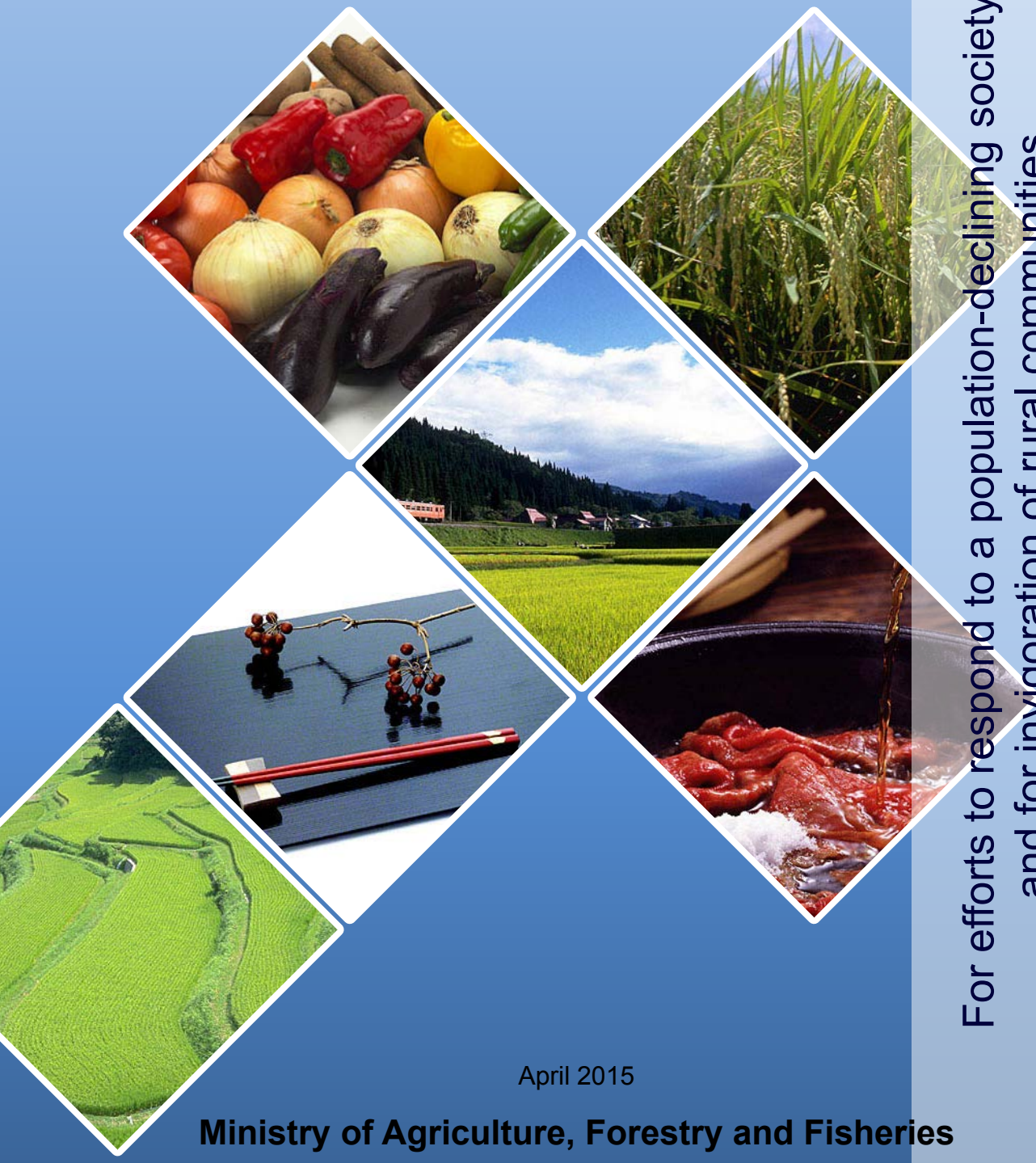
Summary of the Basic Plan for Food, Agriculture and Rural Areas

—Food, agriculture and rural areas over the next 10 years—



For efforts to respond to a population-declining society and for invigoration of rural communities

April 2015

Ministry of Agriculture, Forestry and Fisheries

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Reference

What is the Basic Plan?

- The new Basic Plan for Food, Agriculture and Rural Areas is the fourth Basic Plan decided based on the Food, Agriculture and Rural Areas Basic Act.
- The Basic Plan for Food, Agriculture and Rural Areas serves as a guideline for advancing the reform of measures and efforts by the entire nation so as to enable Japan's agriculture and rural areas to accurately respond to structural and other changes in the economy and society, and to appropriately play their roles in the future, while fully demonstrating their potential.

Structure of the new Basic Plan

Part 1 Basic viewpoints for promoting measures

"Industrial policy" for developing agriculture and food industries into a growth sector as well as "regional policy" for promoting the maintenance and implementation of agriculture's multifunctional roles will be employed to steadily step up the reform of measures for food, agriculture and rural areas.

- Securing of the stability of measures to realize the basic principles of the Basic Act
- Deepening of national discussions on how to secure stable food supply
- Implementation of measures from the viewpoints of demand and consumers
- Development of an environment where farmers can perform well
- Implementation of measures to realize sustainable agriculture and rural areas
- Promotion of technological innovation to explore new possibilities
- Improvement of farmers' income and creation of prosperity in rural areas

Part 2 Food self-sufficiency ratio targets

Food self-sufficiency ratio targets
Calorie supply basis: 39% (2013) → 45% (2025)
Production value basis: 65% (2013) →73% (2025)

Food self-sufficiency potential (potential food production capacity) indicator

Part 3 Measures to be taken

- Securing stable food supply
- Sustainable agricultural development
- Development of rural areas
- Restoration/reconstruction from the Great East Japan Earthquake
- Reorganization/restructuring of relevant bodies

Part 4 Matters necessary for promoting measures

- Participation by various people concerned and cooperation between relevant ministries
- Progress management and evaluation of measures
- Efficient and intensive implementation of fiscal measures
- Decision of measures that are in line with the viewpoint of the general public and the actual situation of rural communities
- Effective and efficient system for promoting measures

Reference [Documents drafted along with the Basic Plan]

- Farmland outlook and how to secure farmlands
- Agriculture structure outlook
- Farm management outlook
- Basic plan for agriculture, forestry and fisheries research
- Toward development of attractive rural areas

Evaluation and challenges

Prospects of medium- to long-term changes in circumstances

Part 1 Circumstances surrounding food, agriculture and rural areas

- Progress in population aging and decline
- Changes in the environment surrounding the world's food supply and demand balance, progress in globalization
- Changes in the social structure, etc. and diversification of consumer needs
- Changes in the structures of agriculture and rural areas including farmland consolidation
- Diverse possibilities (new markets in Japan and other countries, robot technology, etc.)
- Restoration/reconstruction from the Great East Japan Earthquake

Past Basic Plans for Food, Agriculture and Rural Areas

Formulated under the Food, Agriculture and Rural Areas Basic Act (enacted in July 1999).
A medium- to long-term agriculture policy vision indicating the direction of measures over the next decade

- Basic plan developed in March 2000
- Basic plan developed in March 2005
- Basic plan developed in March 2010

Revised about every five years

Development of "strong, aggressive agriculture" and "beautiful, vigorous rural areas"

Key points of the new Basic Plan for

—A Basic Plan for Food, Agriculture and Rural Areas is developed based on the Food, Agriculture and Rural Areas Basic

[Key points]

○ Setting of food self-sufficiency ratio targets with consideration given to their feasibility
○ Release of "food self-sufficiency potential indicator" for the first time

○ Description on the enhancement of initiatives for expanding the export and promotion of AFFrinnovation (adding value to agriculture, forestry and fisheries products in an innovative way, making new combinations, or creating a value chain)

○ Description on the Farming Income Stabilization Measures, Public Corporations for Farmland Consolidation to Core Farmers through Renting and Subleasing (Farmland Banks), and rice policy reform measures

○ Description on the development of regional policy in consideration of progress in population aging and decline, such as the steady promotion of a multifunctional payment system and the maintenance of community functions through "integration and networking"

○ Description on restoration/reconstruction from the Great East Japan Earthquake

○ Description on the first agricultural cooperatives reform and agricultural committees reform in 60 years

Food, Agriculture and Rural Areas

Act about every five years with a vision for approximately the next 10 years, decided by the Cabinet, and reported to the Diet—

[Summary of the new Basic Plan]

Basic direction of measures

- "Industrial policy" for developing agriculture and food industries into a growth sector as well as "regional policy" for promoting the maintenance and implementation of agriculture's multifunctional roles will be employed to step up the agricultural policy reform.

Food self-sufficiency ratio targets

Calorie supply basis: 39% (2013) → 45% (2025), production value basis: 65% (2013) → 73% (2025)

(Food self-sufficiency potential indicator)

- By presenting "food self-sufficiency potential indicator" which evaluates Japan's potential food production capacity, the government intends to deepen national discussions on food security and promote initiatives for securing stable food supply.

Key measures

[Measures for securing stable food supply]

○ Promotion of exports of agriculture, forestry and fisheries products, and food, as well as global expansion of the food industry

- The government will develop an all-Japan framework for promoting exports, improve the export environment by such means as eliminating export-inhibiting factors, and promote the overseas expansion of Japanese food and food culture. It will improve the business investment environment, such as regulations and systems, based on "The Global Food Value Chain Strategy."

○ Strategic promotion of AFFrinnovation

- Through the promotion of AFFrinnovation, the government will create value chains in the production, processing and distribution stages of agricultural products, food, and other items.

[Measures for sustainable agricultural development]

○ Development/securing of business farmers for realizing a strong and sustainable agricultural structure as well as steady promotion of the Farming Income Stabilization Measures

- The government will provide intensive support, such as the Farming Income Stabilization Measures, to business farmers (such farmers as certified farmers, certified new farmers and community-based farm cooperatives). It will also promote the development of agricultural management through the incorporation of farmers and other means, recruitment of new farmers, and development/securing of human resources.

○ Consolidation of farmland to business farmers and securing of farmland through full-capacity operation of the Public Corporations for Farmland Consolidation to Core Farmers through Renting and Subleasing (Farmland Banks)

- The government will promote consolidation of farmland to business farmers by achieving the full-capacity operation of Farmland Banks. It will also work toward preventing farmland dilapidation and clearing dilapidated farmland.

○ Steady promotion of rice policy reform, as well as expansion of rice production for feed and other strategic crops

- Through the steady promotion of rice policy reform, the government will push forward production that meets demand. It will also make full use of paddy fields, as well as expand rice production for feed and other strategic crops in order to maintain and improve the food self-sufficiency ratio and potential.

[Measures for development of rural areas]

○ Steady promotion of the multifunctional payment system, etc.

- The government will promote the maintenance/succession of local resources through joint activities by the whole area, including family management entities, corporation management entities, and local residents. It will also support the continuance of farming in hilly and mountainous areas and other areas with disadvantageous production conditions.

○ Promotion of migration and settlement to rural areas as well as responses to damage due to wild animals

- The government will promote exchanges between urban areas and rural areas in collaboration with tourism, education, welfare, and other sectors, and migration and settlement of various human resources from urban areas to rural areas. It will also promote the enhancement of the prevention of damage due to wild animals, and the effective utilization of local resources, such as the use of captured wild animals for human consumption.

○ Maintenance of community functions through "integration and networking"

- The government will promote the formation of networks by developing traffic networks and "small hubs" that are key communities with concentrated functions such as life service functions.

[Measures for restoration/reconstruction from the Great East Japan Earthquake]

- The government will continue to promote activities including the steady restoration of farmland and agricultural facilities for early resumption of operations by affected farmers. In addition, it will respond to the Fukushima Daiichi Nuclear Power Plant accident and promote initiatives to ensure food safety and eliminate harmful rumors.

[Measures for the reorganization/restructuring of relevant bodies]

○ Agricultural cooperatives and committees

- The government will reform agricultural cooperatives and committees in order to enable motivated business farmers to carry out activities more.

Part 1

Situation surrounding food, agriculture and rural areas

Basic Plan p. 3–9

- Japan is experiencing the arrival of a super-aged society and a full-fledged population-declining society, as well as the progress and acceleration of globalization and informatization.
- Meanwhile, efforts have been started by various local people concerned to review their own strengths, make attempts to develop AFFrinnovation and export products overseas through original and creative approaches, and create new value and cultivate new markets.

1. Effects of aging and population decline on food, agriculture and rural areas

Aging and population decline are progressing in rural areas ahead of urban areas. Farmers are aging and decreasing, and the population of rural communities is also declining.

Dilapidation of farmland is progressing due to the retirement of aged farmers, and the production base is weakening due to a shortage of business farmers. Such trend is particularly notable in hilly and mountainous areas.

There is a risk that the number of farmers would substantially decrease, and as a result, agricultural management would not be passed on to the next generation, and valuable resources and techniques would cease to be handed down.

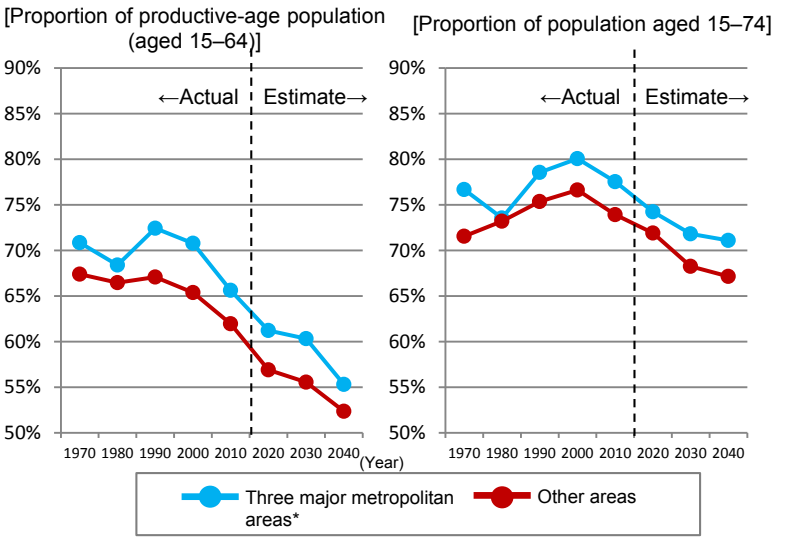
There is also a concern that the decline in the population of rural communities would impede the maintenance and management of local resources, such as farmland and irrigation systems and continued provision of life services and other functions.

In the future, a full-fledged decline in the food consumption per person and the population decline associated with the progression of aging may cause shrinkage of the food market.

Japan's agriculture faces a risk of contraction if conventional initiatives are merely extended.

On the other hand, there is an expectation for the creation of new markets targeting elderly people who will grow in number in the future, such as markets for care food and services to support their health management through food.

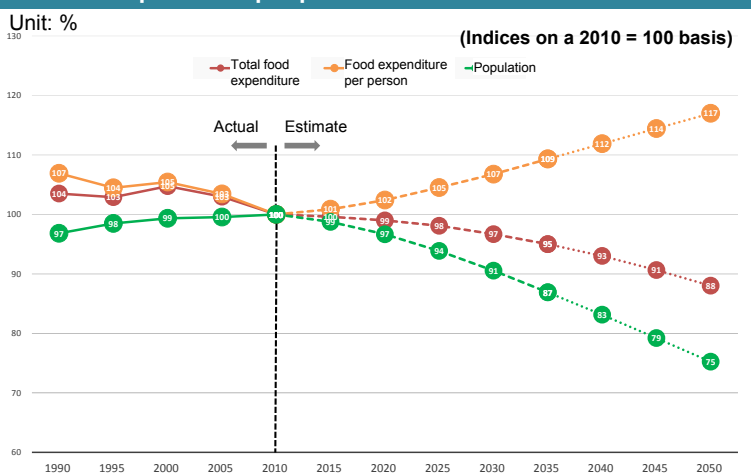
Figure 4-1 **Proportion in the total population**



* Three major metropolitan areas: Total for the Tokyo area (Saitama, Chiba, Tokyo and Kanagawa Prefectures), Nagoya area (Gifu, Aichi and Mie Prefectures) and Osaka area (Kyoto, Osaka, Hyogo and Nara Prefectures)

Source: For data up to 2010, Ministry of Internal Affairs and Communications (MIC), "Population Census"; for data for 2015 onward, National Institute of Population and Social Security Research, "Population Projections for Japan (January 2012)" (Results of Projections According to the Medium-Fertility Assumption with High- and Low-Mortality Assumptions) and "Population Projections by Prefecture (January 2012)."

Figure 4-2 **Future estimation of the total food expenditure and food expenditure per person**

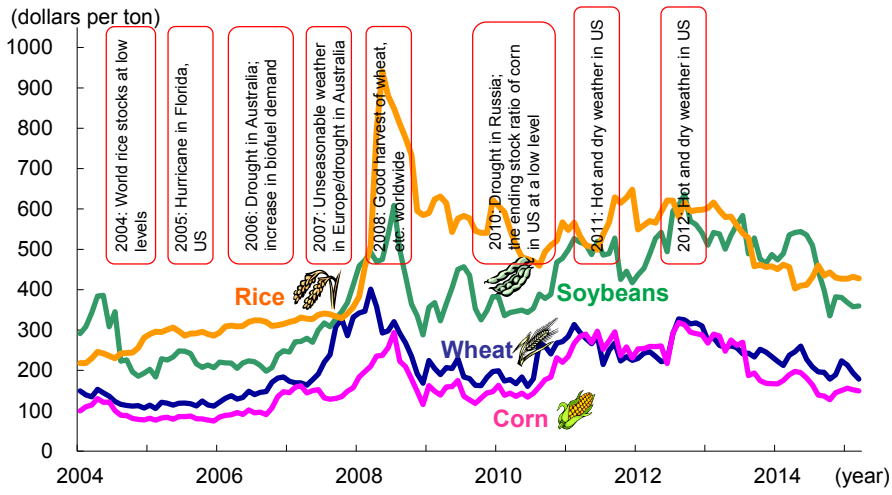


Source: Compiled by the Policy Research Institute, Ministry of Agriculture, Forestry and Fisheries (PRIMAFF)

Notes: 1) Real GDP growth rate for years up to 2022 is based on "OECD-FAO Agricultural Outlook 2013–2022." It rises to about 1.6% by 2022 and is fixed at that level thereafter. The following equation is used: (total food expenditure) = (food expenditure per person) × (population).
2) Supposing that the economy stays in zero growth, the food expenditure per person and the total food expenditure are estimated to be at about 100 and 87, respectively, in 2035, and at about 101 and 76, respectively, in 2050.

2. Prospects of global food supply and demand as well as progress of globalization

Figure 5-1 **Changes in international prices of grains and soy beans**



Source: The Chicago Board of Trade, and the Rice Committee, Board of Trade of Thailand.
Notes: 1) Prices for wheat, corn and soybeans are nearby futures prices on the Chicago Board of Trade on the first Friday of each month until March 2015.
2) Prices for rice are FOB prices for second grade 100% white Thai rice on the first Wednesday of each month announced by the Rice Committee, Board of Trade of Thailand.

The global demand for food and feed is estimated to continue growing in the future.

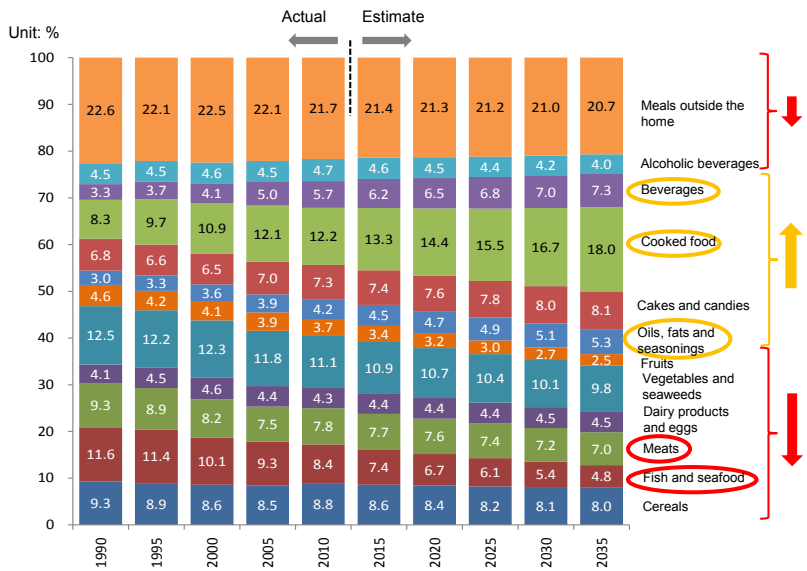
In the meantime, there is concern about food supply due to the impact of climate change, such as global warming.

While the global food-related markets are expected to continue expanding in the future, Japanese food is also drawing increasing attention overseas.

The globalization trend is likely to progress further in the future, with large food companies expanding their procurement of products and other items and reinforcing sales on a global scale, for example.

3. Diversification and evolution of consumer needs and diversification of issues concerning the relationship between consumers and food

Figure 5-2 **Future estimation of the percentage of food expenditure by item (all households)**



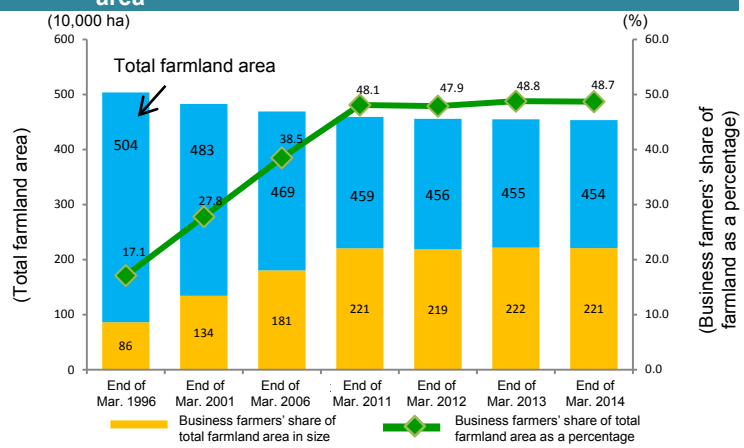
Source: Compiled by PRIMAFF.

In Japan, food quality, service styles and other aspects of the food industry are becoming increasingly diversified and evolved to meet changes in the social structure and lifestyles. For example, the following are more widely available than before:
(i) processed food and ready-to-eat dishes that require no cooking at home;
(ii) products in small sizes; and
(iii) food that can be purchased via the Internet.
Such trend is likely to progress further in the future.

Meanwhile, the diversification of the relationship between consumers and food entails the following concerns:
(i) a decline of the traditional food culture that has been handed down in local communities; and
(ii) a decrease in people's understanding of agriculture and rural areas, and so on, due to the expanding distances between production sites and dinner tables.

4. Changes in the structure of agriculture and rural areas, such as business farmers that support agriculture

Figure 5-3 **Business farmers' share of Japan's total farmland area**



Source: MAFF, "Statistics on Cultivated Land and Planted Area," "Survey on Community-based Farm Cooperatives" (aggregate calculation after reclassification), MAFF surveys.
Notes: 1) Data are at the end of March for each year.
2) "Business farmers' share of total farmland area" represents farmland managed by certified farmers (including specified agricultural corporations), farmers who reach the level as specified in basic plans made by municipal governments, and community-based farm cooperatives (from FY 2003) based on ownership, land-utilization rights or contracts (only farming operations under contracts for community-based farm cooperatives).

In Japan's agricultural structure, farmland concentration through establishment of land-utilization rights and other means has progressed to a certain extent. At present, business farmers have a share of about half of Japan's total farmland area. However, concentrated farmland is often scattered in a complicated manner in small partitions, serving as major impediments to productivity improvement.

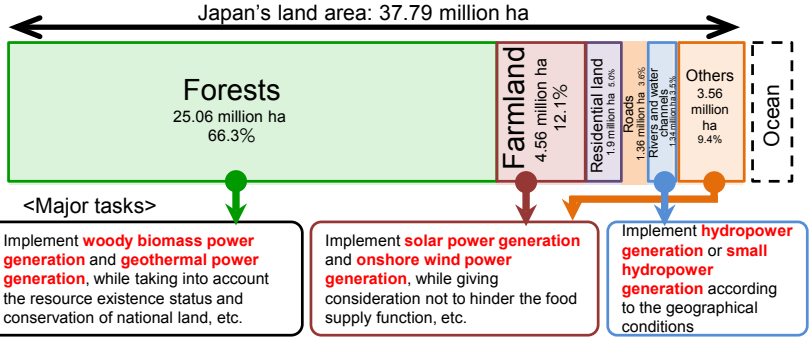
5. Diverse possibilities of agriculture and rural areas

In some areas, there are movements to rediscover the attractiveness of agriculture and the value of rural areas which have such assets as a rich environment and scenery, and traditional culture.

In addition, efforts have been started to create new businesses by effectively utilizing diverse local resources of rural areas that had not been fully utilized in the past, such as biomass utilization and production of renewable energy.

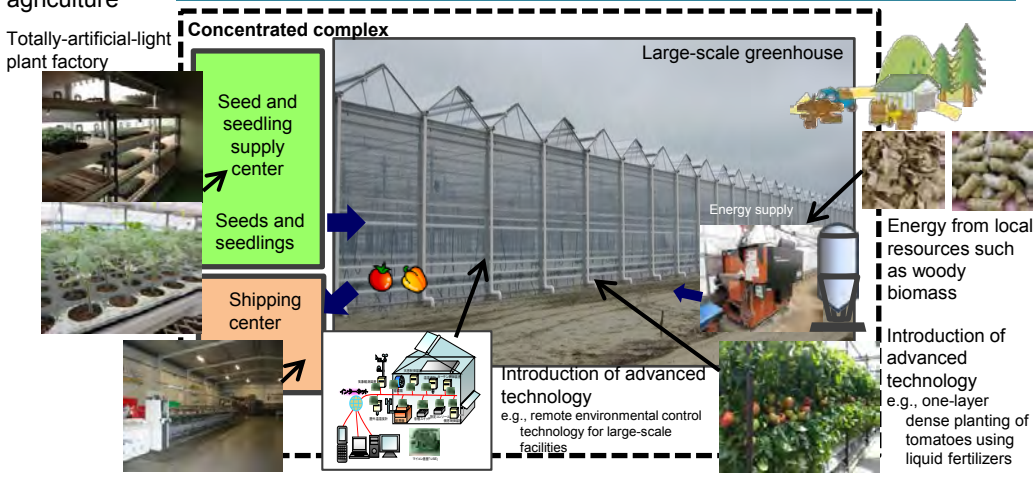
There are possibilities that productivity can be remarkably improved by applying Japan's advanced technology, such as robot technology and ICT, and technology that has been established in other industries in the field of agriculture and rural areas.

Figure 6-1 Existence of renewable energy resources in rural areas



Source: Ministry of Land, Infrastructure, Transport and Tourism (MLIT), "FY2012 Trends Concerning Land."

Figure 6-2 A next-generation greenhouse horticulture complex



Source: Compiled by MAFF.

6. Status of restoration/reconstruction from the Great East Japan Earthquake

The Great East Japan Earthquake of March 11, 2011, and the resulting large tsunami inflicted major damage on agriculture and rural areas. Farmland totaling 21,480 ha and about 10,100 farming organizations were affected by the tsunami.

Since pollution by radioactive substances spread due to the accident of the Fukushima Daiichi Nuclear Power Plant of the Tokyo Electric Power Company (TEPCO), measures were taken to distribute only agricultural products whose radiocesium level does not exceed the standard limit. Specifically, radioactive substance inspections were conducted on agricultural products before shipping, and farmers' efforts to restart business were promoted in areas such as those in which evacuation orders used to be issued. At present, the radiocesium level exceeds the standard limit only in limited agricultural products and production areas.

Figure 6-3 Agricultural, forestry and fishery damage caused by the Great East Japan Earthquake

Total of 2.3841 trillion yen

Agricultural and forestry damage

Damage was caused to a total of 21,000 ha of farmland mainly in six prefectures (Aomori, Iwate, Miyagi, Fukushima, Ibaraki and Chiba Prefectures) especially by the tsunami.

Total amount of damage: 1.1204 trillion yen

Farmland (18,186 partitions)	400.6 billion yen
Agricultural facilities, etc. (17,906 facilities) (Water channels, pumps, community sewerage systems, etc.)	440.8 billion yen
Field crops, livestock, etc.	14.2 billion yen
Agricultural and livestock facilities, etc. (Agricultural warehouses, greenhouses, barns, compost depots, etc.)	49.3 billion yen
Forestry damage (devastation of forest land, forest conservation facilities, forest road facilities, wood processing and distribution facilities, etc.)	215.5 billion yen

Fishery damage

Considerable damage was caused mainly in seven prefectures (Hokkaido, Aomori, Iwate, Miyagi, Fukushima, Ibaraki and Chiba Prefectures), accounting for 50% of Japan's total fishery production volume.

Total amount of damage: 1.2637 trillion yen

Fishing vessels (28,612 vessels)	Fishing vessels in 21 prefectures were affected (about 90% of fishing vessels were affected in Iwate, Miyagi and Fukushima)	182.2 billion yen
Fishing ports (319 ports)	About 40% of fishing ports in seven prefectures were affected (almost all fishing ports were affected in Iwate, Miyagi and Fukushima)	823 billion yen
Aquaculture damage (damage to aquaculture facilities) (damage to cultured organisms)		133.5 billion yen (73.8 billion yen) (59.7 billion yen)
Facilities for joint use (1,725 facilities)		124.9 billion yen

* In addition to the damage indicated in this table, about 160 billion yen of damage was caused to fishery processing facilities and ice-making, freezing and refrigeration facilities owned by private companies (information obtained through interviews with fishery processing organizations, etc.).

* The amount of damage does not include the damage caused by the nuclear disaster.

Part 1

Basic viewpoints for promoting measures

Basic Plan p. 9–12

- Industrial policy for developing agriculture and food industries into a growth sector as well as regional policy for promoting the maintenance and implementation of agriculture's multifunctional roles will be employed to step up the reform of measures for food, agriculture and rural areas.
- In that process, measures need to be implemented based on the following viewpoints.

1. Securing the stability of measures to realize the fundamental principles of the Basic Act

The government will secure the stability of measures so as to prevent causing unnecessary confusion or anxiety among producers, and to enable farmers and related businesses to engage in business expansion or advancement into new business fields with medium and long-term perspectives.

2. Deepening of national discussions on how to secure a stable food supply

The government will evaluate and indicate the food production potential of Japan's agriculture, forestry and fisheries and send out information including the trends and future prospects of global food supply and demand, the results of various risks associated with food supply, and responses to be taken in cases of unforeseeable events, thereby increasing mutual communication with the people.

3. Implementation of measures from the viewpoints of demand and consumers

The government will back up efforts whereby farmers, food industry business operators and various related businesses become strategic partners for absorbing new demand, and while deepening mutual communication, make efforts including accurately responding to diverse and evolved consumer needs based on the "market-in" concept and building production/supply systems for improving productivity.
Since reliable access to safe food is an essential prerequisite for a healthy diet, the government will continue to promote initiatives to secure food safety and consumer confidence in food.

4. Development of an environment where farmers can perform well

The government will promote initiatives for attracting motivated young people from in and outside the agricultural industry, and develop an environment where farmers can enthusiastically engage in management development with solid future prospects.

5. Implementation of measures to realize sustainable agriculture and rural areas

In order to ensure that people can enjoy the benefits of implementation of agriculture's multifunctional roles into the future, the government will promote efforts for local resources such as farmland, irrigation systems and beautiful scenery of rural areas to be preserved and managed in good conditions by local communities and other entities. The government will also promote efforts for ensuring reliable succession of agricultural business management and underlying technology to the next generation, and so on.
In promoting such efforts, the government will encourage the participation of various human resources and business operators from in and outside rural areas, including not only local business farmers, but also small-scale farm households, local residents and human resources in urban areas, and promote the creation of a local environment where such people can fully exert their potential capacity.
From the production aspect as well, the government will promote accurate responses to issues including climate change, and also promote resource-recycling agriculture that is in harmony with the environment.

6. Promotion of technological innovation to explore new possibilities

The government will promote technological development applying advanced technology such as robot technology and ICT, which are Japan's strengths. Meanwhile, it will comprehensively push forward the reform of R&D and technology transfer processes as well as the creation of an environment which enables technology to be widely spread to producers, involving various stakeholders. For example, the participation of farmers could be accelerated, as well as diffusion of organizations in the R&D process and joint research that gathers the knowledge of industrial, academic, financial and public sectors could be implemented.

7. Improvement of farmers' income and creation of prosperity in rural areas

The Plan to Create Dynamism through Agriculture, Forestry, and Fisheries and Local Communities and other documents point at "aiming to double the income of agriculture and rural areas over the next 10 years." To achieve this target, the government will promote measures to increase agricultural income through raising the agricultural production value and reducing production costs and to increase relevant income in rural areas through Affrinovation.

Part 2

Food self-sufficiency ratio targets

Basic Plan p. 13–23

- While the food self-sufficiency ratio targets were set under the Basic Plan of 2010 as “high targets that can only be achieved by inputting all of Japan’s available resources,” the ratio in FY2013 was 39% on a calorie supply basis and 65% on a production value basis, indicating that there are gaps between the targets and the actual ratios.
- Taking such situation into account, new food self-sufficiency ratio targets have been set with a “focus on their feasibility over the plan period,” which are to raise the ratio on a calorie supply basis from the current 39% to 45% and to raise the ratio on a production value basis from the current 65% to 73%.

1. Past food self-sufficiency ratio targets

The food self-sufficiency ratio targets under the Basic Plan for Food, Agriculture and Rural Areas of 2000 and 2005 were set at 45% on a calorie supply basis and at 74% (reference value in the Basic Plan of 2000) and 76% (the Basic Plan of 2005) on a production value basis, “with consideration given to their feasibility over the plan period.”
On the other hand, under the Basic Plan of 2010, the targets were set at 50% on a calorie supply basis and 70% on a production value basis, as “high targets that can only be achieved by inputting all of Japan’s available resources.”

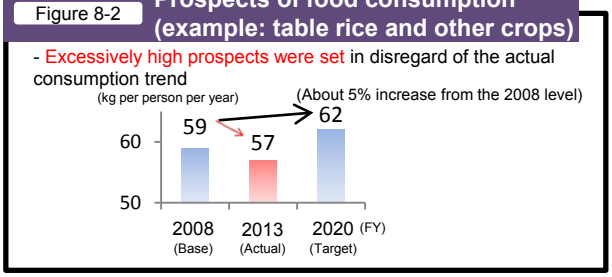
Figure 8-1 **Past approaches**

	Total food self-sufficiency ratio targets		Approach to food self-sufficiency ratio targets
	Calorie supply basis	Production value basis	
Basic Plan of 2000	45%	74% (reference value)	Since the targets serve as guidelines for food consumption and agricultural production during the plan period, they were set with consideration given to their feasibility and their impact on initiatives by people concerned and on the promotion of measures.
Basic Plan of 2005	45%	76%	Bearing in mind that the targets function as guidelines for desirable dietary patterns and domestic production that meet consumer needs, they were set with consideration given to their feasibility over the plan period.
Basic Plan of 2010	50%	70%	The targets were set as high targets that can only be achieved by inputting all of Japan’s available resources.

Source: Compiled by MAFF.

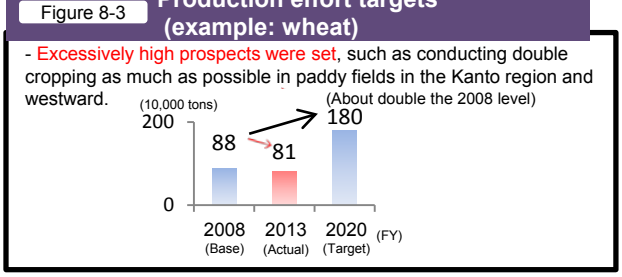
Looking at the progress status of the food self-sufficiency ratio targets under the Basic Plan of 2010, the ratio on a calorie supply basis remained at 39% in FY2013, with the consumption of such crops as rice falling below projections and the production of such crops as wheat showing sluggish growth.

Figure 8-2 **Prospects of food consumption (example: table rice and other crops)**



Source: Compiled by MAFF

Figure 8-3 **Production effort targets (example: wheat)**



Source: Compiled by MAFF

2. New food and feed self-sufficiency ratio targets

Based on the verification results of the Basic Plan of 2010, the new targets were set with “focus on their feasibility over the plan period.”

Figure 8-4 **New food and feed self-sufficiency ratio targets**

		FY2013 (base fiscal year)	FY2025 (target fiscal year)
Basic Plan of 2015	Calorie supply basis	39%	45%
	Production value basis	65%	73%
	Feed self-sufficiency ratio	26%	40%

Source: Compiled by MAFF.

Figure 8-5 **(Reference) Prospects of the total farmland area, the total planted area and the utilization rate of cultivated land**

	2013	2025
Total farmland area (10,000 ha) (Note 1)	454 (452 in 2014)	440
Total planted area (10,000 ha)	417	443
Utilization rate of cultivated land (%) (Note 2)	92	101

Source: Compiled by MAFF.
Notes: 1) The figures are estimated with consideration given to the past trend and the effects of efforts to reduce farmland dilapidation and restore dilapidated farmland.
2) The utilization rate of cultivated land is obtained by dividing the total planted area by the total farmland area.

3. Prospects of food consumption and production effort targets

In order to achieve the food self-sufficiency ratio targets for FY2025, it is important that (i) in terms of food consumption, consumers, food industry business operators, and other related people make more active efforts to expand the consumption of domestic agricultural products, and (ii) in terms of agricultural production, producers expand production that meets the diverse and evolved consumer needs based on the "market-in" concept. Based on such viewpoint, the prospects of food consumption and production effort targets have been set for each item.

(Examples)
Rice: With regard to such crops as table rice, the tasks are to promote demand-based production that does not rely on the target volume of rice production allotted by administration and reduction of the production costs, while responding to consumer needs, such as preference for convenient food, and needs related to eating out and home meal replacements.
Vegetables: The tasks are to expand vegetable consumption by adults, which currently does not reach the target intake level (350g per day), and to promote the enhancement of the production base of vegetables for processing and other food industries.
Raw milk: The tasks are to expand demand for domestic milk and dairy products through product development and AFFRinnovation, and to promote enhancement of the production base through such means as encouraging "livestock clusters."

Figure 9-1 Prospects of food consumption and production effort targets for FY2025

Items	Prospects of food consumption: Consumption per person per year (kg per person per year)		Prospects of food consumption: Supplies for domestic consumption (10,000 tons)		Production effort targets (10,000 tons)	
	FY2013	FY2025	FY2013	FY2025	FY2013	FY2025
Rice (excluding rice for flour and rice for feed)	57	53	857	761	859	752
Rice for flour	0.1	0.7	2.0	10	2.0	10
Rice for feed	-	-	11	110	11	110
Wheat	33	32	699	611	81	95
Barley/naked barley	0.3	0.2	208	213	18	22
Soybeans	6.1	6.0	301	272	20	32
Buckwheat	0.7	0.5	14	11	3.3	5.3
Sweet potatoes	4.2	4.4	102	99	94	94
Potatoes	16	17	340	345	241	250
Rapeseed	-	-	232	216	0.2	0.4
Vegetables	92	98	1,508	1,514	1,195	1,395
Fruits	37	40	766	754	301	309
Sugar beet (refined sugar equivalent)	(19)	(18)	(246)	(220)	344 (55)	368 (62)
Sugar cane (refined sugar equivalent)					119 (14)	153 (18)
Tea	0.7	0.7	8.9	8.5	8.5	9.5

Items	Prospects of food consumption: Consumption per person per year (kg per person per year)		Prospects of food consumption: Supplies for domestic consumption (10,000 tons)		Production effort targets (10,000 tons)	
	FY2013	FY2025	FY2013	FY2025	FY2013	FY2025
Raw milk	89	93	1,164	1,150	745	750
Beef	6.0	5.8	124	113	51	52
Pork	12	12	244	227	131	131
Chicken	12	12	220	208	146	146
Hen eggs	17	17	265	251	252	241
Feed and forage crops	-	-	436	501	350	501

Note: The figures for feed and forage crops are expressed by the total volume of nutrients that can be digested by domestic animals (total digestible nutrients [TDN]).

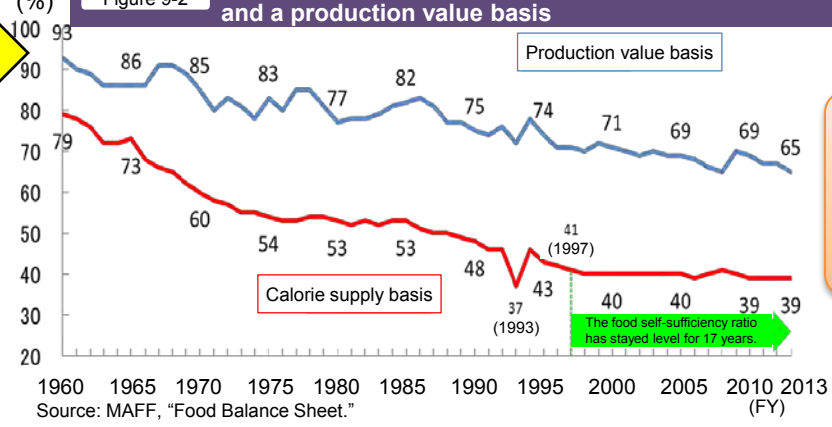
(Reference)

Items	Prospects of food consumption: Consumption per person per year (kg per person per year)		Prospects of food consumption: Supplies for domestic consumption (10,000 tons)		Production effort targets (10,000 tons)	
	FY2013	FY2025	FY2013	FY2025	FY2013	FY2025
Fish and shellfish (for human consumption)	27 (27)	30 (30)	785 (622)	842 (635)	429 (370)	515 (449)
Seaweed	1.0	1.0	15	15	10	11
Mushrooms	3.4	3.6	53	53	46	46

Note: The supplies for domestic consumption denote the amount obtained by multiplying the consumption per person per year by population, and adding the amount lost during transportation from the production areas to consumers, etc.
Source: Compiled by MAFF.

Supplementary Information

Figure 9-2 Trend of the total food self-sufficiency ratio on a calorie supply basis and a production value basis



Source: MAFF, "Food Balance Sheet."

Japan's food self-sufficiency ratio had been on a decline in the long term, but has stayed level in recent years.

Part 2

Food self-sufficiency potential indicator
(Food production potential)

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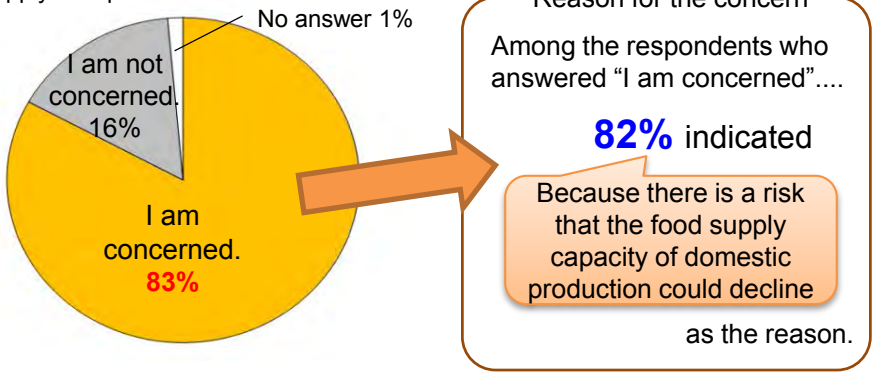
- At a time when many people are concerned about a decline in food supply capacity of domestic production, the food self-sufficiency ratio does not fully reflect the food production potential of Japan's agriculture, forestry and fisheries.
- Therefore, the government has newly presented the "food self-sufficiency potential indicator," which evaluates Japan's food production potential. By sharing recognition of the present and past trends of Japan's food self-sufficiency potential, the government intends to deepen national discussions on food security.

1. People's awareness of the future food supply in Japan

Since there are factors that can destabilize international food supply and demand, many people are concerned about a decline in the food supply capacity of domestic production.

Figure 10-1 People's awareness of future food supply in Japan

Are you concerned about the future food supply in Japan?

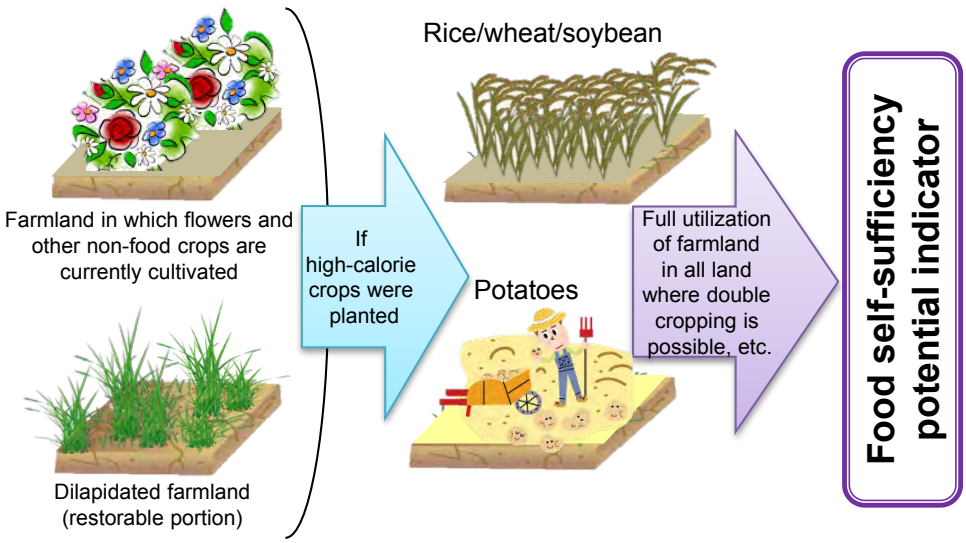


Source: Cabinet Office, "Special Public Opinion Poll on Supply of Food" (January 2014).

2. Food self-sufficiency potential indicator

The "food self-sufficiency potential indicator" estimates how much food can be produced at the most by domestic production alone (food production potential).

Figure 10-2 Concept of the "food self-sufficiency potential indicator"



Source: Compiled by MAFF.

Supplementary information

- When trying to indicate the food production potential, the food self-sufficiency ratio has limits, since it does not count the potential of farmland in which flowers and other non-food crops are currently cultivated.