

Comparative Study on the Fishery Labor Supply in East Asian Countries/ Region

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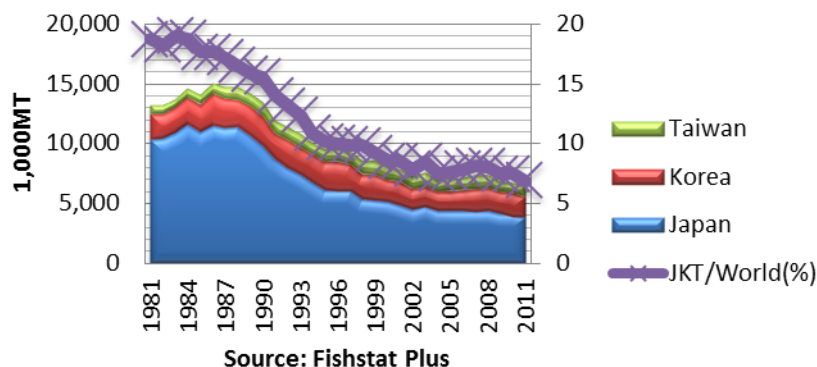
Objectives

- Aging Fishermen (Japan)
 - Number of new entrants were 2,000/year
 - 34% of fishers were over 65 years old (2008 census)
- Future issues and challenges
 - **Short term:** lack of fisher labor supply, decline in production & threatened marine security
 - **Long term:** shrinking fisheries sector
- Arguments can be done from various aspects;
 - Over capacity, low income & productivity, retirement, etc.
- Is this a unique phenomena of Japanese fisheries?
- If the issue is same in other countries, how do they cope with this?

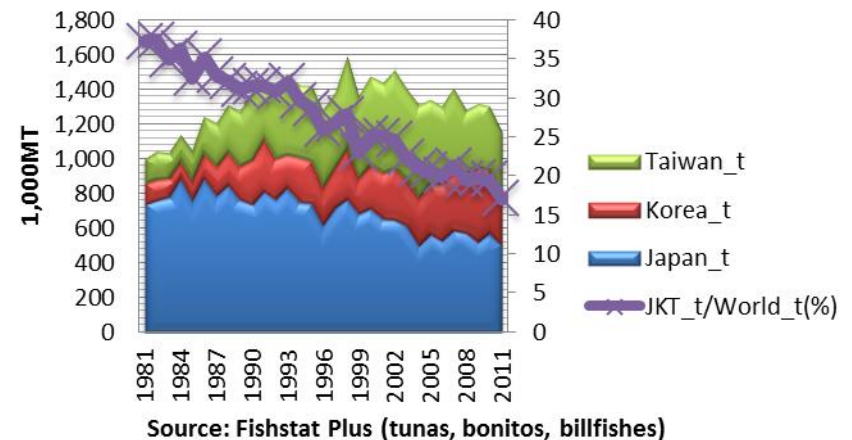
Methodology

- Compare the Japanese situation with other countries/ regions
 - Characteristics : Large fisheries sector, many alternative job opportunities, high per capita income, similar cultural background
 - Study locations : Taiwan (Mar 2013) and Korea (Jan 2014)
 - Sample: In-depth interviews with government, cooperatives and fishers
 - Data : Primary data composed of both formal/informal and comparisons were made

Total Catch and Share in the World



Total Tunas Catch and Share in the World



Comparison 1: similar in many ways, but...

Taiwan
Global solution

- Retirement at around 65
- Replace completely with foreign labor force

Korea
Attracting youth

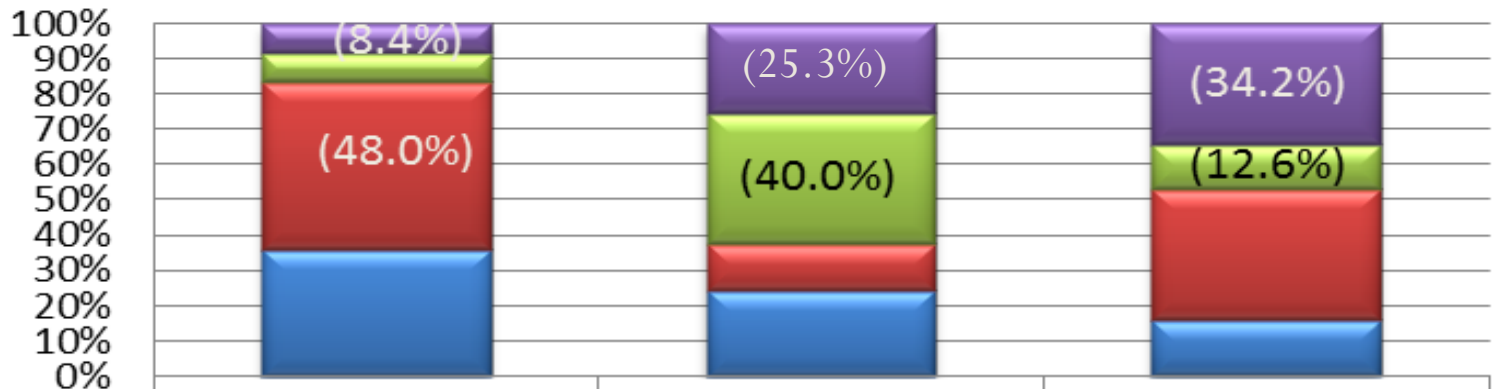
- Trend of aging fishers in the next five years
- Attract young labor force by the exemption from military duty

Japan
In-house solution

- Postpone retirement
- Aged fishers are willing to perform till industry get replacement

Comparison 2: composition of fishers

Figure: Fishers Ratio by Age Group



Pingu province

	Taiwan(2012)	Korea(2011)	Japan(2008)
65-	1,573	40,427	75,810
60-64	1,488	58,879	28,038
41-59	8,949	21,122	82,897
-40	6,776	38,871	35,163

Fishers	330,000 (recorded)	160,000 (recorded)	210,000
Offshore	20,000	100,000	50,000
Coastal	60,000		14,400
Production	903,905 MT(2011)	1,761,785MT(2011)	3,849,522MT(2011)
Population	23mil	50mil	130mil

Comparison 3 : Income distribution

(unit: 1000US\$/year)	Taiwan	Korea	Japan
Average household income	38.4	53.9	54.1
Freshman's salary	10.4	30.0	28.0
Average fishers household income (from fishing)	25.5	37.4 (19.5)	39.0 (22.3)
Fisher / non-fisher income	66.4%	69.4%	72.1%
Pension (monthly)	25.2 (2.1)	(some)	65.4 (5.5)

Comparison 4: Institutional Arrangements & the (poor) results

	Taiwan	Korea	Japan
Institutional arrangements	✓ Program to direct the young people towards farming	✓ Policy of supporting retuning people to the farms and fishing villages (subsidy scheme , low interest rate loans, support for start up businesses)	
	✓ Award of US\$30k after an year's work in fishery upon the graduation of fishery high-school/college	✓ Large purse-seiners organization recruit high-school graduates (with the privilege of army duty exemption)	✓ Employment matching fair for fishery is organized 6 times a year
The results of the institutional arrangement	6 people returned in one year	9% (20 people) of the graduates became fishers/year	At one fair in Tokyo, 300 people visited and 5 matches (2%) with fisheries

Comparison 5: Dependency on foreign workers

	Taiwan	Korea	Japan
Background	<ul style="list-style-type: none"> ✓ Common across industry and in home ✓ 150K people work in manufacturing (21K) & services(131K) 	<ul style="list-style-type: none"> ✓ Foreign workers were accepted to offshore fishery from 2010 ✓ Max 1,000 people ✓ 3 years + 3 years 	<ul style="list-style-type: none"> ✓ Foreign trainees were invited from 2005 ✓ 70K people ✓ One year of training and two years of OJT
Number of foreign fishermen in fisheries sector	<ul style="list-style-type: none"> ✓ 6,342 ✓ Pingtung province, Taiwan Taiwanese 19,000 Indonesian 1,100 Chinese 400 Philippino 86 	<ul style="list-style-type: none"> ✓ 1,000 ✓ Large Purse-seine 300 / 1,700 crews Offshore Trawl / 2,000 Offshore long line 200 / 300 ✓ Indonesian→Chinese→Vietnamese→Laos, Yammer 	<ul style="list-style-type: none"> ✓ 1,782 (1,056 in fishery, 726 in aquaculture) ✓ Across industry, Chinese 66.2% Vietnamese, Philippine, Indonesian, Thai & Others
Wage US\$/m	<ul style="list-style-type: none"> Chinese 600 Others 540 		<ul style="list-style-type: none"> 1st year 500 2nd, 3rd year 800
Example of working conditions	<ul style="list-style-type: none"> ✓ A Taiwanese coastal squid fisherman act as a captain and 5 crews were all foreigners ✓ Chinese workers have to stay 12 miles away while others can land 	<ul style="list-style-type: none"> ✓ In the case of Offshore long line (200 out of 300), most of the crews were foreigners ✓ Offshore long line seeks to be accepted for army exemption 	<ul style="list-style-type: none"> ✓ Coastal fishermen were not used to work with foreigners ✓ Fish processing sector heavily dependent on foreign labor

Conclusions: sustainability and applicability

Taiwan
Global
solution

- Retirement at around age 65
- Complete utilization of foreign labor force
- Sustainable solution in the middle term
- Possible application to other nations

Korea
Catching
young

- Trend of aging in the next five years
- Attract young labor force by the exemption from military duty
- Unique in terms of background
- Applicable as “internship opportunity”

Japan
In-house
solution

- Postpone retirement. Aged fishers are willing to perform till they can
- Unique in terms of motivated aged workforce
- Applicable to the others, i.e. Korean

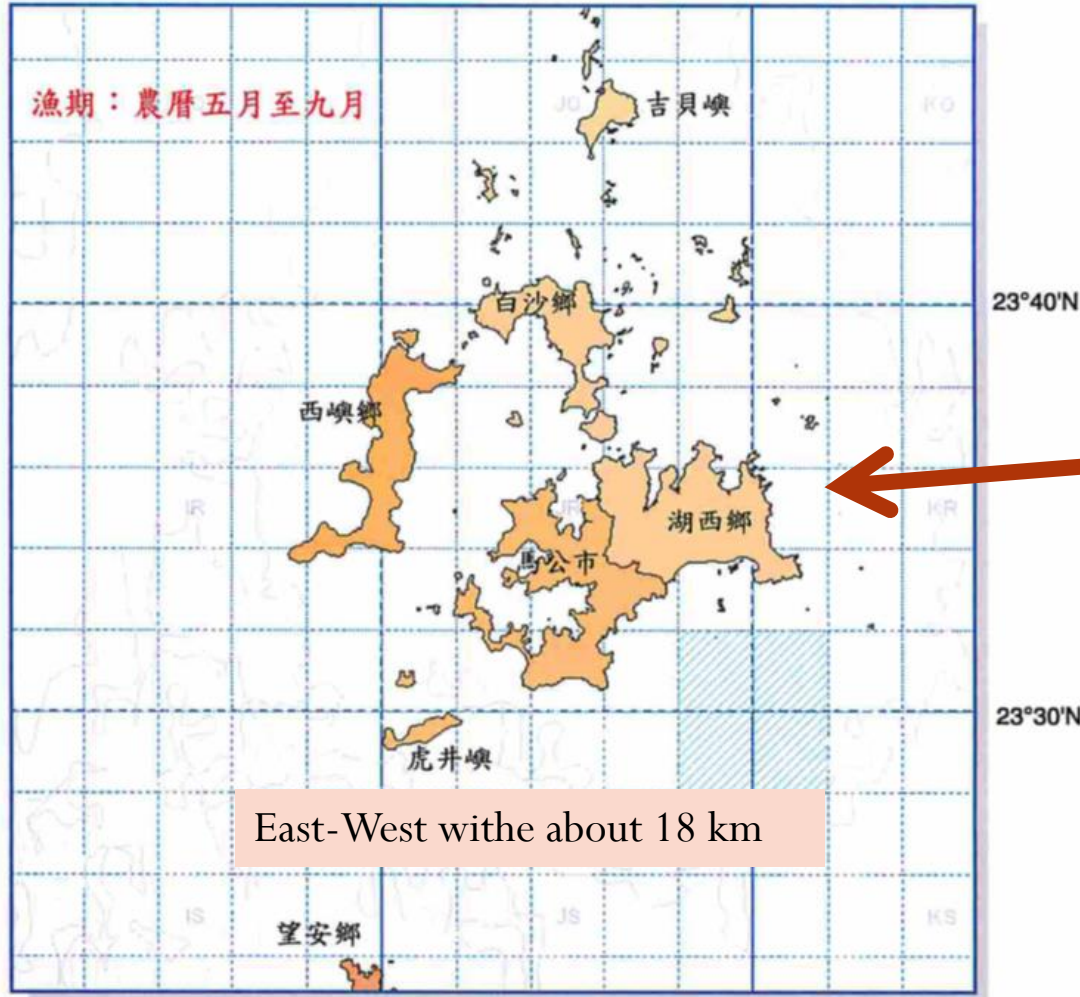
Thank you!

(Map of the Pinggu province in Taiwan)

119°20'E

119°30'E

119°40'E



East-West with about 18 km

圖 2-15 澎湖縣小雙拖之作業漁場與漁期

