

行政院及所屬各機關出國報告
(出國類別：參加國際研討會)

參加 APEC 「糧食安全政策夥伴：促進
農村發展研習會(PPFS Workshop:
Stimulating Rural Development)」報告

服務機關：行政院農業委員會農糧署

出國人員：黃馨儀

行政院農業委員會農糧署 技正

出國地區：紐西蘭北島

出國期間：民國 103 年 7 月 22 日至 103 年 7 月 25 日

報告日期：民國 103 年 10 月

公務出國報告摘要

壹、參加 APEC「糧食安全政策夥伴：促進農村發展研習會(PPFS Workshop: Stimulating Rural Development)」報告

貳、執行期間：103 年 7 月 22 日至 103 年 7 月 25 日

參、出國類別：參加國際研習會

肆、前往國家：紐西蘭

伍、出國人員：黃馨儀 行政院農業委員會農糧署技正

陸、會議議程及研討主題摘要：

一、議程要點：

(一)會議名稱：APEC「糧食安全政策夥伴：促進農村發展研習會(PPFS Workshop: Stimulating Rural Development)」

(二)主協辦單位：紐西蘭初級產業部(Ministry for Primary Industries)

(三)會議目的：

- 1.農村永續之經濟發展已成為 APEC 經濟體關切之重要議題，如何發揮農村效益在糧食安全、經濟發展及強化社會韌性方面至為重要。
- 2.本研習會界定 APEC 經濟體目前農村經濟發展的障礙，包括：土地使用權、產權及利用、資本及相關研究成果之取得；基礎建議的限制；與大型市場之距離；企業結構與整體環境等，皆為影響農村發展之因素。
- 3.本研習會將透過經濟體經驗分享進行個案研究，以界定並研討相關可能之政策工具。

(四)會議日期、地點及形式：103 年 7 月 22 日至 25 日在紐西蘭北島，包括 1 天參訪農牧場及 1 天研習會。

(五)與會國家及人員：共有我國、紐西蘭、中國大陸、日本、泰國、菲律賓、印尼、越南、秘魯等 9 國人員參加，並由紐西蘭、中國大陸、日本、印尼及秘魯進行國情簡報。

二、會議結果：

- (一)本次會議有 5 篇簡報(詳如附件 2)。
- (二)由於各國的情況雖有共同點(如同樣農業人力老化及重視糧食安全)，惟各國農業與糧食問題仍有所不同，研習會並就「土地」、「人/技術」及「市場」等三議題分為三個小組進行圓桌討論，做成總結。

三、主要政策建議

- (一)重視糧食安全價值鏈。
- (二)強調「組織」或「整合」功能。
- (三)重視氣候變遷對糧食安全及農村發展之影響。
- (四)讓農業是可獲利的產業，使年輕人願意從農。
- (五)強化我國農業發展優勢、學習他國發展經驗。
- (六)重視紐西蘭毛利人產業發展。
- (七)依據臺紐經濟合作協定（ANZTEC）盤點我國具出口潛力產品，強化外銷供貨及行銷。
- (八)分組圓桌討論，可快速、聚焦、得出具體結論，可作為我國辦理相關國際會議之參考。

參加 APEC 「糧食安全政策夥伴：促進農村發展研習會
(PPFS Workshop: Stimulating Rural Development)」報告

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一、議程要點

(一)會議名稱：APEC「糧食安全政策夥伴：促進農村發展研習會 (PPFS Workshop: Stimulating Rural Development)」。

(二)主辦單位：紐西蘭初級產業部(Ministry for Primary Industries)¹

(三)會議目的：

- 1.農村永續之經濟發展已成爲 APEC 經濟體關切之重要議題，如何發揮農村效益在糧食安全、經濟發展及強化社會韌性方面至爲重要。
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(四)會議日期、地點及形式：103 年 7 月 22 日至 25 日在紐西蘭北島，包括一天參訪紐西蘭農牧場及一天研習會。

會議行程(議程如附件 1)：

時 間	行 程	內 容
7 月 20-21 日 (星期日、一)	啓 程	由桃園出發至紐西蘭奧克蘭
7 月 22 日 (星期一)	奧克蘭 至群島灣	各國代表陸續抵達 參訪水產養殖中心 搭乘巴士至會場飯店 歡迎儀式及紐西蘭初級產業部簡報

¹ 紐西蘭農林部自 101 年 4 月 30 日起更改名稱爲初級產業部 (Ministry for Primary Industries) 主管範圍涵蓋農業、園藝、漁業與水產養殖、林業、食品及生物安全等部門。

7 月 23 日 (星期二)	群島灣	上午參訪 sweetwater enterprise 下午參訪 Omapere and Rangihamama farms
7 月 24 日 (星期三)	群島灣	上午國家報告：中國大陸、印尼、日本及秘魯 下午分組圓桌會議討論
7 月 25 日 (星期五)	群島灣 至奧克蘭	搭乘巴士至機場飯店
7 月 26-27 日 (星期六、日)	返程	由紐西蘭奧克蘭返抵桃園

(五)與會國家及人員：共有我國、紐西蘭、中國大陸、日本、泰國、菲律賓、印尼、越南、秘魯等 9 國人員參加，並由紐西蘭、中國大陸、日本、印尼及秘魯進行國情簡報。

二、研習內容

(一)紐西蘭農業概況

- 1.紐西蘭農林部自 101 年 4 月 30 日起更改名稱爲初級產業部 (Ministry for Primary Industries) 主管範圍涵蓋農業、園藝、漁業與水產養殖、林業、食品及生物安全等部門。初級產業部促進農業發展外，並重視環境保育。
- 2.紐西蘭面積是台灣 7 倍，人口是台灣的 1/6。紐西蘭農業貢獻了 5%的實質 GDP，農業就業人口約 15 萬人，占總就業人口 6.8%，平均年齡約 50 歲。酪農平均規模爲 140 公頃、402 頭牛；羊/牛牧場則爲 100 至 1,000 公頃之間(取決於是否爲密集農場或山地農場)。
- 3.紐國農業生產高度機械化，主要農作物有小麥、大麥、燕麥、玉米、水果等，畜牧業有牛肉、羊肉、乳製品、羊毛等。2013

年農林漁牧產品出口值達 324 億美元，農產出口值占紐國總出口值高達 71%，農產進口值占紐國總進口值 12%。

(二)參訪農牧場

- 1.紐國初級產業部專案計畫輔導毛利人農企業發展，建立 6 個輔導步驟改善土地性能，透過專人與毛利人溝通，評估不同土地利用方式，確定部落(Iwi)願景目標，組織整合擴大規模，持續溝通協助，計畫提送及執行。
- 2.上午參訪 sweetwater enterprise、下午參訪 Omapere and Rangihamama farms。參訪農場前，先至落部的產業文化中心與毛利人見面，毛利人會以歌唱及演說表示歡迎及祈福，初級產業部同仁亦會以歌唱回應毛利人表示感謝與祈福。歡迎儀式是先與毛利人握手、以鼻尖碰鼻尖，接著由雙方代表介紹與說明。
- 3.sweetwater enterprise 係由 3 家農場整合而成，面積計 2,479 公頃、其中乳業計 1,100 公頃、肉牛計 1,040 公頃、2,700 頭乳牛，22 位員工。部落願景(Iwi aspirations)為促進經濟成長、改善收入及創造就業機會、強化毛利人部落與部落間土地合作、策略性租地和利用、增加乳牛的擠奶平台、未來 3 至 5 年乳牛頭數由 2,700 頭增加至 5,000 頭以上、產量由 1,000 公噸增加至 2,000 公噸，以及成功的世代交替等。
4. Omapere and Rangihamama 農場，紐西蘭初級產業部自 2012 年起開始輔導，從放牧到高生產率的乳牛養殖，促使毛利人農場加速轉型、擴大面積至 278 公頃。

(三)研習會

本次會議分為二部分，一是由四國經濟體代表進行報告，二分成 3 個小組進行分組討論。

- 1.研習會上午由四國經濟體代表，包括中國大陸(中國農科院

Feng Dongxin 局長)、印尼(農業部 Jjuk Eko Hari Basuki 局長)、日本(農水省 Harumi Narita 科長)、秘魯(發展與社會包容部 Beariz Robles、農村發展機構 Alfonso Velasquez 執行長)編寫國家報告，並報告各國農村發展現況及面臨之挑戰，報告重點摘述如下(報告詳附錄)：

(1) 中國大陸鄉村改革與發展：過去 30 年中國大陸農業對經濟成長的貢獻為 4.04%，低於整體經濟成長率 9.98%，但高於人口成長率 0.93%。2012 年穀物產量為 5.9 億噸，農產品產量快速的成長，增加國內糧食供應能力，提供改善糧食消費的基本保證。實施農村扶貧計畫後，貧窮人口由 1978 年 2.5 億人減少為 2011 年 1.22 億人。農村改革政策包含土地、市場化、貿易自由化、勞動力遷移、農業科學及技術。

(2) 印尼降低貧窮及提升糧食安全與尊嚴之經驗：印尼為群島型的國家，2010 年農業產值占 GDP15%，主要作物為稻米、木薯、花生、橡膠、可可、咖啡、棕櫚油、椰肉等，其中稻米年消費量由 2005 年 105.2 公斤/年，降為 2012 年 97.63 公斤/年。印尼遭遇天然災害如海嘯、地震、火山爆發、糧食安全等問題，鄉村低人口密度、自然資源豐富。為改革鄉村及扶貧，推動糧食韌性計畫，其目標為：a 重塑鄉村社區機構，加強社區的社會資本；b.發展農村生產力的活動，以實現糧食安全；c.增加貧困家庭無障礙公共政策。該計畫對於推動主食多樣化有正面的影響，並有助於減少貧困(從 57.49%減至 42.24%)、增加貧困家庭的收入和儲蓄 7.9%，以及改變其貧困家庭的心理。

(3) 日本鄉村發展的方法：日本農業改革的四個主軸為 a.加強

生產場域、b.建立農村多功能示範區、c.擴展需求、d.建立連接供給與需求的價值鏈。其中糧食價值鏈係串連農業生產、製造、加工、銷售到消費全方位的組合，將整個價值鏈創造更高的價值。

(4)秘魯發展和社會包容政策：監督不同部門和各級政府影響貧困之行動，並通過五項社會方案直接提供服務。國家策略共分成五個階段，階段一為 0 至 3 歲孩童的營養、階段二為 0 至 5 歲孩童的發展、階段三為 6 至 17 歲生活技能的發展、階段四為 18 至 64 歲經濟包容、階段五為 65 歲以上老人照護。政府推廣發展及促進經濟機會，讓農村貧困人口產生獨立的收入，以及參與地方、區域與國家經濟活動，其主要 4 項措施為家庭生產、改善住宅、包容性的農村事業、以及融資等。

2. 研習會下午由紐西蘭初級產業部工作人員依「土地」、「人才/技能」及「市場」等三議題分為三個小組進行圓桌討論，由各國代表自行選擇擬參與之小組，我國選擇「土地」分組，且各分組可就其他議題進行討論，各組分別就「問題」、「障礙」、「機會」面向等進行討論並歸納出 3 至 5 項小結。我國發言要點如下：

- (1) 我國平均生產規模僅約 1 公頃、農民平均為 63 歲，且由於繼承問題，面臨生產規模小、土地分散、年齡高齡化之問題。
- (2) 我國糧食自給率僅 31%，可能是亞洲地區已開發國家最低，政府持續進行糧食安全相關計畫。
- (3) 基於上述問題，我國自 2009 年正式推動「小地主大佃農」政策，在確保退休農民所得下，鼓勵老農將土地承租於輕

年農民，以利輕年農民擴大生產規模，降低生產成本。

(4) 加強輕年農民生產輔導、低利貸款、農機設(施)備補助、教育訓練等。

(5) 因應氣候變遷，加強地域性研究及推廣，調適及減緩其影響。

3. 各組小組歸納出總結如下：

<i>Future view</i>	
<i>Land</i>	<ul style="list-style-type: none"> • Resilient landscape – soil, water and climate (adaptive management procedures) • More profitable farms • Resilient and diversified crops – crops matched to the environment • Environmental integrity
<i>People/skills</i>	<ul style="list-style-type: none"> • Young farmers and resilient families • Improved living conditions – (social, cultural, economic and environmental) • Collective vision – people, skills and culture • Learning exchange between land→market→people
<i>Pathways to market</i>	<ul style="list-style-type: none"> • Equity across value chain (from production – consumption) • Take advantage of change and innovation • Good leadership + governance • Connectivity across regions of individual economies eg. sectors, supply chains • Basic infrastructure
<i>Challenges and barriers</i>	
<i>Land</i>	<ul style="list-style-type: none"> • Costs of remaining in the agricultural sector – unprofitable farms, young people leaving the land • Land ownership challenges • Vulnerability of land eg. Flooding, landslides, adverse weather
<i>People/skills</i>	<ul style="list-style-type: none"> • Knowledge gaps • Access to education, training, capital • Short-term policy – unable to implement policy
<i>Pathways to market</i>	<ul style="list-style-type: none"> • Market intelligence – APEC members need improved understanding of other members • Need political will to support knowledge sharing between APEC economies

	<ul style="list-style-type: none"> •Regulatory barriers – domestic and international •Infrastructure – roads/transport
<i>Opportunities</i>	
Land	<ul style="list-style-type: none"> •Sustainable farming – balancing sustainability of land with profitability •Exploring new food opportunities: new crops, different farming techniques •Regional focused policies/ regional advocacy – balance between local and international •Locally driven research
People/skills	<ul style="list-style-type: none"> •improved communication and collaboration (education, knowledge and technology) •Robust succession planning (allowing people to develop at all ages)
Pathways to market	<ul style="list-style-type: none"> •Cooperation (not competition): training, intelligence and technology •Diversity – of market and product •Innovation
<i>Rural development policy direction</i>	
Land	<ul style="list-style-type: none"> •Continued education for all age groups to understand business and value chain •Incentives for exploring the development of high value crops (but appropriate to environment) •Public/private partnerships for research and innovation •Innovation and adaptation and innovation to climate change.
People/skills	<ul style="list-style-type: none"> •Culture of ongoing learning •Policy incentives that encourage change •Collaborative approach – across agencies •Policies that benefit people: education, health, employment
Pathways to market	<ul style="list-style-type: none"> •Explore possibility of APEC free trade area •Harmonisation of trade policy •Resiliency for climate change •Better use of Information Technology (IT)

4. 最後由紐西蘭（舉辦國）作正式會議結論，提交後續 APEC

會議討論使用，其政策宣言(Policy Statement)如下：

- (1) Rural communities have the means to enable the sustainable development of their resources – including their natural and human resources – to strengthen economic, social and environmental resilience by encouraging innovation and constant improvement.

(2) Sustainable economic development requires, among other things, leadership that recognises the connectivity and diverse potential of communities across regions, across economies and across generations. Central to this is strengthening the food and agricultural sectors ability to provide more food with more limited resources.

三、心得與建議

- (一)重視糧食安全價值鏈：由中國大陸、日本、印尼、秘魯各國代表報告內容觀察，多數與會國家對於糧食安全與農村發展仍著重在增加生產投入及技術改進，甚至是解決提升生活品質及扶貧問題(中國大陸、印尼及秘魯)，而部分國家則開始重視採取更全面的概念，如將糧食品質、營養及安全皆列為糧食安全重要的追求目標，逐步建立其價值鏈。
- (二)強調「組織」或「整合」功能：紐西蘭農業發展成功的原因，除了市場自由化、取消補貼以外，更重要的是紐西政府在農產整合、出口、行銷上做的努力。臺灣係以小農經營型態為主，宜再強化協調及整合功能，並朝向跨領域異業合作模式，提升產業規模與競爭力。
- (三)重視氣候變遷對糧食安全及農村發展之影響：我國已著手進行相關研究，包括加速抗逆境品種研發及設施之設計與推廣，建立最適栽培模式，並同步開發因應氣候變遷之生產與管理新技術，強化水與土地資源與生態環境之策略調適，部分研究短期無法有立即成果，宜持續進行，並確立短、中、期策略，成果應逐步落實並推廣運用，以確保糧食安全供應，促進農業及農村永續發展。
- (四)讓農業是可獲利的產業，使年輕人願意從農：紐國農民平均 50 歲較我國年輕，其政府透過農場與組織整合，擴大經營規模，降低生產成本，提高議價能力，使農業是可獲利、有願景的產

業，吸引年輕人返鄉從農。

(五)強化我國農業發展優勢、學習他國發展經驗：我國以農業支持工業發展歷程、精緻農業及科技研發成果，於相關國際場域作出貢獻，以增加我國糧食安全之國際合作管道，相對的，其他國家發展經驗亦可作我國擬訂政策之參考。

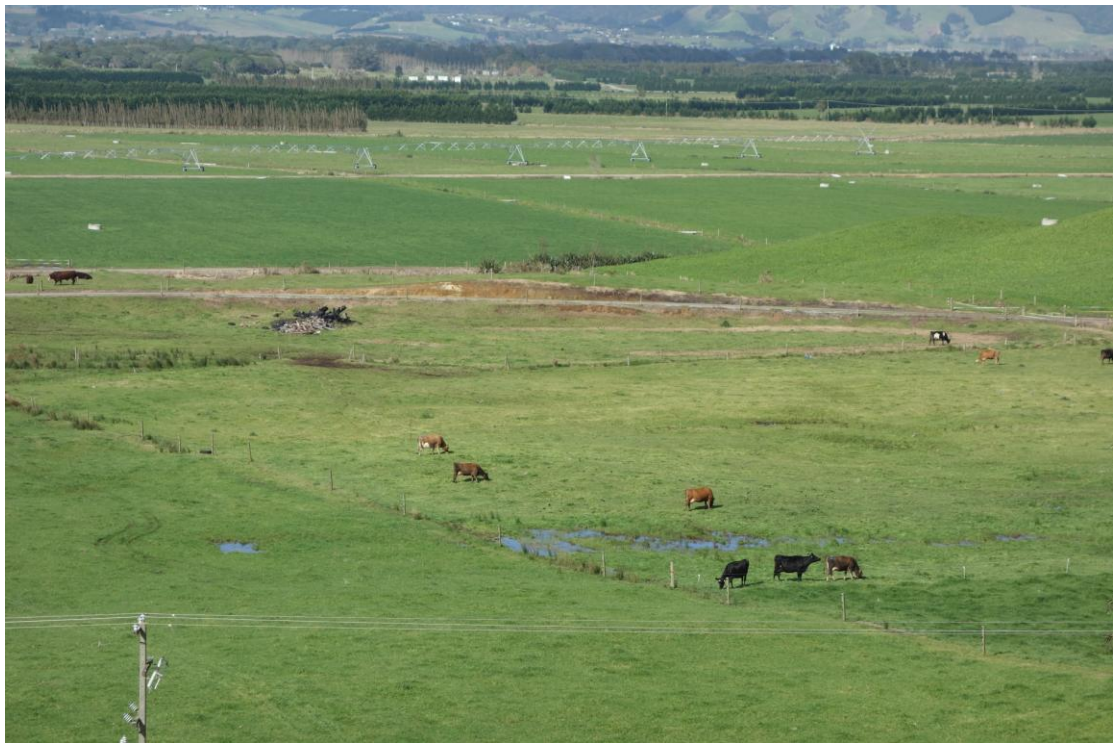
(六)重視紐西蘭毛利人文化及產業發展：紐國尊重及保存毛利人文化，在相關官方宣導資料英文及毛利文並列。此外，政府成立專案計畫，由專案人員進行農產業輔導，透過不斷的溝通，確立共同目標，依照輔導步驟，強化農場整合，提升競爭力。

(七)臺紐經濟合作協定（ANZTEC）於 102 年 12 月 1 日生效，紐國屬高物價國家，人口數較少，氣候與產期與我國相異，因我國農產品具優質、安全之特質，可就紐國國內自給率低，且自全球進口實績之產品(如香蕉)，盤點我國具出口潛力產品，強化外銷供貨及行銷。

(八)利用會議 2 小時進行分組圓桌討論，可快速、聚焦、得出具體結論，可作為我國辦理相關國際會議之參考。



參與會議成員全體合照



農場自動化灑水系統



參觀農場



研習會會場



圓桌分組討論海報紀錄情形



圓桌分組結論分享與討論



PPFS Rural Development Workshop

Tuesday 22 July – Friday 25 July 2014

Bay of Islands, Northland, New Zealand

WORKSHOP AGENDA

BAY OF ISLANDS

The Bay of Islands is authentic New Zealand – both stunningly beautiful and historically significant.

The Bay of Islands was where the first European settlers arrived, and where they forged the first relationships with local Maori. The famous Treaty of Waitangi became the founding document for our new nation, and is celebrated every year here in the Waitangi Treaty Grounds.

Each town in the Bay of Islands has its own unique culture and lifestyle - from the more up-market lifestyle focus of Kerikeri, to bustling Paihia with its focus on providing a great visitor experience, to the calming historic atmosphere of Waitangi and the Haruru Falls, and the beautiful and sometimes quirky sea-side town of Russell.

Please note that due to heavy rainfall in the last week, there will be evidence of a flooding in the area.

FLIGHT INFORMATION

Check In

For any *International flights*, we recommend you check-in at least two hours before your scheduled departure.

For any *Domestic flights*, we recommend you check-in at least sixty minutes before your scheduled departure.

Please ensure you have your passport to present at check-in for International flights along with your booking reference number and e-ticket number which are indicated on your personal itinerary.

Baggage

Please ensure that your luggage is clearly labelled with all of your details. This will assist the hotel with identifying your bags and have these transferred to your room.

Please refer to airline carriers for their details on baggage guidelines. Note New Zealand has strict biosecurity requirements. **All passengers bags are subject to 100% checking.** If you are carrying food items, **you must** declare the presence of the items on your arrival form. Non-complying food will be removed without penalty if declared. If food is not declared instant fines are likely to apply.

Please ensure you have all your carry on aerosols, liquids and gels of 100ml or less in the re-sealable plastic bags provided. This bag must then be presented separately at the security screening point. Non-complying items will be confiscated.

Sunday 20 July - Monday 21 July: Arrivals

Various International delegates arrive and check in to Novotel Auckland Airport located opposite the International Terminal entry/exit.

Dinner at the hotel, please charge back to your room and this will be covered by MPI.

Hotel Address: Auckland Airport, Ray Emery Dr, Mangere 2022

Hotel Phone: 09 257 7200

Tuesday 22 July: Transfer and Introductions

6.30 Breakfast is available at the hotel.

7.30 You are to check out of the hotel and pay for any additional incidentals (ie mini bar, dry cleaning, drinks from the bar). Please note, dinner at the hotel will be covered.

7.50 You are to meet the group in the Novotel Auckland Airport lobby to depart for the Bay of Islands by bus (2.5 hrs drive). Please be aware that the roads can be windy so if you are prone to car sickness please make sure to have some motion sickness tablets handy.

10.30 Stop for a tour of The Bream Bay Aquaculture Park. The Bream Bay Aquaculture Park provides world-class research and services to help satisfy the growing global demand for high quality, protein-rich seafood.

11.30 Depart for lunch at a local restaurant.

11.45 Enjoy lunch before you resume your journey.

12.45 After lunch, the group will depart for Copthorne Hotel (1.45hrs drive).

Hotel Address: Tau Henare Dr, Waitangi 5024

Hotel Phone: 09 402 7411

14.30 Arrive at the Copthorne Hotel to check in and register for the workshop on Thursday. You have some time to refresh before the afternoon activities.

16.15 Meet the group in the hotel lobby to depart for a tour of Waitangi Treaty Grounds. The Waitangi Treaty Grounds is New Zealand's premier historic site where in 1840 New Zealand's most significant document was signed by the British Crown and Māori Chiefs: the Treaty of Waitangi.

17.00 Official Welcome to commence at the Copthorne Hotel.

17.30 Afterwards, you will head back to the Rangatira Room at the Copthorne for substantial canapés and beverages.

17.45 Presentation from Ben Dalton, Deputy Director General, Sector Partnerships and Programmes, Ministry of Primary Industries.

19.30 Welcome Function concludes. You will be transported back to the hotel and are at leisure for the remainder of the evening.

Dress code: You will require warm clothing as the top of the Treaty Grounds is very open and will be cold.

Ponchos will be supplied in case of rain as there is little shelter during the tour.

Wednesday 23 July: Presentations and Case Studies

6.30 Breakfast is available in the Waitangi Restaurant, located on the ground floor by the lobby.

7.15 You will depart for case studies (1h 45min drive).

Dress Code: Casual. You will be visiting farms that could be muddy so please keep this in mind when choosing your attire. Dark colours recommended.

9.00 Official Welcome and discussion in the Atrium of the Ta Ahu Centre.

9.30 Enjoy a light morning tea in the foyer beside the theatre.

Case Study 1 - Te Runanga o Te Rarawa

9.45 We will depart for Sweetwater Farm (20min drive) where you will tour the farm and speak with local farmers.

11.15 We will depart for Kohewhata Marae (1h 30/45min drive).

Case Study 2 - Rungihamama Farm

13.00 On arrival you will be formally welcomed onto the Marae.

During a welcome or powhiri, women tend to walk as a group, while men also group together. Please do not eat or drink during the welcome. At the conclusion of the welcome, it is polite to hariru (shake hands) and hongī (press noses).

13.30 Enjoy lunch on the Marae with the locals.

It is polite to let the kaumātua (elders) go first. Before eating, a karakia (grace/prayer) will be said. Please do not sit on tables or pass food over a person's head.

14.00 Presentation from Omapere Rangihamama Trust

14.15 We will depart for Rangihamama Farm where you will tour the farm and speak with local farmers.

Case Study 3 - Supreme Award, 2014 Northland Ballance Farm Environment Awards

15.30 We will depart Rangihamama Farm and drive to Case Study 3 (15 min drive) where you will tour the farm and speak with local farmers.

16.45 We will depart Case Study 3 to head back to your hotel.

17.15 Arrive at the hotel to relax before dinner.

18.30 Pre-dinner drinks will be served at the hotel bar area before moving into the Rangatira Room for a sit down dinner.

Dress Code: Smart casual evening attire.

21.00 Dinner concludes.

Thursday 24 July: Facilitated Workshop

6.30 Breakfast is available in the Waitangi Restaurant, located on the ground floor by the lobby.

8.50 Day two commences.

Dress Code: Smart casual business attire.

9.00 Presentations from co-sponsors will begin;

Peru, China, Japan, Indonesia (20 mins each)

11.00 Enjoy a break after presentations with morning tea provided in the Cafe bar.

11.15 Facilitated workshop: Session One.

12.45 Enjoy lunch in the Waitangi Restaurant.

13.45 Workshops to resume after lunch for Session Two.

15.10 Enjoy a break with afternoon tea in the Cafe bar.

15.30 Session Three to begin followed by a group discussion.

17.00 Workshop ends.

18.30 There will be a group dinner tonight at the Duke of Marlborough Hotel in Russell. The award winning restaurant is located right on the waterfront. The menu showcases the best of locally sourced and seasonal produce and presenting a new take on the classic favourites.

Dress Code: Smart casual evening attire.

21.30 Dinner to conclude

Friday 25 July: Departures

7.00 Breakfast is available in the Waitangi Restaurant, located on the ground floor by the lobby.

8.00 This morning you have the choice to experience some recommended optional activities before your transport back to Auckland. Please see below for the activity options that you can pre-book with events at your own cost. The hotel will store your baggage if you choose to go sightseeing.

10.00 Please make sure you have checked out of rooms and paid for any incidentals. If you choose to dine at the hotel your lunch will be complimentary.

14.00 Your transfer will depart for Auckland.

**GROWING AND PROTECTING
NEW ZEALAND**

**Stimulating rural development
in Northland**

Ben Dalton
Deputy Director-General, Sector Partnerships and
Programmes
23 July 2014

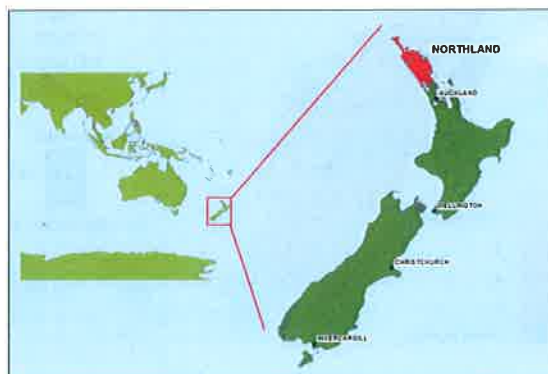


Ministry for Primary Industries
Manatū Ahu Motua



Welcome to Northland

*The region's land, sea, air and water resources are under
the guardianship of its
residents in partnership with local and central government*



Distinctive features

1700 km's coastline

Proximity to coast

Mild climate

The History of Northland



Regional Demographics

Median income for Māori is -
\$17K

Māori make up **1/3** of the population

Housing prices* (1000)



*Average price in 10 May 2014. Noted from 2014 state of house sale.

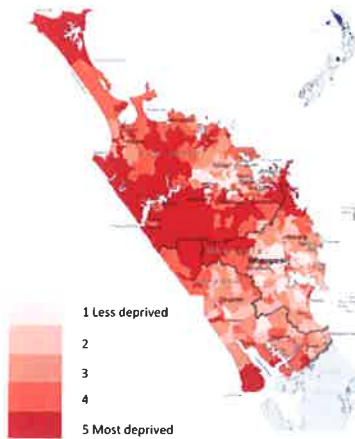
Education

39% of all school leavers achieved university entrance standard (2012)

Employment rate

56% Northland
13.5% unemployment

Social deprivation



Northland's closest port is international markets



Land usage by area

Land usage	Area	Percentage
Grassland & tussock for grazing	640,645 ha	8.9%
Forestry	152,281 ha	2.1%
Horticulture of land	3,273 ha	0.0%
Grass & crop land	3,273 ha	0.0%
All other	116,436 ha	1.6%

Average net office rent* (£/m²/y)



*Net office rent based on highest grossable office space and may include the land value, sourced from Colliers International

Overall life satisfaction

88% Northland
67% New Zealand

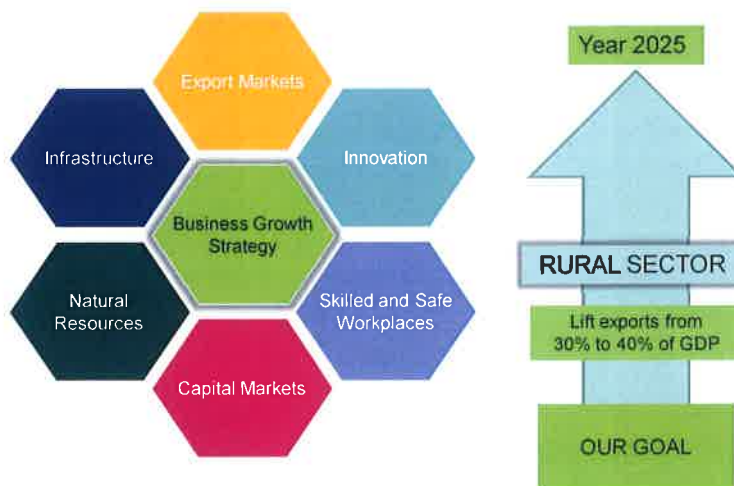
Average household income* (2013)

\$69,300 Northland
\$50,100 New Zealand

Natural resources and challenges



The Government's *Business Growth Agenda* strategy



Role of the Ministry for Primary Industries



Funding economic growth and innovation initiatives

Value chain innovation

Community projects to achieve economic, environmental or social goals

Māori Agribusiness

Irrigation Acceleration Fund

Forestry

Kaitiaki

Kerikeri

Kaitiaki

Whangarei

Dargaville

Kaitiaki Harbour

Wairoa


Role of MPI in supporting the rural sector recover from adverse events




Maori Agribusiness Programme



Promoting best practice



Encourage sustainable land management



Profitability need not compromise and can restore and enhance environmental values






Good farming practices

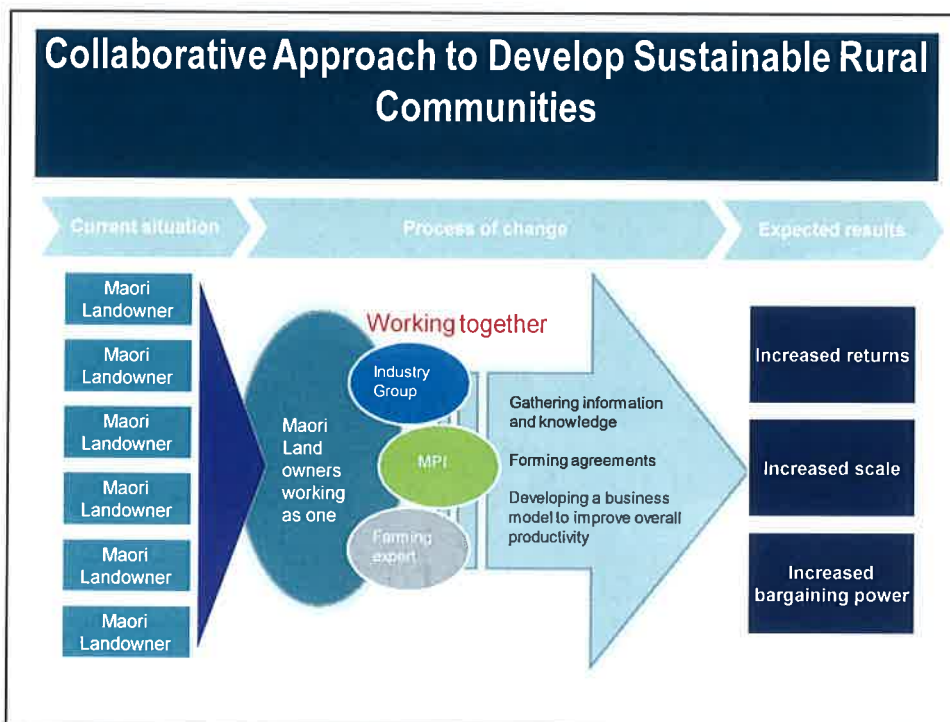
Strong financial practices

Excellent nutrient management

Livestock health and wellbeing

Bringing young people into the business.

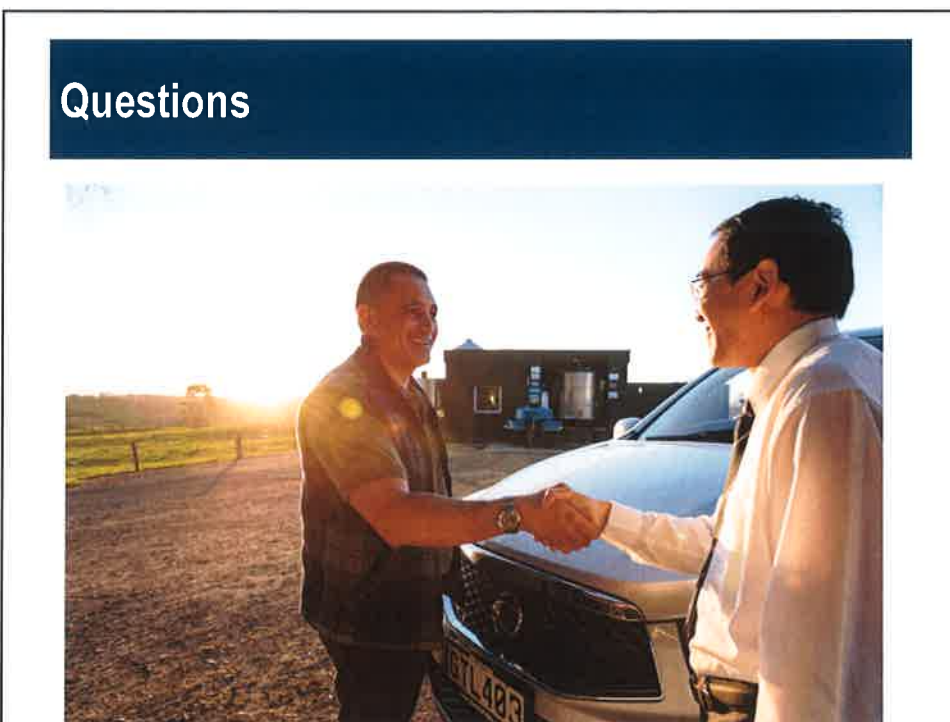








Video: Six common steps that can assist Māori to improve the performance of their land



Questions



**APEC PPFS Project:
Stimulating Rural Development**



Rural Reform and Development in China: perspective of land, market and people

Dongxin Feng
Chinese Academy of Agricultural Sciences

July 24, 2014
Bay of Islands, New Zealand

Outline



- ❖ Achievements
- ❖ Reform policies
- ❖ Perspectives
- ❖ Conclusion and implication

Part 1-Achievements



- ❖ Agriculture growth rate
- ❖ Grain productivity
- ❖ Food consumption
- ❖ Farmer's income
- ❖ Poverty alleviation

Part 1-Agriculture Growth Rate

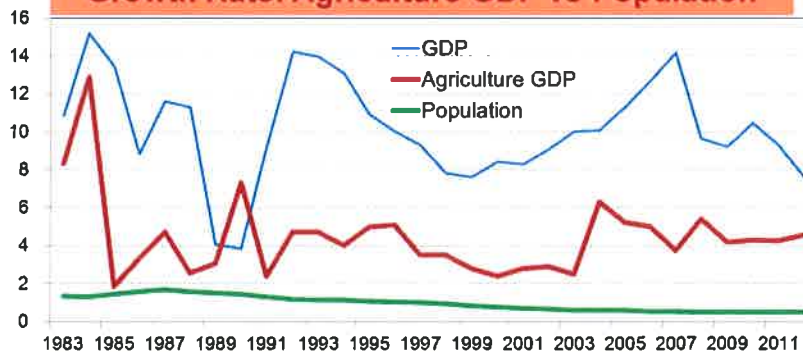


- ❖ In the past 30 years, Chinese agricultural economy has made a continuous and stable growth rate (4.04%).
- ❖ Although it was lower than the overall economic growth rate (9.98%), it was much higher than population growth rate (0.93%).

Agri. GDP Growth Rate > 4%



Growth Rate: Agriculture GDP vs Population



Source: NBS.

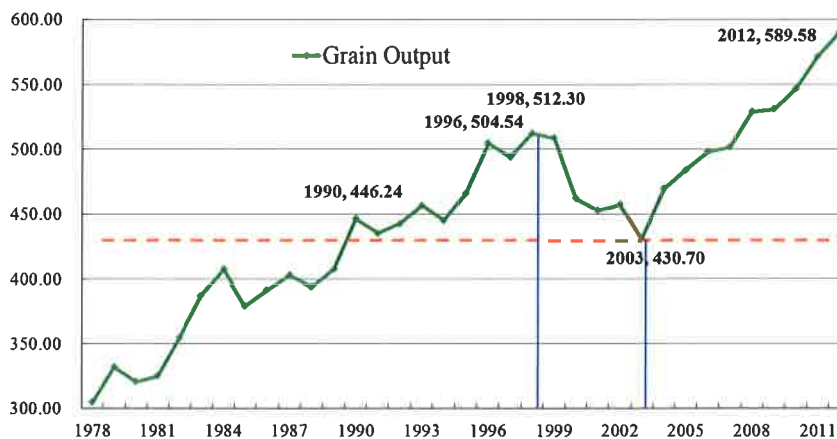
Agriculture GDP growth rate is 4 times than that of population (4.04% vs 0.93%) in the past 30 years.

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Part 1-Grain Productivity



Million tons



Source: NBS.

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Part 1-Food Growth Rate



	Before reform	Reform period				
	(70-78)	79-84	85-95	96-00	01-12	79-12
Grain	2.8	4.9	2.0	-1.5	2.6	1.4
Oil product	2.1	12.7	3.8	8.0	1.5	4.3
Meat	4.4	7.0	10.0	6.9	2.8	6.6
Aquatic product	5	7.4	12.6	3.8	4.0	9.0
Population	1.8	1.4	1.4	0.9	0.5	1.0

Source: NBS.

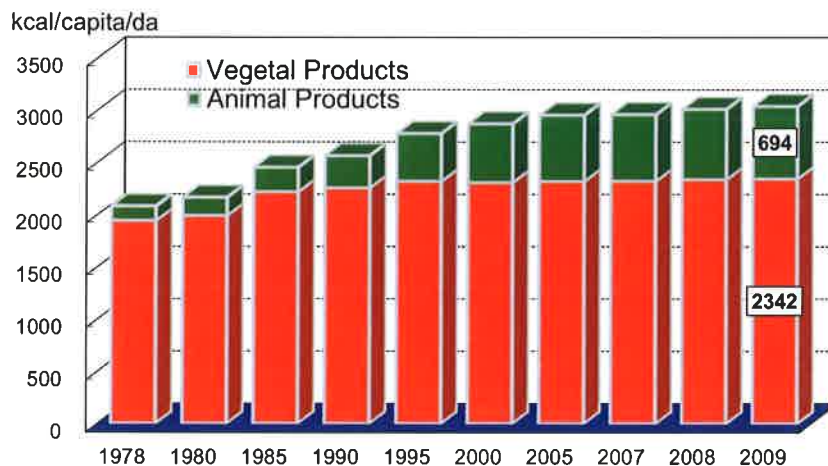
Part 1-Food Consumption



- ❖ The rapid growth of agricultural production significantly increased the ability of domestic food supply, which provides fundamental guarantee for the improvement of food consumption.



Part 1-Calories Intake



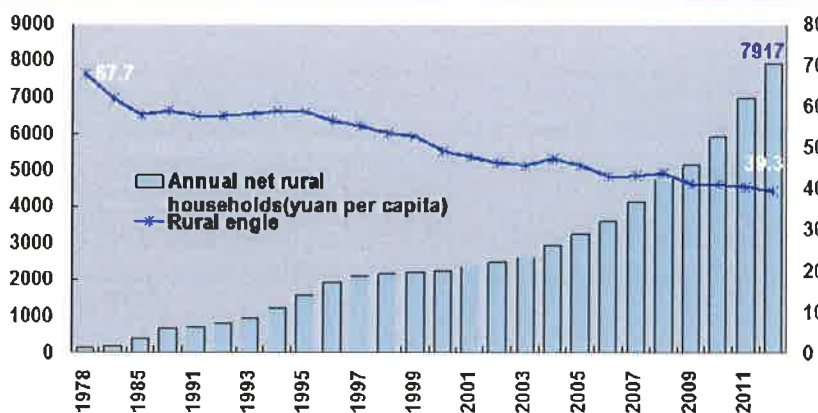
Source: FAO.

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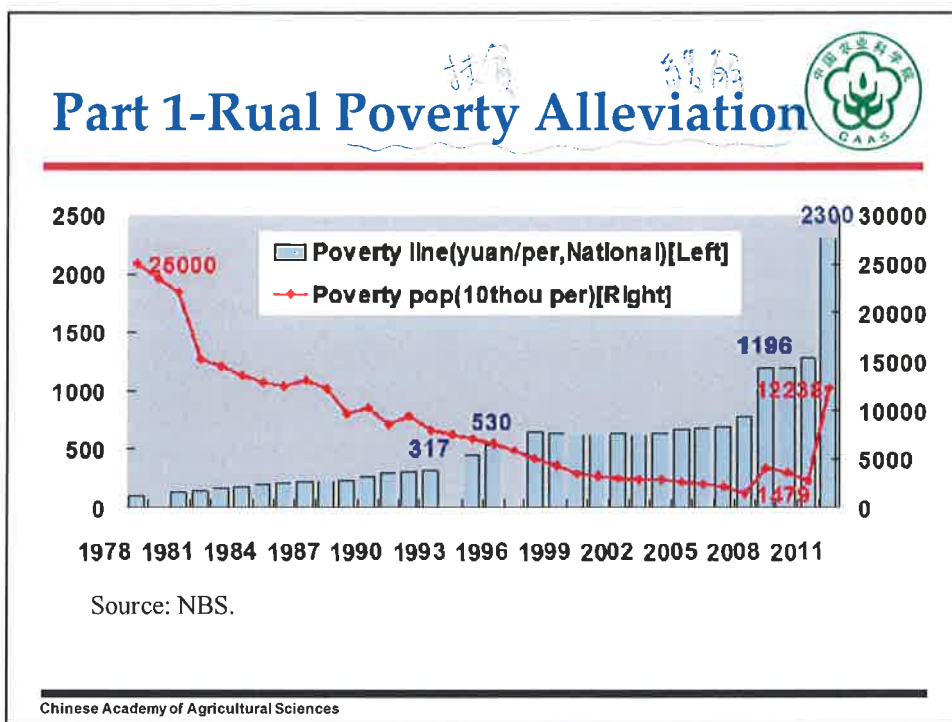
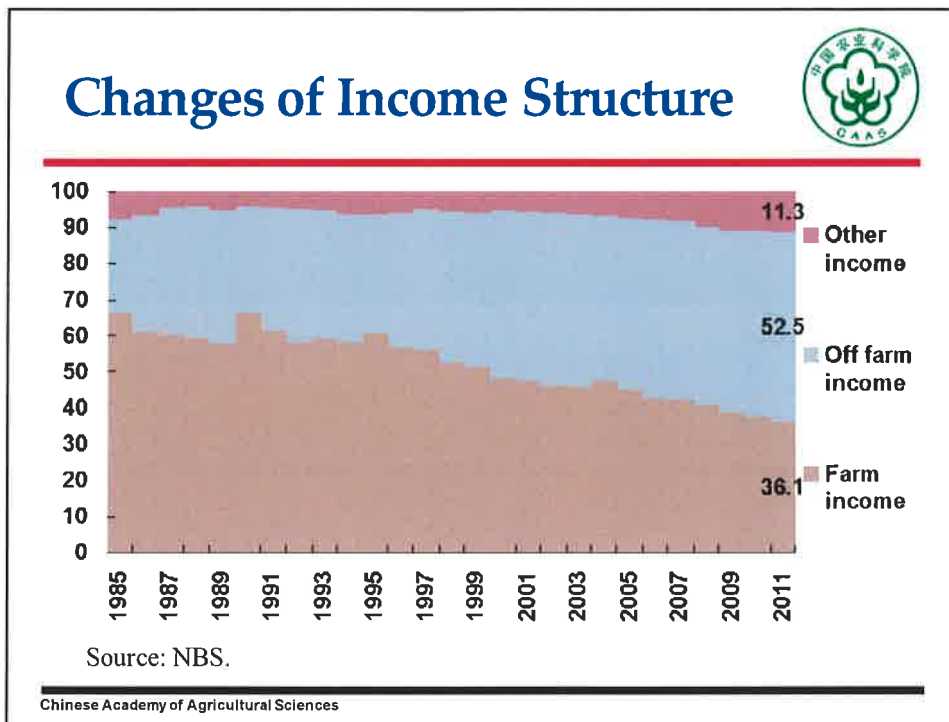


Part 1-Rural Farmer Income



1978-2011: Per capita annual net income of rural households has increased 10 times. Source: NBS.

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Part 2-Reform Policies



Rural reform policies in China

- ✓ Rural land system
- ✓ Marketization and trade liberalization
- ✓ Rural labor migration
- ✓ Agricultural science and technology

As a result, a better relationship between farmer and market is set up.

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Part 2-Reform on Rural Land System



- ❖ Many studies show that rapid growth of agricultural production in early reform is mainly due to institutional change, and **Household Responsibility System (HRS)** is the main source of such agricultural growth. HRS reform gave the farmers the decision-making power in production and profit distribution, greatly mobilizing the enthusiasm of farmers (McMillan et. al. 1989; Fan, 1991; Lin, 1992).

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Part 2-Reform on Rural Land System



Household Responsibility System (HRS)

- ❖ Introduced in 1978, aimed at increasing peasants' incentive to promote agricultural production;
- ❖ Gave farming households the power of making decisions on agricultural production while the farmland ownership remains owned by the state;
- ❖ Allow farmers to deal with their own products (e.g. sell their products in the free market) after **selling** a fixed amount to the government in a way of signing contract.

Part 2-Reform on Rural Land System



Household Responsibility System (HRS)

- ❖ The HRS increased agricultural production.
- ❖ The government extended the contracted period from 15 years to 30 years in 2003.

Part 2-Reform on Marketization



- ❖ Market structure and price liberalization reform in agricultural sector has been promoted since 1970's.
- ❖ Price reform began in normal goods, such as vegetables, fruits, fish and livestock products, then gradually extending to other national strategic goods, i.e. sugar, oil, cotton and grain. In general the government has abandoned most price interventions on agricultural products by the end of 1990.
- ❖ Marketization reform on grain experienced a long period and price intervention has not been removed until early 21centry. By 2004, the central government promulgated a formal policy to declare the beginning of full food marketization .

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Part 2-Reform on Procurement System



In 1979, the procurement prices of crop products was increased to raise farmers' income.

A farmert selling his products to government officials

Source: Xinhua Net.

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Part 2-Strustural Adjustment



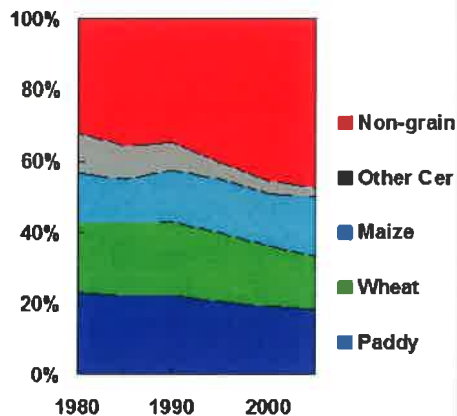
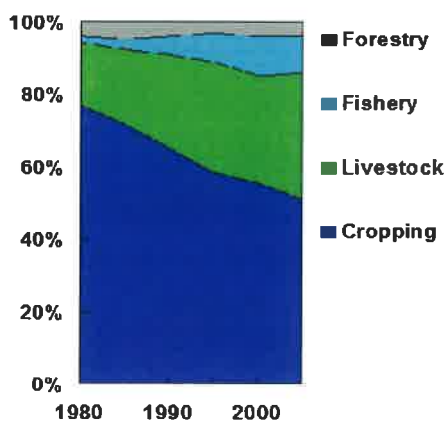
- ❖ Along with the progress made in agricultural science and technology,
 - In one hand, rapid growth have been emerging in various industry, including agriculture, forestry, animal husbandry, aquaculture, and the same happened within crop farming system.
 - In another hand, structural adjustment were developed both in agriculture industry and in crop farming system.

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Agri. production structure
Output value (%)

Planting structure
Area (%)



Source: NBS.

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Part 2-Reform on Rural Labor Migration

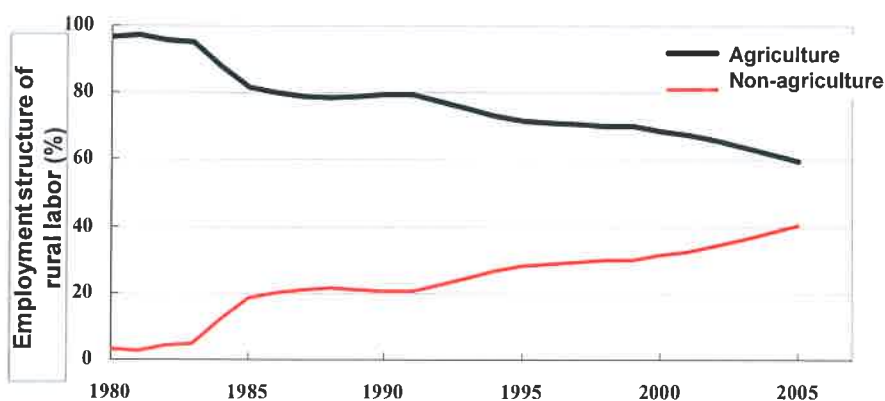


- ❖ Economic reform greatly liberated rural labors and activated the economy, which led to a rapid development of rural industry and service sectors. These non-agricultural sectors provided a large number of employment opportunities for rural labors.
- ❖ At the same time, thanks to the economic reform, the restriction on rural labor mobility was gradually diminished and the industrialization process developed, a large-scale migration of labor has emerged from agriculture to industry, from countryside to city, and from the underdeveloped area to the developed area.

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Part 2-Reform on Rural Labor Migration



Source: NBS.

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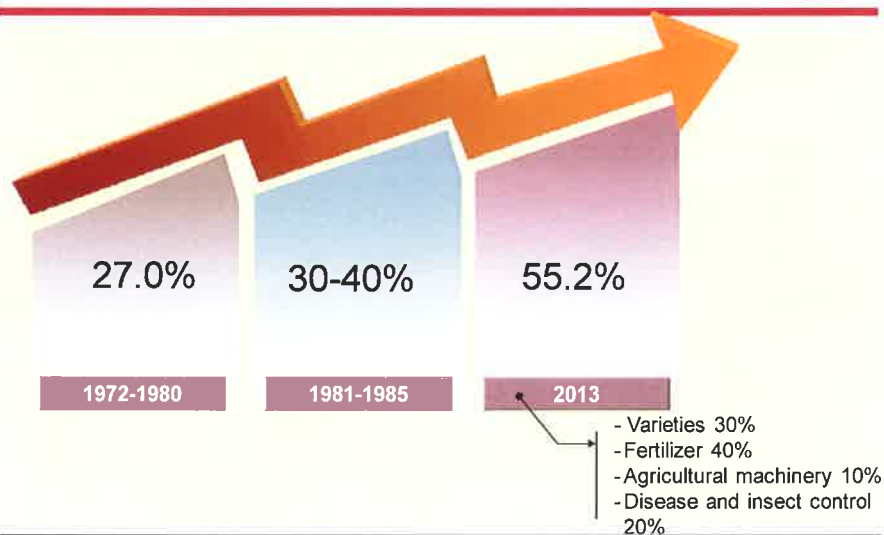
Part2-Science and Technology

Challenges: population, land and water scarcity, climate change....

- ❖ Science and technology is becoming the main driving force in promoting agricultural development.
- ❖ Since the new century, the central government issued No. 1 documents which focused on agriculture consecutively, and the importance of agricultural science and technology is always underlined.



Contribution Rate of Agricultural S&T to Agricultural Production in China



Part 3-New Trends and Perspectives

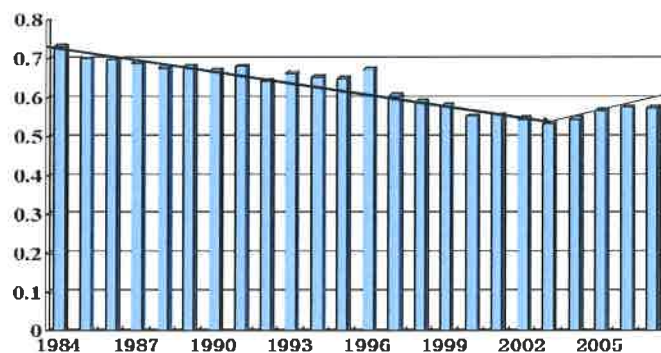


- After entering into the new century, especially in recent years, some new trends has emerged in the rural area.
- It is significant to adjust and fine-tune the direction of rural reform, and formulate relevant new policies on rural development.

Part 3-Arable Land



Arable land per household (Ha)



Source: NBS.

Arable land increased from 2003 due to rural land circulation.

Part 3-New Trends and Perspectives



Future Reform Focus

- ❖ Coordinate new trends with current rural land system under the contents of small scale farm economy
 - **Technology extension**
 - **Mechanization**
 - **Standardization of agro-production and food safety**
 - **Connection between small-scale farmers and modern market**
 -
- ❖ Focusing on in-depth reform of rural land system, to promote various of reform on agriculture and rural development, promote agricultural S&T innovation, improve agro-product market, and facilitate the table and coordinated development of urban and rural.

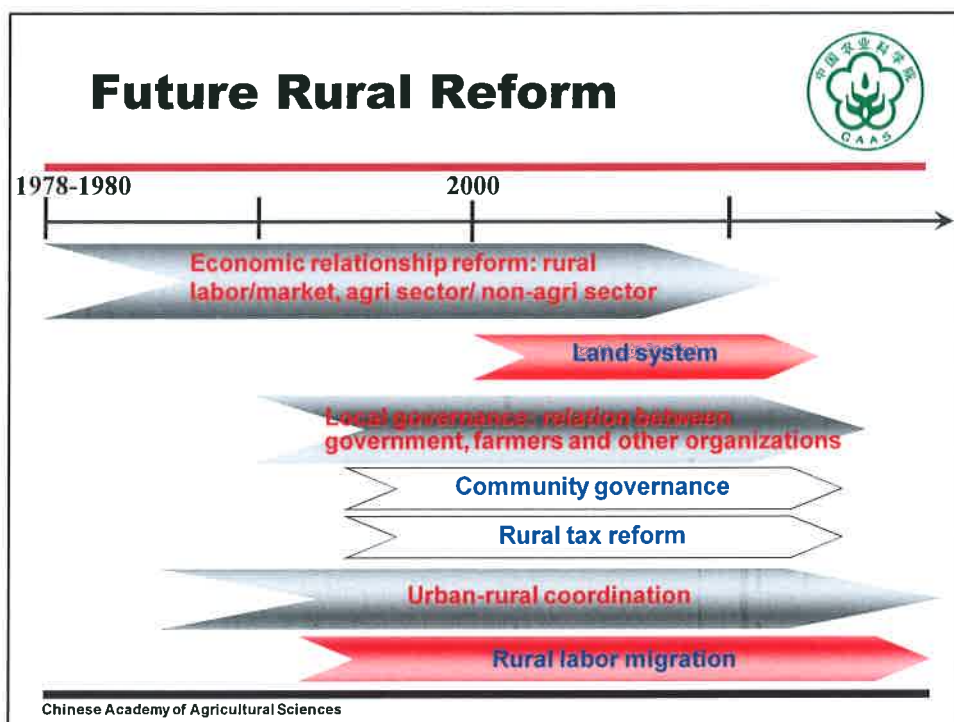
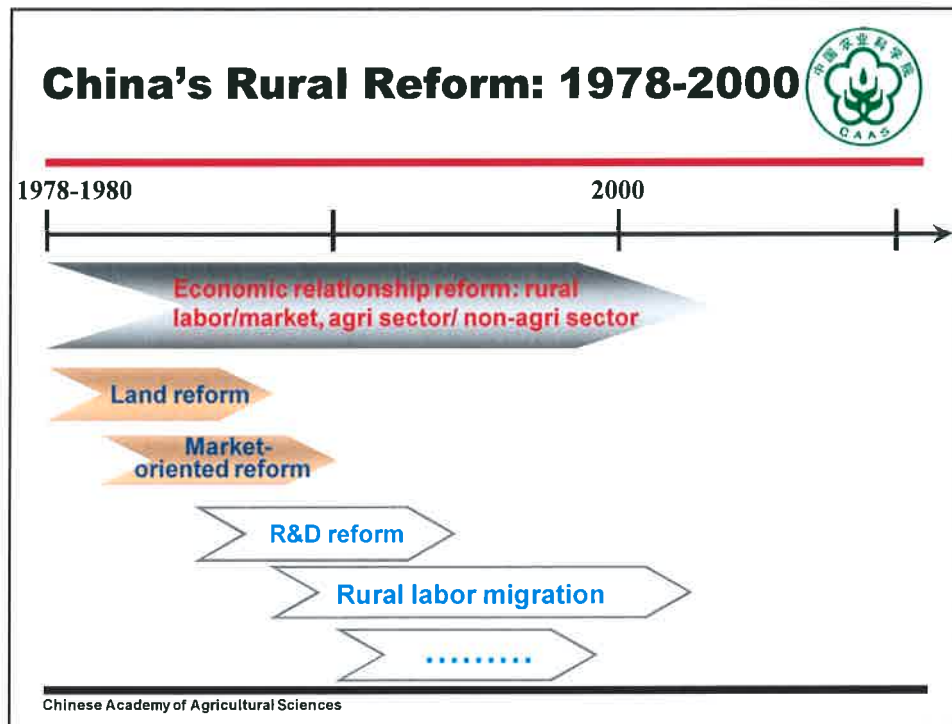
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Part 3-New Trends and Perspectives



- ❖ No.1 document of the central government in 2014:
 - Farming operation system
 - Contacted land circulation 流通
 - Urbanization

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Part 4-Conclusion & Implication



- ❖ Rural land reform has greatly stimulated the enthusiasm of farmers, and improved land productivity and labor productivity to a great extent.
- ❖ Marketization reform and opening policies have set up a solid foundation for the marketization of agro-products, improved the efficiency of resource mobilization, and promoted the structure adjustment and optimization of agricultural production.
- ❖ Rural labor migration has mobilized the rural labors to participate actively in the process of industrialization and urbanization, promoted non-agricultural employment, and further improved the famers' income.

Part 4-Conclusion & Implication



- ❖ In new period, agriculture and rural development faces great challenges.
 - The initial reform initiatives (such as HRS and agro-product price policy) which have played important role in China's agricultural development have been gradually weakened and even disappeared.
 - Small-scale farmers are difficult to adapt to the impacts of modern food supply chain and economic globalization.
 - Traditional farmers have to face the challenges caused by the huge agro-product market abroad with rapid development, and they also need to adjust their state of mind to fit in with the development of modern agriculture (land, labor, capital and technology etc.).

Part 4-Conclusion & Implication



- ❖ New policies focusing on reform on agriculture and rural development in the next stage should be in place to tackle new challenges for rural development:
 - To improve current policy on rural land property rights, deepen the reform of rural land circulation and operation system.
 - To reform the household registration system (Hukou) to facilitate permanent residency of rural migrators.
 - To improve relevant policies on farmer cooperatives, and promote the capacity of farmers in adapting challenges caused by the development of big market.



Thanks!

**STIMULATING RURAL DEVELOPMENT
through VILLAGE FOOD RESILIENCE
PROGRAM:**

**Indonesian Experience in reducing poverty and
strengthening food security with dignity**

Dr. Tjuk Eko Hari Basuki
Agency for Food Security
Ministry of Agriculture, Republic of Indonesia
Auckland, July 2013



PRESENTATION OUTLINE

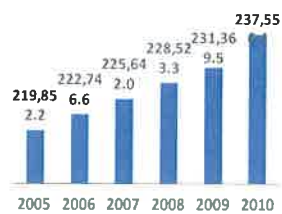
- 1. INTRODUCTION**
- 2. RETHINKING OF RURAL AREAS AND RESILIENCY**
- 3. INDONESIA EXPERIENCE: VILLAGE RESILIENCE PROGRAMME**
- 4. WAYS FORWARD**

I. INTRODUCTION



Land Use, Population and Economy

- 17.504 islands
 - EEZ: ±8 million Km² (76 % water, 24 % land)
 - 86.000 Km coastal line
- arable land: 12.34%**
permanent crops: 10.5%
other: 77.16% (2011)



Population 237,6 million (2010) and increasing 1,49%/year

Economic structure (GNP)

Sector	Year (%)			
	1965	1980	1996	2010
Agriculture	51	24	16	15
Industry	13	42	43	47
Service	36	34	41	38

Utilization	Year (%)		
	2011	2012	2013
Household consumption Expenditure	54,83	54,54	55,82
% Food	25,96	26,02	26,67
% Non-Food	28,67	28,62	29,16

Agriculture - products: rice (3), cassava (tapioca) (3), peanuts, rubber (2), cocoa (2), coffee, palm oil (1), copra; poultry, beef, pork, eggs

CHALLENGES

17 Mega diversity Countries (UNEP)



- 100 species (plants) as sources of carbohydrate (cerealia, tubers, sagoo, etc)
- 100 species (plants) as sources of protein and fat (nuts, etc)
- 250 Species vegetables
- 450 species fruits
- 70 species spices
- 940 species medicinal plants

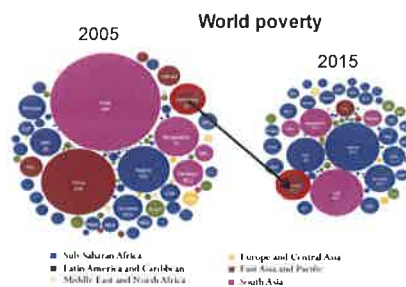
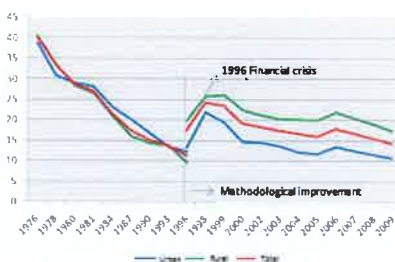
Consumptions (kg/cap/tahun)

No		2005	2010	2012
1	Rice	105.2	100.76	97.63
2	Wheat Flour	8.4	10.34	9.94
3	Tubers	21.9	14.2	12.06
4	Meat	5.9	6.2	7.19
5	Fish	18.6	18.1	17.62
6	Vegetables	50.8	49.3	47.44
7	Fruits	31.7	27.9	25.24

Source: National Socio-economic Survey, 2005, 2010, 2011 and 2012 Q/CBS;

CONSUMPTION IS DOMINATED BY RICE, WHILE TUBERS IS DECREASING, WHEAT FLOUR IS INCREASING SIGNIFICANTLY

Poverty:



Despite the successful poverty mitigation efforts Indonesia to reduce proportion of people living under the national poverty line from 15.10% (1990) to 12.49% (2011), the number of poor people is still unacceptably high.

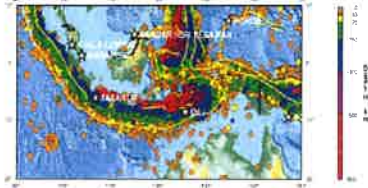
→ It will change the world poverty structure

Indonesia is vulnerable to natural disaster

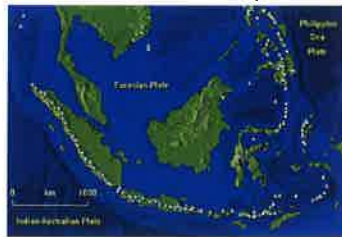
Vulnerable to Tsunami



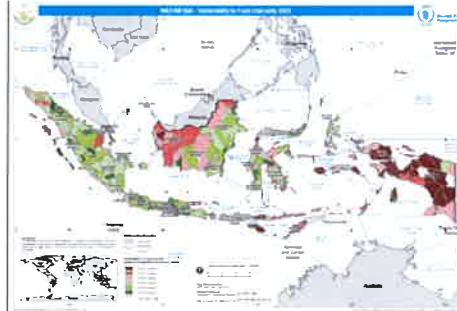
Vulnerable to Earthquakes



Vulnerable to Volcanoes Eruptions



Regencies Vulnerable to Food Insecurity



2. RETHINKING OF RURAL AREA AND RESILIENCY:

U.S. Department of Health and Human Services defines the word "rural" as encompassing "...**all population, housing, and territory not included within an urban area. Whatever is not urban is considered rural.**"

Wiki: "An **urban area** is characterized by higher **population density** and vast human features in comparison to the areas surrounding it".

→ Urban areas may be cities, towns or conurbations, but the term is not commonly extended to rural settlements such as villages and hamlets.

RURAL → LOW POPULATION DENSITY → NATURAL RESOURCES ABUNDANCE



OWNERS OF REAL ASSETS

Post 2015 Development Agenda

- In July 2012 UN Secretary General you tasked a twenty-seven person panel to make recommendations on the development agenda beyond 2015. The panel has consulted extensively in every region and across many sectors.
- The Panel concluded that the post-2015 agenda is a universal agenda. It needs to be driven by **five big, transformative shifts**:
 - 1) **Leave no one behind.**
 - 2) **Put sustainable development at the core.**
 - 3) **Transform economies for jobs and inclusive growth**
 - 4) **Build peace and effective, open and accountable institutions for all.**
 - 5) **Forge a new global partnership.**



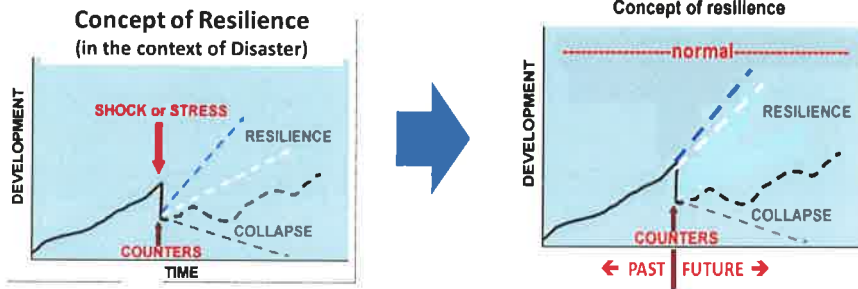
STIMULATING RURAL DEVELOPMENT SHOULD BE BASED ON THE ABOVE 5 TRANSFORMATION SHIFTS: FROM PHYSICAL OUTPUTS TO MORE HUMAN DEVELOPMENT AND CAPACITY BUILDING FOCUS

From physical outputs to a more integrated livelihood

Research work carried out in the late 1980's and early 1990's indicated that the focus on physical outputs such as increasing production as they were currently conceived needed to be broadened. It was found that physical outputs is but one sub-set of objectives of rural households. production is only one of a whole range of factors which determined why the poor take decisions and spread risk, and how they finely balanced competing interests in order to subsist in the short and longer term (for example; Maxwell and Smith 1992). It is misleading to treat agriculture and increasing production as a fundamental need, independent of wider livelihood considerations

Livelihood: can simply be defined as the way people make a living. **A livelihood comprises the capabilities, assets and activities required for a means of living.** A livelihood is sustainable when it can cope with, recover from stresses and shocks and maintain, enhance, and improve its capabilities both now and especially in the future, while not undermining the natural resource base.

Redefining resilience



Resilience: *the ability to make changes and improve capacity, effectiveness or legitimacy better than the last state by relying on their own capacity and resources while other external sources are merely additional supplement to speed up the change*

Key words

- 1) Ability to make changes and improved capacity, effectiveness or legitimacy better for/in the future; and
- 2) Such changes are carried out based on the internal resources; external resources are supplementary only.

Resilience livelihood

Resilience livelihood: *the ability to make changes and improve capacity, effectiveness or legitimacy better than the last state by relying on their own capacity and resources while other external sources are merely additional supplement to speed up the change, while not undermining the natural resource base.*

Key words

- 1) Ability to make changes and improved capacity, effectiveness or legitimacy better for/in the future; and
- 2) Such changes are carried out based on the internal resources; external resources are supplementary only.
- 3) Not undermining the natural resource base (by not compromising the needs of future generations).

3. INDONESIAN EXPERIENCE IN DEVELOPING RURAL LIVELIHHOD THROUGH VILLAGE FOOD RESILIENCE PROGRAMME

Resiliency*):

- Not physic-biological concept:** → a person could have legs, but not resilience
- A psyco-cultural concept** → Not to depend to anyone else, not to blame other(s) for his/her failure, always seeking internal (community) strengths (resources – *natural, technological, financial, human resource or social*)
- Human Resource is the key**

*) Resilience is an individual's capacity to change for a better future.

Village Food Resilience Program/ Desa Mandiri Pangan

An empowerment programme for a community to have capability of otimalizing local resources (*natural resource, human resource, technology resource, financial resources, and social capital and economy resources*) to achieve food security

Objectives:

To develop community's resiliency in achieving food security (individual, household, and community level)

Specific goals: (a) strengthening community's social capital by reinventing village community institutions; (b) develop rural productive activities to achieve food security, including individual and community's income/welfare, (c) increase poor households accessibility to public policies (village).

Target beneficiaries

Poor households in a village

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Selection and targeting Beneficiaries

1. Regencies/Cities

Based on the result of Food Security and Vulnerability Atlas (FSVA) with 1st-3rd Priority that indicated highest poverty.

2. District

Provincial FSVA, if available, or based on poverty data from Central Bureau of Statistics or Food and Nutrition Surveillance System or National Family Planning Coordinating Board.

3. Village

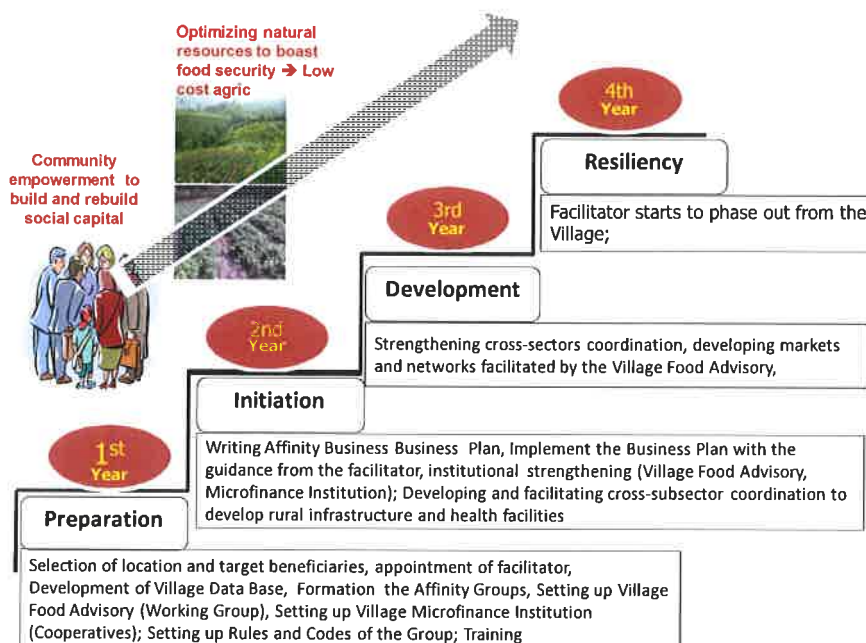
Regency/City FSVA, if available, or based on Household Baseline Survey, with **at least 30% poor households**.

4. Affinity Group

Based on Survey of Poor households, the poor households develop affinity groups through the support and facilitation from a facilitator.

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The Programme is implemented in 4 stages:



GOVERNMENT INTERVENTIONS

- 1) Facilitators
- 2) Training
- 3) Seed Capital

Facilitator



Training



Seed Capital:



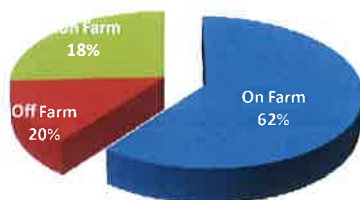
Implementation of Village Food Resilience Programme

DESCRIPTION	Year						
	2006	2007	2008	2009	2010	2011	2012
PROVINCE	30	32	33	33	33	33	33
REGENCIES/CITIES	122	181	202	276	378	399	410
VILLAGE ^{*)}							
Regular	250	604	825	1,184	1,650	2,275	3,280
Replication	0	0	0	0	363	576	0
GROUP	1,250	3,020	4,125	5,920	9,425	10,960	14,790
Total Poor Households Involved	31,250	75,500	103,125	148,000	235,625	274,000	369,750

*) Starting 2010, villages achieving resiliency are assigned to facilitate its neighboring village to develop similar Village Food Resilience programme
 → exit strategy and expansion of business activities.
 At 2012, evaluation was conducted → Food Resilience Region

Utilization of Seed Capital

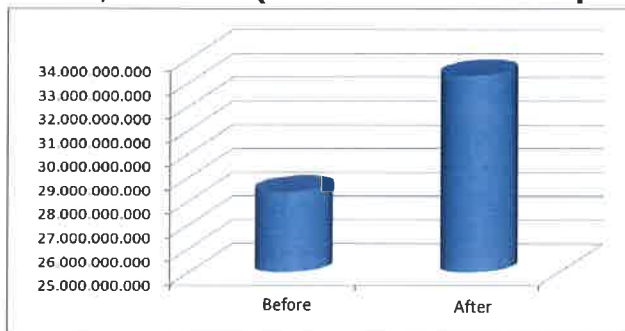
- Each village is given Rp. 100 millions (US\$ 10.000)
- Each Affinity Group develop Business Plan as Guidance to utilize seed capital disbursed through Village Financial Institution.
- The Group implements the Business Plan
- Use of the Seed capital: 62% on farm; 20% Off farm, 18% Non farm



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Growth of The Village Micro Finance

- ✓ During 2006-2012, Rp. 42,9 billions (± US\$ 4,29 million) has been disbursed for 3280 villages.
- ✓ Out of 773 Affinity Groups that has completed the programme (2012, for those starting to implement 2006-2008), 343 Affinity Group with 20.047 members at 343 villages have been evaluated. The results indicates significant increase from the initial seed capital of Rp. 28.4 billion to IDR, 33.3 billion (**17% from the initial capital**).



Source : Regular Evaluation in 2012

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The Impact Evaluation

Evaluation conducted by independent team consisting of state/private universities in each province from August to November 2012 shows:

- *The programme* has positive impact on the diversification of staple foods which is in aggregate decrease 10.7 percents from 39.8 percents to 29,0 percents. Such a decrease is even faster in outer islands (12.69 %, in Java only 3.4 %).
- It contributes significant impact on poverty reduction "poor category" from 57,49% to 42,24%.
- Income and savings of poor families increase 7.9 percents.
- It is also able to changes mindset of poor family in the village. Empowerment and involvement of poor family in the Affinity Group give positive impact on self confidence, gender mainstreaming, and entrepreneurship → contributing the those positive impacts, including technology adoption for family productive enterprise.

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4. WAYS FORWARDS: PROMOTING GENUINE GREEN INVESTMENT

Investment activities that focus on companies or projects that are committed to the conservation of natural resources, the production and discovery of alternative energy sources, the implementation of clean air and water projects, and/or other environmentally conscious business practices.

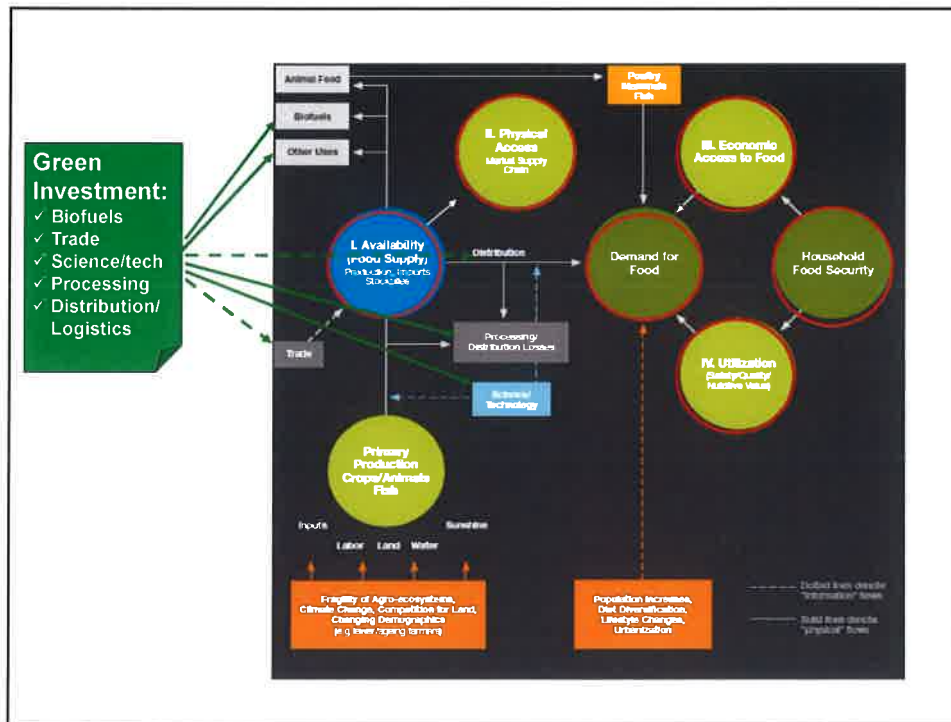


Currently, farmers are the biggest investor in the agricultural sector.



FACILITATED, ENHANCED AND PROTECTED

Investment activities that focus on companies or projects that are committed to the conservation of natural resources, the production and discovery of alternative energy sources committed to the use of agricultural products sustainably and not displacing farmers in its process, the implementation of clean air and water projects, and/or other environmentally conscious business practices.





MIDIS
Ministry of Development and Social Inclusion



INCLUDE TO GROW: DEVELOPMENT AND SOCIAL INCLUSION POLICY - PERU

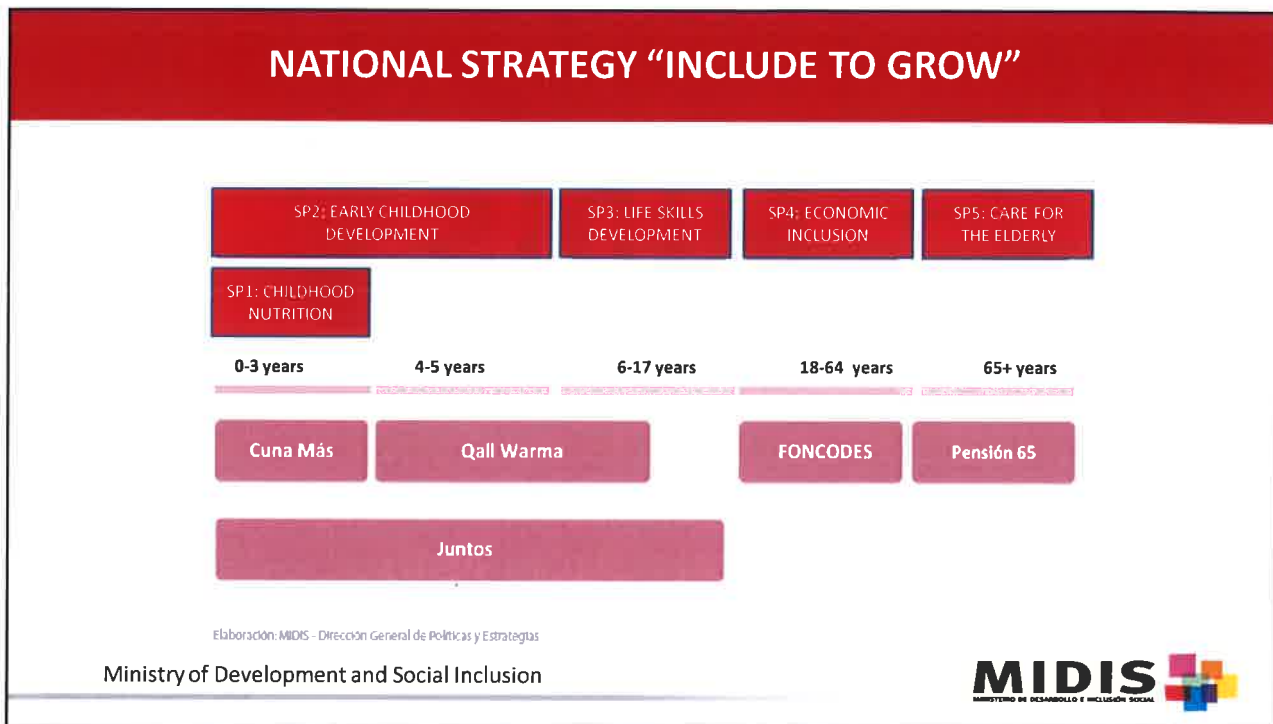
New Zealand, July 2014

MIDIS MISSION

MISSION:
Oversight of action by the different sectors and levels of government that affect poverty; and the direct provision of services through five social programmes: CUNA MAS, QALI WARMA, JUNTOS, FONCODES and PENSION 65

Ministry of Development and Social Inclusion





CREATING ECONOMIC OPPORTUNITIES AND RURAL DEVELOPMENT

Peruvian Cooperation Fund for Social Development (FONCODES) Experience: "HAKU WIÑAY" PROGRAMME

Ministry of Development and Social Inclusion

FONCODES ROLE IN INSTITUTIONAL REDESIGN

Promoting development and increasing economic opportunities in order to poor rural populations generate independent income and participate in local, regional and national economy's dynamism.

INTERVENTION LINES:

- GENERATING ECONOMIC OPPORTUNITIES
 - PRODUCTIVE DEVELOPMENT PROJECTS
 - INFRAESTRUCTURE PROJECTS
- SPECIAL PROJECTS

Ministry of Development and Social Inclusion



TARGET POPULATION AND TARGETING CRITERIA

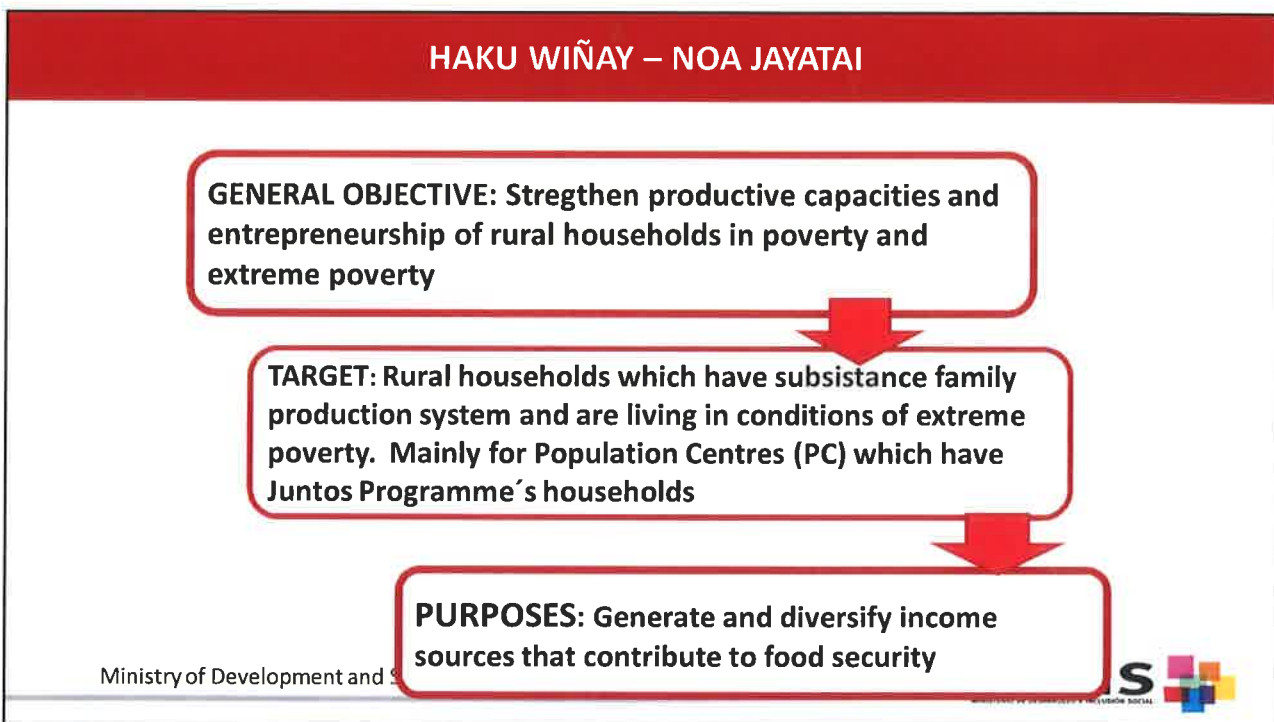
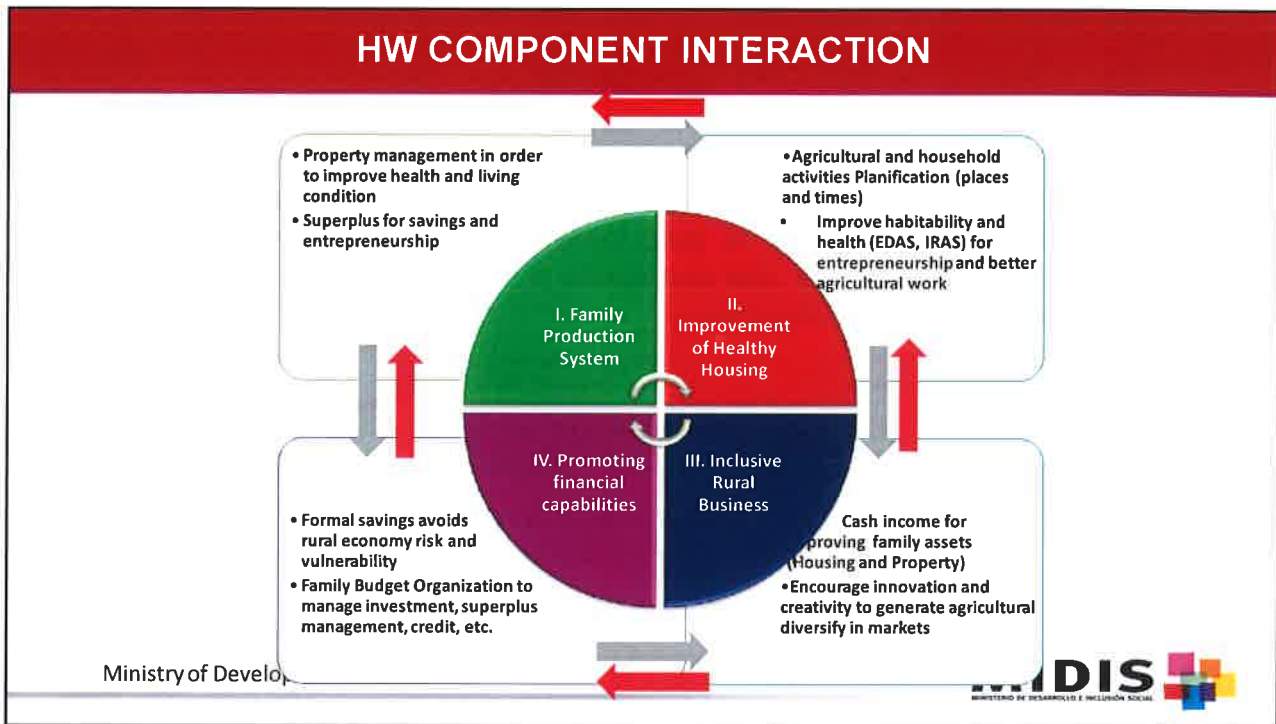
Population Centres - FONCODES

Targeting Criteria:

- Rural Population Centres(RPC) \geq 40 households
- RPC in Districts $>$ 40% monetary poverty
- RPC \geq 40 households located in districts prioritized
Chronic Child Malnutrition (*Directive N° 004-2012-MIDIS*)

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PROJECT COMPONENT

**STRENGTHENING
FAMILY
PRODUCTION
SYSTEM- FPS**

Technical Assistance, training and productive assets
Better practices for family production system.
Simple technological innovation, low cost, flexible and suitable to each FPS household.



Ministry



BEST PRACTICES AND INNOVATION IN FAMILY PRODUCTION SYSTEM



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2nd COMPONENT

**IMPROVEMENT
OF HEALTHY
HOUSING**



**Training , technical assistance , assets
in order to improve living conditions
Healthy Stoves, Safe Water and
Solid Waste Management**



Ministry of



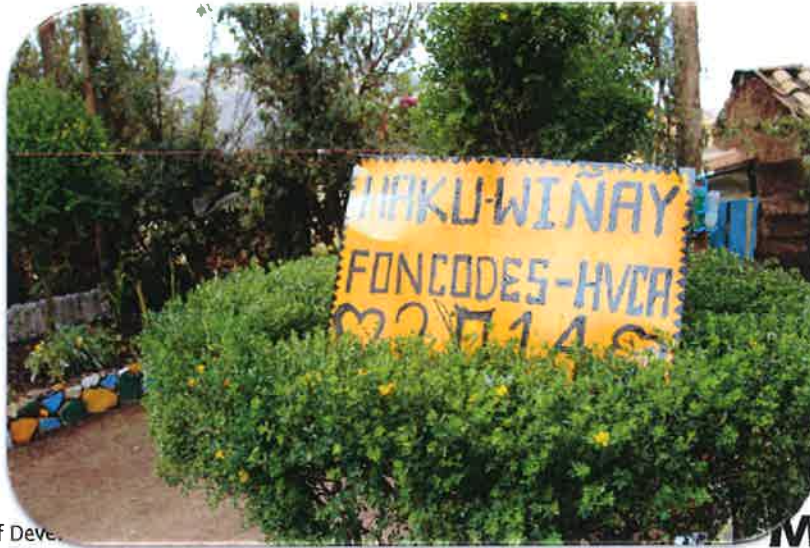
LATER: HEALTHY STOVES



Ministry of



One of the most quick change occurs in the home



Ministry of Deve.



3rd COMPONENT:

PROMOTING
INCLUSIVE
RURAL
BUSINESS



Technical Assistance, Training and
Asset Finance in order to promote
business profiles competition -
Local Resource Allocation Committee
(CLAR)



Ministry of Developme



COMPETITION: BUSINESS PROFILES



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4th Component

**PROMOTING
FINANCIAL
CAPABILITIES**



**Training in order to improve saving management
Focus on JUNTOS users;
Improve the access to another financial products and services**

**JUNTOS USER
IS LEARNING ABOUT
HOW TO USE AN ATM**



Ministry of

usion



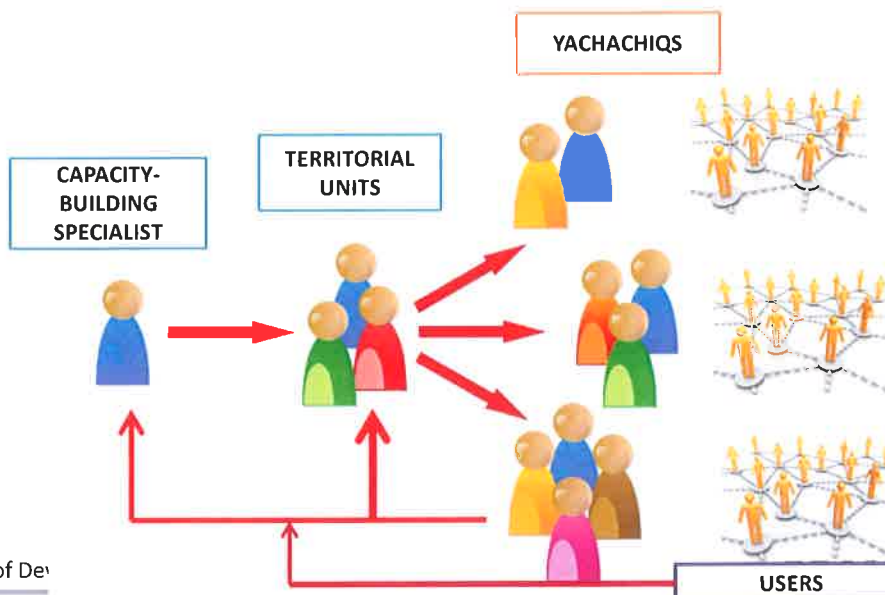
Promoting Financial Capabilities



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PRODUCTIVE CAPACITY-BUILDING PROCESS



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¡Thanks!

Stimulating Rural Development --Japan's Approach--



Ms. Harumi NARITA
Ministry of Agriculture, Forestry and Fisheries, Japan

July 24, 2014

Today's Topic

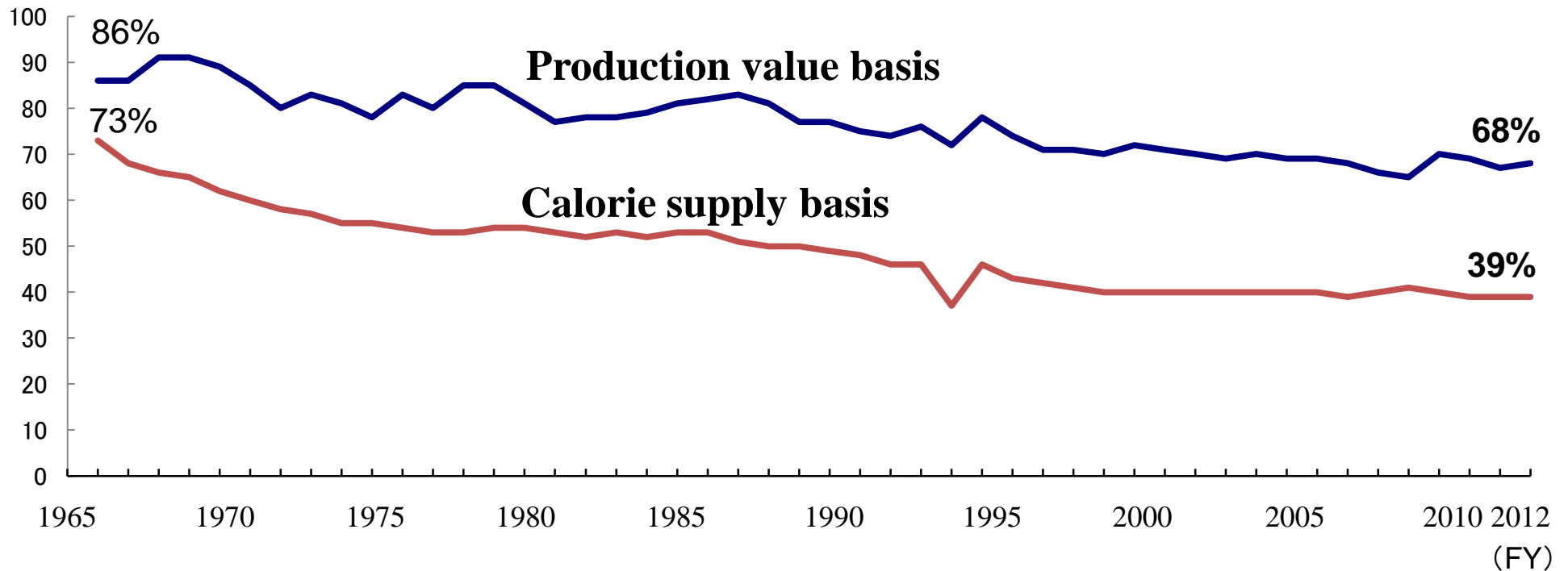
- 1. Agricultural Situations in Japan**
- 2. To implement “ Aggressive
Agriculture, Forestry and Fisheries”
— Japan’s Agricultural Policy Reform —**
- 3. Establishment of Food Value Chain**

1. Agricultural Situations in Japan

Changes of Food Self-sufficiency Ratio since 1965

○ Japan's food self-sufficiency ratio in 2012 is 39% on a calorie supply basis and 68% on a production value basis

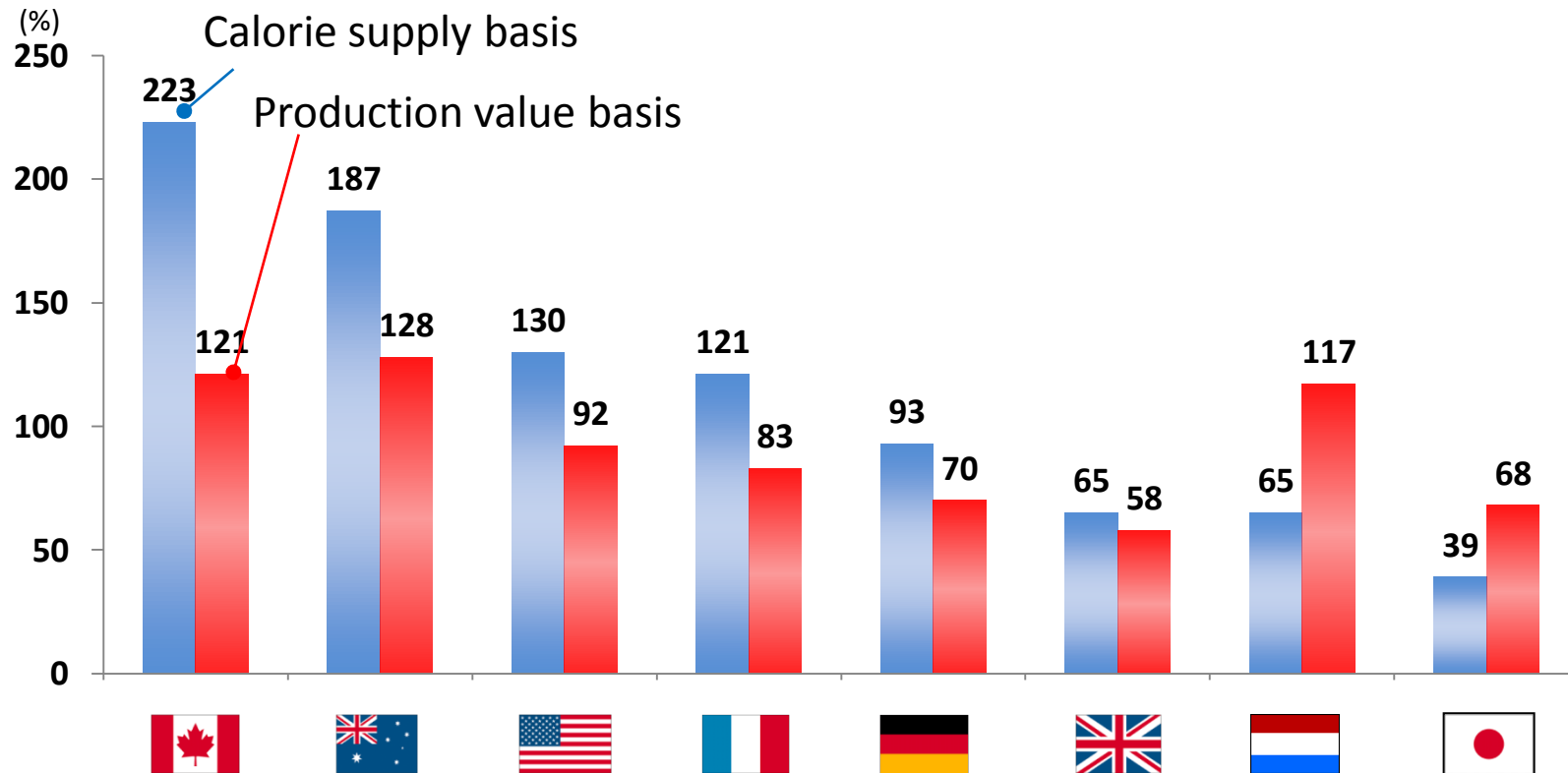
Total Food Self-sufficiency Ratio (%)



Source: "Food Balance Sheets"(MAFF)

Food Self-sufficiency Ratio in developed countries

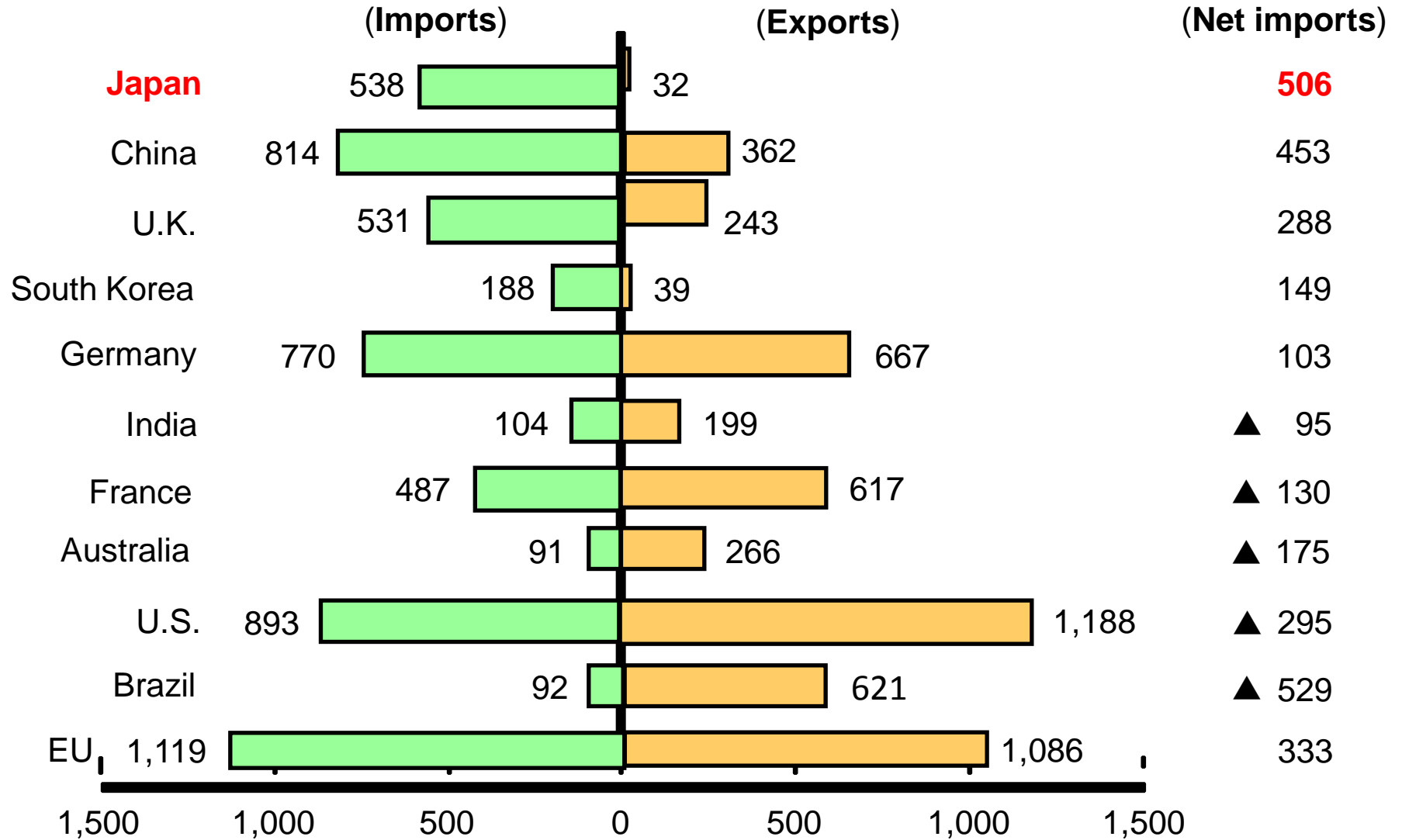
○ The Food Self-sufficiency Ratio of Japan is the lowest among developed countries.



Source: Estimated by MAFF based on sources including “Food Self-sufficiency” (MAFF) and “Food Balance Sheets” (FAO)

Agricultural imports and exports of major countries

○Japan is the world's largest net importer of agricultural products.



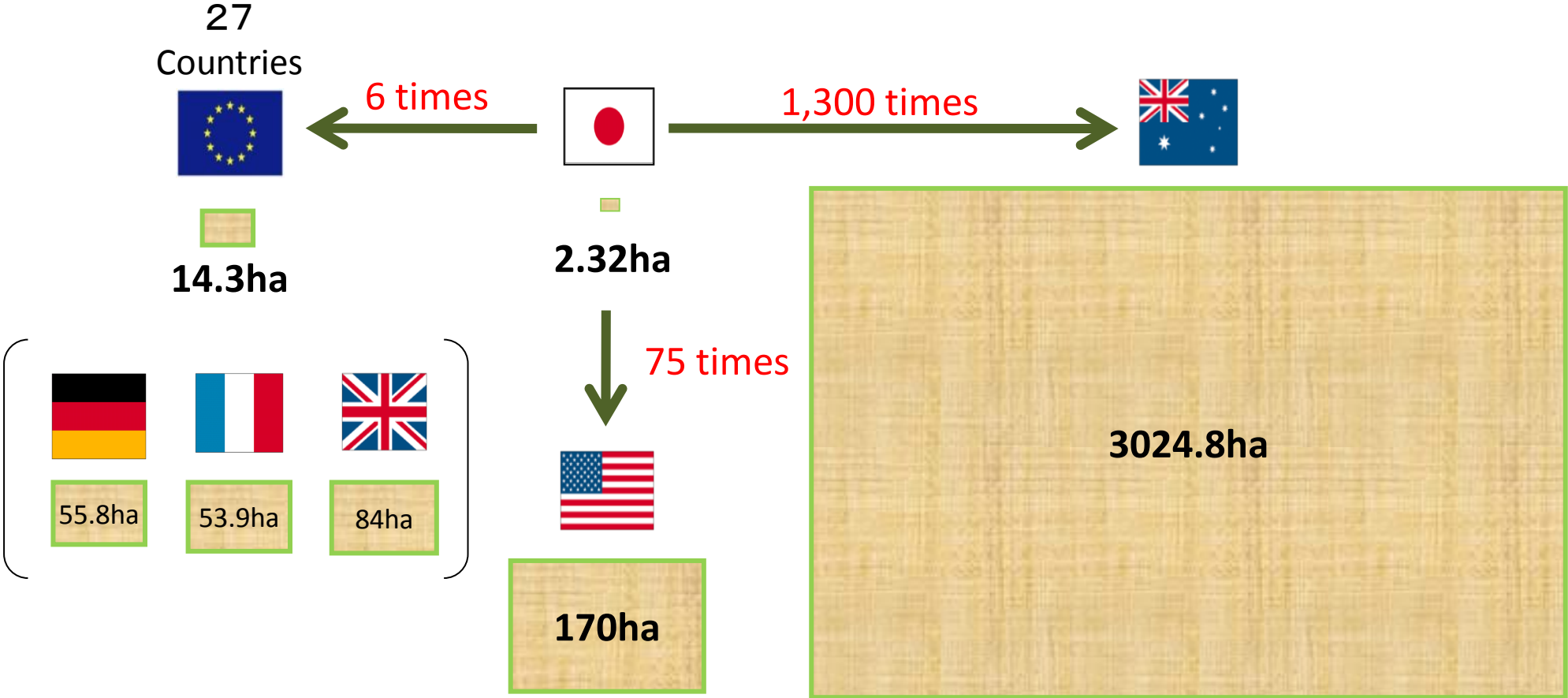
Source : Prepared by MAFF based on "FAOSTAT" (FAO) in 2010. ⁶⁹

Note : Imports and exports of U.K. ,Germany, and France include those within the EU.

(100 million dollars)

Average Cultivated Land under management(Area per household)

○ The Average Cultivated Land under management (Area per household) of Japan is the smallest among the major developed countries.

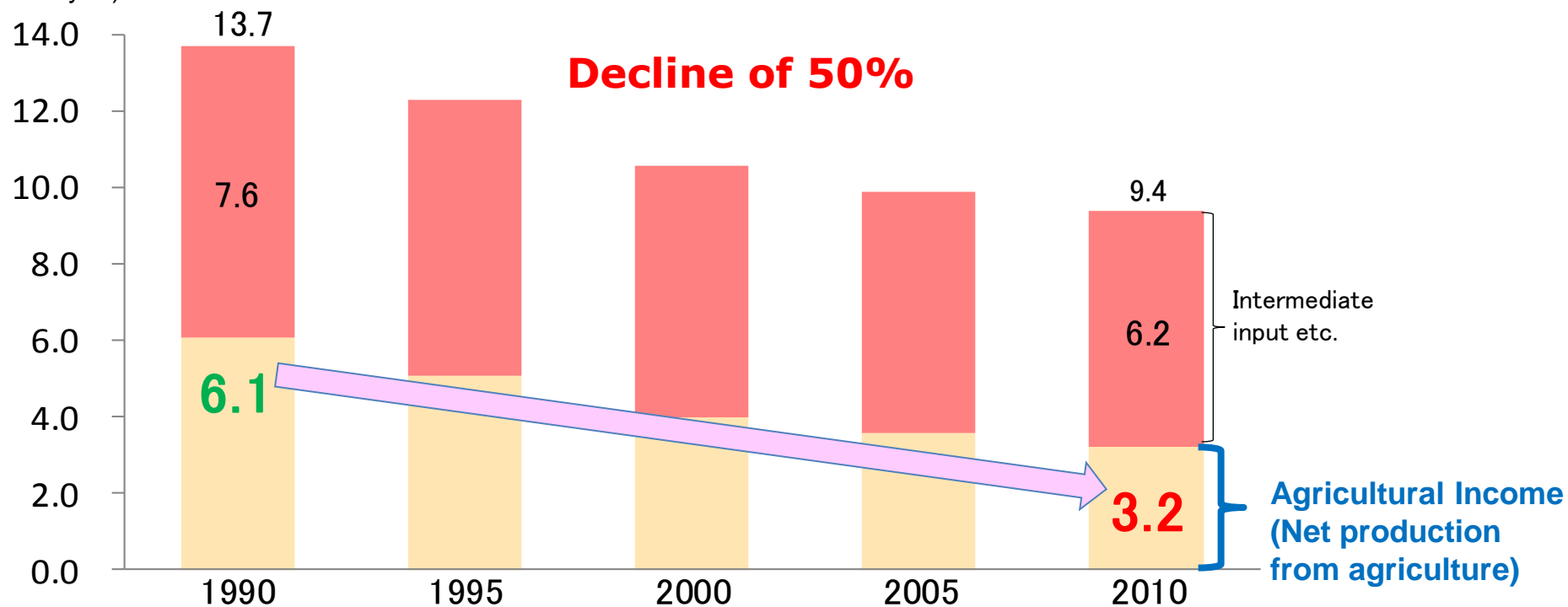


Source: "Survey on Movement of Agricultural Structure"(MAFF), USDA/NASS, EU Census, Australian Commodity Statistics etc.

Drastic Decrease of Agricultural Income

- Agricultural income (net production from agriculture) has halved in 20 years from 1990 (6.1 trillion yen) to 2010 (3.2 trillion yen).

(Trillion yen) Agricultural Output

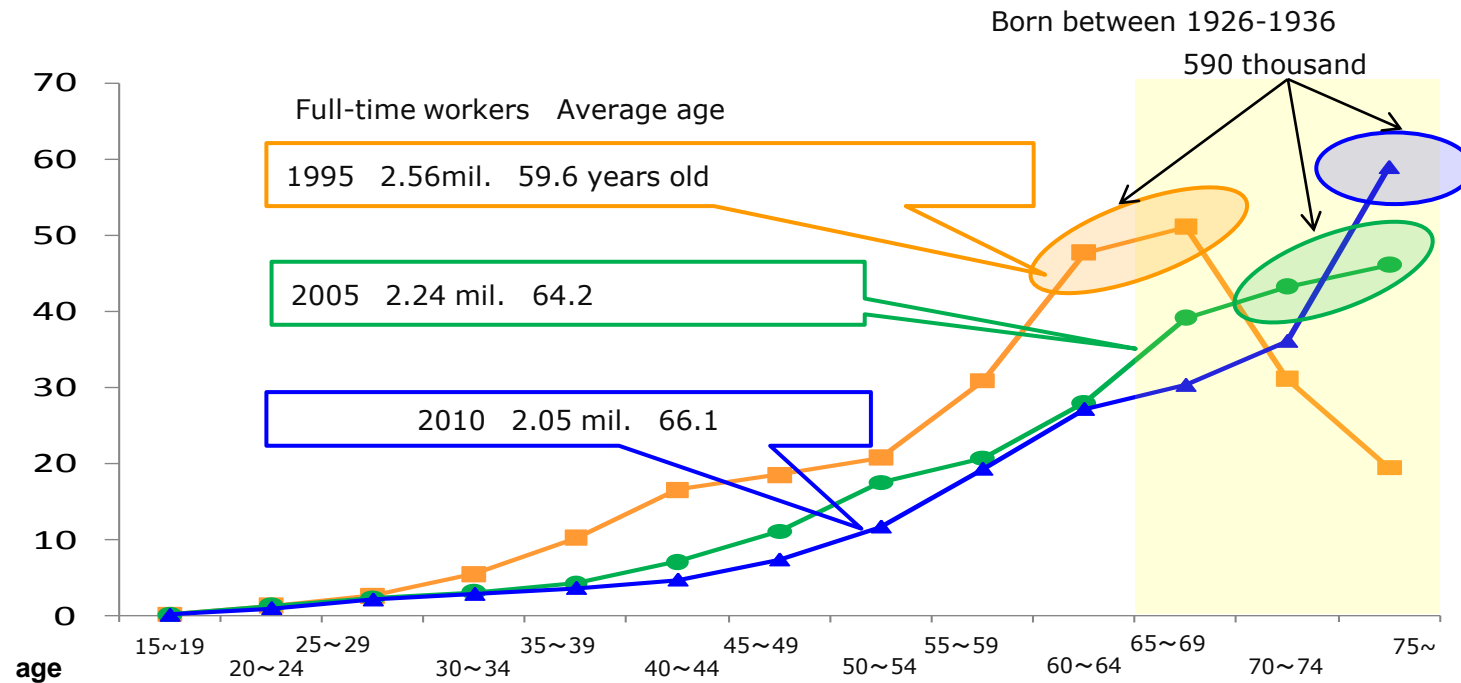


Source: "Census of agriculture and forestry"(MAFF)

Age Distribution of Farmers

- The number of full-time agricultural workers is 2 million, with an average age of 66.1 years. The largest group is aged 70 years or more.

Age distribution of agricultural workers*



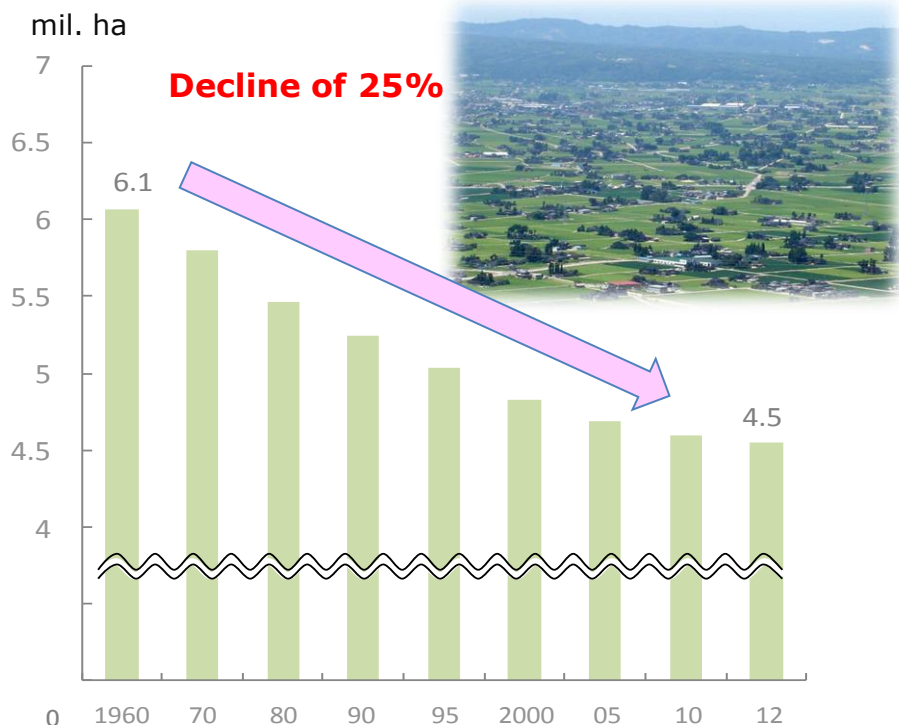
Source: "Census of agriculture and forestry"(MAFF)

* Full-time workers

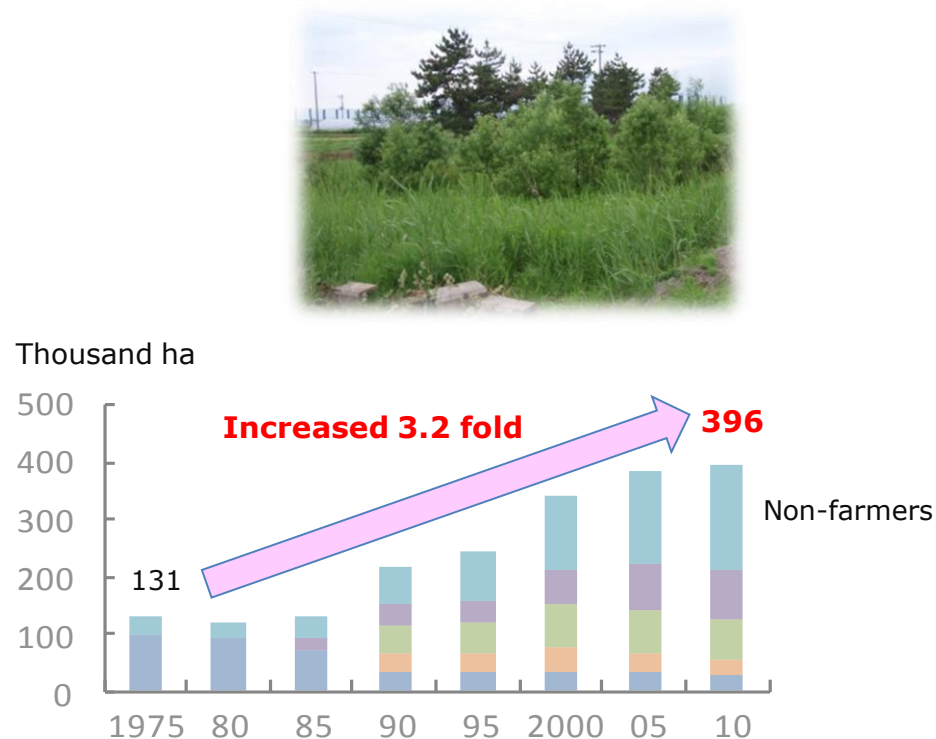
Decrease of Farmland and Increase of Abandoned Farmland

○ Farmland has decreased by 1.5 million ha over the last five decades. On the other hand, abandoned farmland has increased 3.2-fold (by 0.36 million ha) over the last three decades. A significant portion of this abandoned farmland is owned by non-farmers.

Farmland



Abandoned farmland



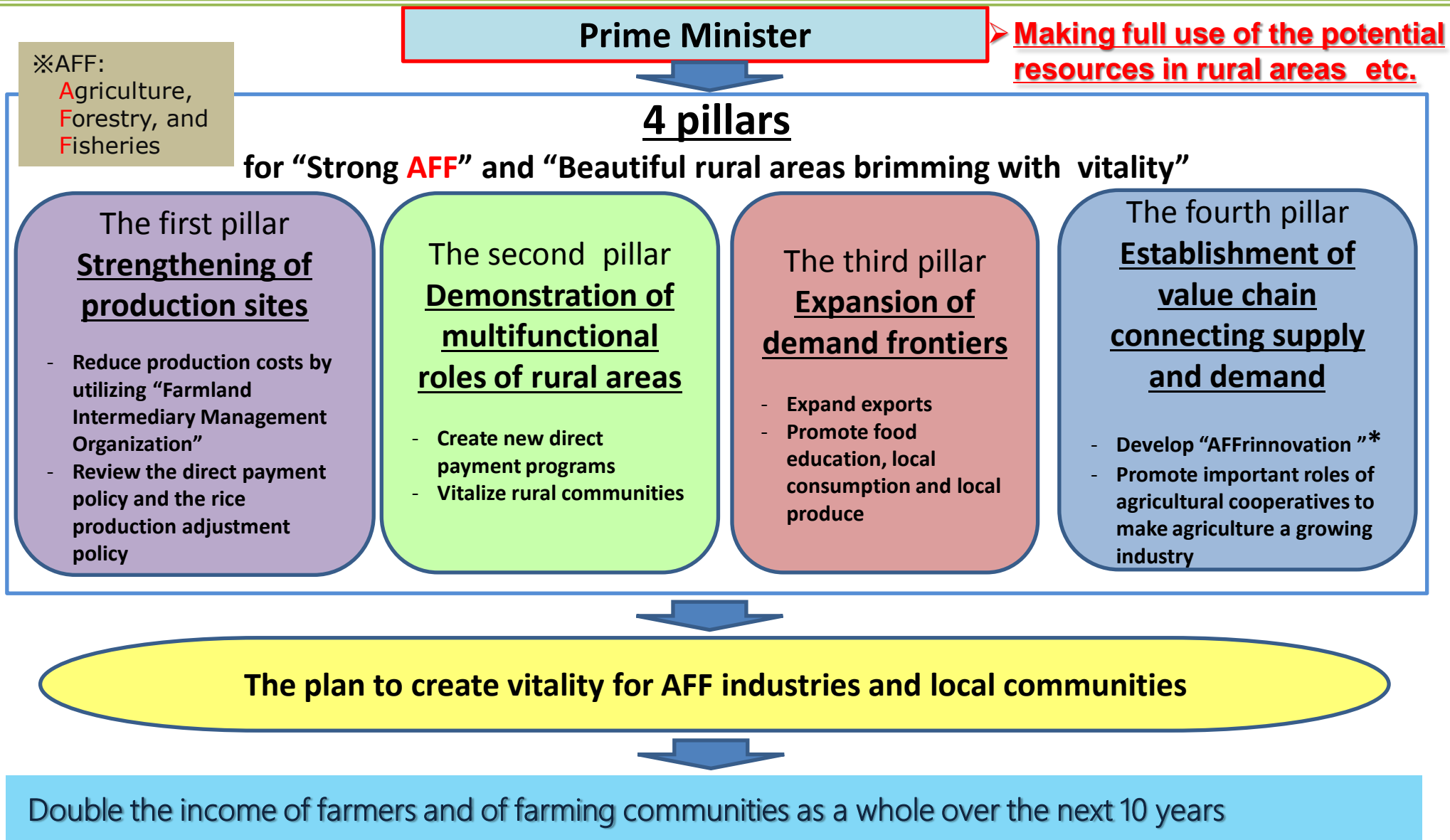
Over five decades,	
Expansion	1.05 mil. ha
Non-use	-2.58 mil. ha
Total	-1.53 mil. ha (-25%)

Source: "Statistics of cultivated and planted areas"(MAFF)

Source: ""Agricultural and Forestry Census"(MAFF)

- 2. To implement “Aggressive
Agriculture, Forestry and Fisheries”**
- Japan’s Agricultural Policy Reform —**
-

The Plan to Create Vitality in the Agriculture, Forestry and Fishery Industries and Local Communities (December, 2013)



* Agrinnovation, Forestrinnovation and Fisherinnovation. Adding value⁷⁵ to agricultural, forestry and fishery products in innovative ways, by making new combinations, and creating a value chain.

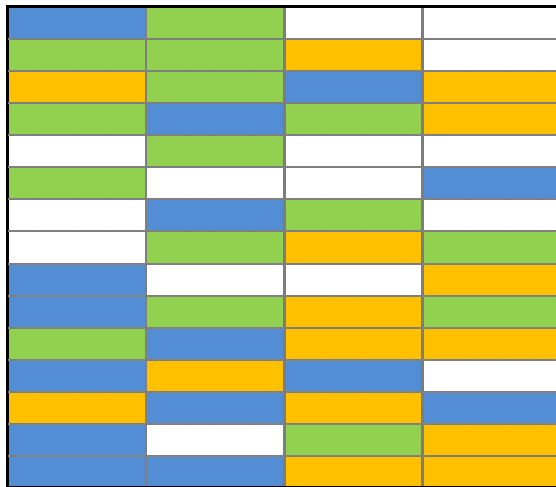
Farmland consolidation to core farmers

Fostering core farmers through farmland consolidation



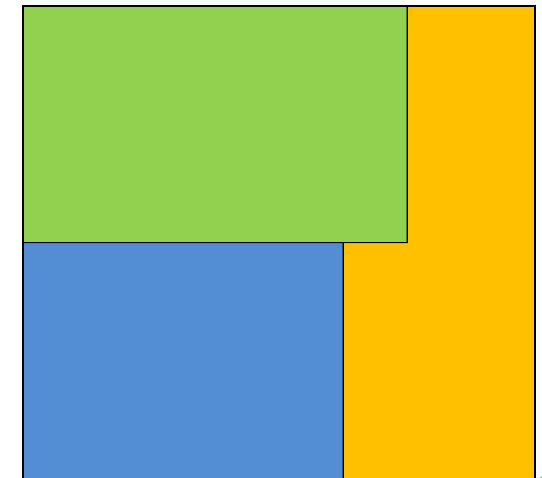
Farmland consolidation (image)

Scattered farmland
< Each parcel is **30 a** >



*Reduce production costs
by reallocating farmland*

Reallocated farmland
< Each parcel is **1 ha** >



Strengthening of production sites / Demonstration of multifunctional roles of rural areas

- End the rice production adjustment program within 5 years, which has been in place for 40 years
- Reduce the current payment for rice production and shift to decoupled support, and payment for farmers of various sectors involving environmental farming with due attention to the multifunctionality of agriculture

① Reduce the current payment for rice production

Shift to production based on decision by farm managers

Reduce disincentives to give up small scale farming

Regional government supported institutions

Consolidation of farmland to core farmers

② Shift to direct payment in exchange for maintaining agricultural multifunctionality

Maintain community activities, such as taking care of farmland, irrigation facilities and farm roads in rural areas to reduce burdens on core farmers

Reduce interferences with production decisions (decoupled support).

④ End set aside program for rice production

Environmental enhancement for producing crops to meet demand, without depending on the personal quota of rice production

③ Promote to produce crops with potential demand

Promote crops such as wheat, soybeans, rice for livestock feed and rice for rice flour, which also contribute to improving the food self-sufficiency rate

Provide alternatives with producers motivated to take on new crops

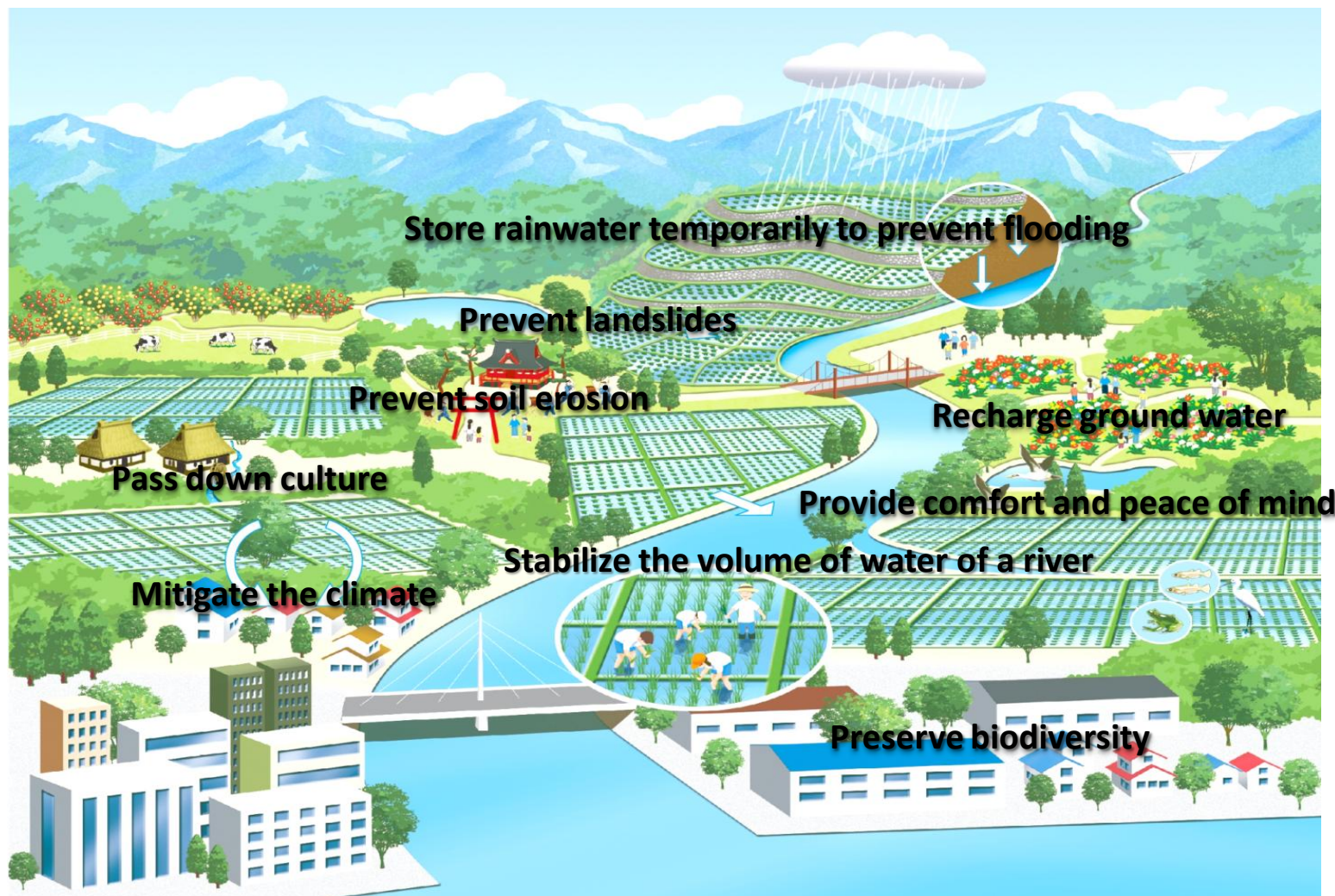
Promote reusing abandoned farmland and reduce production costs by making full use of farmland

Transformation of agriculture into growing industries

- In next decade, 80% of farmland to be consolidated to core farmers
- Reduce production costs by 40%, along with efforts to reduce input costs by industry



Multi-functionality



Types of Functions
Flood prevention function
River flow stabilization function
Ground water recharge function
Soil erosion prevention function
Landslide prevention function
Organic waste disposal function
Climate mitigation function
Healthcare/recreation and relaxation function

Source: Science Council of Japan "On Evaluation of Multifunctional Roles of Agriculture and Forests Related to the Global Environment and Human Life (policy recommendations to the government)" (November 2001) and related appendices

Expansion of demand frontiers

○ Export of AFF products: approx. 450 bil. yen (2012) → approx. 551 bil. yen (2013)

FBI strategy to export Japanese food

Made From Japan: Export **ingredients** by making them indispensable for chefs around the world

※ Yuzu has become popular among cooks around the world. Scallops have been exported as an expensive ingredient in Chinese cuisine.

Collaborate

Made By Japan: Export Japanese food **culture** and food **industry**.

Made In Japan: Formulate a strategy for each country and each product. Place emphasis on “**killer contents**”

Examples of export strategies (excerpts)

2012	Outstanding strategies	Key items	Key countries and areas	2020
Marine products 170 bil.	Develop a branding strategy, establish a quality control system. Develop a speedy system to issue sanitary certificates.	Yellowtail, mackerel, fast fish, scallops, salmon, etc.	Southeast Asia, EU, Africa, etc.	350 bil.
Processed food 130 bil.	Expand exports of ingredients through “Made by” strategy. Shift target from accessible markets to potentially lucrative markets.	Seasoning agents (miso, soy sauce, etc.), confectionery, soft drinks, health food, retort packaged food	EU, Russia, Singapore, Thailand, Vietnam, India, etc.	500 bil.
Rice and processed rice 13 bil.	Polish rice in each country. Sell rice and rice cookers. Place emphasis on sake and rice processed food.	Rice, rice confectionery, retort rice, packaged sake	Hong Kong, Singapore, Australia, EU, US, India, Brazil, etc.	60 bil.
Fruit 8 bil.	Develop new markets including Taiwan and Southeast Asia. Establish year-round supply systems.	Apples, oranges, strawberries, <i>nagaimo</i> , sweet potato	Taiwan, Southeast Asia	25 bil.
Beef (wagyu) 5 bil.	Place emphasis on promotions in large markets such as the EU or the US. Sell various cuts of meat. Promote comprehensively with Japanese diet culture.	Beef	US, EU, Hong Kong, Singapore	25 bil.

Target

1 trillion yen in 2020

Expand domestic demand

- Study a new system and set a model area to expand demand for local products.
- Expand consumption in school meals. Promote dietary education (collaborate with schools and companies).

“WASHOKU;Traditional Dietary Cultures of the Japanese”



- "WASHOKU; Traditional Dietary Cultures of the Japanese" was inscribed on the representative list of the intangible cultural heritage (ICH) of humanity on Dec. 4, 2013.
- Following this, it's important to protect and hand down Japanese dietary cultures into the future.

Keeping the concern by continuous PR

Protection and inheritance by “Shokuiku”



Attention to Japan around the world
 The International Exposition in Milan 2015
 The Olympics in Tokyo 2020
 ||
 Golden opportunities to promote Japanese dietary cultures to the rest of the world

【What is the ICH?】
 • According to the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage, ICH means intangible cultures that communities, groups or individuals recognize as part of their cultural heritage.
 • It includes performing arts, social practices, traditional craftsmanship, etc.

WASHOKU → Social practice based on the essential spirit of Japanese “respect for nature”

Feature ① : Various fresh ingredients and using their natural tastes

Ingredients used in WASHOKU are diverse, fresh and available in four distinct seasons. WASHOKU requires minimum cooking and processing.



Feature ② : Well-balanced and healthy diets

WASHOKU contributes to a healthy life, long life expectancy and prevention of obesity among the Japanese since it offers a well-balanced and low-fat diet.

Feature ③ : Emphasis on the beauty of nature in presentation

The beauty of nature and the changing of seasons are emphasized in the presentation of WASHOKU. Plates are decorated with leaves, flowers and bamboo, and natural motifs are represented in decoratively cut foodstuff. Decorating tables and rooms with objects matched to the season are also closely associated with WASHOKU.



(c) Masashi Kuma, 2006

Feature ④ : Connection to annual events

WASHOKU has developed using traditional knowledge and customs closely associated with nature and a connection to annual events. It strengthens the bonds of family and community members when they share mealtimes together, appreciating ingredients gifted by nature.



3. Establishment of Food Value Chain

— Fourth pillar —

What is Food Value Chain (FVC)?

- ◆ The FVC is designed to connect a set of values created in the full range of activities from agricultural production, manufacturing, processing and distribution to consumption, i.e., to convey producers' "created value" through to consumers.
- ◆ The FVC will create higher value in the whole food value chain and also bring about higher value to each player in the FVC including producers, manufacturers, distributors and consumers.

What is “6th Industry” ?

The term “**6th industry**” is derived by multiplying the industrial sectors:



**1st (Primary)
Industry**



**2nd (Secondary)
Industry**



**3rd (Tertiary)
Industry**



Collaboration of these industries to synergistically create **new added value** in the food value chain

**Revitalize agriculture and rural areas and
Improve income levels**

[No.1] Tourism in a Rural area

Farmer

Tourist agent
Hotel business

- A farmer provides a farming experience. A hotel business takes care of service. A tourist agent plans a tour and attracts people. Differentiation by high quality services putting their knowhow together



[No.2] Production and Export of Sea Food Products

Fisher

Seafood processing firm
Food trading firm

- Seafood processing firms process farmed fishes into suitable sized products. A food trading firm sells these products to foreign countries.



[No.3] Create a New business model for experimental pig farming

Farmer

Drug company

- Farmers raise small pigs (less than 10kg), and provide them to drug companies as experimental animals for research and development of medical products, etc.
- This constitutes a new business model where by farmers earn higher profits by selling experimental pigs at higher selling prices and with lower raising costs



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[No.4] Sell Wood Pellets as Biomass Fuel

Forester

Local government

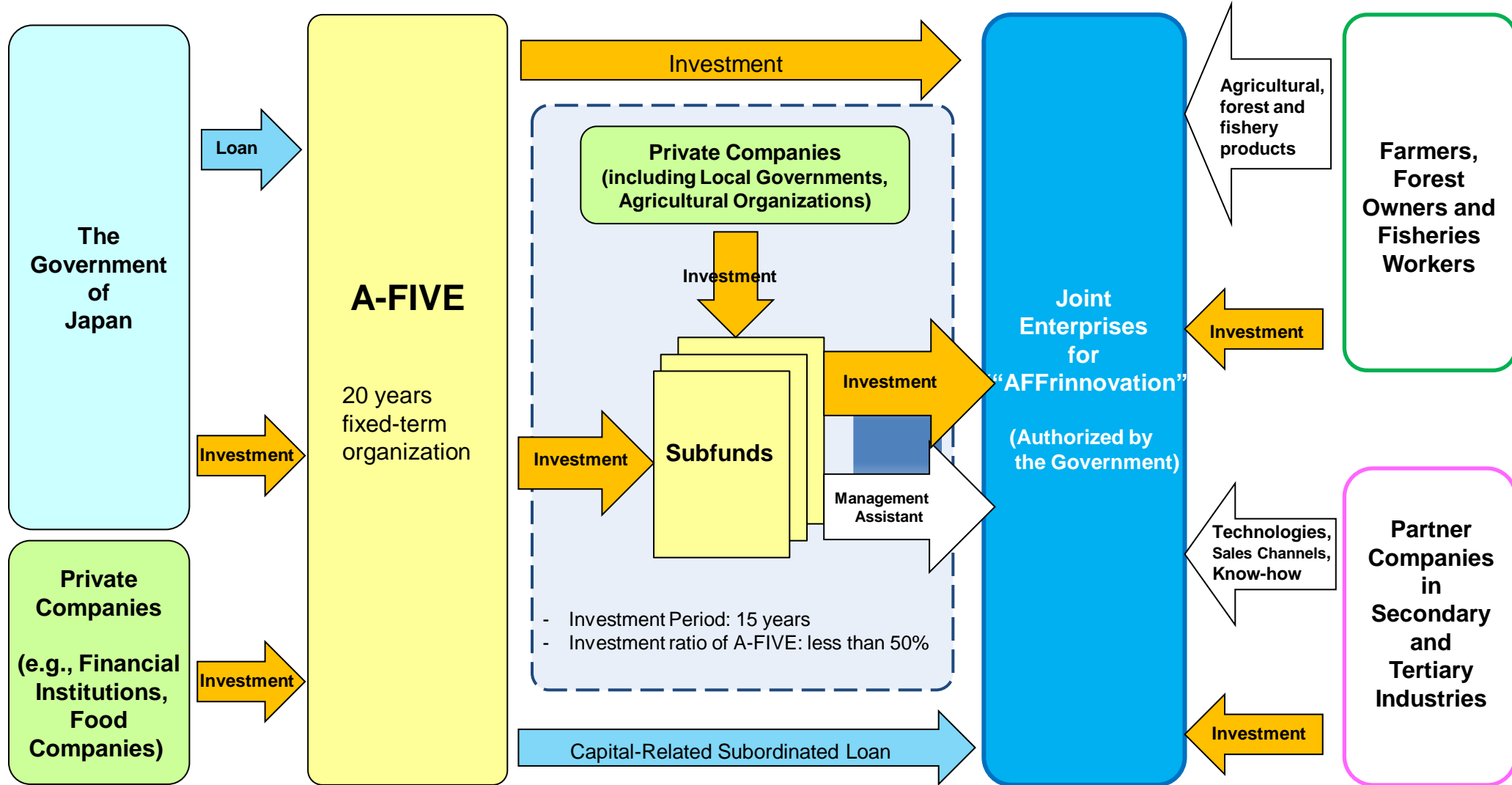
- A forest owners' cooperative association bought pellet stoves and lent them to schools. The association produces wood pellets from thinned wood logging residue and sells them to schools



Function of A-FIVE

A-FIVE : Agriculture, forestry and fisheries Fund corporation for Innovation, Value-chain and Expansion Japan

A-FIVE will promote the establishment of a new joint enterprise centering on primary industry, and connect the value derived from the effort of farmers to secondary and tertiary industries.



AFFrinnovation: adding value to agricultural products, forest products, and fishery products in innovative ways, making new combinations, creating a value chain.

Strategy for the Global Food Value Chain

Objectives

- ◆ Establish the FVC from production to consumption through Public-Private Partnership by utilizing the unique strengths of the Japanese food industry as the world food market rapidly grows (Promote “Made in Japan”).
- ◆ By establishing the FVC,
 - i) Promote overseas business and investments of the Japanese food industry;
 - ii) Enhance exports of Japanese food-related infrastructures and create a favorable business environment for Japanese food exports;
 - iii) Promote economic growth in developing countries in collaboration with economic assistance.
- ◆ Achieve the target of doubling overseas sales of the Japanese food industry from 2.5 trillion yen (26 billion USD*) in 2010 to 5 trillion yen (53 billion USD*) in 2020 by implementing this strategy.

The Basic Strategy

- ◆ Develop a strategic Public-Private Partnership
- ◆ Establish a framework such as a bilateral policy dialogue with partner countries and a public-private council
- ◆ Utilize economic assistance strategically
- ◆ Develop food-related infrastructure such as cold chains in export markets
- ◆ Create a favorable business and investment environment for the Japanese food industry
- ◆ Strengthen the information-gathering system
- ◆ Develop human resources both inside and outside Japan
- ◆ Develop research and technology
- ◆ Facilitate financing for overseas business

Establishment of Food Value Chain

The Food Value Chain
-Convey producers' created value through to consumers-

Production

- Horticultural farming centers
- Farming machines and seeds
- Agricultural infrastructure (e.g. irrigation)



Manufacturing & Processing

- Food industrial parks
- Food manufacturing facilities



Distribution

- High-end cold chains
- Cold distribution centers



Consumption

- Japanese-style CVS, supermarkets, department stores
- Japanese restaurants



Overseas business development of the Japanese food industry

- <Strengths of the Japanese food industry>
1. Business development based on “only one Washoku” registered as a UNESCO Intangible Cultural Heritage
 2. High-quality cold chains
 3. Cutting-edge technologies such as ICT, energy-saving technologies, plant factories , etc.
 4. Advanced and convenient Japanese food distribution systems such as POS, CVS, shopping malls, etc.

Strategic utilization of economic assistance

- Develop horticultural farming centers
- Introduce high-end farming machines
- Develop agricultural infrastructure such as irrigation
- Develop human resources who support the FVC
- Establish systems, rules and standards related to agricultural production, distribution and food safety.

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Promotion of Japanese food exports

- Export Japanese food for overseas Japanese food factories, restaurants, supermarkets, CVS, etc.
- Develop food-related infrastructure such as cold chains in export markets
- Establish market-oriented structures of Japanese food exports based on the needs of Japanese firms overseas

Japan's proposing APEC Project

High Level Public-Private forum on Cold Chains to Strengthen Agriculture & Food's Global Value Chain

- Expected date: second half of 2015
- Venue: Japan (Tokyo) or proponent economy
- Objectives: Sharing experiences of cold chain for reducing food loss, improving dietary life and involving small farmers in the global value chain
- Participants: government, private sector, etc.
(not only from agriculture and food industry but also from infrastructural sectors.)
- Program: 2 day workshop and 1 day field trip

Case Studies:

Making full use of the potential resources in rural areas

Case Study1

As part of efforts for 6th industry, apple farmers use their own apples to make and sell cider.

The Cider winery was built through project of 6th industry.



Apple cider winery
「Hirosaki cider workshop”kimori”」

Case Study2

In paddy fields, where rice is cultivated as a staple food, “paddy arts” from rice planting to harvesting have been created all by hand (with the opportunity offered to experience these tasks). As a result, more than 250,000 tourists have visited a village of only 8,000 people.



2014 Paddy art





Vital rural areas
Farmland consolidation



Washoku: Cultural Heritage of
UNESCO



Thank you for your attention

Contact: apec@nm.maff.go.jp

Beautiful rural areas
Improve environment



Business opportunities

APEC PPFS Rural Development Workshop, New Zealand, July 2014

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