture, forestry and fisheries sector, and Japanese food culture would contribute to resolving common challenges for all humanity. Events and the food court introduced Japanese food culture.

The Japanese pavilion became one of the most popular pavilions at the expo, attracting 2.28 million visitors, accounting for a little more than 10% of the total visitors to the expo. The Japanese pavilion won the gold prize for best exhibition design, obtaining high ratings.



Japanese pavilion on Japan Day (July 11)



Tonkatsu (deep-fried pork cutlet) served at the food court

## 1 Objectives and present situation of Basic Plan for Food, Agriculture and Rural Areas

- In March 2015, the government decided the Basic Plan for Food, Agriculture and Rural Areas as a guideline for promoting agriculture and rural area policy reforms and national initiatives. The plan set the food self-sufficiency ratio target of 45% on a calorie supply basis and 75% on a production value basis for FY2025.
- The overall food self-sufficiency ratio on a calorie supply basis in FY2014 remained unchanged from 39% in the previous year. While domestic wheat and soybean output increased, demand for rice, the domestic production of which can fully meet demand, declined after a last-minute rise just before a consumption tax increase, leading rice's share of total calorie supply to drop.
- The overall food self-sufficiency ratio on a production value basis in FY2014 dropped by one percentage point to 64% as a decline in prices of domestically produced rice was coupled with a rise in seafood import costs under the yen's depreciation.

Food self-sufficiency ratio targets

(Unit: %)

	FY2013	FY2014	FY2025 Target
Food self-sufficiency ratio on a calorie supply basis	39	39	45
Food self-sufficiency ratio on a production value basis	65	64	73
Feed self-sufficiency ratio	26	27	40

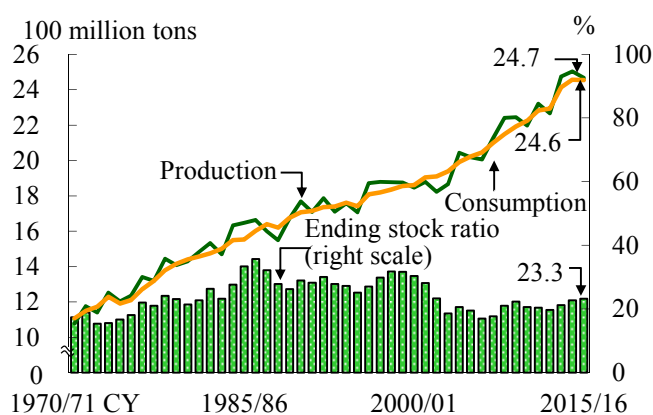
Source: MAFF

## 2 Global food supply and demand, and efforts for establishing food security

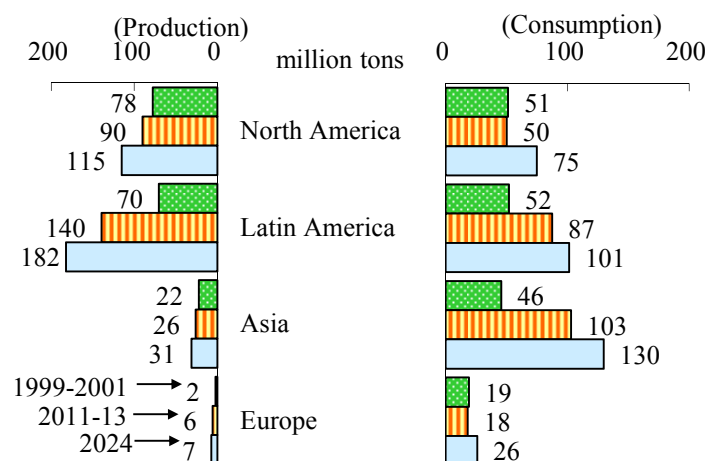
### (1) Global food supply/demand trends

- Global grain production in the 2015-16 CY is expected to decline by 40 million tons or 1.4% from the previous year to 2.47 billion tons due to falls in corn and rice output. Meanwhile, consumption is projected to level off at 2.46 billion tons.
- Global grain and soybean production and consumption are projected to increase in the future. Particularly, Asian soybean consumption is expected to expand, while production in North America and Latin America for soybean supply to Asia is predicted to grow.

Grain production, consumption, ending stock ratio



Global soybean production and consumption trends and outlook



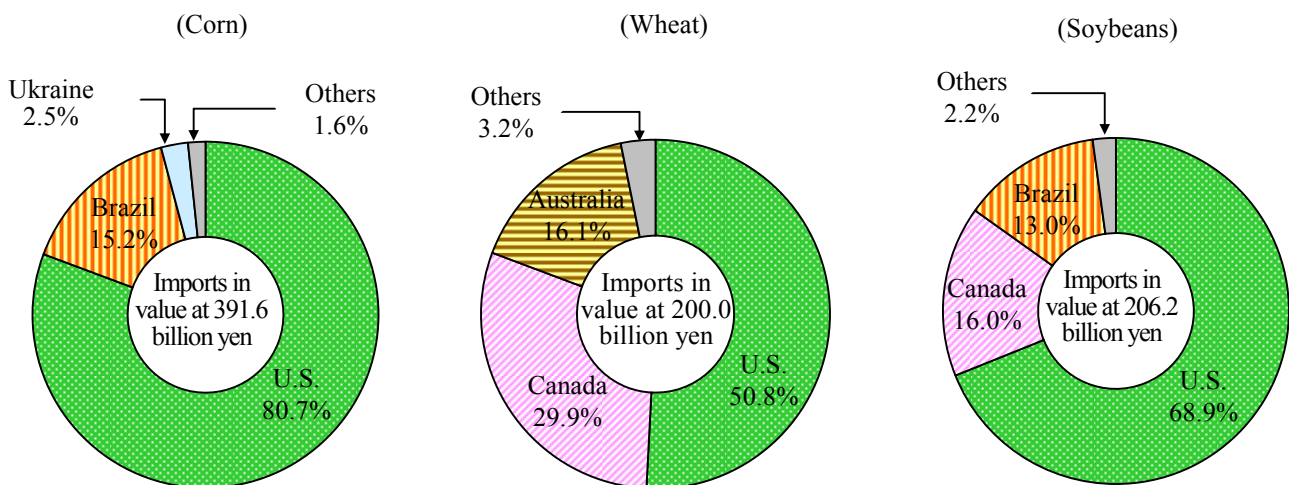
Source: Prepared by MAFF based on U.S. Department of Agriculture, "PS&D," "World Agricultural Supply and Demand Estimates" (as of March 2016)

Source: Policy Research Institute, MAFF "Global Food Supply/Demand Outlook for 2024 -- Projection with Global Food Supply/Demand Model"

## (2) Efforts for establishing food security

- In preparation for unforeseeable events including food import disruptions, the government regularly analyzes and assesses the impacts of risks involving a stable food supply. Based on the results of such analysis and assessment, the government considers and implements measures to mitigate the impacts. It also promotes the development of specific procedures for responding to unforeseeable events and shares them with relevant parties.
- A breakdown of Japan's major farm products imports in value by country indicates that the top three exporters account for more than 90% of the total for each product. Japan thus depends heavily on a limited number of specific countries for farm imports.

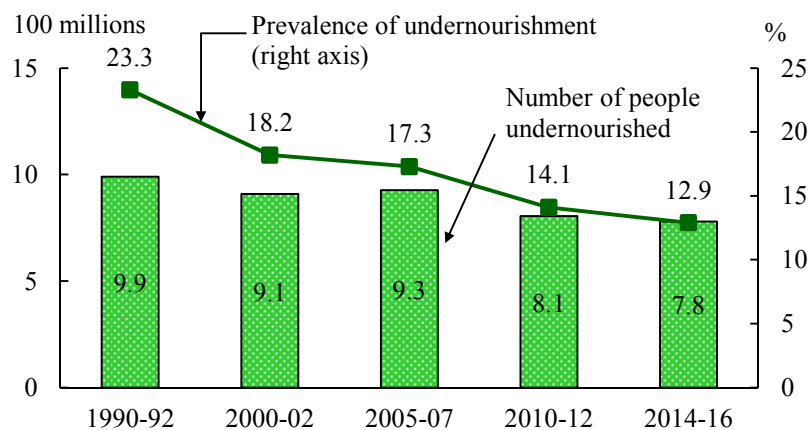
Breakdown of Japan's major farm products imports in value by country (2015)



Source: Prepared by MAFF, based on MOF, "Trade Statistics"

- The share of undernourished people in the population (the prevalence of undernourishment) in developing regions, though falling, still stands at about 13% (780 million people). To help accomplish goals and targets (including ending hunger by 2030) in the 2030 Agenda for Sustainable Development as adopted by the United Nations in September 2015, Japan is promoting private sector investment and economic cooperation.

Number of people undernourished in developing regions



Source: FAO, IFAD, WFP, "The State of Food Insecurity in the World 2015" (published September 2015)

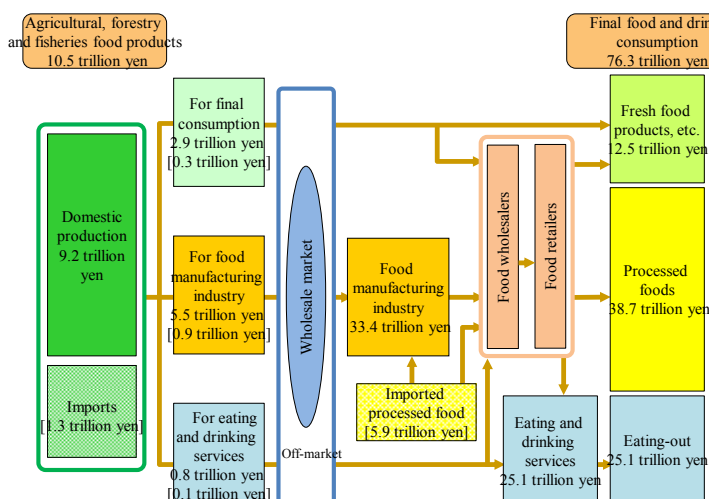


### 3 Food consumption trends and promotion of Shokuiku (food and nutrition education)

#### (1) Food consumption trends

- In 2011, domestic food supply included 10.5 trillion yen in agricultural, forestry and fisheries food products (9.2 trillion yen in domestic production and 1.3 trillion yen in imports) and 5.9 trillion yen in processed food imports. Final food and drink consumption totaled 76.3 trillion yen, continuing a downward trend after peaking in 1995.
- Japan's daily per capita calorie supply has followed a downward trend. While livestock products, fatty oils, wheat and potato/starch supply has remained almost unchanged, mainly rice and seafood supply has declined.

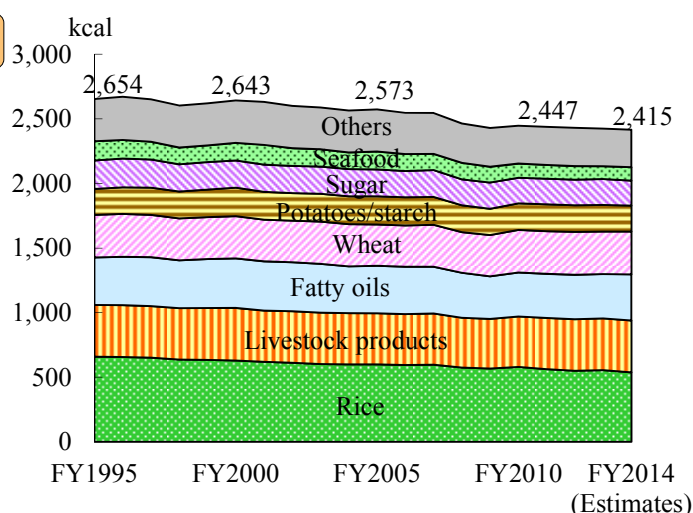
Flow of Japan's agricultural, forestry and fisheries products production, distribution, processing and consumption (2011)



Source: MAFF, "2011 Input-Output Tables for Agriculture, Forestry and Fisheries, and Related Industries"

Note: Import figures in parentheses

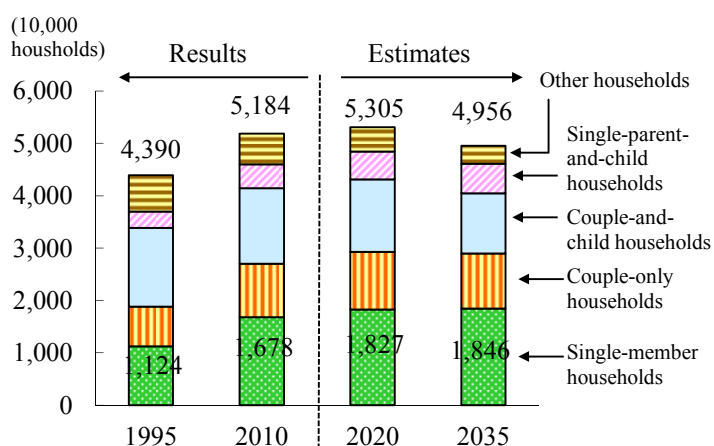
Daily per capita calorie supply trends



Source: MAFF, "Food Balance Sheet"

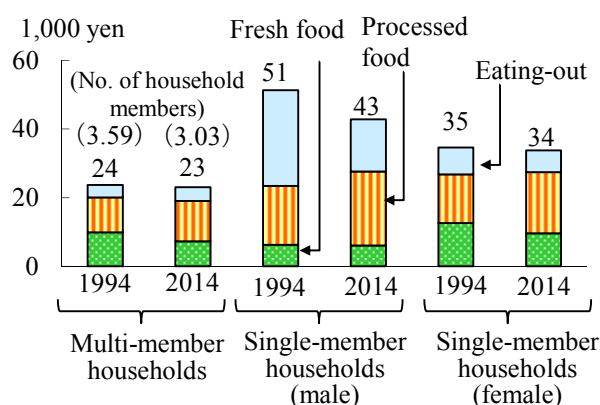
- The number of households has recently increased, with the rise centering on single-member households. While the total number of households is expected to peak in 2020, single-member households are projected to increase.
- Of per capita food spending, processed food spending for both men and women for single-member households is greater than for multi-member households. As single-member households increases, processed food spending is expected to expand.

Trends of households by household type



Sources: MIC, "Population Census"; National Institute of Population and Social Security Research, "Household Projections for Japan (nationwide estimates) (January 2013)"

Trends of monthly per capita food spending by household type



Source: Prepared by MAFF, based on MIC, "National Survey of Family Income and Expenditure" and "Consumer Price Index"