出國報告（出國類別：其他）

參加「**2007**年國際漁業團體聯盟（**ICFA**）會議」報告

服務機關：行政院農業委員會漁業署
姓名職稱：黃 友 義 研究員
派赴國家：義大利 羅馬
出國期間：96 年 9月29日
至96 年10月 6日
報告日期：96 年 月 日

參加「2007 年國際漁業團體聯盟(ICFA)」年會報告

摘　要

一、　國際漁業聯盟 2007 年年會於本（96）年 10 月 1 日至 4 日於義大利羅馬舉行,共計有來自美國、加拿大、歐盟、冰島、挪威、澳洲、紐西蘭、日本及韓國等國漁業團體參加,本署則由黃友義研究員及對外漁協派員協同出席。

二、　本次會議由西班牙漁業聯合會秘書長 Mr.Javier Garat Perez 主持，本次年會主要係由各會員國漁業產業界就各國過去一年來國際漁業界發生之重大事件交換意見並與聯合國農糧組織(FAO)漁業處官員溝通意見等。本次年會中主要係針對海洋保護區設立、CITES 與 FAO 關係、IUU 漁業、eco-label 及 FAO 專家會議形成過程等議題進行討論。茲分述如下;

(一)海洋保護區議題:有關設立海洋保護區業經長時間之發展,目前 FAO 則於 2005 年 cofi 會議中要求發展指導原則,並預定於 2008 年提出,而所謂海洋保護區主要係在增加海洋生物多樣化、保護棲地及減少漁業努力量等原則,FAO 野村處長相當審慎表示不反對 MPA 之設立,但是其看法則應屬漁業管理之一環,而且倘 FAO 並不進行發展指導原則,其他國際組織同樣會推動。而 ICFA 則要求 FAO 發展指導原則應邀請該團體專家參與並應避免由環保人士主導。

(二)CITES 與 FAO 之關係議題:Nomura 先生首先指出,FAO 與 CITES 之間已簽署 MOU,因此當 CITES 討論漁業相關議題時皆會遵重 FAO 之意見,諸如倘屬某水域之海洋生物發生問題時,CITES 一般會遵重 FAO 建議以建立漁業管理作為解決手段,而非將其列入附錄名單之管理方式。

(三)IUU 漁業議題:ICFA 從產業界角度要求 FAO 能在網站上公告 IUU 漁船名單包括運搬船等,以使產業界能快速取得資訊,避免與 IUU 漁業發生連結。惟 FAO 野村處長表示由於涉及法律責任,FAO 應避免公告 IUU 漁船名單,但是目前 FAO 正發展建立全球各國漁船名單供查詢,但是在名單中並不對各船之情形進行判斷,另外為防堵 IUU 漁業業已發一套港口檢查機制,並於本(2007)年起即開始辦理相關訓練工作。

(四)Eco-label 議題:有關海洋永續標章(MSC)業已逐漸受到產業界及部分消費者接受,視其在 pollack、salmon、cod 等魚種申請通過 MSC 最多,而其主要係有三個原則分別為 1 其漁群數量是否可支持永續漁業 2 漁業對海洋環境影響如混獲等 3 漁業管理制度的評估等三項,但是 ICFA 等代表對於 MSC 持正面看法,惟其中驗證系統繁復及收費過高等有所指責,日本代表則說明該國預計於本(2007)年年底即可由日本水產協會建立 MEL-Japan 標章,主要係對日本小漁漁業提供較低之驗證費用即可通過驗證制度。

(五)FAO 專家會議形成議題:FAO 野村處長表示 FAO 決策係由專家會議討論後交由各會員國參加之技術諮商會議再提報委員會作成決定,但是由於產業界對於 FAO 專家邀請過程等有所疑慮,並對於形成決定之過程並未充分考量產業界意見多所批評,並要求能推薦專家參與。FAO 官員則說明專家係由資料庫中選取,其原則係考量區域性、學術代表性等由秘書長選任,而且一經選為參與專家會議則其應以個人身分參與,並公正參與制定指導原則,FAO 同意由 ICFA 推舉之專家納入選取,但是仍強調獲推選參與即與 ICFA 無關。

三、 本次會議共計通過修正去年三項決議,分別為 MPA,IUU 漁業,公海拖網等議題。並經一致推選西班牙漁業聯合會秘書長 Mr.Javier Garat Perez 主席連任，明年年會預定於 2008 年 11 月於同地舉行

四、 後續因應建議

(一)由於 ICFA 年會係我國能接收 FAO 相關資訊之管道，因此建請仍應持續派員參與。另外 FAO 業已接受 ICFA 推薦專家參與專家會議，建請相關業務組應就 FAO 相關議題研究，倘有需要可透過 ICFA 管就推薦專家參與專家會議俾能及早將我國意見反應在 FAO 專家會議討論過程。

(二)有關海洋漁業產品之 eco-label 業已逐較成為世界潮流，因此國內漁業應即早進行研究及採取相關因應措施。

參加「2007 年國際漁業團體聯盟(ICFA)」年會報告

目　次

參加「2007 年國際漁業團體聯盟(ICFA)」年會報告

壹、前言

國際漁業團體聯盟(International Coalition of Fisheries Association；ICFA)成立於 1988 年，係由各國具國家代表性漁業團體所組成之非政府組織（NGO），並已取得聯合國(UN)及聯合國糧農組織(FAO)非政府組織觀察員之身份，目前參與之會員計有東南亞國協聯盟、澳洲、台灣、西班牙、加拿大、冰島、日本、韓國、美國、紐西蘭、挪威、智利、祕魯、巴西、俄羅斯及歐盟等 16 個漁業團體，另有葡萄牙及厄瓜多 2 個預備會員，我國係以臺灣水產協會代表參加該組織。

ICFA 成立的目的在於維護漁業的正常營運，並兼顧海洋漁業資源保育及生態平衡，使海洋能成為全世界人類主要糧食的來源。又鑑於國際環保團體極度擴張生態保育意識，妨礙正常漁業資源之利用，因此，集合世界主要漁業國家之漁業團體成立聯盟，藉以擴大其影響力，以維護世界漁業之正常營運。

2007 年 ICFA 年會於 10 月 1 日至 4 日在義大利羅馬之 Monastery of Sant' Anselmo 召開，為善盡會員權利與義務，並維持與 ICFA 會員之交流關係，我方決定由漁業署署長機要秘書黃研究員友義參加，並邀請中華民國對外漁業合作發展協會黃易德隨團協助。

貳、會議過程紀要

與會之會員除我方代表外，尚有澳洲水產品協會(Australian Seafood Industry Council)、歐盟捕撈漁業組織總會(Association of the National Organizations of Fishing enterprises in the E.U.,簡稱 Europeche)、西班牙漁業聯合會(Federación Española de Organizaciones Pesqueras；FEOPE)、冰島漁業協會(Fisheries Association of Iceland) 、加拿大漁業協會(Fisheries Council of Canada)、大日本水產會(含拖網協會)、韓國漁業協會(Korea Fisheries Association)、美國國家漁業協會(National Fisheries Institute)、紐西蘭水產品協會(New Zealand Seafood Industry)、挪威漁業協會(The Norwegian Fisherman's Association)及祕魯國家漁業協會(Sociedad Nacional de Pesqueria)等 13 個漁業團體參加。謹簡介說明會議召開情形如下：

一、本次會議由西班牙漁業聯合會秘書長 Mr. Javier Garat Perez 主持，依據議程(附件 1)首先由各國代表介紹其國家報告(附件 2~7)，並就各國過去一年來國際漁業界發生之重大事件交換意見，並與聯合國糧農組織(FAO)漁業處官員溝通討論等。本次年會中主要係針對海洋保護區(MPA)設立、CITES(華盛頓公約)與 FAO 關係、IUU 漁業、eco-labeling 及 FAO 專家會議形成過程等議題進行討論。茲分述如下：

(一) 海洋保護區議題

有關設立海洋保護區歷經長時間之發展，目前 FAO 則於 2005 年 COFI 會議中要求發展指導原則，並預定於 2008 年提出，而所謂海洋保護區主要係在增加海洋生物多樣化、保護棲地及減少漁業努力量等原則，FAO 野村處長相當審慎表示並不反對 MPA 之設立，渠並認為 MPA 應屬漁業管理之一環，而且若 FAO 不進行發展指導原則，其他國際組織同樣會推動，如世界自然基金會(World wildlife fund；WWF)、Greenpeace。而 ICFA 則要求 FAO 發展指導原則應邀請該團體專家參與並應避免由環保人士主導。

(二) CITES 與 FAO 之關係議題

FAO 野村處長首先指出，FAO 與 CITES 之間已簽署 MOU 備忘錄，因此當 CITES 討論漁業相關議題時皆會尊重 FAO 之意見，如某水域之海洋生物發生問題時，CITES 一般會尊重 FAO 建議以建立漁業管理作為解決手段，而非將其列入 CITES 附錄加以保護之管理方式。

(三) IUU 漁業議題

ICFA 從產業界角度要求 FAO 能在網站上公告 IUU 漁船名單包括運搬船等，以使產業界能快速取得資訊，避免與 IUU 漁業發生連結。惟 FAO 野村處長表示由於涉及法律責任，FAO 應避免公告 IUU 漁船名單，但是目前 FAO 正發展建立全球各國漁船名單供查詢，但是在名單中並不對各船之情形進行判斷，另外為防堵 IUU 漁業已開發一套港口檢查機制，並於本(2007)年起即開始辦理相關訓練工作。

(四) Eco-labeling 議題

有關海洋管理評議會(Marine Stewardship Council；MSC)之認證已逐漸受到產業界及部分消費者接受，視其在 pollack、salmon、cod 等魚種申請通過 MSC 最多，而其主要係有三個原則分別為：1.其魚群數量是否可支持永續漁業、2.漁業對海洋環境影響如混獲等、3.漁業管理制度的評估等三項，ICFA 等代表對於 MSC 持正面看法，惟對其中驗證系統繁復及收費過高等有所指責，日本代表則說明該國預計於本(2007)年年底即可由日本水產協會建立 MEL-Japan 標章，主要係針對日本國內的小型漁業提供較低之驗證費用即可通過的驗證制度。

(五) FAO 專家會議形成議題

FAO 野村處長表示 FAO 決策係由專家會議討論後，交由各會員國參加之技術諮商會議再提報委員會作成決定，但是由於產業界對於 FAO 專家邀請過程等有所疑慮，並對於形成決定之過程並未充分考量產業界意見多所批評，並要求能推薦專家參與。FAO 官員則說明專家係由資料庫中選取，其原則係考量區域性、學術代表性等由秘書長選任，而且一經選為參與專家會議則其應以個人身分參與，並公正參與制定指導原則，FAO 同意由 ICFA 推舉之專家納入選取資料庫，但是仍強調獲推選參與即與 ICFA 無關。

二、ICFA 與會人員於 3 日赴 FAO 與該組織漁業處處長野村一朗等官員就 Marine protected areas Trends、Development and pace of RFMO Reform、Combating

IUU、Tracking trade in fish and fish products、UNIDO-FAO Partnership、FAO-CITES relationship 等 6 項議題交換意見，其中野村處長針對 ICFA 特別關切之 MPA 及 IUU 議題加以說明及建議：

(一) MPAs Trend

野村處長表示，MPA 實為確保漁業利益已達不得不設立之底限，公海如認定有必要亦會劃設保護區，並呼籲各產業界應訂定相關因應計畫，而非作無謂的抗議，渠並表示 FAO 會經過充分的科學調查，明確訂出保護區劃設方針，並整合 MPAs 以提升保護區周圍有更高之生產力。

(二) Compacting IUU

野村處長提出目前可能潛在 IUU 漁業的對象有：localize fishing、fish cheap market、flag of convenience 及 transhipping，渠表示 RFMOs 即為防範 IUU 而發展及編成，FAO 就 IUU 議題已開發港口檢查機制(port state measures)，另 FAO 亦編列 IPOA-IUU 長程計畫以確保守法業者之權益。

三、本次會議經各國代表交換意見後，通過修正去(2006)年三項決議，分別為海洋保護區、IUU 漁業及公海拖網等議題。另紐西蘭、挪威及日本代表對於 MSC 議題，有關認證標準、永續漁業標章及市場實踐等作進一步討論，ICFA 各會員國咸認 FAO 是合適處理永續性及認證之機構。

四、除通過修正上述各項決議外，亦決定 ICFA 將派員參加本(2007)年 10 月中旬 FAO 及 UNIDO 在維也納召開之有關 Large Marine Ecosystems 專家會議、10 月中下旬於紐約召開之聯合國大會(UNGA) Fisheries Resolution 會議、11 月在羅馬召開之 Guidelines for Responsible Fish Trade 技術諮商會議、明(2008)年 2 月初在羅馬召開之遠洋漁業公海管理指導方針會議、FAO Port State Measures 會議(6 月)及 FAO COFI 貿易次委員會(6 月)等 6 項會議，明(2008)年年會預定 11 月於同地舉行。

五、會中一致推選 2008 年主席由西班牙漁業連合會秘書長 Mr. Javier Garat Perez 連任，並遴選挪威漁業協會代表為副主席，年費仍維持 2007 年議定之 3,000 美元；另基於 ICFA 預算有限，會中亦決議 Mr. Tinkham 以 ICFA 秘書長身份參加國際漁業會議之旅費由 ICFA 負擔，其他各會員參加國際漁業會議之旅費則自行承擔。

參、心得與建議

一、藉由本次年會，已與各國主要漁業團體建立聯繫管道，並更進一步瞭解目前 FAO 處理海洋保護區劃設、水產品永續利用認證、區域性管理組織、專家會議形成及防堵 IUU 等漁業議題最新發展，對於日後研擬漁業政策具有相當助益。

二、由於 ICFA 年會係我國能接收 FAO 相關資訊之管道，因此建請仍應持續派員參與，除政府部門參與外，我方業者亦應踴躍參加，除可擴增國際觀，瞭解最新國際漁業議題發展，亦有助於建立與相關國家民間團體聯繫之管道，

以維護業者利益。

三、FAO 已接受 ICFA 推薦專家參與專家會議，建請相關主管單位應就 FAO 相關議題研究，倘有需要可透過 ICFA 管道推薦專家參與專家會議，俾能及早將我國意見反應在 FAO 專家會議討論過程。

四、有關海洋漁業產品之 eco-labeling 已逐漸成為世界潮流，因此國內漁業應即早進行研究及採取相關因應措施。

五、ICFA 網頁內容相當受到各會員重視，ICFA 將依會員之建議陸續更新其網頁內容(www.icfa.net)。近年各會員國漁業團體關切議題漸廣，互相交換意見討論熱烈，文件檔案繁多，ICFA 將於近日上傳本(2007)年年會討論議題及相關決議電子檔提供下載(www.icfa.net/assets/files/events/ICFA_2007.zip)。

International Coalition of Fisheries Associations

INTERNATIONAL COALITION OF FISHERIES ASSOCIATIONS
2007 ANNUAL MEETING

Dates: 1-4 October 2007

Location: Rome, Italy

Meeting Location: Monastery of Sant' Anselmo
Piazza dei Cavalieri di Malta 5
I – 00153 Rome , Italy
Tel: 39-06-5791-1

Agenda:

Monday, 1 October

1830 Welcome Reception – Hotel Sant' Anselmo
Address: Pizza Sant'Anselmo, 2

Tuesday, 2 October **(at Monastery of Sant' Anselmo)**

0830 Gather and Coffee
0900 – 1700 Discussion Session
1230 Lunch
2000 Dinner

Wednesday, 3 October **(at FAO Headquarters)**

0830 Meet outside FAO visitor entrance
0900 – 1700 Discussion Session with FAO
1230 Lunch
2000 Dinner with ICFA and invited FAO staff

Thursday, 4 October **(at Monastery of Sant' Anselmo)**

0830 Gather and Coffee
0900 – 1300 Discussion Session
1300 Lunch
Afternoon: ICFA members visit their respective diplomatic representations to the FAO
2000 Informal Dinner

Please confirm your attendance with Stetson Tinkham by email (stinkham@nfi.org) or telephone at 703-752-8892

International Coalition of Fisheries Associations

Rome, Italy

1-4 October 2007

Monastery of Sant' Anselmo

Monday, 1 October

1830 Welcoming Reception at Hotel Sant' Anselmo, Pizza Sant' Anselmo 2, Rome

Dinner on own

Tuesday, 2 October

0830 Gather and Coffee

0900 International Coalition of Fisheries Associations Welcoming Remarks

0915 Country Reports

Purpose: To highlight the major developments and challenges for each participating ICFA member, with regard to fishing issues.

1030 International Meeting Reports

- UN General Assembly Fisheries Resolution (New York, November 2006)
  - --"Vulnerable Marine Ecosystem" actions
  - --Establishing RFMOs where none exist
- South Pacific RFMO negotiations (Chile, xx 2007)
- North Pacific RFMO negotiations (Japan, xx 2007)
- UN FAO Committee on Fisheries (Rome, March 2007)
- RFMO Reform
  - --Model RFMO Documents
  - --Progress by Tuna RFMOs
  - --Progress by Non-tuna RFMOs
  - --Review of "Fisheries Partnership Agreements"
- CITES COP 14 (The Hague, June 2007)

Purpose: To review actions taken by various intergovernmental meetings, identify issues on which ICFA should develop a policy, and develop advocacy strategy.

1230 Lunch

1400 ICFA Policy Development and Advocacy Strategy

Planned international meetings where ICFA views should be considered:

- UN General Assembly Fisheries Resolution (Fall 2007)
- FAO Technical Consultation on Technical Guidelines for Responsible Fish Trade (Rome, 5-7 November 2007)
- Global Forum on Oceans, Coasts, and Islands (including its working group on Fisheries and aquaculture)
- FAO Technical Consultation on Vulnerable Marine Ecosystems and Significant Adverse Impacts (Rome, 2008)
- FAO Technical Consultation on Port State Measures
- FAO Committee on Fisheries Subcommittee on Fish Trade (Bremen, 2-6 June 2008)
- FAO Committee on Fisheries Subcommittee on Aquaculture (Santiago, October 2008)

Purpose: To develop or affirm the ICFA policies that individual ICFA members will advocate for in international meetings. To also identify what ICFA members will participate in which international meetings. Finally, to identify needed advocacy tools (e.g., pamphlets, posters, etc,)..

1700 ICFA Administration

Purpose: To review ICFA finances, agree on the 2008 budget, and elect the 2008 Chair.

2000 Dinner

Wednesday, 3 October

0830 Gather outside FAO visitor entrance

0900 Dialogue with FAO Department of Fisheries and Aquaculture Staff

- FAO-CITES relationship: Lessons learned?
- Development and pace of RFMO Reform
- Combating IUU
- United Nations Industrial Development Organization-FAO Partnership
- Marine protected areas: Trends?
- Tracking trade in fish and fish products

1230 Lunch

1400 Dialogue (continued)

- FAO Expert Consultations – where the experts come from
- Role of outside groups (e.g. Global Forum on Oceans, Coasts and Islands) in driving the global fisheries policy debate

Purpose: Discuss with FAO staff issues that impact fish and seafood broadly – whether it be harvested in the wild or cultivated through aquaculture.

1630 Discuss meeting action steps

1700 Adjourn

2000 Dinner with ICFA and key FAO staff

Purpose: Continue informally the discussions of the day.

Thursday, 4 October

0830 Gather and Coffee

0900 Revise Policies and advocacy strategies in light of discussions with FAO

Purpose: Ensure that ICFA and its members successfully engage international fisheries fora and national fisheries policy-setting processes.

1300 Lunch

1500 Resume discussions (if necessary)

1700 Adjourn

2000 Informal Dinner

Country report

Taiwan

1. General description of the fishery

In 2006 the fisheries production of Taiwan reached 1, 283,587 tons with the value of about US$ 2.6 billions. The fishery of Taiwan can be classified into four categories, including far seas fishery, offshore fishery, coastal fishery and aquaculture. In terms of production, far seas fishery surpasses the other three fisheries, followed by aquaculture, while coastal fishery falling behind all others. The status of those fisheries in 2006 is general described as follows:

(1) Far seas fishery

A. Far seas fishery refers to the fishery operated outside 200-mile exclusive economic zone of Taiwan. The major fishing methods include tuna longline fishing, tuna purse seine fishing, trawling, squid jigging and torch light saury fishing, in which the fishing grounds of tuna longliners cover the high seas areas of all major oceans of the world, using foreign base ports to support their operation.

B. The annual production of far seas fishery in 2006 reached 757,896 MT, accounting for about 59 % of the total fisheries, showing an increase of 5,778 MT compared to the previous year.

(2) Offshore fishery

A. Offshore fishery refers to those fishing activities performed within Taiwan's exclusive economic zone from 12 to 200 miles from the baselines. The major fishing methods include trawling, ring net fishing, purse seine fishing, gill net fishing, longline fishing, etc.

B. The total production of offshore fishery in 2006 was 154, 873 MT, accounting for about 12 % of the total fisheries production, showing a decrease of 46,796 MT compared to the previous year.

(3) Coastal fishery

A. Coastal fishery refers to those fishing activities performed within 12 miles territorial sea of Taiwan, including inland fishing activities. The major fishing methods also include trawling, ring net fishing, purse seine fishing, gill net fishing, longline fishing and hand line fishing, etc.

B. The total production of coastal fishery in 2006 was 54,536 MT, accounting for about 4.2 % of the total fisheries production.

(4) Aquaculture

A. There are three major types of aquaculture in Taiwan, namely fresh water pond aquaculture, brackish water pond aquaculture and marine culture.

B. The production of aquaculture in 2006 was 316,282 MT, accounting for 25 % of the total fisheries production, showing an increase of 9,008 MT compared to the previous year.

The details of each fishery production and value in 2006 are shown in the following tables (Table 1 and Table 2):

Table 1. Various Fisheries Production in 2006/2005

	Fishery Production (M.T.)		
	2006	2005	Rate %
Grand Total	1,283,587	1,314,225	- 2.33
Far Seas	757,896	752,118	+ 0.77
Offshore	154,873	201,669	-23.20
Coastal including (Inland Fishing)	54,381(155)	52,956(207)	+ 2.69(-25.27)
Marine Culture	34,571	34,922	- 1.00
Inland Culture	281,711	272,352	+ 3.44

Table 2. Value of Each Fishery Production in 2006/2005

	Production Value (Thousand NT$)		
	2006	2005	Rate %
Grand Total	85,879,550	93,108,970	- 7.76
Far Seas	41,419,200	43,602,060	- 5.01
Offshore	9,823,000	12,850,750	-23.56
Coastal	5,961,060	5,348,940	+11.44
Inland Fishing	7,710	13,540	-43.06
Marine Culture	4,084,170	3,996,370	+ 2.20
Inland Culture	24,584,410	27,297,310	- 9.94

Note：1USD=33 NT

2. Key programs and activities

(1) Fleet reduction

After the completion of the 2-phase fleet reduction program in 2005 and 2006, the total number of large-scale (more than 100 gross registered tonnage) tuna longliners in Taiwan has reduced from 614 to 444. This meets the objective of FAO

IPOA-Fishing Capacity urging a 20% reduction of the world's total large-scale tuna longliners. It is also in line with the international trend of enhancing fisheries management and conservation of marine resources for achieving the objectives of "assuming the responsibility of resources conservation" and "commensuration of the size of fishing fleet with the availability of fishing opportunities".

(2) Holistic reinforcement of management on far seas fishing fleet

For being consistent with the resolutions adopted by the RFMOs, a holistic approach with several stringent measures has been taken by the fisheries agency of Taiwan, including management of catch transshipment at-sea, implementation of observer program and port inspection, conducting VMS program, enactment of a special management law for governing the investment activities of our nationals in foreign countries in terms of fishing vessel and fishing activity.

(3) Safety management of fishery products

To improve the quality of cultivated fish and shellfish, random hygienic inspections were performed in fishery products, and fish/shellfish farming surroundings were periodically monitored. The fisheries authority has also tightened the restrictions on drugs added to fish feeds and the detection of drug residues in fishery products. The results serve as a red flag warning, which helps the authorities to take the appropriate precautionary measures. In addition, a traceability system for monitoring sanitation of fishery products similar to EU system has been established for tracing the flow of the fishery products. Last year the Congress also adopted the Agricultural Production and Certification Management Act to regulate relevant elements of the procedures of certification and labeling, aiming to upgrade the quality and safety of fisheries products and their processed products in order to protect the health and the interest of the customers.

United States of America
Country Report
International Coalition of Fisheries Associations
October 2, 2007
Sant' Anselmo Monastery
Rome

1. U.S. Fisheries Legislative Changes: Magnuson-Stevens Act Reauthorization
   - Strengthen RFMOs: time bound; need to comply with domestically imposed schedule.
   - Stop IUU: will guide positions US takes in international negotiations.
   - Change domestic management systems to emphasize sustainability, sound science, and move towards rights-based fisheries

2. Trade Concerns
   - Contaminants and other human health-related concerns.
   - Risk of reorganization of safety inspection agencies, processes.
   - Subsidies and linkages to agricultural subsidies in conclusion to Doha Round WTO negotiations.
   - Bonding court decision.

3. Marine Protected Area Designations?
   - Expectation that the President may designate new MPAs.
   - Do not expect areas outside the US EEZ will be affected.

4. NFI Economic Integrity Initiative
   - How has it working for NFI as an association?
   - What is happening in the marketplace?

5. IUU Cooperative Enforcement Initiative
   - Large-scale, high seas driftnet fishing continues in the North Pacific Ocean.
   - North Pacific Heads of Coast Guards cooperate.
   - USCG, with Chinese enforcement official, boarded suspect vessel.
   - Confirmed driftnet deployment.
   - USCG turned vessel over to Chinese authorities for prosecution.

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Country Report

Korea

International Coalition of Fisheries Associations
Annual Meeting

Rome, Italy
October 2007

1. Fishery Production

Korea's fishery production in 2006 totaled 3,032,000 metric ton(MT) including seaweed. That was an increase of 10% from previous year. The growth was due to aquaculture and stock management. Meanwhile, declining quotas for pelagic fisheries, cuts in new authorizations for fishing and the vessel buyback program are negative factors for fishery production growth.

Table 1 〈 Total Production 〉

(unit : thousand MT)

Year	Total＊	Coastal &Offshore	Aquaculture	Inland	Deep Sea
2000	2,514	1,189	653	21	651
2001	2,665	1,252	655	18	739
2002	2,474	1,095	781	18	580
2003	2,483	1,094	826	19	544
2004	2,519	1,077	918	25	499
2005	2,714	1,097	1,041	24	552
2006	3,032	1,109	1,251	25	639

＊seaweed included

2. Fishing Vessels

The number of fishing vessels decreased by 5,155, from 95,890 vessels (923,099 G/T) in 2000 to 90,735 vessels (700,810 G/T) in 2005. The decrease in number and gross

tonnage was the result of the government's fleet reduction program. Korea has established a vessel buyback plan aimed at decommissioning more than 1,000 fishing vessels, 30 percent of the total offshore fishing vessels from 2007 to 2010.

This plan is made based on the determination that the portion of offshore fishing vessels takes up 30 percent greater than coastal and offshore stock resources and also consideration of the potential financial difficulty in the fishing industry from recently rising oil prices and external impacts from FTAs.

Meanwhile, the number of fishing vessels and the type of fisheries to be subject to the decommissioning scheme will be determined based on the results of the survey, and the scheme operation guidelines will soon be established.

3. International Trade

The trade balance in fishery products has been in the red since 2001. In 2004, the deficit amounted to about $1 billion and about $1.7 billion in 2006. The demand for fishery products is far beyond the Korean industry's fishery production. So Korea imported $2,383 Million in 2005 and $2,769 Million in 2006.

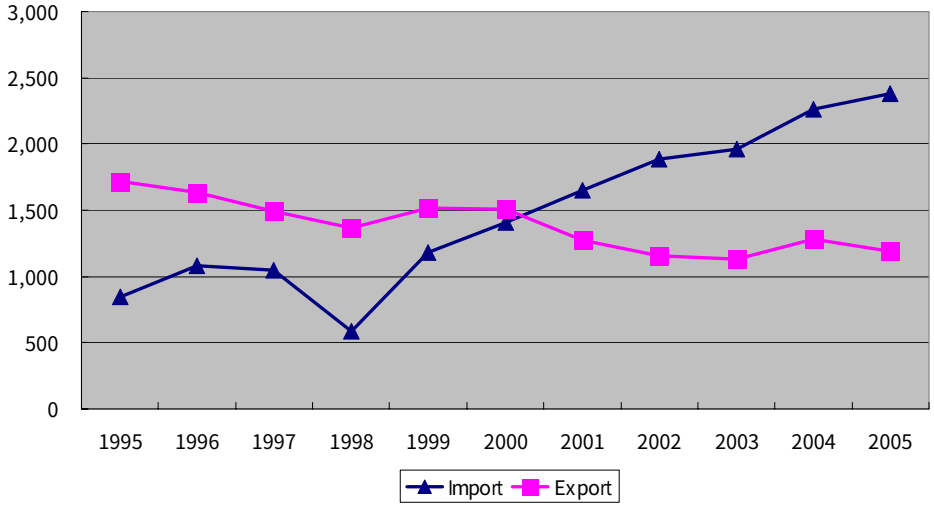
Korea's exports of fishery products have been maintained at over $1.5 billon since 1987. But since 2001, it has been declining due to stagnated production and largely expanded domestic consumption.

Table 2 〈 Exports & Imports of Fishery Products 〉

Year	Exports Value (Million $)	Imports Value (Million $)
2000	1,504	1,141
2001	1,273	1,648
2002	1,160	1,884
2003	1,129	1,961
2004	1,278	2,261
2005	1,193	2,383
2006	1,089	2,769

However, the import of fishery products has been rising sharply, with imports in 2006 reaching about $2.7 billion. This trend is expected to continue along with trade liberalization such as FTAs and WTO regime.

Graph 1 〈 Trade Balance 〉



4. Fishery Issues

4-1. FTA talks

Along with the global trends of proliferation of regional trade agreements, Korea is actively involved with the bilateral negotiations for the conclusion of Free Trade Agreements (FTAs). On February 16, 2004, Korea ratified its first FTA with Chile. Until now Korea signed FTA with Singapore (Effective from March 2, 2006), EFTA (finalized on Dec. 15, 2005), FTA with ASEAN (Products Trade Agreement finalized on May 16, 2006) and Korea-U.S.A. FTA(finalized on June 30, 2007) and currently talks for Korea-EU FTA, Korea-China FTA Joint Study Group Meeting are proceeding. Such bilateral trade negotiations will substantially improve market access to fisheries of each side and promote mutual benefits for and cooperative relationship between the parties to the FTAs.

4-2. Fisheries Traceability System

A traceability system for fish and fishery products, which provides information on the entire process, from the fish farm to the consumers' table, will be implemented in 2008.

The fisheries traceability system records and manages all data in every process from production to consumption, and all information is made available to the public. Thus, consumers can purchase fisheries products and be ensured of their safety under the system. In particular, the system keeps records of hygiene and sanitation information as well as general data. In addition, the system minimizes damage incurred from

food-related accidents through immediately tracing back and removing the problematic product.

Korea formulated the basic plan for the introduction of the fisheries traceability system in 2004, and conducted a trial operation of the system on three species such as oyster, laver and flatfish in 2005. Last year the system was expanded to an additional ten items and will see further expansion to a total of 30 items

4-3. Expo 2012 Yeosu Korea

It was in May 2006 that Korea presented a letter of application to the BIE (Bureau of International Exhibitions) for the hosting of the Expo in 2012. Ever since, the Korean government has been exerting sincere endeavors to win the support of the international community.

The proposed theme for the Yeosu Expo is "The Living Ocean and Coast: Diversity of Resources and Sustainable Activities". To meet this ends, the Expo 2012 Yeosu Korea could provide an opportunity to draw up a practical solution to this challenge. The final result will be in November 2007.

New Zealand Country Report – 2007

to International Coalition of Fisheries Associations

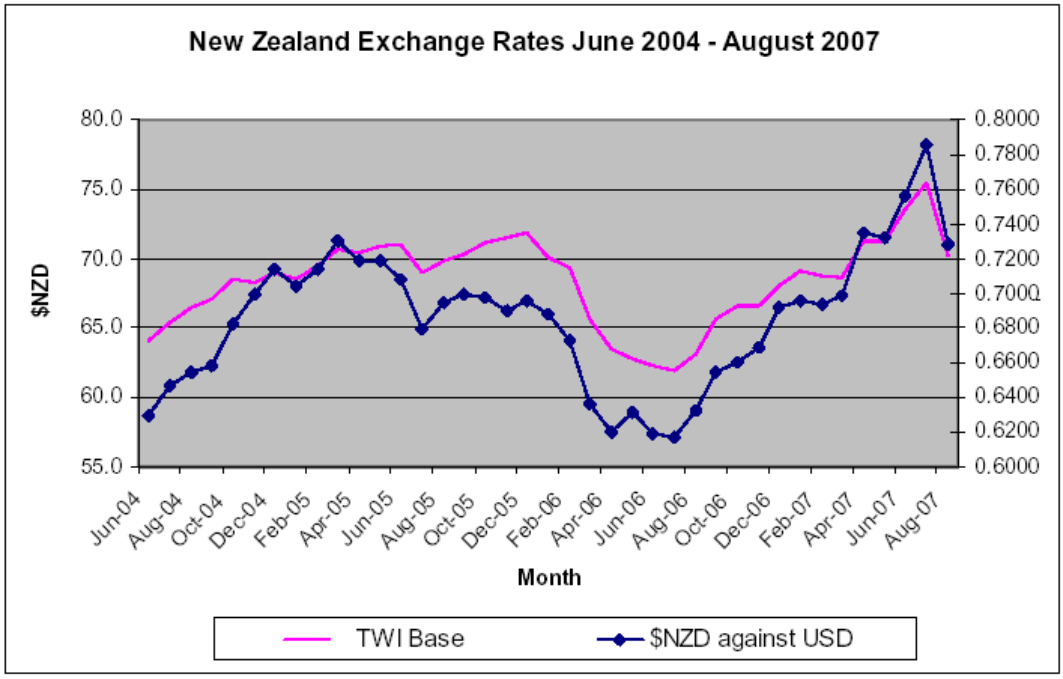
Key Indicators

- Seafood ranks as New Zealand's fifth largest export goods earning sector – after dairy products, forestry, meat and horticultural products
- Seafood exports earned NZD$1.32 billion in the year to 30 June 2007
- Domestic sales are estimated to be about 10% of the total of export sales

Key Species Exported in the Year to 30 June 2007

Species	June 2005	June 2006	June 2007
Greenshell Mussels*	NZ$156 mil	NZ$173 mil	NZ$186 mil
Hoki	NZ$167 mil	NZ$155 mil	NZ$154 mil
Squid	NZ$160 mil	NZ$130 mil	NZ$81 mil
Rock Lobster	NZ$110 mil	NZ$122 mil	NZ$128 mil
Orange Roughy	NZ$90 mil	NZ$74 mil	NZ$70 mil
Abalone / Paua	NZ$53 mil	NZ$51 mil	NZ$58 mil
Mackerel	NZ$36 mil	NZ$45 mil	NZ$48 mil
Ling	NZ$47 mil	NZ$41 mil	NZ$56 mil
Hake	NZ$45 mil	NZ$34 mil	NZ$37 mil
Salmon	NZ$31 mil	NZ$32 mil	NZ$40 mil
Snapper	NZ$27 mil	NZ$28 mil	NZ$30 mil

The New Zealand seafood industry is dependent on exports, with 90% of product exported. While international seafood prices have been firm, profitability has been eroded by high and volatile exchange rates, and higher fuel prices. The following table plots the New Zealand exchange rates since June 04.



The economic position has led to some commercial rationalisation, with a number of smaller quota owners selling to larger businesses. This has led to rationalisation of both harvesting and processing. Quota stocks have remained steady, but it is anticipated that the quota for hoki will be cut by 20% for the 2007/2008 fishing year. This will have impacts on both harvesting and processing. Industry scientists consider that at this level the fishery will rebuild, after several poor years for recruitment.

New Zealand has a very tight labour market, with unemployment levels among the lowest in the Western World. This is putting real pressure on the recruitment of staff, particularly into the harvesting and processing sectors. SeaFIC has a very proactive training organisation providing a wide range of training options across the sector.

As reported last year, the New Zealand industry proposed that 31% of its EEZ (the fifth largest in the world) be closed to bottom trawling. The proposal was to close representative areas not previously bottom trawled. After considerable debate, Government has accepted the proposal albeit after considerable pressure from Environmental groups demanding that larger areas and areas already fished be included.

Quota Management System

The New Zealand Quota Management System celebrated its 20th birthday in 2006. The system has been acclaimed as a very effective means to manage a fishery. It

establishes a property right which can be bought and sold or leased subject to sustainability of fish stocks. The system is under pressure particularly in the inshore fisheries from other interested parties who want a bigger share of the TACC (recreational fishing) or other groups (particularly environmental) who want to constrain commercial fishing.

In this regard, there have been two major policy developments in the past year. The first was an ill-conceived Shared Fisheries proposal promoted by Government, which was strongly opposed by all sector interests. Government is still considering how it will move forward on the issue. The second is the Governments Marine Protection Strategy which is essentially a guise for imposing Marine Reserves over 10% of New Zealand's economic zone. This would potentially stop fishing in some of the most productive inshore fisheries. The concerning issue is that it is a blanket approach without any effort to identify what is at risk and the bet way to provide protection.

We also face a move by some within Government to abandon the international approach to the precautionary principle, meaning that sustainability would have absolute priority over utilisation. New Zealand is an island country where the population has a strong affinity with the oceans, and a view that sustainability will only be achieved by stopping fishing. This will be a major challenge for the industry over the next five years.

Certification

The New Zealand Hoki Fishery is still proceeding through a dispute resolution process that, if successful, will result in the fishery being recertified to the MSC's standard for another five years. The certifier remains committed to re-certifying the fishery. In the meantime, the 2001 certificate has been extended until October 2007. The fishery has recently been subject to a compliance audit against the 2001 certificate, and at the same time the certification team met to address the issues remanded to it from the Dispute Panel.

There is strong demand from a small number of customers for more New Zealand fisheries to be certified to the MSC's standard. This is particularly so in the US and UK markets. However the demand for verification that fisheries are being well managed is still a second order concern for customers in most markets, well behind being assured that seafood products are safe to eat and meet customer specification and expectation.

Evidence of a market premium for certified seafood is hard to identify – it appears that certification is of assistance in gaining customer preference rather than premium.

The New Zealand Government has made a small allocation in the Ministry of Fisheries baseline budget for the Ministry to engage with industry on fisheries and aquaculture certification. In the first year (ending June 2008) the funds will be used for Ministry led projects and thereafter the funds will be contestable on a dollar for dollar basis to co-fund industry led projects. While the Ministry appeared to start out with a position to support certification applications to the MSC standard, that focus has changed to support for certification to other standards, including the possibility of developing a New Zealand standard or guideline.

SeaFIC is forming a small industry focus group to work government officials to develop certification projects that may be fully or part funded through the Ministry of Fisheries.

New Zealand has joined a group of official standards organisations, under the International Standards Organisation, chaired by the Norwegian standards organisation, to develop an ISO standard for sustainable fisheries and aquaculture. The FAO's Fisheries and Aquaculture Department is participating in the process also.

South Pacific RFMO Negotiations

The fourth round of negotiations for the proposed South Pacific RFMO takes place in Noumea from 10 to 14 September 2007.

The primary objective for this meeting is to progress the convention's draft text. A revised draft has been posted on the SPRFMO website. The draft takes account of comments made on the text principally by distant water fishing states, led by the EU, to take account of other RFMO convention texts relevant to non-tuna fisheries, especially the SEAFO, NAFO and NEAFIC texts. While the focus of the original draft was to emphasise precaution, the draft now better reflects a primary objective of sustainable use of fisheries resources.

Institutional structures foresee the operation of science and data committees and splitting operational, day to day management between two committees respectively focused on the eastern and western Pacific. This structure has been proposed to provide assurance to the Latin American coastal states that the RFMO will take appropriate account of their interests in management and use of the straddling

mackerel fish stock.

The text proposes that the agreement would be funded through equal fixed membership fees and fees based on high seas fishing activity in the region. Inevitably such a structure would see the eastern fishery bearing the brunt of the budget, and it is unclear whether those stakeholders will tolerate any cross-subsidisation of the much smaller western demersal fisheries, which is likely to be more costly to manage due to environmental impact concerns.

Greenpeace has provided text proposing the convention allows for the establishment of a network of MPAs. However the proposal will have to be reconciled with the intent of the convention to address fishing – in keeping with UNCLOS and the UN Fish Stocks Agreement. Thus MPAs would have to be justified as fisheries management tools.

The previous negotiating meeting in Chile in May 2007 concentrated on reaching agreement on voluntary interim arrangements to apply to the area until the RFMO is completed and brought into force. These have the effect of freezing effort and catches and regions fished to the average of the last five years. In the case of bottom contacting fisheries, especially bottom trawling, the arrangements attempt to give effect to the UN General Assembly resolution requiring RFMOs in negotiation to implement measures to control fishing that might damage vulnerable marine ecosystems. VMEs are simply defined as seamounts and other habitats that might support corals and sponges, but no guidance is provided by the UN on judging extent of impacts.

There is no doubt that the interim measures will impact on continued fishing by NZ and Australian vessels. They will be required to carry official observers and the costs are significant. There is uncertainty surrounding the level of detail that will have to be supplied regarding location of fishing and potential for fishing to impact VMEs when lodging permit applications. The interim measure will require vessels to move on 5 miles if a VME is encountered, and there is a strong expectation that this will have the effect of requiring movement away from the fishing ground entirely – as they tend to be small and discrete and my be confined to one or two fishable trawl tracks.

Coincident with the RFMO meeting in Noumea, the FAO is organising an expert consultation in Bangkok to provide advice on managing high seas deep sea fisheries and their environmental impacts.

ICFA 2007 THE NORWEGIAN FISHERMEN'S ASSOCIATION

Country Report - Norway

MAJOR ISSUES

Domestic issues

Stock Conditions

In general, the fish stocks that are most important to Norwegian fisheries are in a good condition. There are, however, some exceptions. The cod stocks in the North Sea and along the Norwegian coast and the stocks of Redfish are depleted. The capelin stock in the Barents Sea is at a low level, but this is due to natural variations. The stocks of Norway pout and Sandeel are both severely reduced. It is not clear whether this is caused by overexploitation or natural variations.

Levy on emissions of NOx – pending agreement between government and industry

The industry (together with other sectors) is also deeply concerned about a levy on NOx emissions which was introduced from 2007. This levy, which is a result of Norway's obligations according to the Gothenburg-protocol, is for this year on NOK 15 per kg NOx (€ 1,75) and is claimed from all vessels with engine power above 750 kW. The levy is a heavy burden which – too heavy for many vessels. The actual cost of the levy vary with the actual emissions from each vessel, but for the largest it is estimated to amount to NOK 5 millions (€ 590.000) per year.

The NFA is, together with all major business associations in Norway, involved in a work which is aimed at finding an alternative to this levy which will be more effective regarding reducing emissions and less damaging to industries. This group has, for more than a year worked to reach a specified agreement on reduction of emissions combined with an independent fund which will support investments aimed at reducing emissions. The idea is that such a commitment together with contribution to this fund will comprise an exemption from the liability to pay the levy. We have had several committing statements made by official representatives from the government, but so far there has been no conclusion. It seems clear that this is an issue where the different parties in government have different views. The industry still expects negotiations about this will start shortly.

Capacity reduction

Programs for reducing catch capacity within the coastal fleet are still a major political

issue at the moment. The socialist/green government froze most of the programs aimed at restructuring the fishing fleet and to reduce capacity.

After a major debate the government has introduced a new program for capacity reduction. For the most part it means a continuation of the previous government's policy, but some modifications have been made. These are generally aimed at limiting the decline in number of vessels.

Relations between petroleum industry and fisheries

The Norwegian Government has presented a white paper to the parliament, with a management plan for the Barents Sea and the sea areas off Lofoten.

One of the main issues in the plan concerns the expansion of new oil and gas exploitation into areas important both for the fisheries and for marine living resources. The basic aim for the management plan is to use ecological principles to assess the various activities as well as their coexistence and potential for future development.

The plan considers the various activities in the area comprising oil and gas, shipping and fishing activities and their possible impacts on the marine environment and its living resources. In addition the possible influence of pollutants transported to the area by ocean currents and through the air is considered.

Coexistence between the various commercial activities is a main objective as is the sustainable use of the area. The proposals in the white paper will encourage research and monitoring in a broader context so that the important components of the various marine ecosystems in the area are given due attention. The white paper also includes a proposal for better coordination of and extended monitoring of pollutants. This will enhance the documentation of the quality of Norwegian seafood.

The NFA responded quite positively to the white paper, commenting that the industry's need for area was adhered to. Also, the NFA pointed out that the most sensitive areas are still excluded from exploratory activity other than seismic surveys.

International issues

IUU Fishing

IUU Fishing has been, and still is, an issue of great concern for Norwegian fishermen. Through an intensive effort from the NFA, the Norwegian government took a leading role in the effort to have the North-East Atlantic Fisheries Commission (NEAFC)

introduce the new port-state control regime.

We view this as a breakthrough in combating illegal fishing in our maritime areas. The system includes the entire EU, Russia, Iceland, Greenland, the Faroe Islands and Norway. For foreign vessels to land frozen fish in these countries' ports, all parties will have to follow an elaborate procedure.

When the vessel sends prior notification of a landing, the flag state must confirm to the port state that:
- the vessel in question has a sufficient quota for the catch
- the catch has been reported to the flag state for quota settlement
- the vessel has a licence to fish in the area in question
- its fishing activity agrees with the flag state's satellite tracking data

Without such confirmation, frozen fish may not be landed. NEAFC has set up databases to keep information for the use of the organization and member countries.

Following a proposal from Norway, the UN Food and Agriculture Organization (FAO) has decided to study a global regime for port-state control of fisheries.

Trade Policy

For Norway, as a major seafood exporter, the lack of progress of the negotiations within the WTO is causing concern. Encouraging more effort in this work is therefore a priority for the fishing industry.

Documentation of sustainability and legality of Norwegian fisheries

The Norwegian fisheries industry is taking action to satisfy the market's need for information and documentation in this area. It is important that Norway does not make itself dependent on a single system for providing such documentation.

In recent years, the Norwegian fisheries industry has become aware of increasing demands to provide evidence that the products offered come from fish stocks that are managed sustainably. From parts of the industry concern has also been expressed that Norwegian fish may lose out in competition with eco-labelled fish.

The Norwegian fisheries industry has agreed on a strategy aimed at meeting the needs of fish purchasers. A working group consisting of representatives from relevant organisations and from the Norwegian Ministry of Fisheries and Coastal Affairs is

already at work. The group is charged with obtaining and assessing sufficient information to enable it to make recommendations for sound environmental documentation that can be used across the entire Norwegian fisheries industry.

The industry has applied for MSC certification of the Norwegian saithe fisheries as a whole. It's expected that the certification will be ready this fall. Several pelagic fisheries are in pipeline for consideration for MSC certification.

Management of marine mammals

Management measures for marine mammals are decided on by the International Whaling Commission (IWC), the North Atlantic Marine Mammals Commission (NAMMCO) and the Joint Norwegian-Russian Fisheries Commission. The IWC has not been able to follow the advice provided by its Scientific Committee and adopt a Revised Management Scheme. Therefore, the Commission does not set quotas. Norway has reserved its position in accordance with international law and is therefore not bound by the IWC nonquota regime. Since 1993 Norway has set unilateral quotas for the take of minke whales from the Northeast Atlantic stock, on the basis of the work of the IWC Scientific Committee. NAMMCO adopts management measures for whales and seals in the northern Northeast Atlantic area.

A major problem for the whaling industry is the absence of international trade. At the moment this is hindered by a ban on import in potential markets. A resolution of this problem is considered to be crucial for the future of the industry.

Further information about Norwegian Fishing Industry

www.fisheries.no
www.seafood.no
www.fiskeridir.no
www.imr.no
www.regjeringen.no/en/dep/fkd.html?id=257

COUNTRY REPORT – JAPAN

ICFA ANNUAL MEETING – ROME, ITALY, OCTOBER 2-4, 2007

(1) Overview – From the website of Ministry of Agriculture, Forestry and Fisheries

(2) Introduction of a New Certification Scheme under Development Designing plan of “Marine Eco-Label Japan” (MEL-Japan)

(3) Other topics – Promotion of Shokuiku (Food Education)
Practice of Japanese Dietary Pattern and Various Initiatives Promoted in the Process from Production to Consumption

農林水産省 The Ministry of Agriculture, Forestry and Fisheries of Japan

Top page | Japanese

Contact MAFF

About MAFF

The Role
List of Senior Officials of MAFF
The Organization[PDF]
A Guide to MAFF

Public Information

MAFF UP DATE (The weekly update news) NEW
No.679
1. Notice of Drafting Activities for the Revision and Establishment of Official Standards under the Fertilizer Control Law
List of Booklet and Video on agriculture,forestry,and fisheries in English

Topics

Recommendation of Japanese Restaurants Outside Japan
What is "Shokuiku (Food Education)"?[PDF] NEW
Key Points in the Basic Plan for Food, Agriculture and Rural Areas[PDF]
JOINT PRESS STATEMENT FOR THE

Statistics

Preliminary Statistical Report on Agriculture,Forestry and Fisheries
ABSTRACT OF STATISTICDS ON AGRICULTURE,FORESTRY AND FISHERIES IN JAPAN 2005
MONTHLY STATISTICS OF AGRICULTURE, FORESTRY AND FISHERIES

Annual Report

2006

Fisheries of Japan-2006/2007
Fisheries policy for FY2007(Executive Summary)[PDF:2MB]
Annual Report on Food, Agriculture and Rural Areas in Japan FY2006, Policies on Food ,Agriculture and Rural Areas in Japan FY2007 (Summary)[PDF:4.6MB]

2005

FY2005 Trends in Fisheries
Fisheries Measures for FY2006[PDF]
Annual Report on Food,Agriculture and Rural Areas in Japan FY2005

RESUMPTION OF TRADE IN BEEF AND BEEF PRODUCTS by the Government of the Japan and the Government of United States October 23, 2004
WHY AGRICULTURE NEEDS DIFFERENT TREATMENT IN TRADE RULES? - JAPAN'S POLICY REFORM AND WTO NEGOTIATIONS -[PDF]
Ministerial Recommendation adopted by the Ministerial Meeting on Water for Food and Agriculture Third World Water Forum

Policy Information

Principles of the Environmental Policy in Agriculture, Forestry and Fisheries
Outline[PDF]/Full text (only available in Japanese)[PDF]
International Network for Water and Ecosystem in Paddy Field (INWEPF)
Biomass Nippon Strategy Outline/Full text
The Basic Law on Food,Agriculture and Rural Areas (Provisional Translation)
WTO Negotiations
The Report Submitted to the Prime Minister by the Investigative Council on Basic Problems Concerning Food, Agriculture and Rural Areas
Information on Whaling Issues
Labelling and Standards
Environmental Externalities of Japan's Paddy Fields Farming Menu
Beautiful Japanese Villages
What is Multifunctionality of agriculture?
Biotechnology
Agriculture,Forestry and Fisheries Research Council line

(Summary)[PDF]

2004

Annual Report on the Developments in the Fisheries Industry in FY 2004[PDF]
Annual Report on Food, Agriculture and Rural Areas In Japan FY 2004 (Summary)[PDF]

2003

Annual Report on the Developments in the Fisheries Industry in FY 2003[PDF]
Annual Report on Food, Agriculture and Rural Areas In Japan FY 2003 (Summary)[PDF]
Annual Report on Trends of Forest and Forestry 2003(Summary)

2002

Annual Report on the Developments in Japan's Fisheries in FY2002[PDF]
Annual Report on Food, Agriculture and Rural Areas In Japan FY 2002 (Summary)[PDF]
Annual Report on Trends of Forest and Forestry 2002(Summary)
Report on Agricultual,Forestry,and Fishery Trades in 2002[PDF]

The Past Annual Report

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Toward a World Free of Starvation and Poverty[PDF]

THE TOKYO GRAIN EXCHANGE
THE TOKYO METROPOLITAN CENTRAL WHOLESALE MARKET
FAO/FAOSTAT
Japan International Training Cooperation Organization(JITCO)
East Asia Emergency Rice Reserve

ASEAN Food Security Information System Project (AFSIS)
FAO Regional Data Exchange System on Food and Agricultural Statistics in Asia and Pacific Countries

(3) Fishery production

Source : Annual Statistics on Fishery and Aquaculture Production, Statistics Department, Minister's Secretariat, Ministry of Agriculture, Forestry and Fisheries.

a By major types of fisheries

Unit : 1,000 MT

Type of fisheries	1985	1990	1995	2000	2004	4) 2005
1) **Total**	**12,171**	**11,052**	**7,489**	**6,384**	**5,776**	**5,719**
Marine fisheries	10,877	9,570	6,007	5,022	4,455	4,412
Distant water fisheries of which	2,111	1,496	892	855	535	544
Distant water trawl	806	745	255	201	81	72
2) Distant water tuna and skipjack fisheries	491	413	462	432	391	413
Off-shore and coastal fisheries of which	8,766	8,074	5,091	4,167	3,920	3,868
3) Large and medium surrounding nets (One boat operation)	3,462	3,319	987	638	571	614
Purse seine (one boat and two boat operation)	1,055	982	635	426	403	403
Saury stick-held dip net	242	305	267	211	199	231
Squid angling	234	319	376	457	221	212
Marine aquaculture	1,088	1,273	1,315	1,231	1,215	1,211
Inland water fisheries	110	112	92	71	60	54
Inland water auqaculture	96	97	75	61	46	42

Notes : 1) Excluding whaling.
2) Including mother ship type.
3) Excluding tuna and skipjack.
4) Preliminary

http://www.maff.go.jp/toukei/abstract/1_9/44a.htm 2007/09/26

b By major fish species

Unit : 1,000 MT

Species	1985	1990	1995	2000	2004	2) 2005
1) **Total**	**12,171**	**11,052**	**7,489**	**6,384**	**5,776**	**5,719**
Marine fisheries	10,877	9,570	6,007	5,022	4,455	4,412
Fishes	9,483	8,057	4,570	3,573	3,359	3,393
Bluefin tuna	30	14	17	23	19	25
Albacore	58	43	64	66	69	51
Bigeye tuna	149	122	116	87	80	69
Yellowfin tuna	134	98	112	99	77	80
Marlines, swordfish	49	34	34	24	21	20
Bonito, frigate mackerel	339	325	336	369	319	396
Shark	33	22	18	22	25	30
Salmon, trout	203	223	282	179	259	246
Herring	9	2	4	2	5	9
Sardine	3,866	3,678	661	150	50	28
Round herring	30	50	48	24	32	35
Anchovy	206	311	252	381	496	347
Jack mackerel, scad	225	331	385	282	280	216
Mackerel	773	273	470	346	338	604
Saury	246	308	274	216	204	236
Yellowtail	33	52	62	77	66	56
Flounder, halibut	214	77	83	79	62	60
Cod	118	59	57	51	38	48

http://www.maff.go.jp/toukei/abstract/1_9/44_45.htm 2007/09/26

Alaska pollack	1,532	871	339	300	239	194
Atka mackerel	66	134	177	165	176	140
Rock fish	17	10	2	1	1	1
Croaker	21	13	9	5	3	3
Sea bream	26	25	27	24	27	26
Sand lance	123	76	108	50	67	67
Other marine animals	853	886	874	923	570	534
Shrimp and lobster	53	43	36	29	24	24
Crab	100	61	57	42	33	34
Squid	531	565	547	624	349	326
Octopus	40	55	52	47	55	55
Marine mammals	2	2	1	2	2	2
Shellfishes	355	418	412	405	410	380
Short-necked clam	133	71	49	36	36	34
Seaweed	184	208	151	119	114	104
"Kombu"tangle	133	132	121	94	91	79
Marine culture	1,088	1,273	1,315	1,231	1,215	1,211
Yellowtail	151	161	170	137	150	160
Oyster	251	249	227	221	234	217
"Nori" laver	352	387	407	392	359	387
"Wakame" seaweed	112	113	100	67	62	64
Inland water fisheries	110	112	92	71	60	54
Salmon, trout	13	18	18	17	22	19
Sweet fish	14	18	14	11	7	7

Inland water culture	96	97	75	61	46	42
Eel	37	39	29	24	22	20
Trout	20	20	18	15	13	12
Common carp	25	16	13	11	4	4
1) Whale(Unit:number)	3,087	91	174	188	111	121

Notes: 1) Figures since 1990 are numbers of small type whaling
2) Preliminary

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(5) Supply and demand of fishery products

Source : Minister's Secretariat, Ministry of Agriculture, Forestry and Fisheries.

a Fishes and shellfishes

Unit : 1,000 MT

Classification	F.Y.1980	1985	1990	1995	2000	2004
Domestic production	10,425	11,464	10,278	6,768	5,736	5,135
For food	7,421	7,268	6,311	5,255	4,515	4,411
Fresh, frozen	2,320	2,100	1,510	1,205	2,198	2,317
Salted, dried, smoked & others	4,156	4,413	4,351	3,682	2,008	1,863
Canned	945	755	450	368	309	244
For fertilizer, feed	3,004	4,196	3,967	1,513	1,221	711
Imports	1,689	2,257	3,823	6,755	5,883	6,055
For food	1,027	1,880	2,714	3,872	4,249	4,103
Fresh, frozen	847	1,356	2,034	3,123	1,685	1,583
Salted, dried, smoked & others	169	509	662	730	2,522	2,407
Canned	11	15	18	19	42	113
For fertilizer, feed	662	377	1,109	2,883	1,634	1,952
Exports	1,023	1,357	1,140	283	264	627
For food	817	601	453	263	253	536
Fresh, frozen	202	154	280	206	191	474
Salted, dried, smoked & others	12	123	97	37	52	54
Canned	603	324	76	20	10	8

For fertilizer, feed	206	756	687	20	11	91
Changes in stock	357	101	△ 67	1,334	543	82
For food	△ 35	131	226	△ 57	△ 18	△ 14
For fertilizer, feed	392	△ 30	159	1,391	561	96
Supply for domestic consumption	10,734	12,263	13,028	11,906	10,812	10,481
For food	7,666	8,416	8,798	8,921	8,529	8,005
Fresh, frozen	3,009	3,342	3,315	4,167	3,667	3,439
Salted, dried, smoked & others	4,383	4,717	5,067	4,432	4,524	4,217
Canned	274	357	416	322	338	349
For fertilizer, feed	3,068	3,947	4,230	2,985	2,283	2,476

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②

Introduction of a New Certification Scheme under Development: Designing plan of "Marine Eco-Label Japan (MEL-Japan)"

Background

- Under the Japanese fisheries co-management regime, many autonomous organizations of fishers are implementing voluntary management measures to achieve responsible fisheries (Table 1).
- In recent years, Japanese consumers are getting more sustainability conscious.
- A certificate label can provide additional information on the products' sustainability/eco-friendliness.
- The Japanese government officially announced to promote certificate schemes (the Basic Plan of Fisheries Policies of 2007).
- Based on these background factors, a new certificate scheme called "Marine Eco-Label Japan" are now under development in Japan.

Promotion of environmentally-friendly detergent

Cleanup activities at coastal area

construction of seaweed beds

Release of fish seeds

Forestation activities by local people

"Forests are the roots of coastal fish"

Distinguishing Features Of the MEL-Japan

<BASIC PRINCIPLES>

- **Promotion of sustainable and eco-friendly fisheries throughout Japan.**
- **Non-commercial and non-profit scheme.**
- **Facilitating fisheries co-management via communication with consumers.**

- Postulating the compatibility of resource/ecosystem conservation, and stable food supply by responsible fisheries development at local basis.
- Appreciating voluntary activities by fishers, and promoting these activities to other areas (reflecting fisheries co-management in Japan).
- Transparent certification process conducted by independent reviewing bodies.
- Science-based review processes based on advice from Board of Trustees and Technical Committee (composed of distinguished academics and researchers).
- Based on FAO guideline, and being valid for international trade.

Drivers of new certification

- Growing public awareness on resource sustainability and marine environment.
- Growing fears on the consumers' side, because of the repeated media report on fake-labelling scandals in domestic/imported products.
- Industry's desires to promote their management activities.
  (Several advanced cases are applying / got Marine Stewardship Council's certificate in Japan)
- Small-scale fishers' or small companies' needs for more reasonable (affordable) certification scheme.

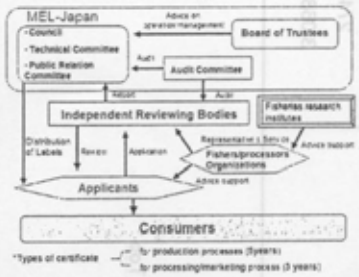
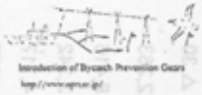


Figure 1: The "MEL-Japan" Scheme

Table 1: Fisheries Co-management in Japan

<Official management measures>
- **Entrance control**: Rights, licenses, approvals, notifications.
- **Effort control**: Gear/season/ground limits, Total allowable effort (TAE) settings.
- **Output control**: Size limits, Total allowable catch (TAC) settings.
- **Environmental conservation**: Water quality control, sea grass bet / tidal land conservations, upstream forestations, alien invasive species controls, marine protected areas (MPAs) constructions.
- **Resource Recovery**: Resource Recovery Plans, fish seeds releases.

<Voluntary management measures>
- **Entrance control**: Reductions of fishing vessels, eliminations IUU vessels, promotion of the positive list scheme.
- **Effort control**: Additional gear/season/ground limits.
- **Output control**: Additional size/catch limits.
- **Environmental conservation**: Promotion eco-friendly detergents, sea grass bet / tidal land conservations, upstream forestations, coastal cleanups, implementation of bycatch prevention gears, marine protected areas (MPAs) constructions.
- **Resource Recovery**: Fish seeds releases.



Introduction of Bycatch Prevention Gears

Decision Makings by Local fishers

Environmental Issues

- Various voluntary activities (see Figures) are not fully informed to consumers.
- Advanced and efficient conservation activities should be promoted to other areas.
- New bycatch-prevention technologies should be disseminated to other fisheries.
- Local fisheries operations are playing an important role in marine ecosystem monitoring, but not fully appreciated.
  (In general, local fishers have harvested almost all of keystone species in local marine ecosystems, and kept recorded on catch amount, size, ground, etc., for a long time)

Future Actions of MEL Japan

- For the moment, the MEL-Japan is targeting domestic fisheries industry, but aiming to develop certificate for export products.
- However, in order to prevent consumer's confusion caused by the proliferation of too many certificates, MEL-Japan is preparing to enter into mutual-certificate relationships with other schemes to share the same philosophy.

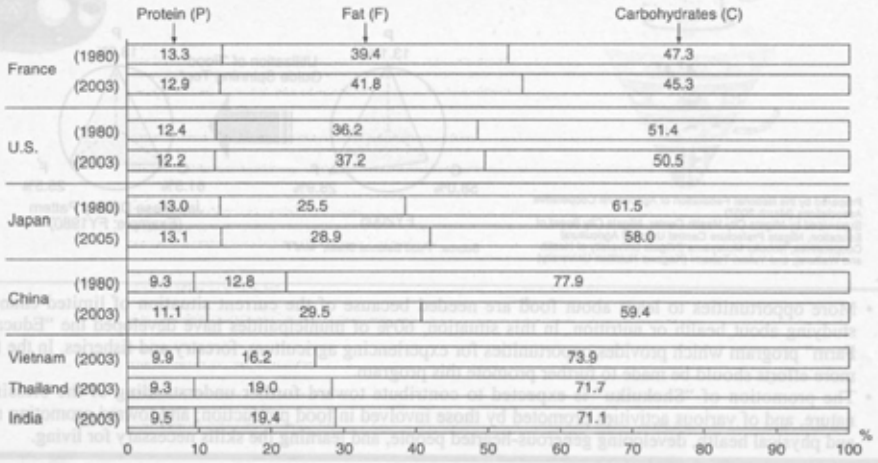
③

Section 3 **Practice of Japanese Dietary Pattern and Various Initiatives Promoted in the Process from Production to Consumption**

(1) Promotion of "Shokuiku"

- Our dietary habits have been diversified along with the changes in our lifestyles. In recent years, disorder of dietary habits, lack of physical exercise and increasing the consumption of fats like the case of France and the U.S. caused some problems such as the increase in the prevalence of life style related diseases.

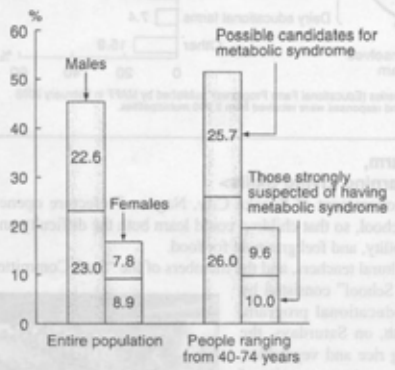
Percentages of Supplied Calorie by Nutrient in Selected Countries



Source: Prepared by MAFF according to "Food Balance Sheet" (MAFF) and "Food Balance Sheets" (FAO)
Note: The supplied calorie does not include that derived from alcoholic beverages.

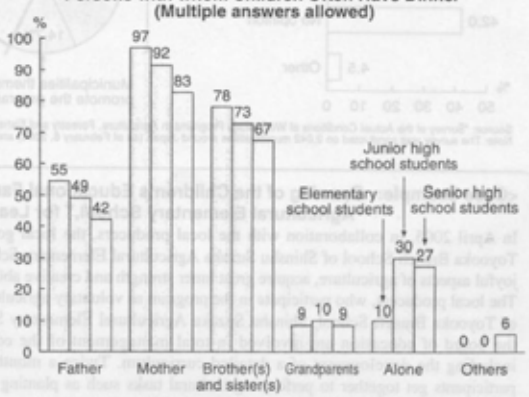
- A half of Japanese males ranging from 40 to 74 years in age are strongly suspected of having metabolic syndrome (visceral fat syndrome) or are candidates for this syndrome. A total of about 19.6 million persons are likely to suffer from metabolic syndrome.
- The problems, such as skipping of breakfast and eating alone without family members has worsen.

Prevalence of Metabolic Syndrome in Japan (20 years old and over, 2004)



Source: "National Health and Nutrition Survey," Ministry of Health, Labour and Welfare

Persons with whom Children Often Have Dinner (Multiple answers allowed)



Source: "Dietary Habit' Inherited from Parents, 'Dietary Habit' to Be Promoted" (published, in February 2005, by The Norinchukin Bank)
"Dietary Patterns of Current Senior High School Students" (published, in March 2006, by The Norinchukin Bank)

Notes: 1) The survey was conducted on a total of 800 male and female students attending elementary (4th, 5th, 6th grade), junior high and senior high schools in the toroidal region 20 to 50 km from the center of Tokyo.
2) The elementary and junior high school students were directly interviewed, while the senior high school students completed the self-administered questionnaire.

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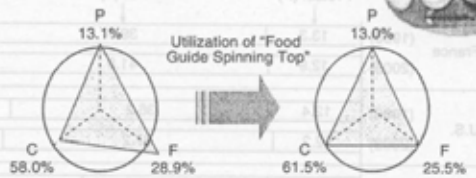
- "Shokuiku Basic Law" came into enforcement in July, 2005, and the Shokuiku Basic Promotion Program has been enacted in March 2006. In this matter, "Shokuiku" has been promoted as a national movement.
- It is necessary to promote the well-balanced 'Japanese dietary pattern' featuring rice by utilizing the "Japanese Food Guide Spinning Top," which described plainly "what to eat" and "how much to eat."
- These activities are expected to contribute toward improving the food self-sufficiency ratio and handing down traditional dietary culture, as well as toward promoting health.

Example of a Local Version of the "Japanese Food Guide Spinning Top" "Niigata Children's Food Guide Spinning Top"

Prepared by the National Federation of Agricultural Cooperative Associations (March 2007)
Supervised by Niigata City Health Center, Niigata City Board of Education, Niigata Prefecture Central Union of Agricultural Cooperatives, Nobuko Murayama (Niigata University of Health and Welfare), and Yukari Takemi (Kagawa Nutrition University)

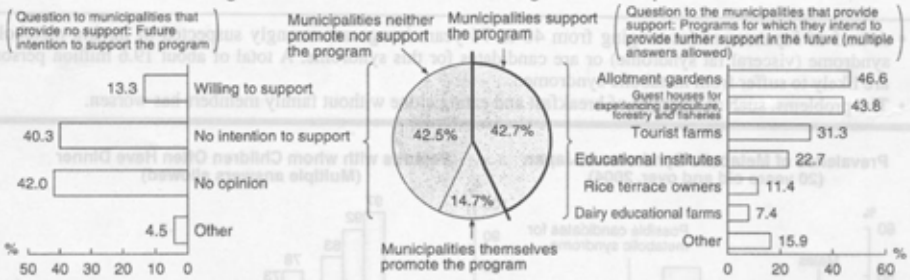
Well Balanced "Japanese Dietary Pattern"



Source: "Food Balance Sheet," MAFF

- More opportunities to learn about food are needed because of the current situation of limited chances of studying about health or nutrition. In this situation, 60% of municipalities have developed the "Educational Farm" program which provides opportunities for experiencing agriculture, forestry and fisheries. In the future, more efforts should be made to further promote this program.
- The promotion of "Shokuiku" is expected to contribute toward further understanding of the blessings of nature, and of various activities promoted by those involved in food production; and toward promoting mental and physical health, developing generous-hearted people, and learning the skills necessary for living.

Progress of the "Educational Farm" Program in Municipalities



Source: "Survey of the Actual Conditions of Work-study Programs in Agriculture, Forestry and Fisheries (Educational Farm Programs)" published by MAFF in February 2006
Note: The survey was conducted on 2,042 municipalities around Japan (as of February 6, 2006) and responses were received from 2,040 municipalities.

<Case Example: Opening of the Children's Educational Farm, "Agricultural Elementary School," for Learning Living Skills>

In April 2005, in collaboration with the local producers, the local government of Suzaka City, Nagano Prefecture opened Toyooka Branch School of Shinshu Suzaka Agricultural Elementary School, so that children could learn both the difficulty and joyful aspects of agriculture, acquire great inner strength and creative ability, and feel gratitude for food.

The local producers, who participate in the program as voluntary agricultural teachers, and the members of the "Staff Committee of Toyooka Branch School, Shinshu Suzaka Agricultural Elementary School" consisted by the board of education are involved in total management of the educational program, including the development of a detailed curriculum. Twice a month, on Saturdays, the participants get together to perform agricultural tasks such as planting rice and vegetables, pulling up weeds, harvesting, and threshing.In this manner, they can experience a series of agricultural tasks throughout the year. The curriculum also includes a program for making contact with local traditional culture and traditional food. This annual program contributes toward promoting intergeneration ties and cooperation between adults and children in the local community, and encourages participants to feel gratitude for food.

Rice planting program in agricultural elementary schools