

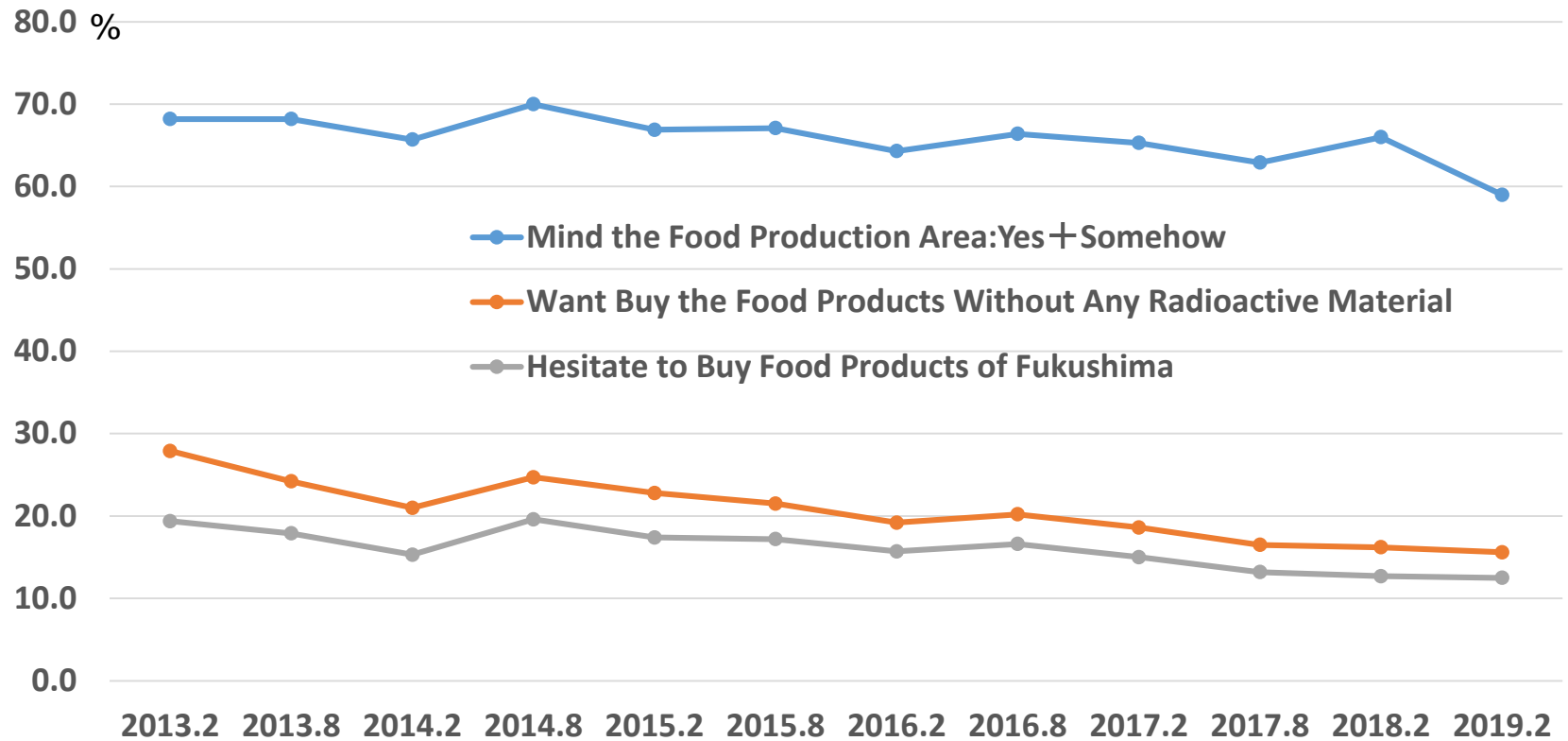
What should be done after 9 years?

—The current situation of Fukushima food products from a market point of view—

Yasumasa IGARASHI

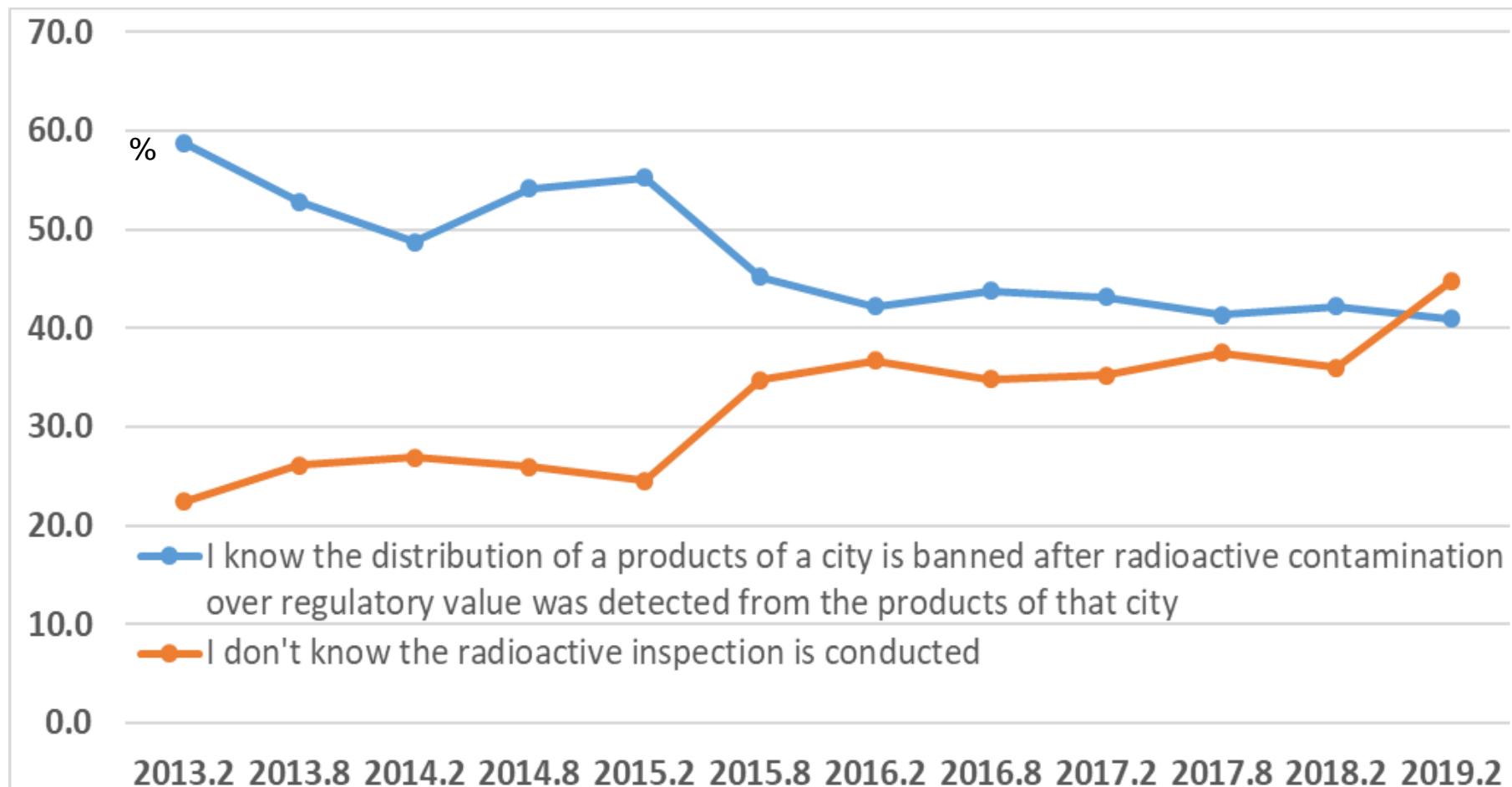
(Graduate School of Humanities and Social Sciences, University of Tsukuba)

Consumers who avoid Fukushima food products are in the minority but not decreasing rapidly



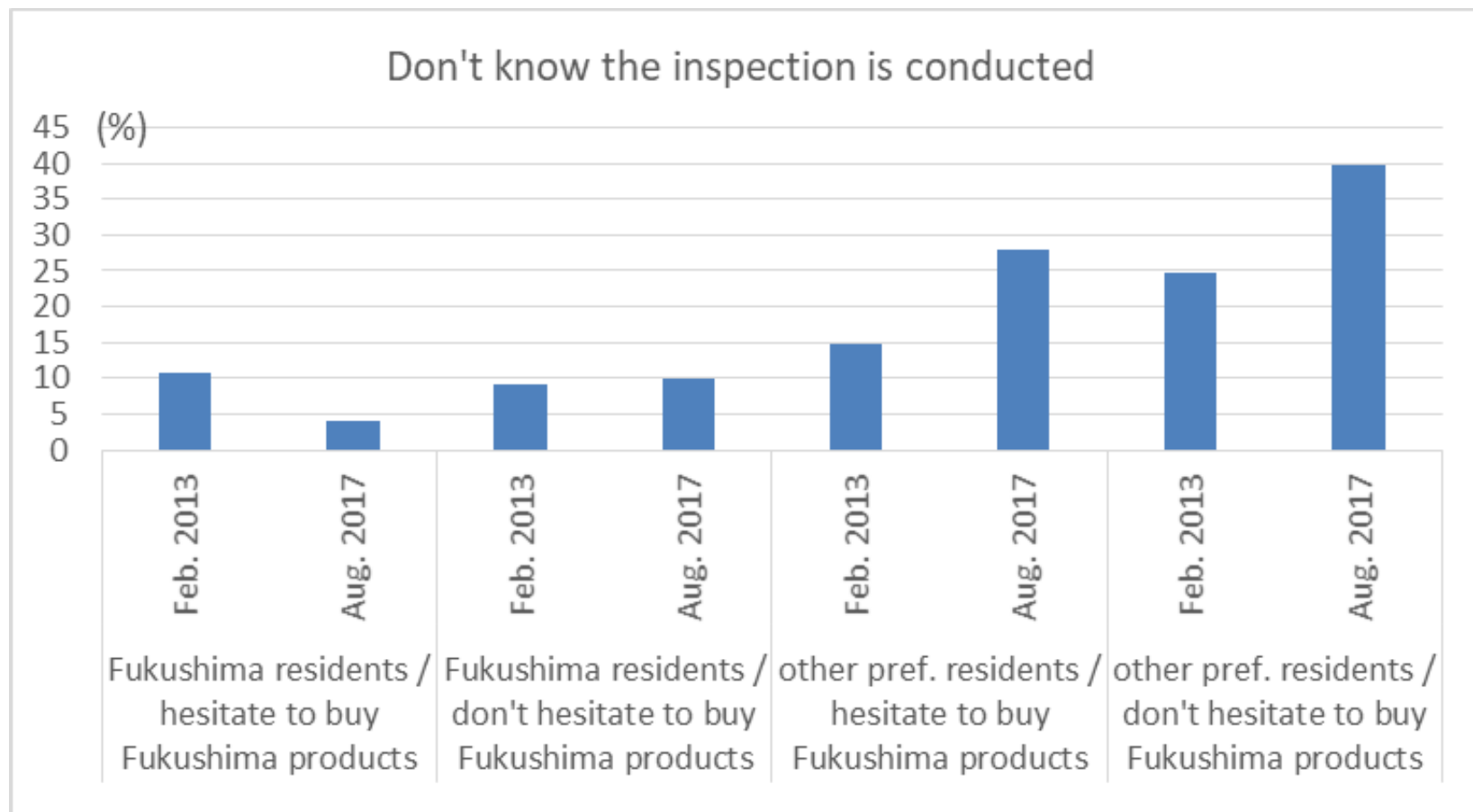
Panel Research by Consumer Affairs Agency
『風評被害に関する消費者意識の実態調査』

Forgetting has steadily progressed over time



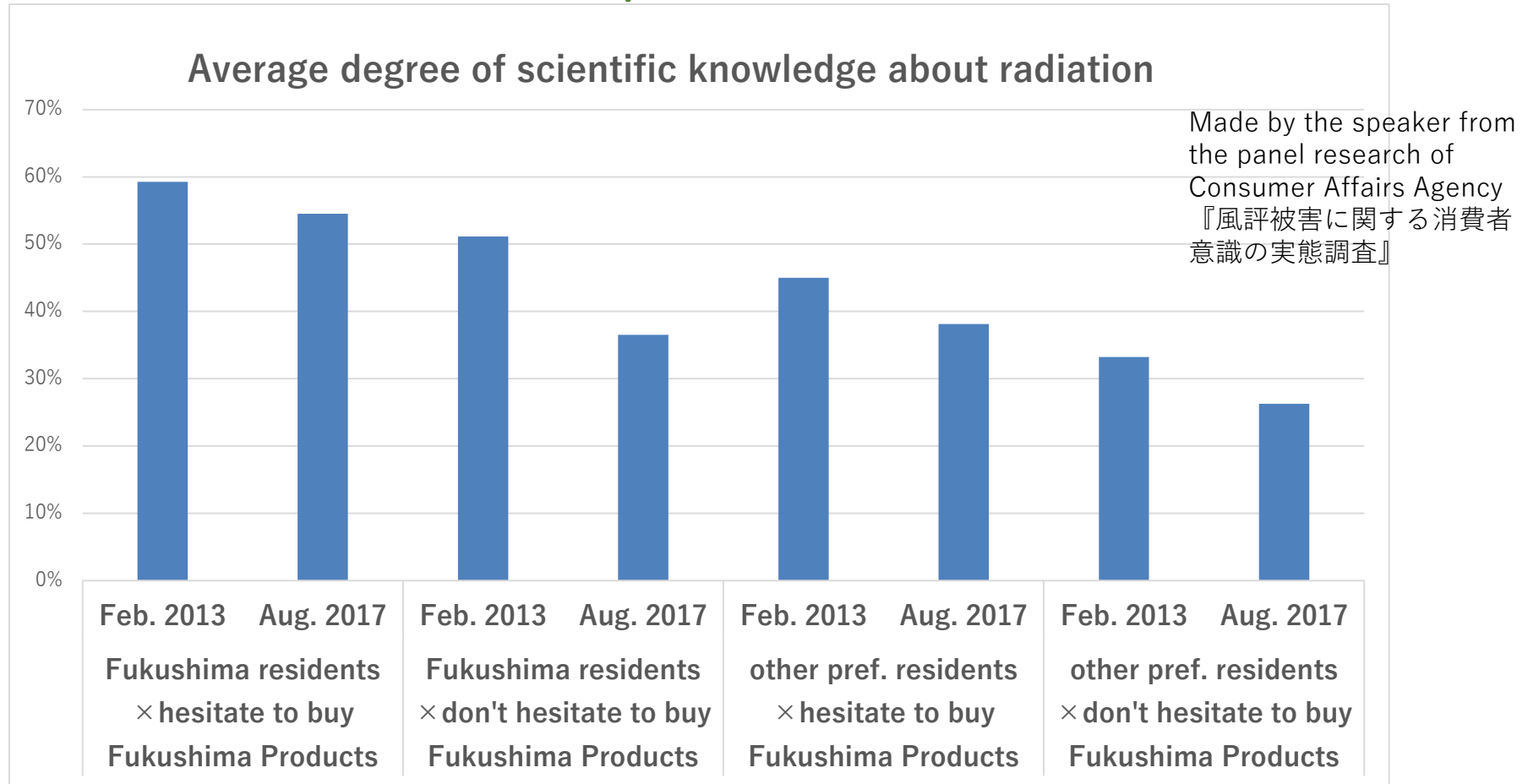
Made by the Speaker from the Panel Research of Consumer Affairs Agency
『風評被害に関する消費者意識の実態調査』

Consumers who avoid Fukushima food products maintain their strict assessment of risk even after they know the facts ①



Made by the speaker from the panel research of Consumer Affairs Agency
『風評被害に関する消費者意識の実態調査』

Consumers who avoid Fukushima food products maintain their strict assessment of risk even after they know the facts ②



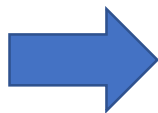
It can't be said that the avoidance of Fukushima products is the result of scientific ignorance among consumers.

Four factors in the difficult position of Fukushima food products

- problems in the **distribution process**
- **prolonged vague anxiety** and **forgetting** on the part of some customers
- **rebuilding trust** in the minority of consumers who feel deep distrust toward mainstream scientists, TEPCO, and the government
- **the social dialogue** with those refusing to eat food from the area affected by the nuclear disaster even after the most honest communication with them

The results of “the total amount of all bags inspection” of rice

- Screening inspection followed by detailed inspection



(Cs134+137)

		< 25 Bq/kg	25–50 Bq/kg	51–75 Bq/kg	76–100 Bq/kg	> 100 Bq/kg
2012	Number of Bags	10,323,674	20,357	1,678	389	71
	Proportion	99.7826%	0.1968%	0.0162%	0.0038%	0.0007%
2013	Number of Bags	10,999,223	6,484	493	323	28
	Proportion	99.9334%	0.0589%	0.0045%	0.0029%	0.0003%
2014	Number of Bags	11,013,045	1,910	12	2	2
	Proportion	99.9825%	0.0173%	0.0001%	0.00002%	0.00002%
2015	Number of Bags	10,498,050	647	17	1	0
	Proportion	99.9937%	0.0062%	0.0002%	0.00001%	0%
2016	Number of Bags	10,255,166	417	5	0	0
	Proportion	99.9959%	0.0041%	0.00005%	0%	0%

From <https://fukumegu.org/ok/kome/>

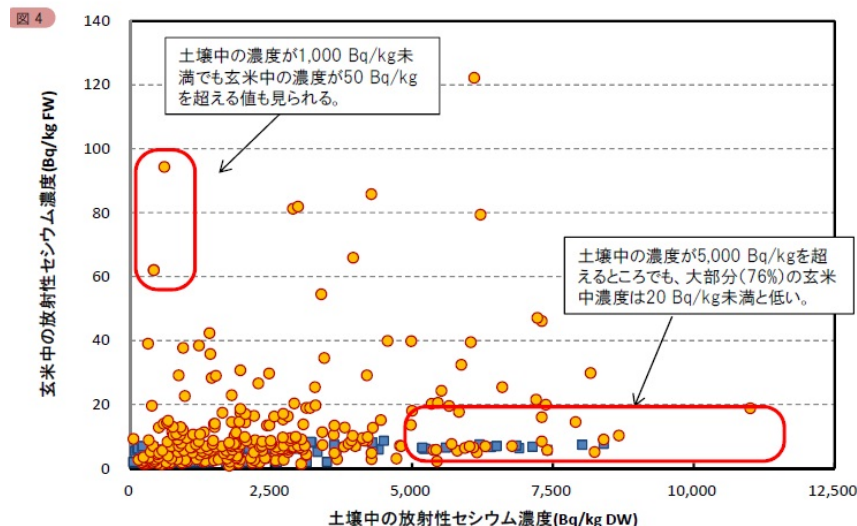
The determining factor of radioactive contamination of rice is ...

- ... the density of K in farm soil rather than the level of radioactive contamination of the soil itself.
- An effective countermeasure against the contamination of rice is the use of K fertilizer.
- Understanding and implementation of this countermeasure have been rapid among the farmers of Fukushima.

ア 土壤中の放射性セシウム濃度

○ 土壤の放射性セシウム濃度と玄米中の放射性セシウム濃度の間には相関は見られない。

土壤中の放射性セシウム濃度と玄米中の放射性セシウム濃度の関係

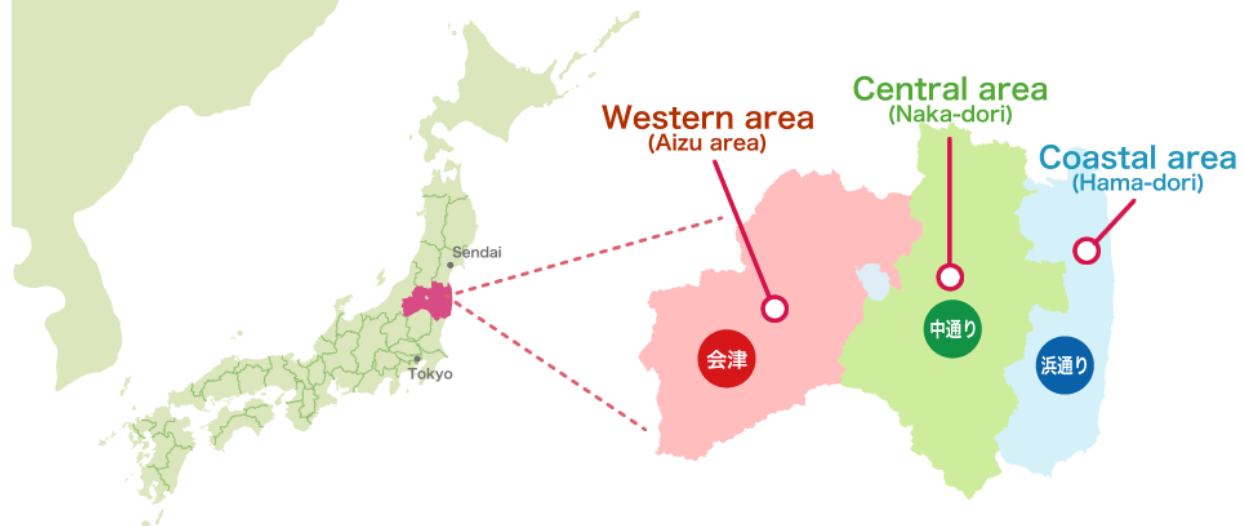


放射性セシウム濃度の高い米が発生する要因とその対策について

(農林水産省・福島県、2013年1月)

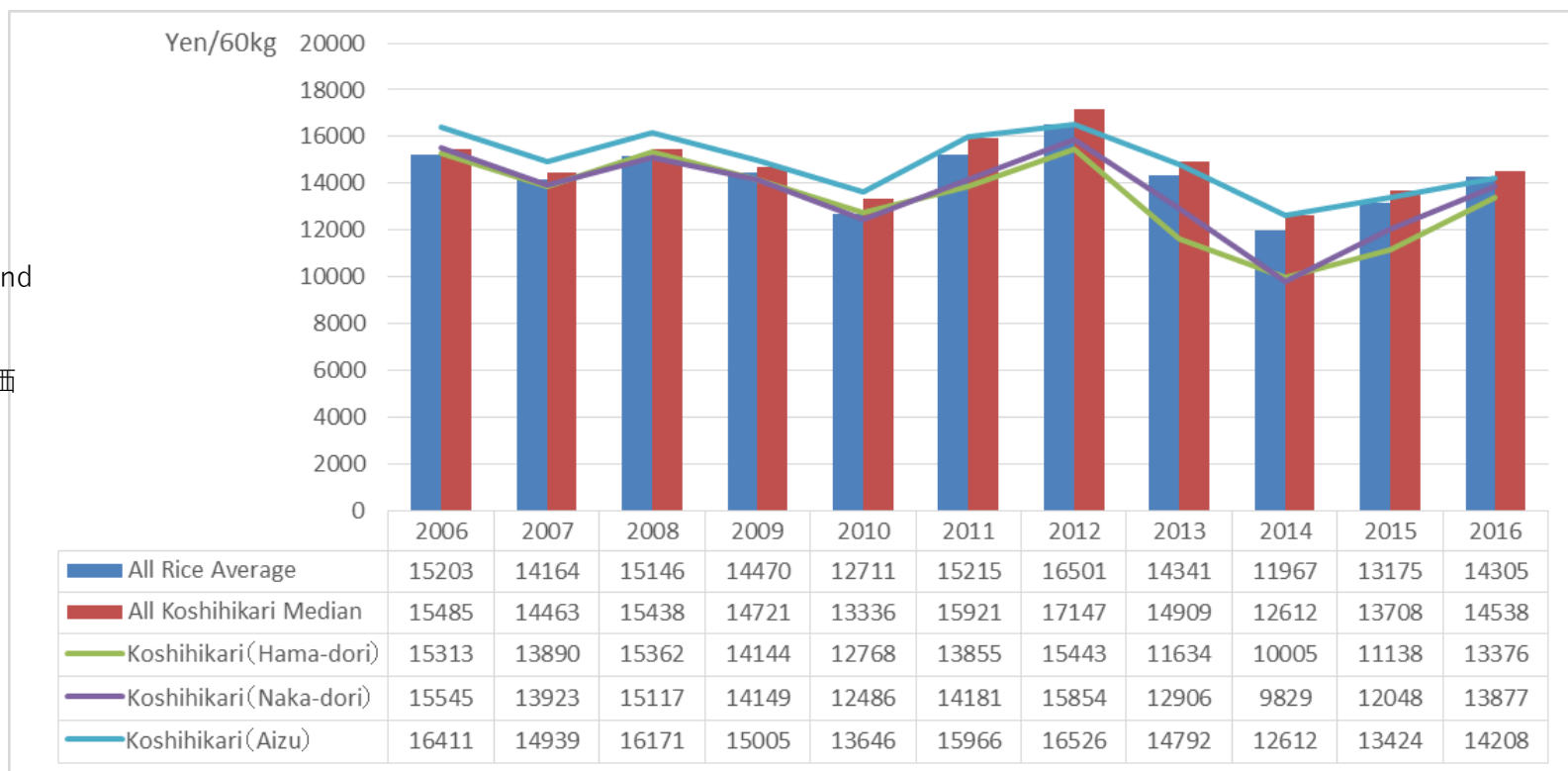
http://www.maff.go.jp/j/kanbo/joho/saigai/pdf/youin_kome2.pdf

Changes in the price of rice

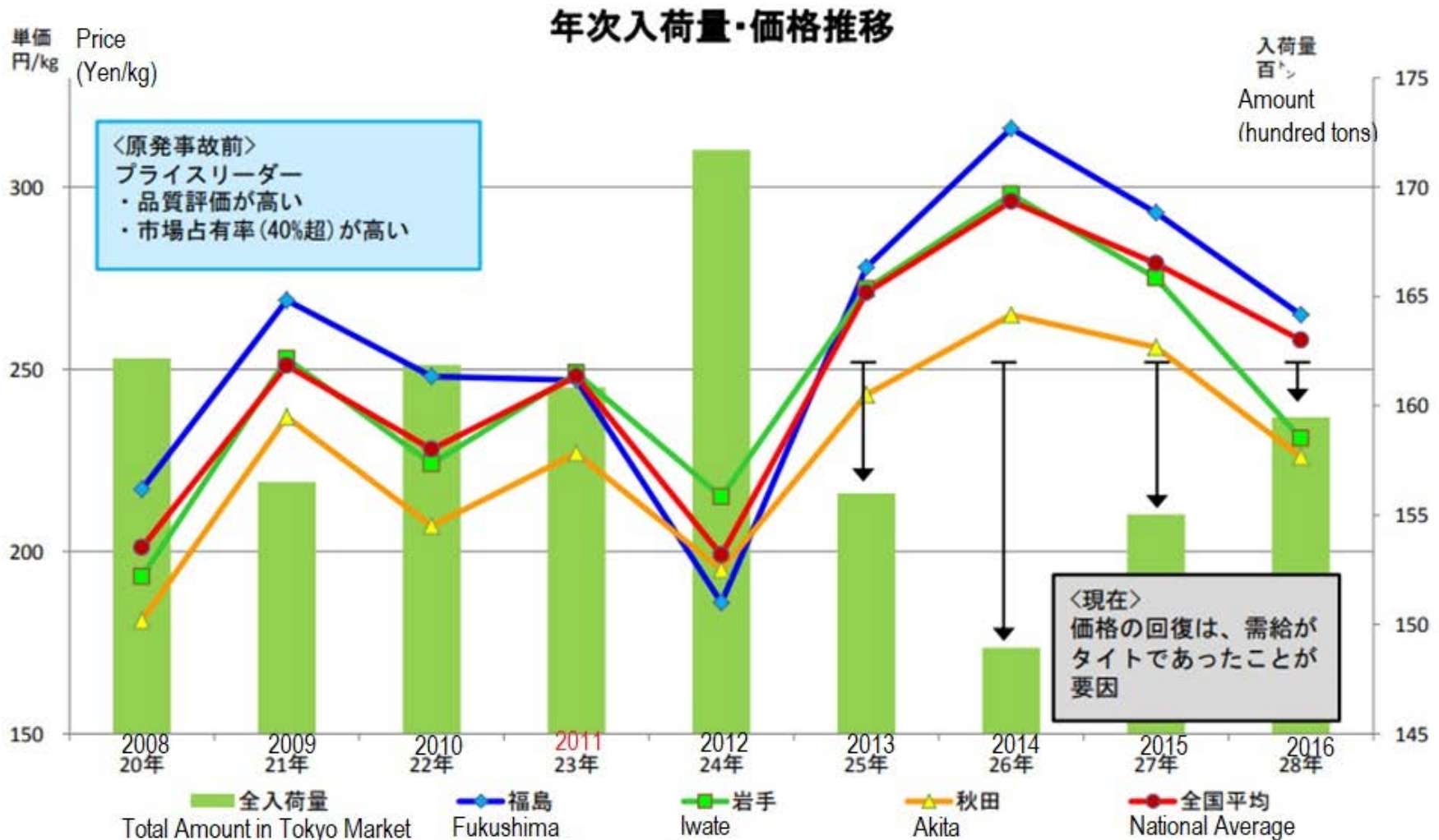


From the Ministry of
Agriculture, Forestry, and
Fisherie, 2007-2017

『各年産米の相対取引価
格（出荷業者）』



Cucumber did not suffer any serious price drop in the Tokyo market after the disaster except 2012



注) 東京都中央卸売市場「市場統計情報(7-8月実績)」より

Characteristics of rice as a commodity leading to a price drop in Fukushima rice after the disaster

- Rice is produced in **all prefectures of Japan**, is harvested in the **same season** throughout Japan, and is distributed and consumed **throughout the year**.
- Many brands of rice from many prefectures are available, even in small supermarkets, and consumers and distributors usually have **numerous options** for rice.



The determining factor in the market is the presence of alternatives rather than the degree of radioactive inspection and countermeasures

- Freedom from radioactive contamination is **not the decisive factor** and is **not enough** to make consumers choose Fukushima rice over rice from other areas not affected by the disaster.

- Supermarket buyers tend not to stock Fukushima rice **in order to avoid complaints from a few customers** who are deeply anxious about radiation.

		評価される側					
		卸売	仲卸	加工	小売	外食	消費者
評価する側	卸売	4.0 (104)	3.2 (77)	2.8 (78)	2.8 (91)	2.8 (79)	
	仲卸	3.0 (133)	3.5 (203)	2.5 (82)	2.5 (146)	2.5 (98)	
	加工	3.0 (68)	3.0 (50)	3.1 (176)	2.9 (60)	2.8 (47)	
	小売	3.2 (162)	3.2 (116)	2.9 (132)	3.1 (209)		2.6 (166)
	外食	3.0 (174)	2.9 (115)	2.9 (156)		3.1 (352)	2.6 (183)
	消費者						3.2 (-)

※「5 前向き」「4 やや前向き」「3 どちらともいえない」「2 やや後向き」「1 後向き」の5段階評価の平均値。

MAFF, 2019

- To restart the sales contract with Fukushima rice farmers means ~~to~~ canceling the sales contract with the producers in the other prefectures--existence of **switching cost** among buyers.

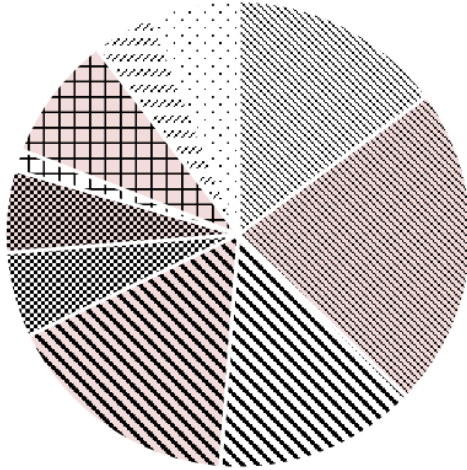
What is necessary now is...

“Commonplace” Marketing and Branding Strategy

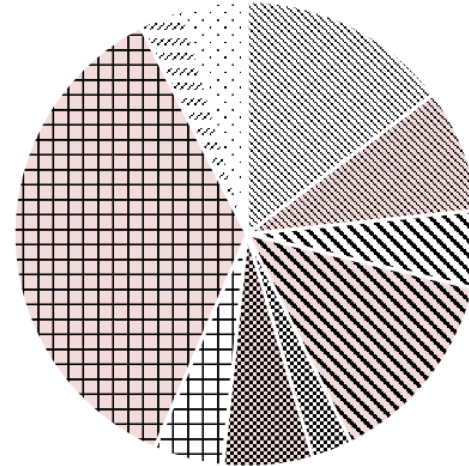
- The characteristic of Fukushima agriculture as an all-round player is that of being relatively vulnerable to buyers' and consumers' avoidance or so-called reputational damage.
- By understanding the safety, one can turn one's negative evaluation or image into a neutral one, but not quite into a positive one.
- The buyers and consumers need to choose to show that each Fukushima food product surely has its own values and attractions in comparison with other areas' products.

Where has the Fukushima rice gone?

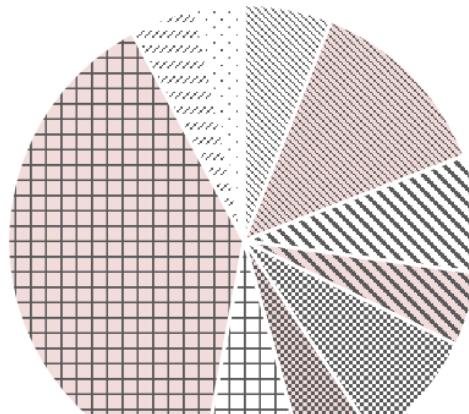
Proportion of sales channels, 2008
(excluding sales to wholesales distributors)



Proportion of sales channels, 2012
(excluding sales to wholesales distributors)



Proportion of sales channels, 2015
(excluding sales to wholesales distributors)



- ◆ rice store /Fukushima
- ◆ rice store /other Pref.
- ◆ supermarket /Fukushima
- ◆ supermarket /other Pref.
- ◆ restaurant /Fukushima
- ◆ restaurant /other Pref.
- | onigiri and bento /Fukushima
- | onigiri and bento /other Pref.
- .. direct sales to consumer
- other routes

Made by the speaker
from the research of
Fukushima prefectural
government
『県産米流通状況調査報
告書』

Is using rice for *onigiri* and *bento* necessarily bad?

- Absence of visible Fukushima branding on rice in supermarkets causes additional damage to the brand image
- lower price range but stable long-term sales contracts
- demand and prices for *onigiri* and *bento* sold in convenience stores are rising due to changes in lifestyle
- Specializing in *onigiri* and *bento* use can be not only a pragmatic strategy but also a **blue ocean strategy** for Fukushima rice farmers.

