Current Situation and Policy on Organic Agriculture in Japan

August, 2019
Sustainable Agriculture Division,
Agricultural Production Bureau,
MAFF (Ministry of Agriculture Forestry and Fishery)
Position of Sustainable Agriculture including Organic farming in Japan

The Basic Law on Food, Agriculture and Rural Areas (enacted in 1999)

Article 4  (Sustainable Agriculture Development)
In consideration of the importance of its conventional role as a primary food supplier and its multifunctional roles, the sustainable development of agriculture shall be promoted by maintaining and improving the natural cyclical function of agriculture*1.

*1 the function of agriculture in stimulating the biological and physical cycle in nature while being influenced strongly by the cycle (see image below)

---

“Organic agriculture is a holistic production management system which promotes and enhances agro-ecosystem health, including biodiversity, biological cycles, and soil biological activity”
“Organic Agriculture” in Japan

The Act on the Promotion of Organic Agriculture (enacted in 2006).

→ to establish a basic philosophy of organic agriculture
→ clarify the responsibilities of the national and local governments
→ establish the basis of measures to promote organic agriculture
→ promote the development of organic agriculture.

“organic agriculture” is defined as follows
(by the article 2 of this act)

the agriculture using the methods which reduce the load on
environment derived from agricultural production as much as
possible based on

→ not using chemically synthesized fertilizers and
pesticides

→ not using genetic recombination technologies
"Organic Agricultural Products” in Japan

the Organic JAS System (operation since 1999)

In accordance with “the Act of Japanese Agricultural Standard (JAS)”, a third-party organization inspects the production that conforms to the “Organic JAS Standard” and allows certified business operators only to use the “Organic JAS Mark” and the term of “Organic Agricultural Products”.

Japanese Agricultural Standard for Organic Agricultural Products

✓ Basically to avoid the use of chemically synthesized fertilizers and pesticides for more than a certain period prior to seeding or planting.

✓ to take necessary measures preventing prohibited materials from flying or flowing from the surrounding area.

✓ exerting the production capacity of the farmland derived from the nature of the soil.

etc.
Structure of Sustainable and organic agriculture in Japan

**Sustainable Agriculture**
Agricultural production methods to reduce environmental load caused by agricultural production

**Organic Agriculture**
Agricultural production methods defined in the Act on the Promotion of Organic Agriculture

**Organic Agricultural Products**
Produced in production methods followed Japanese Agricultural Standard for Organic Agricultural Products and a third-party organization inspects the production that conforms the rules.

* can be attached Organic JAS logo.
* can be labeled as “Organic”.

*Organic Agricultural Products*
Current Status of Organic Agriculture in Japan
The area of JAS certificated organic farmland was researched by the Food Manufacture Affairs Division. The area of non JAS certificated organic farmland was estimated by the Sustainable Agriculture Division. (The area of non JAS certificated organic farmland differs in survey and estimation method between 2009, 2010-2014, 2015-2017. The method of data collection also differs by prefecture.)

As a result of a survey in 2018 (provided by the Sustainable Agriculture Division), the total area of organic farmland in 2015 has been revised since 2018. This is because the areas of non JAS certificated organic agricultural after 2015 was modified by several prefectures.
Type of farmland and organic farmers in Japan

Transition of land use in organic JAS certificated farmland

<table>
<thead>
<tr>
<th>Year</th>
<th>Paddy Field</th>
<th>Upland Field</th>
<th>Livestock Feed/Grazing Land</th>
<th>Orchard (Including Tea Field)</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>9,889</td>
<td>10,043</td>
<td>9,937</td>
<td>10,366</td>
<td>10,792</td>
</tr>
<tr>
<td>2013</td>
<td>9,937</td>
<td>10,043</td>
<td>9,956</td>
<td>10,366</td>
<td>10,792</td>
</tr>
<tr>
<td>2014</td>
<td>10,043</td>
<td>10,043</td>
<td>9,956</td>
<td>10,366</td>
<td>10,792</td>
</tr>
<tr>
<td>2015</td>
<td>10,366</td>
<td>10,043</td>
<td>9,956</td>
<td>10,366</td>
<td>10,792</td>
</tr>
<tr>
<td>2016</td>
<td>10,043</td>
<td>10,043</td>
<td>9,956</td>
<td>10,366</td>
<td>10,792</td>
</tr>
<tr>
<td>2017</td>
<td>10,792</td>
<td>10,043</td>
<td>9,956</td>
<td>10,366</td>
<td>10,792</td>
</tr>
</tbody>
</table>

Land use in organic JAS certificated farmland in 2017

- Paddy field: 27%
- Upland field: 47%
- Livestock feed / grazing land: 9%
- Orchard (including tea field): 10%
- Orchard (excluding tea field): 5%
- Others: 2%

Percentage of new farmers from other field engaged in organic farming

<table>
<thead>
<tr>
<th>Year</th>
<th>Organic Farming in Some of Their Management</th>
<th>Organic Farming in All of Their Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>5.7%</td>
<td>23.2%</td>
</tr>
<tr>
<td>2016</td>
<td>5.9%</td>
<td>20.8%</td>
</tr>
</tbody>
</table>
Retail sales of organic food (2017)

Germany: 10.0 billion €
China: 7.6 billion €
France: 6.7 billion €
United Kingdom: 2.3 billion €
Spain: 1.9 billion €
Japan: 1.4 billion €
Republic of Korea: 0.3 billion €

Source: Organic Agriculture Research Institute (FiBL) & IFOAM, "The World of Organic Agriculture Statistics & Emerging Trends 2019"
### Consumer survey results

#### The frequency of use of organic food

- **Almost every day**: 3.3%
- **A couple of times a week**: 6.7%
- **About once a week**: 8.5%
- **About a couple of times a month**: 9.1%
- **About once a month**: 6.5%
- **Less than once a month**: 12.1%
- **Almost no use (purchase, eating out)**: 54.8%

**4,530 respondents**

#### Subcategories:

- **Almost all purchased foods are “organic”**: 9.6%
- **Almost all purchased foods are safety-conscious and environmentally friendly, such as “organic” and “lower pesticide”**: 60.8%
- **Some purchased foods are safety-conscious and environmentally friendly, such as “organic” and “lower pesticide”**: 29.6%

**523 respondents**

### Comparison with 2009 estimates

<table>
<thead>
<tr>
<th>Estimated year</th>
<th>2017</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>① The monthly average per household of the purchased amount of organic foods in consumers who is “almost all purchased foods are ‘organic’”</td>
<td>10,750 yen</td>
<td>11,800 yen</td>
</tr>
<tr>
<td>② The percentage of consumers who is “almost all purchased foods are ‘organic’”</td>
<td>1.68%*1</td>
<td>0.90%</td>
</tr>
<tr>
<td>③ Number of households in Japan (households)</td>
<td>53.4 million households</td>
<td>49 million households</td>
</tr>
<tr>
<td>④ Organic food purchase amount of consumers who is “almost all purchased foods are ‘organic’” in Japan</td>
<td><strong>115.7 billion yen</strong>*2</td>
<td><strong>62.4 billion yen</strong></td>
</tr>
<tr>
<td>⑤ Estimated organic food market size in Japan</td>
<td><strong>185.0 billion yen</strong></td>
<td><strong>130 billion yen</strong></td>
</tr>
</tbody>
</table>

*1: 17.5%×9.6%  *2: 10,750 yen × 12 months × 1.68% × 53.4 million households
Trends in distribution and consumption of organic agricultural products

Organic specialty supermarket Bio c’ Bon

Bio c’ Bon Japon Co., Ltd., joint venture between a Japanese retailer and a French organic shop, firstly opened the organic specialty supermarket “Bio c’ Bon” in Tokyo in December 2016, and has opened other stores in and around Tokyo one after another.

Trends in organic couriers – The case of Bio Market –

Bio Market Co., Ltd., which develops home delivery services for organic agricultural products, mainly in Kansai region, sells agricultural products and processed products authorized with organic JAS certification.

It has also worked on wholesale and online shops, providing school meals in the Keihan area, etc. and increased sales of agricultural products.

Serving hotels as well — The case of Super Hotel –

Super Hotel Co., Ltd., adopted organic JAS certified vegetables for all its breakfast salads at approximately 130 stores nationwide (except for some areas) since seven years ago. Organic vegetables are purchased through Green Club Co., Ltd.

Each store also provides information about production areas of vegetables and strives to connect consumers and producers.
Consumers Awareness for “Organic”

Q: Do you know the term “organic”?

Target: Domestic consumers over 16 years old  (n=4,530)

- Don’t know the term 9.0%
- Familiar with the term correctly 3.7%
- Familiar with the term roughly 29.1%
- Know the term “organic” 90.9% as total
- Know the term, but unsure about labeling restriction 58.1%

Source: Survey about Organic Foods Market (2018, Sustainable Agriculture Division, MAFF)
Consumers Awareness for “Organic”

Q: What do you think about “organic foods”?

Target: Domestic consumers over 16 years old who buy organic foods more than once a week (n=523)

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Agree</th>
<th>Relatively Agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td>31.7%</td>
<td>54.3%</td>
<td>86.0%</td>
</tr>
<tr>
<td>Expensive</td>
<td>34.2%</td>
<td>48.6%</td>
<td>82.8%</td>
</tr>
<tr>
<td>Healthy</td>
<td>31.7%</td>
<td>47.8%</td>
<td>79.5%</td>
</tr>
<tr>
<td>Resonate with the concept</td>
<td>18.4%</td>
<td>47.4%</td>
<td>65.8%</td>
</tr>
<tr>
<td>Delicious</td>
<td>17.8%</td>
<td>46.1%</td>
<td>63.9%</td>
</tr>
<tr>
<td>Harmonized with the environment</td>
<td>17.8%</td>
<td>44.7%</td>
<td>62.5%</td>
</tr>
</tbody>
</table>

Source: Survey about Organic Foods Market (2018, Sustainable Agriculture Division, MAFF)
Organic Agriculture in the SDGs Action plan in Japan

Organic agriculture is positioned in the “Action Plans for Sustainable Development Goals”, Japanese cabinet decided on December 21, 2017

Creating Growth Market, Revitalization of Rural Areas, and Promoting Technological Innovation

Establish Stable Organic Agricultural Products Supply System

Conservation of Environment, including Biodiversity, Forests and Oceans

Promotion of Organic Agriculture and Environmentally Friendly Agriculture

Source: http://www.kantei.go.jp/jp/singi/sdgs/
Promotion measures for organic farming

- Creating the Hub for Organic Farming
- Others
Creating Hubs for Organic Farming Projects

MAFF is now supporting some local farmers group activities to create the Hub for Organic Farming in all over the country.

**targeting activities**

- Establishing the organic producers networks
- Facilitating promotion to agricultural products buyer and consumers
- Setting training farms for new farmers

**Hubs for organic farming**

- Applicants who want to start organic farming
- Veteran organic farmers
- Newcomers from non-organic farming/New organic farmers

Share technical and management skills and start group business activities

**Restaurants • supermarkets**
- many items • stable supply

**JA Local government**

cooperation
Example for the Hubs - Isumi City, Chiba Prefecture

- Offer training for new farmers by veteran organic farmers
- Establishment of supply system for organic rice and vegetables to school meals (Since 2018 all rice used for school meals in the City have managed by local organic products)

![Graph showing organic agricultural farmland](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>Rice (ha)</th>
<th>Vegetable (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>25</td>
<td>0.5</td>
</tr>
<tr>
<td>2019</td>
<td>10</td>
<td>0.4</td>
</tr>
</tbody>
</table>

▲ Training for new organic farmers

▲ Environmental education through farming experience
Creating Hubs for Organic Farming Projects

Projects have implemented in 21 areas in FY2018.

Vision
• Increase the hubs all through the country
• Enhance productivity and supply capability of organic agricultural products

Project location in FY 2018
**Promotion measures for organic farming**

- Creating the Hub for Organic Farming
- Others
Promotion for Export of Japanese Organic Products

Japan's organic food exports are on the rise as the global organic market expands, and MAFF is helping to promote these movements.

Source by MAFF
Examples for Export of Japanese Organic Products

**Case1 : JA*1 Tajima (Toyooka city, Hyogo prefecture)**

- Export organic rice “Kouno Tori*2 Natural Rice” to Australia.

*1 JA (Japan Agricultural Cooperatives):
The cooperative organizations to improve members’ agricultural activities established voluntarily by farmers and non-farm members

*2 “Kouno Tori”:
the term stork in Japanese

**Case2 : Iida Farm (Nagoya city, Aichi Prefecture)**

- Exhibition to FOODEX Japan (Asia's No.1 Professional Trade Show for Food & Beverage)

- Export tomato and its processed foods and drinks to Asian countries.
Best Farmers Awards for Sustainable Agriculture

**Award from Minister of Agriculture, Forestry and Fishery**

Kagoshima Organic Farmer’s Association (Kagoshima city, Kagoshima)

- Established in 1984
- Area of Farmland: 8 ha (in 1984) → 275 ha (in 2018)
- Number of members: 10 (in 1984) → 162 (in 2018)
- Started processing and exporting organic products in recent years

**Award from Director-General of Agricultural Production Burau**

Kaorinomiya Farm & Agriculture (Goutsu city, Shimane)

Agreenheart Co., Ltd. (Kuroishi city, Aomori)

JA Midorino - PalSystem Rice Production Group (Misato town, Miyagi)
Creating the Municipalities Network to promote Organic Farming

• MAFF supports establishment of **Municipalities Network for regional development and organic farming**

• This network would work to share the experiences, opinions and know-how among the municipalities etc.

- The network was launched on August 1, 2019.
- The networking event with network members and local government staffs etc. was held.

**The 1st Networking Event (August 2, 2019)**

MAFF announced the launch of this network with the municipalities.

Group discussion

▲ Presentation from Pioneer municipalities in organic farming

Share the experiences, opinions and know-how etc.

Support collaboration

**Municipalities interested in organic farming**

**Municipalities promoting organic farming**

**Pioneer Municipalities in organic farming**

**Prefecture**

**Government**

**Private Companies**

**Organic Farmers Association**