

# MEL Workshop 2023

Trends in Japan's Fisheries and the Necessity of Ecolabels

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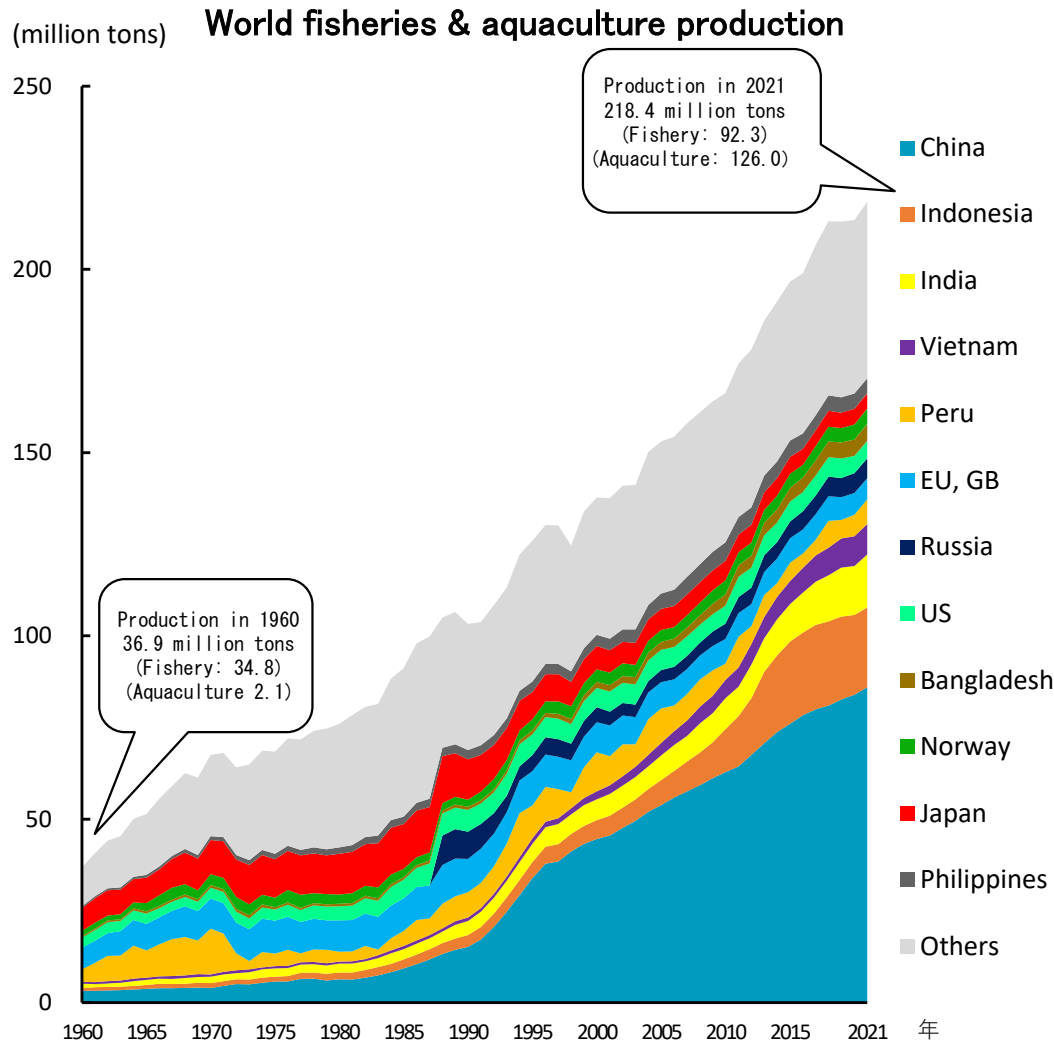
August 23, 2023

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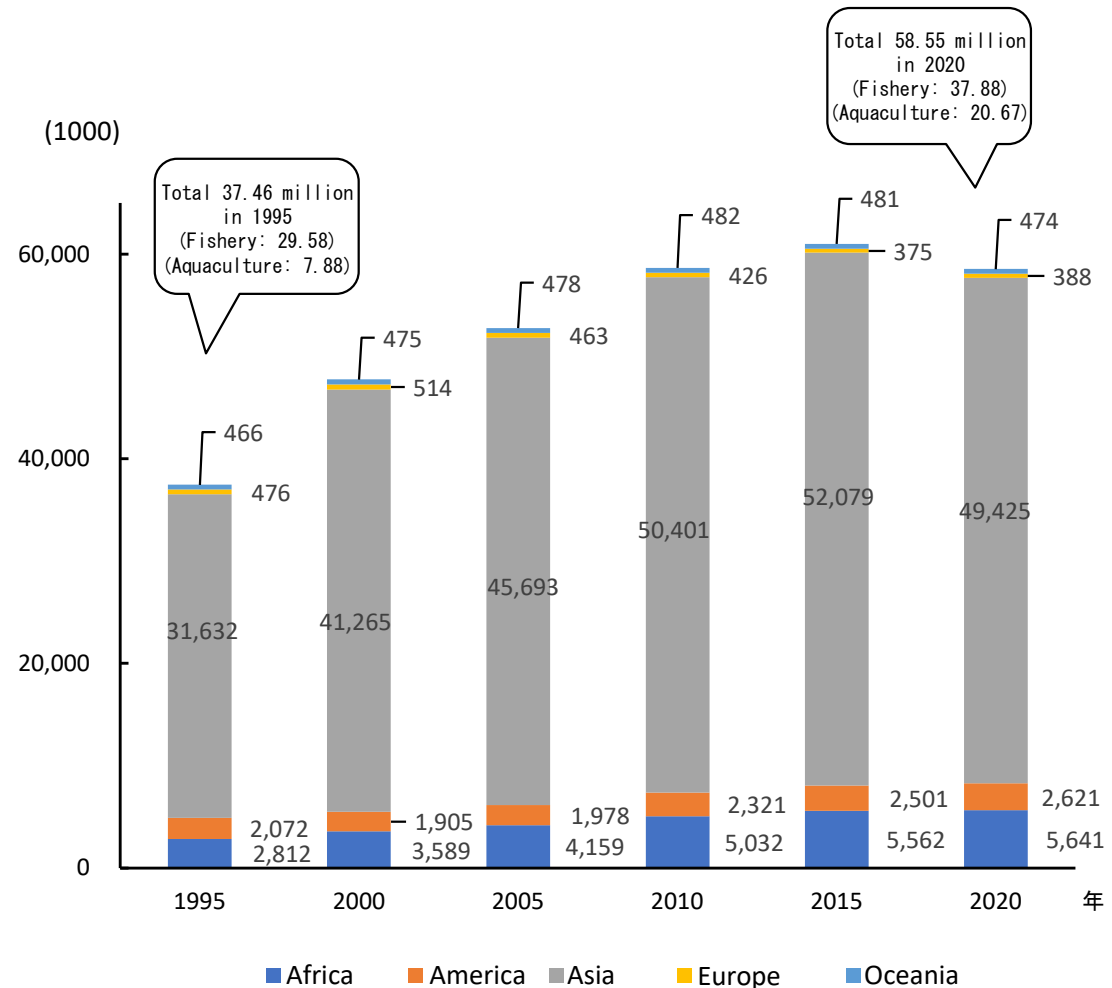
# Status of World Fisheries and Aquaculture

- World fishery production in 2021 is 92.41 million tons. Production is leveling off, increase potential is declining.
- World aquaculture production in 2021 is 126.03 million tons. Production is increasing, but possibility of facing limit, due to limitations such as suitable in the medium to long term.
- The number of people engaged in the industries has increased, mainly in the aquaculture, but remains flat since 2010.



Source: FAO Fishstat "Global capture production, Global aquaculture production" (except Japan), and the MAFF "Fisheries and Aquaculture Production Statistics" (Japan).  
Prepared by the Fisheries Agency.

## People engaged in fisheries and aquaculture industries

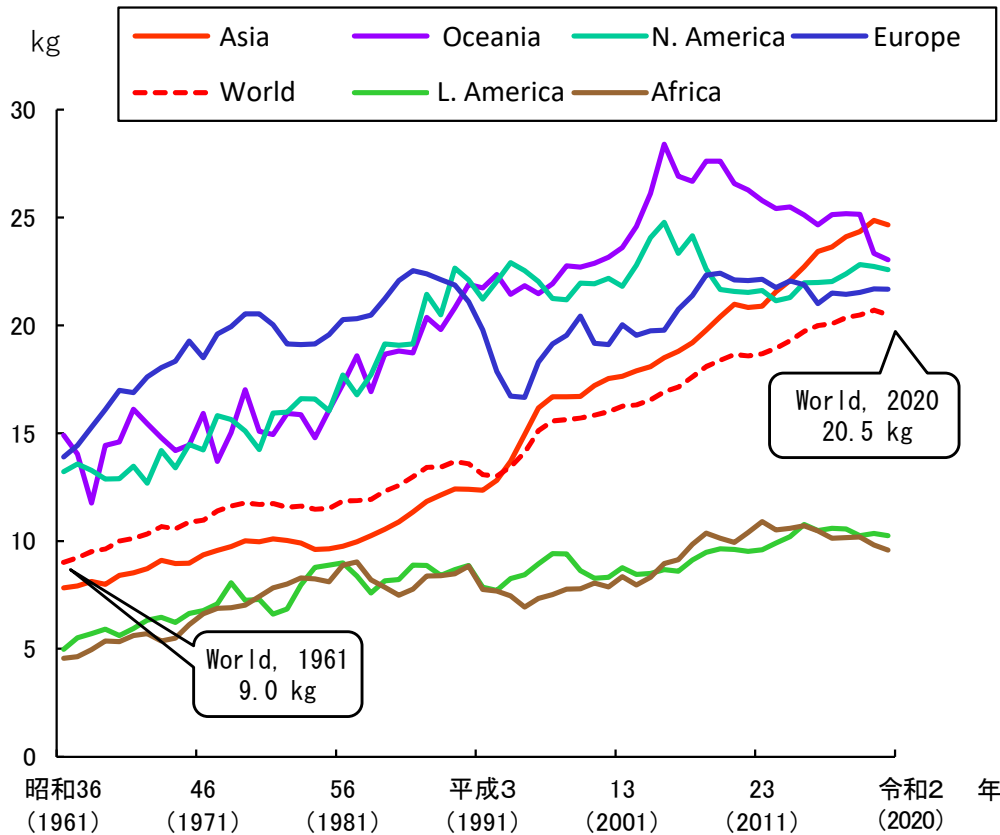


Source: Prepared by the Fisheries Agency, based on FAO "The State of World Fisheries and Aquaculture 2022".

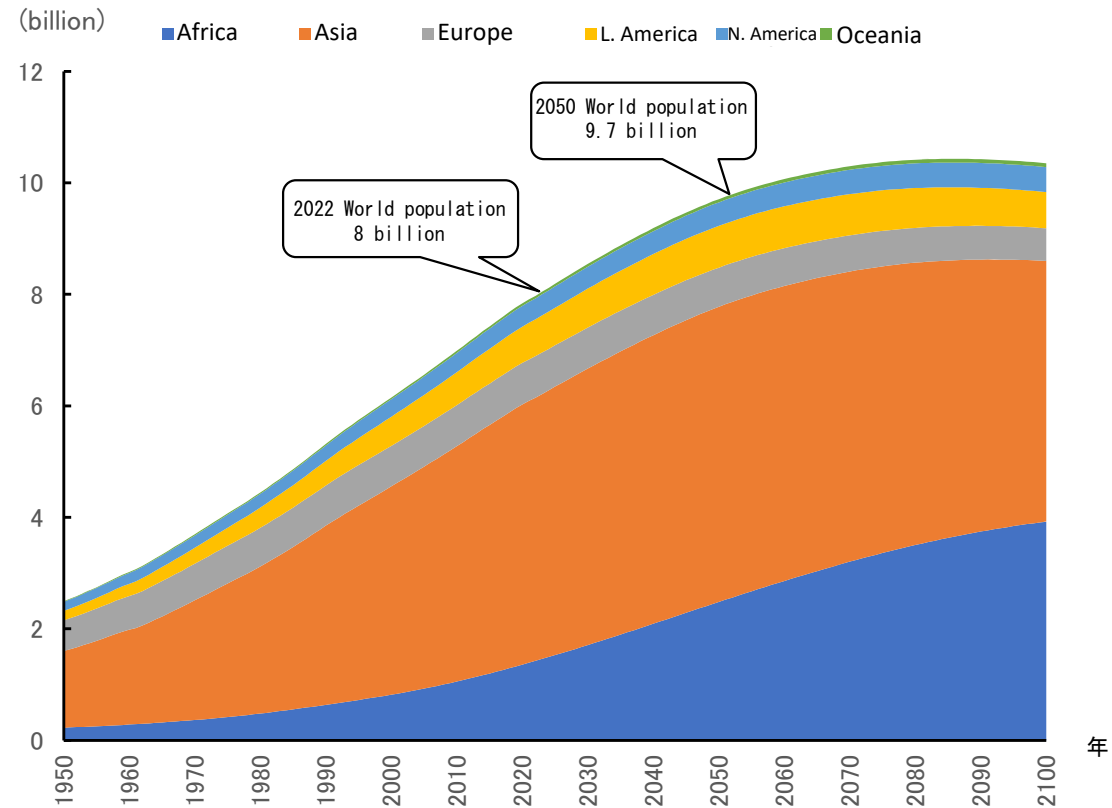
# Increase of World's Seafood Consumption

- Due to growing health consciousness in Europe and America, and economic development in emerging countries such as China and Indonesia, the seafood consumption in the world has been increasing year by year. The world's per capita seafood consumption doubled in five decades.
- According to United Nations projections, the world population will be 9.7 billion in 2050, a 20% increase from 8 billion in 2022, and the world's total demand for seafood is expected to continue to grow.
- The global supply and demand for seafood may become tight in the future.

Trends in the world's annual per capita seafood consumption (gross food based)



Trend and forecast of world population



Source: Prepared by the Fisheries Agency based on FAO "Food Balance Sheets" (except Japan) and the MAFF "Food Balance Sheet" (for Japan).

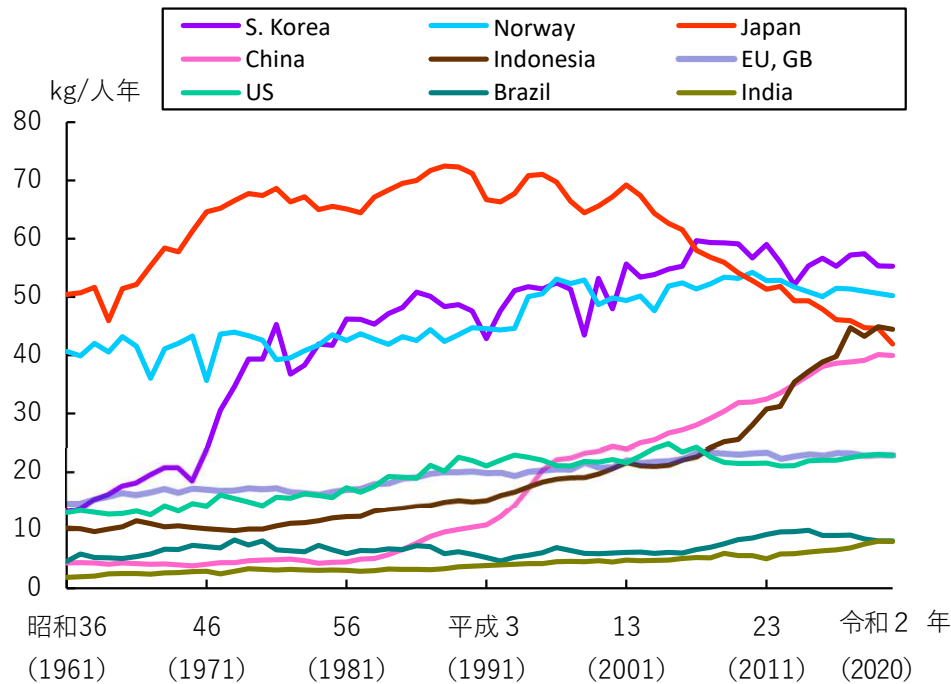
- \* 1) Gross food based consumption is the quantity of edible fish and shellfish, including parts that are discarded.
- \* 2) L. America includes Caribbean region.

Source: Prepared by the Fisheries Agency based on the United Nations "World Population Prospects"  
\* As for prediction after 2022, sourced from "MEDIUM VARIANT".

# Seafood Consumption in Japan

- Annual per capita consumption of seafood is increasing worldwide, declining in Japan.
- Japan's per capita seafood consumption (net food basis) peaked at 40.2 kg in 2001, and has been on downward trend, reaching 23.2 kg in 2021.
- On the other hand, meat consumption has been on the rise, and since 2011, surpasses seafood consumption.

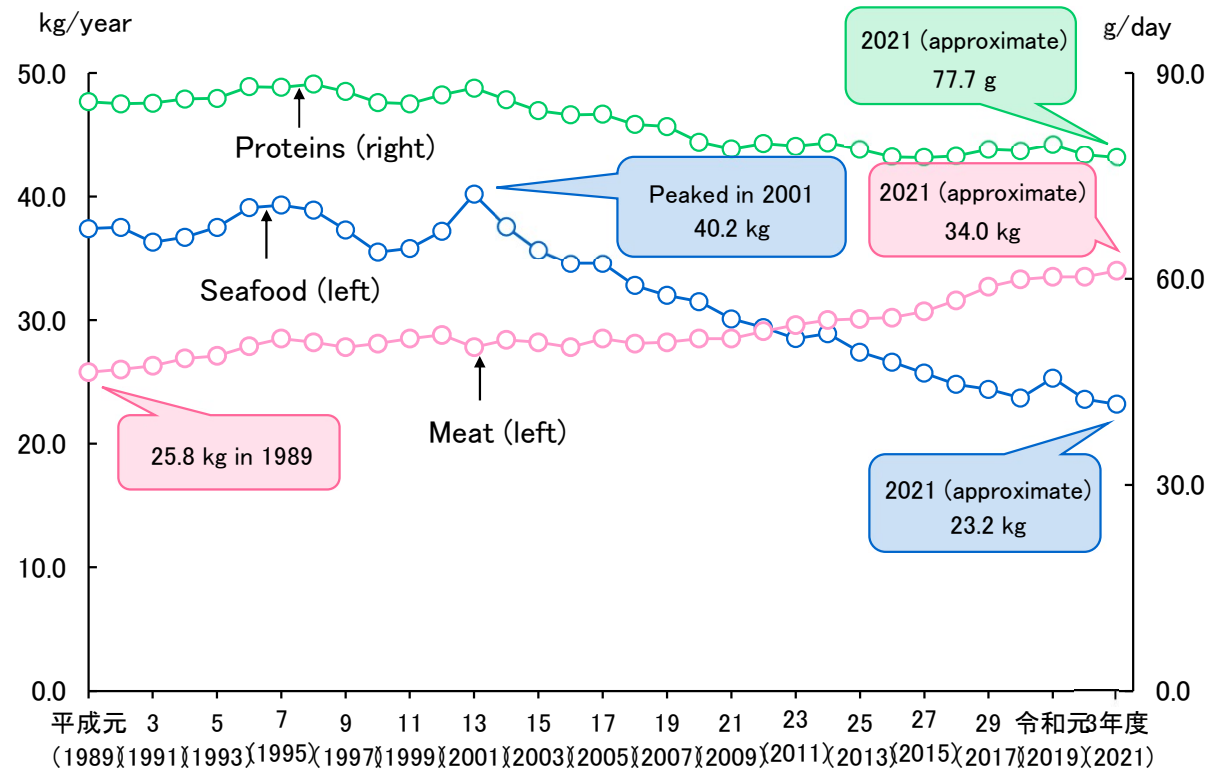
Trends of annual per capita seafood consumption by major countries



Source: Prepared based on the FAO "Food balance sheets" (except Japan) and the MAFF "Food balance sheets" (Japan).

\* Indicating gross food based consumption, the quantity of edible fish and shellfish, including parts that are discarded.

Trends of Japan's annual per capita consumption of seafood and meat, and daily per capita protein consumption



Source: The MAFF, "Food Balance Sheets".

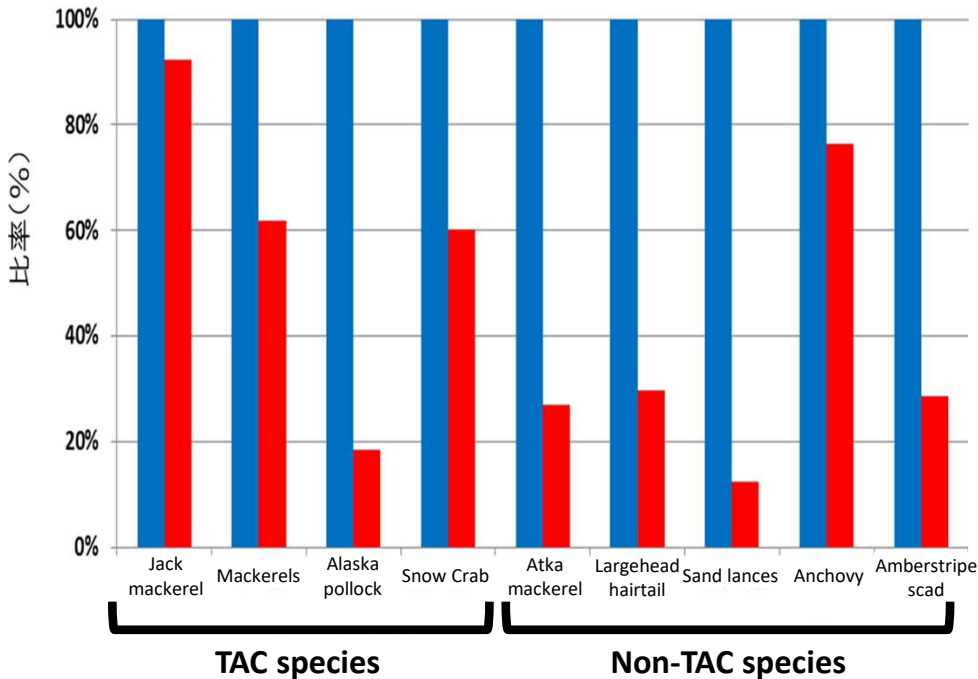
# Current Status of Fishery Resources

- There are various factors that could have caused the decline in the fishery production, but many of them could have prevented or mitigated the decline in catch, if the resources had been properly managed and maintained.
- Regarding fishery resources with quantitative management (resource management by catch limit), the degree of decrease in production is small.
- Of the 22 species (38 stocks) assessed based on MSY, 12 species (14 stocks) are in an appropriate state in terms of both abundance and fishing pressure. 1 species (1 stock) is good in abundance, excessive in fishing pressure. 11 stocks (10 species) are below the MSY level but had an appropriate fishing pressure. 12 stocks (8 species) are below the MSY level in abundance and excessive in fishing pressure.
- In the non-MSY-based stock assessment, 36 species (50 stocks) are evaluated, 11 stocks are at the high stock status, 11 stocks are at the middle, and 28 stocks are evaluated at low.

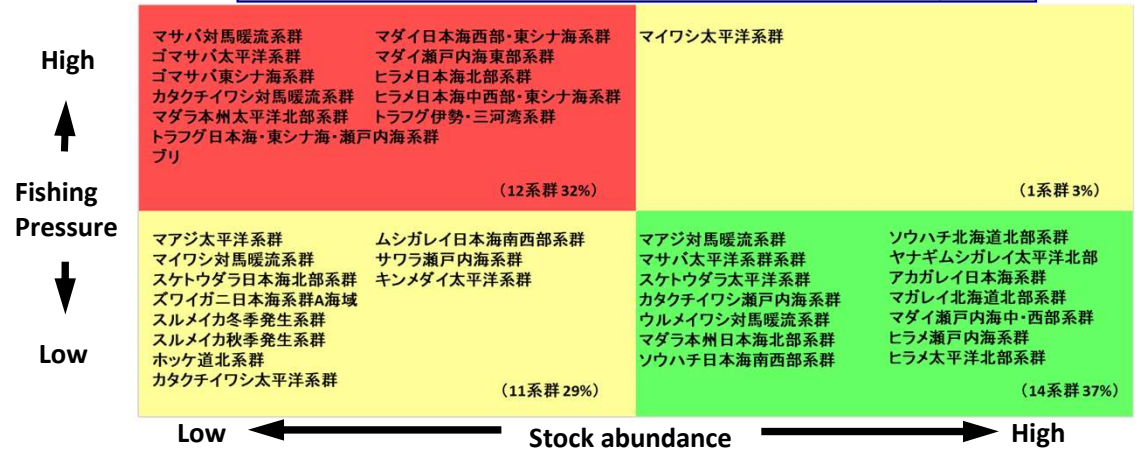
Comparison of catch level by managing method

**TAC (Total Allowable Catch) management system**  
Resource management conducted by the national government by setting annual maximum catch for each fishery resource.

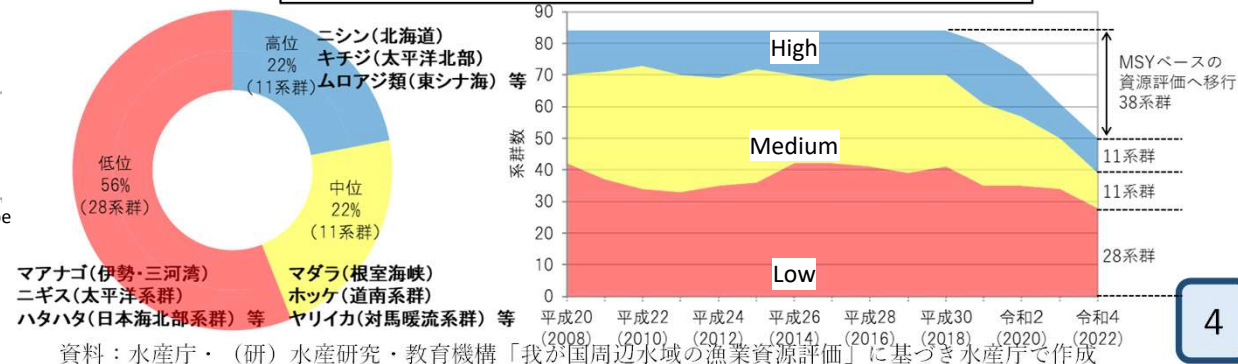
Proportion of catch volume in 2016 ( ■ ) compared to the catch volume in 1984 ( ■ ), as 100%.



Stock status of fishery resources around Japan (stock assessment based on MSY, 38 stocks of 22 species)



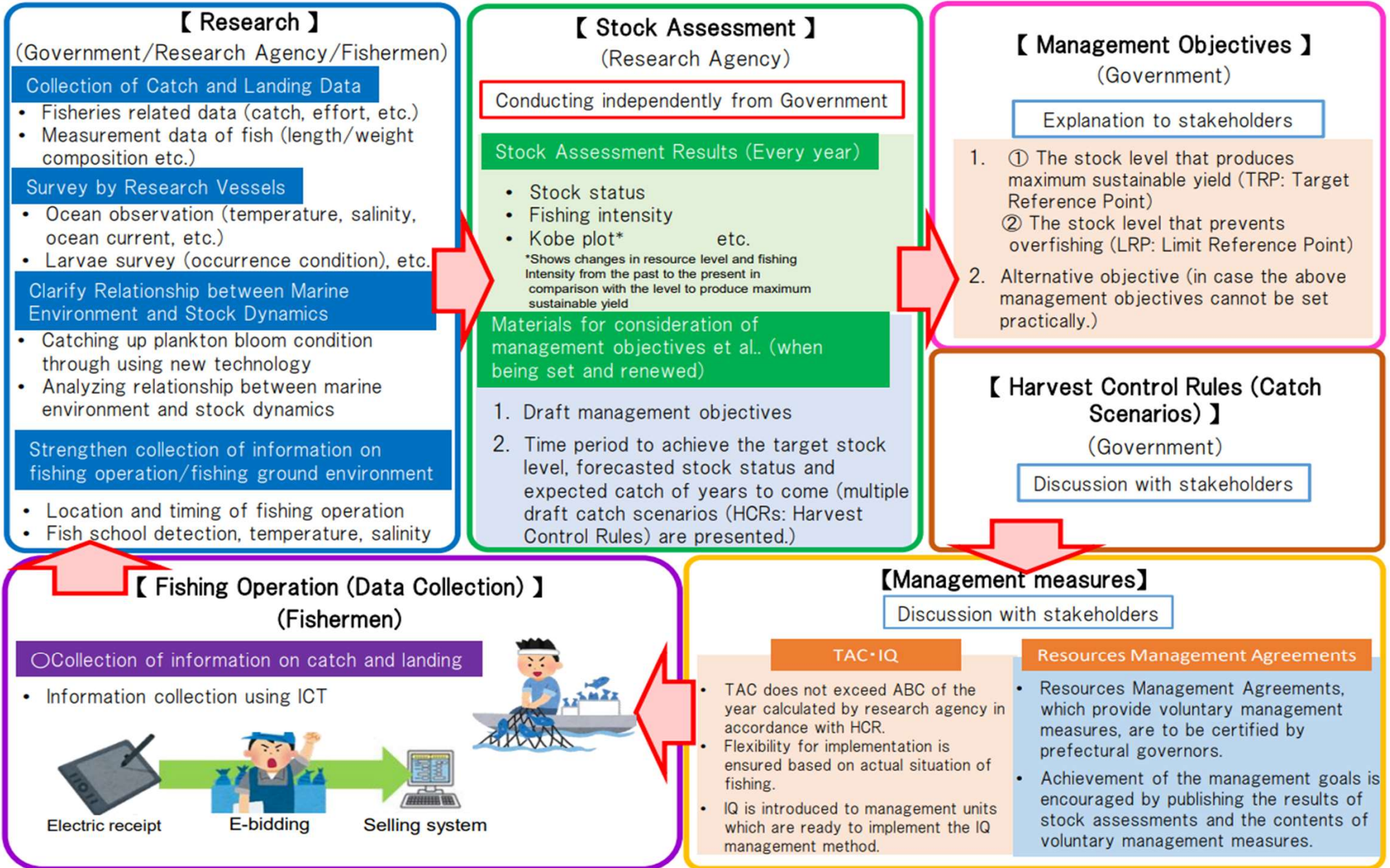
Stock status of non-MSY-based assessment resources (high/medium/low, 50 stocks of 36 species)



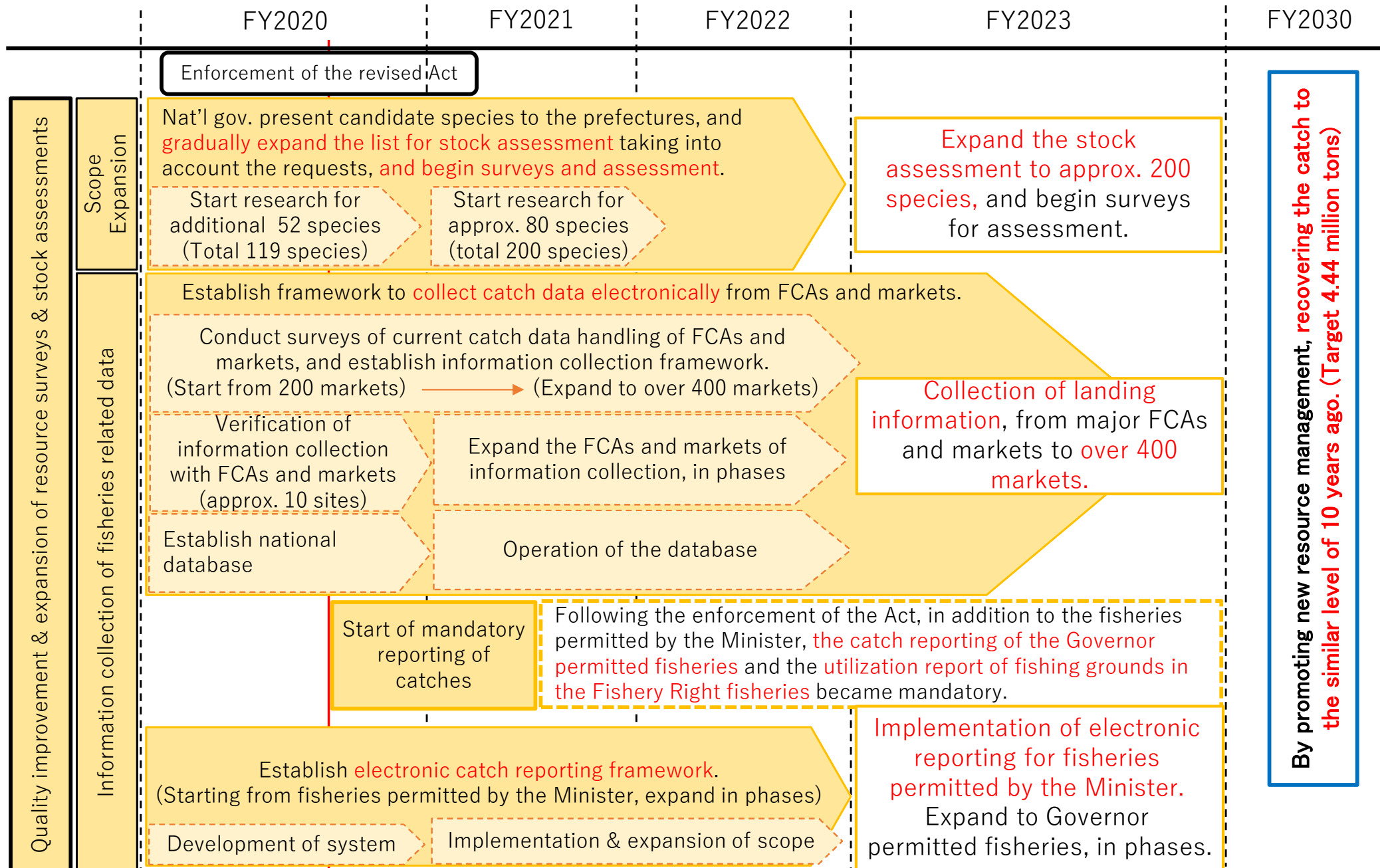
資料：水産庁・(研)水産研究・教育機構「我が国周辺水域の漁業資源評価」に基づき水産庁で作成

# Flow of the New Resource Management

● Aiming to recover fisheries production, the new resource management proceeds following cycle: conducting research and stock assessments by independent research agency, setting resource management objectives based on the results, implementing measures taking into account stakeholder opinions, and reflecting operating data.

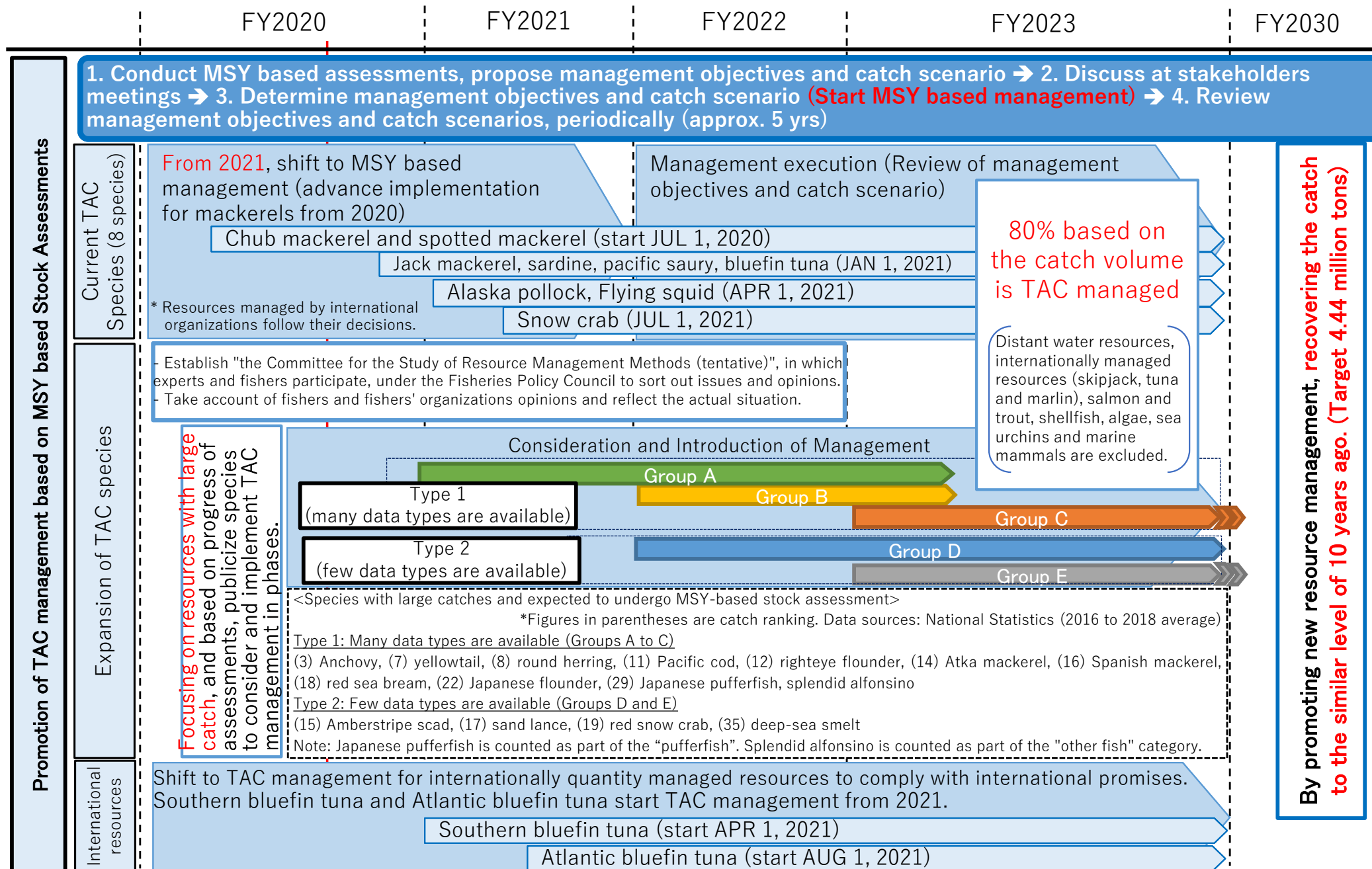


# Road Map for Promotion of the New Resources Management (1/3)



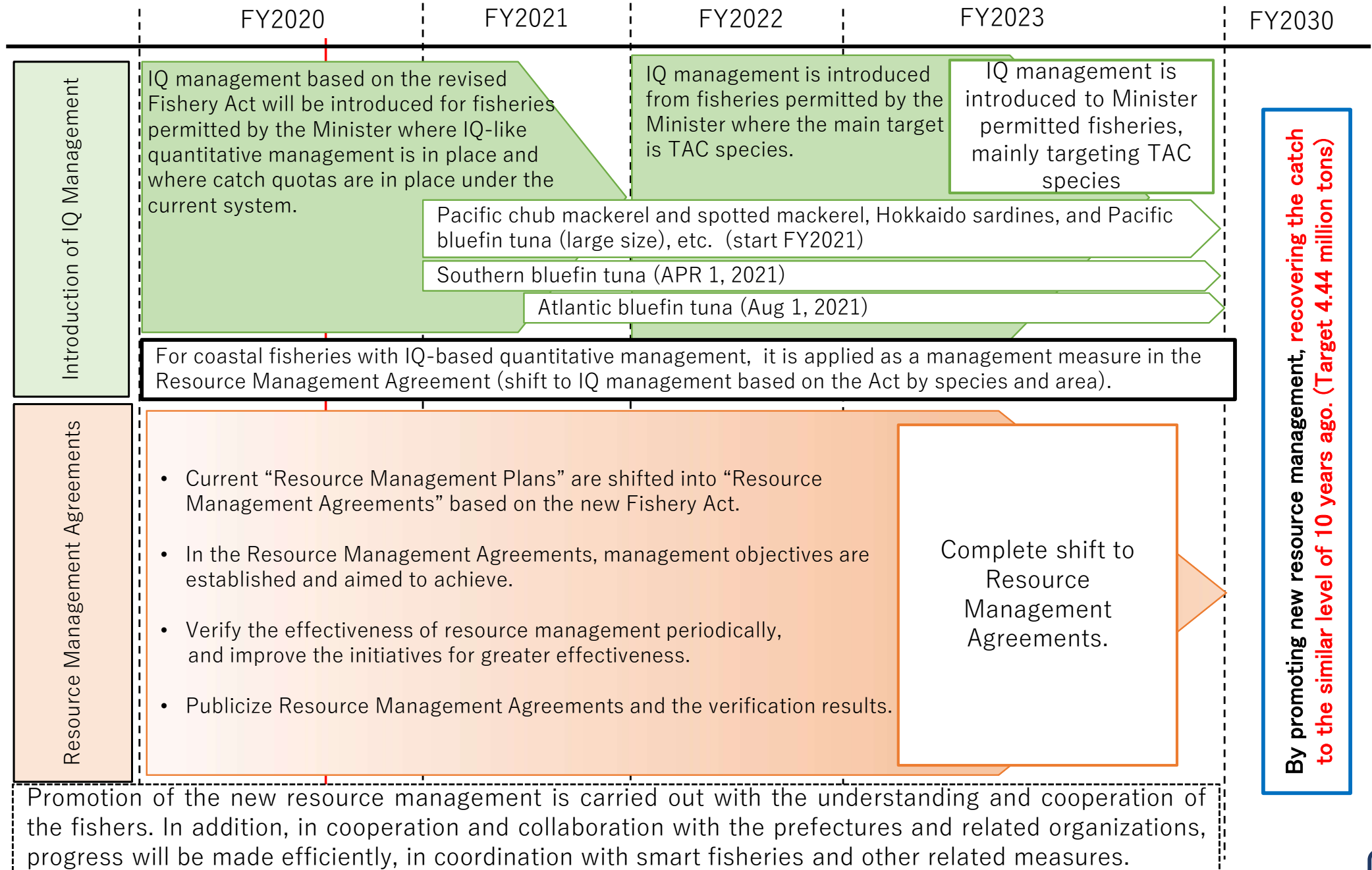
By promoting new resource management, recovering the catch to the similar level of 10 years ago. (Target 4.44 million tons)

# Road Map for Promotion of the New Resources Management (2/3)





# Road Map for Promotion of the New Resources Management (3/3)

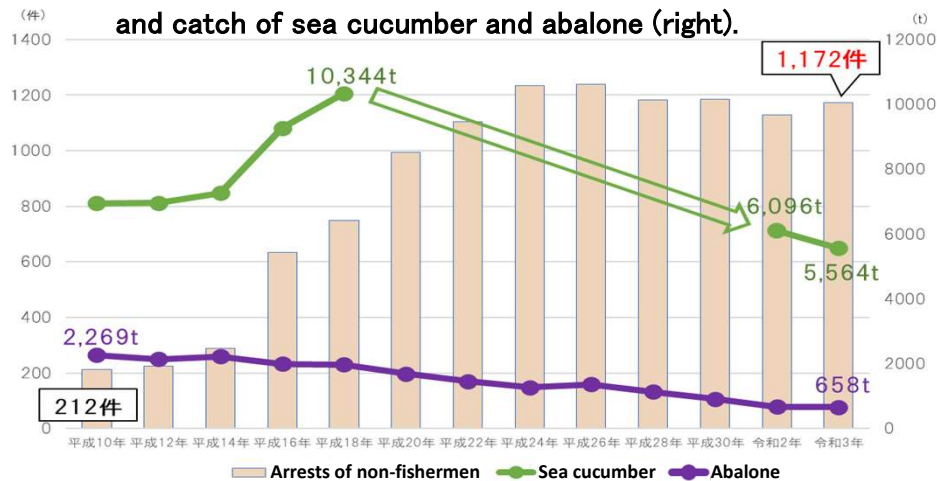


**By promoting new resource management, recovering the catch to the similar level of 10 years ago. (Target 4.44 million tons)**

# Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants

- Since the illegal catch and distribution causes an adverse effect on the sustainable utilization of fishery resources, measures are taken to prevent the distribution of illegal catches and to prevent the outflow.
- Addressing illegal, unreported and unregulated (IUU) fishing is growingly demanded in the international community, and measures will be taken to control imports in order to prevent the domestic influx of IUU catches.

## ○ Trends of maritime arrests of non-fishermen (left)



\*Sea cucumber was excluded from statistics since 2007, and returned since 2019.

## ○ Necessity of response to IUU fishing

### G20 Osaka Leaders' Declaration (June, 2019)

40. As illegal, unreported, and unregulated (IUU) fishing remains in many parts of the world a serious threat to the sustainability of the ocean, we recognize the importance of addressing IUU fishing for ensuring the sustainable use of marine resources and conserving the marine environment including biodiversity, and reaffirm our commitment to end IUU fishing

### G7 Climate and Environment: Ministers' Communique (May, 2021)

We recognise that IUU fishing remains one of the most serious threats to a healthy ocean, depleting fish stocks, distorting competition, destroying marine habitats and jeopardising international efforts to promote better ocean governance and effectively and sustainably manage fisheries. We recognise the importance of concerted international action to deter IUU fishing, including through support for developing countries. ...we commit to ending IUU fishing by ensuring strong measures are effectively implemented and enforced, such as the Catch Documentation Schemes (CDS) to increase traceability...

## Main contents of the Act

### 1. Fishermen, processors, and distributors are required notification and communication of information

Fishermen who catch specific fishery resources must submit notification to the administrative agency that they properly have the right to catch. When they transfer, it is required to communicate catch numbers to the counterparty.

### 2. Preparation and storage of transaction record

Records for above transaction must be prepared and stored.

### 3. Export Regulation

Exporters must attach certificate of lawful fishing issued by the Minister of Agriculture, Forestry and Fisheries.

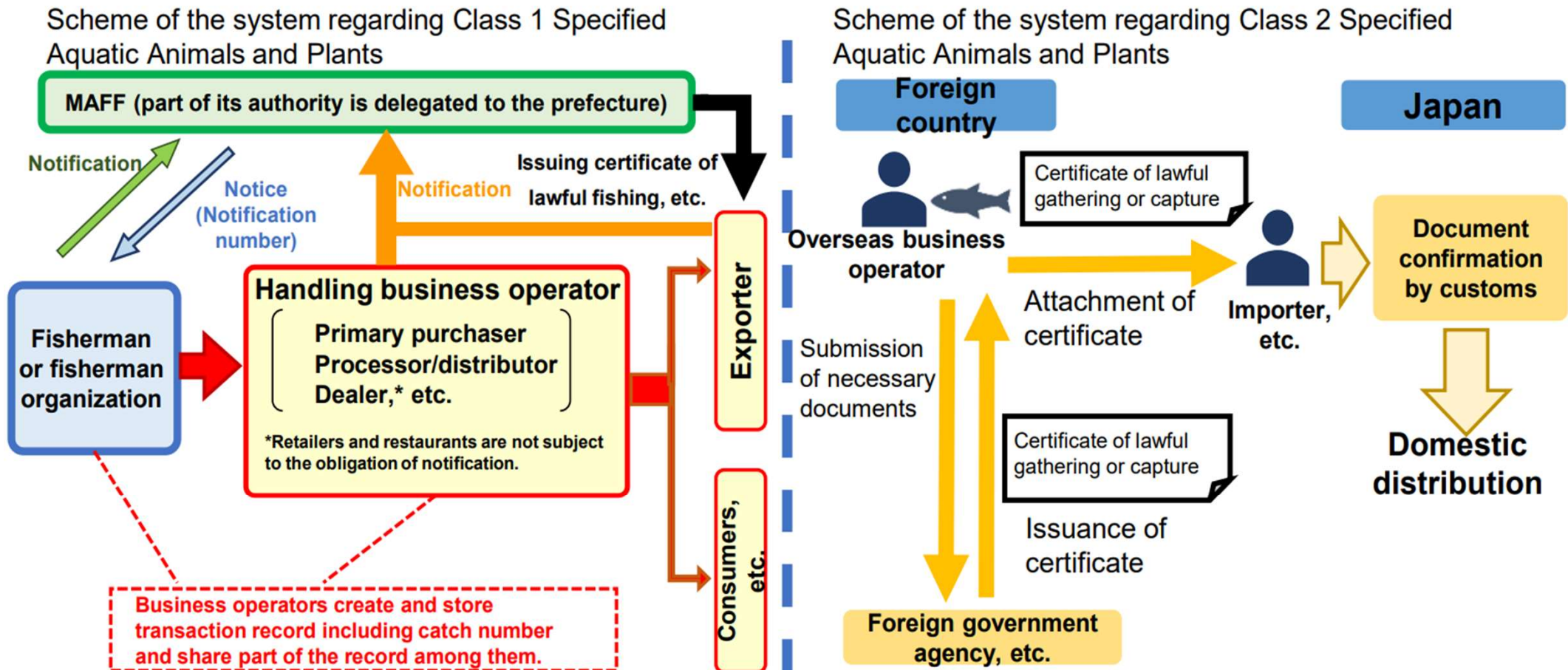
### 4. Import Regulation

Importers of specified fishery products must attach certificate of lawful fishing issued by the flag country's national government.

- 1 to 3 targets species with high probability of IUU catch domestically. (Class 1 Specified Aquatic Animals and Plants: abalone, sea cucumber and juvenile eel. Juvenile eel starting from 2025.)
- 4 targets species with high probability of IUU catch internationally. (Class 2 Specified Aquatic Animals and Plants: squid, pacific saury, mackerel and sardine)

# Content of the Proper Seafood Distribution System

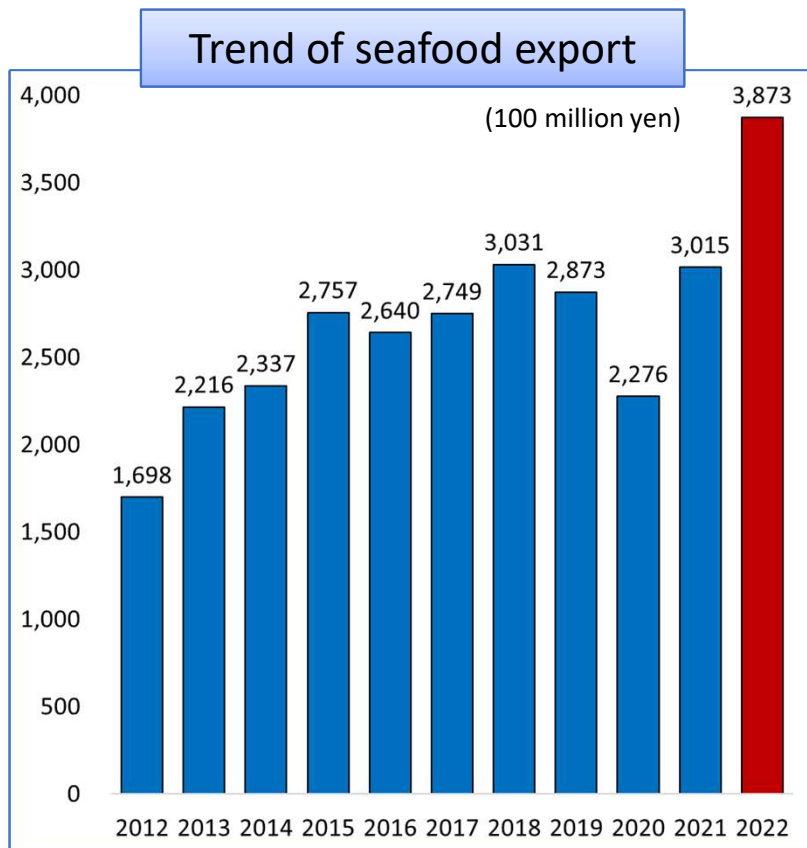
- Targeting species with high probability of illegal and excessive catch domestically (Class 1 Specified Aquatic Animals and Plants: abalone, sea cucumber and juvenile eel. Juvenile eel starts from 2025.), the followings are required: (1) notification to administrative agency by fisherman, (2) communication of catch number, (3) creating and storing transaction records, and (4) attaching certificate of lawful fishing issued by the national government.
- Targeting species with high probability of IUU fishery internationally (Class 2 Specified Aquatic Animals and Plants: squid, pacific saury, mackerel and sardine), attaching certificate is required at the time of import, issued by the national governments of the flag country.



\*There are penalties for violation of obligation of notification, communication, transaction record, attachment of certificate for import/export and other obligations

# Expansion of Seafood Exports

- In the Basic Plan for Food, Agriculture and Rural Areas, the target for the export value of agricultural, forestry and fishery products and food is set at 5 trillion yen (including 1.2 trillion yen for fishery products) in 2030.
- Seafood exports totaled 387.3 billion yen in 2022. It accounts for 27.4% of the total exports of agricultural, forestry and fishery products and food worth 1,414 billion yen. 28.5% increase compared to the previous year.
- In recent years, as international interest in fisheries resource management has grown, major retailers in Europe and North America have made obtaining seafood ecolabel certifications approved by GSSI (Global Sustainable Seafood Initiative) a prerequisite for business.



- Examples of seafood procurement policy of major European and American retailers

## Wal-Mart (USA) \* Revised in 2017

- Purchase 90% or more of MSC, BAP or FIP certified seafood.
- By 2025, all seafood to be certified by MSC, BAP or **GSSI recognized scheme**, or working on FIP or AIP.

## Metro (Germany) \* Revised in 2016

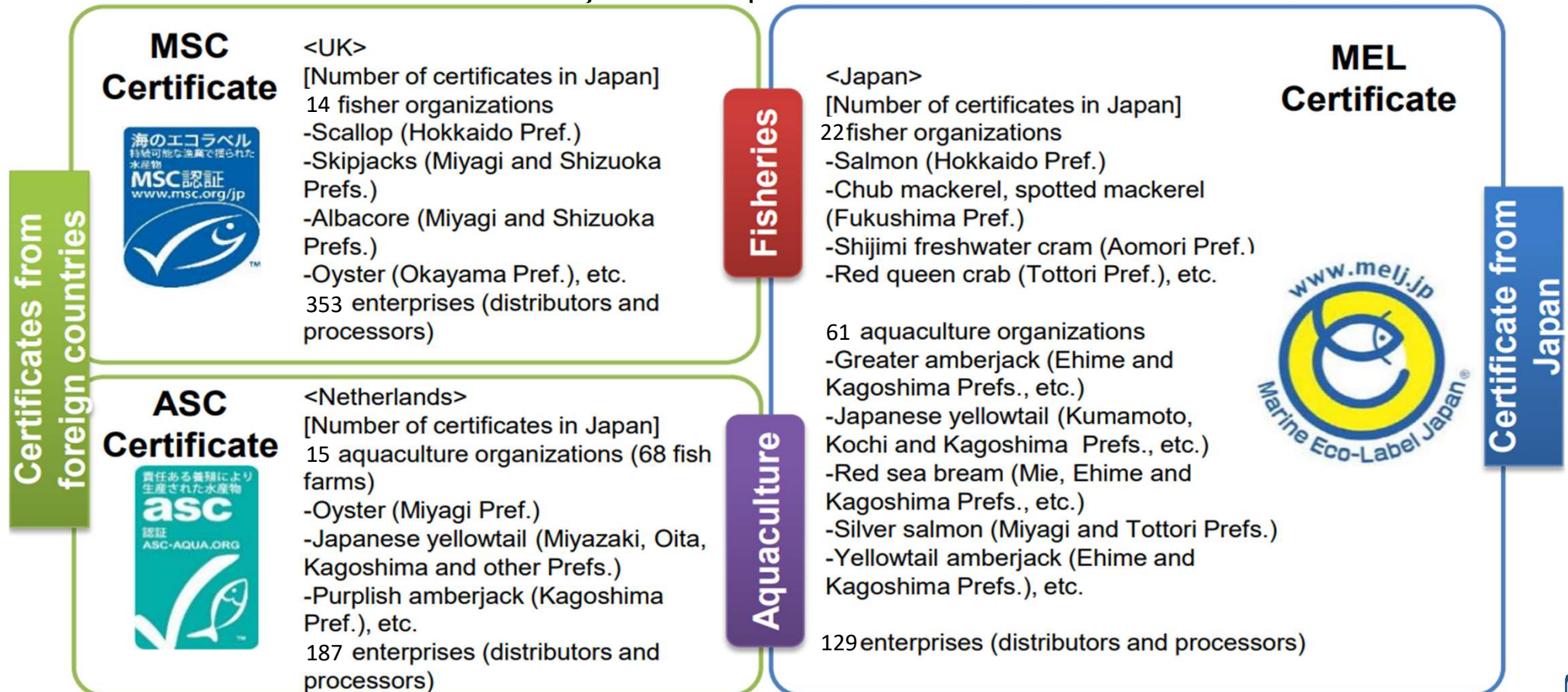
- By 2020, to continuously take full advantage of the social and environmental aspects of the fishery, 80% of the 12 major fish species should be purchased with one of the following certifications:

ASC, European Organic Certification, FOS, GAA-BAP, GLOBAL G.A.P., MSC or **GSSI recognized scheme**

# Trends in Seafood Ecolabels

- Seafood Ecolabel is certification system for initiatives in line with the Guidelines for the Ecolabelling adopted by FAO Committee on Fisheries.
- Given the diverse range of seafood ecolabels worldwide, seeking recognition from GSSI has become a gateway to establish approval as an internationally accepted seafood ecolabel certification scheme.
- As of the end of FY2022, 9 seafood ecolabel schemes are recognized by GSSI, including MEL, MSC and ASC, and the number of these certifications in Japan was 781 (fisheries 36, aquaculture 76, CoC 669)

## Seafood ecolabel certifications mostly used in Japan



\* Number of certifications are as of March 31, 2023 (the Fisheries Agency)

# Challenges and Initiatives of Seafood Ecolabels

The consumer and business awareness is low in Japan, and in order to further promote the utilization of seafood ecolabel for sustainable fisheries development, it is important to increase consumer awareness and provide business operators with incentives to obtain certification such that contributing to export promotion.

## 【Challenges】

- ◆ In Japan, compared to the Western countries, awareness about sustainability is low, and efforts are lagging behind.

Major retailers in the West, such as Walmart in the U.S. and Metro in Germany, require the acquisition of international standardized eco-label certifications (recognized by GSSI) as a prerequisite for seafood trading.

- ◆ Consumers, fishermen, and distribution and processing companies still have low awareness of seafood eco-labels.

Percentage of unfamiliarity with seafood eco-labels (the MAFF survey, March 31, 2020):

Consumers: 59.4%, Fishers: 58.7%, Distributors and Processors: 47.4%

- ◆ The number of major seafood eco-label certifications that received GSSI recognition is small for domestic products.

Number of certifications as of March 2023 (\*As of March 2022 for overseas MSC certification)

GSSI recognized scheme	MSC	ASC	MEL
Overseas certification	Fisheries: 539, CoC: 5,801	Aquaculture: 2,073 sites, CoC: 2,921	
Domestic certification	Fisheries: 14, CoC: 353	Aquaculture: 101 sites (15), CoC: 187	Fisheries: 22, Aquaculture: 61, CoC: 129



**The following initiatives are desired to promote and utilize sustainability certification for domestic products.**

### •Raising consumer awareness

Use influencers and the seafood section of mass retailers to promote certified products to consumers.

### •Promotion of certification acquisition for business operators

In addition to improving the international reputation of Japan-originated ecolabel, implement initiatives such as consultation program of certification application and promotion of the export of certified products to provide incentives for obtaining certification.