

「農産物流通、物流が変わる」

卸売市場は、農産物の生産と小売・消費側を結びつける重要な役割をこれまで果たしてきた。しかしながら近年、生産、小売の構造が大きく変化するなか、卸売市場の取扱量は減少し、卸売市場を通さない市場外流通が増えている。また、卸売市場法の見直しも行われ、2020年6月に施行された。従来、第三者販売の原則禁止（卸売業者は、市場内の仲卸業者、売買参加者以外に卸売をしてはならない）、直荷引きの原則禁止（仲卸業者は、市場内の卸売業者以外から買い入れて販売してはならない）、商物一致の原則（卸売業者は、市場内にある生鮮食料品等以外の卸売をしてはならない）とされていたが、これらが原則、廃止された。これらの動向によって、卸売市場流通は今後大きく変わっていくことが予想される。

また、全国で生産される豊富な農産物を年間を通して全国の消費者が安定的に手に入れることができる、このような状態を支えているのが物流である。一方で、物流におけるドライバー不足は深刻化しており、さらに時間外労働時間の上限規制が2024年4月から適用される。農産物物流においては中長距離輸送が多いが、今後、運べないという事態が発生することが懸念されている。このように農産物流通、物流は、現在大きな変革期を迎えており、本号では、抱えている課題と同時に、今後の方向性について、様々な視点から論じるものである。

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The Changing Structure of Distribution and Logistics Systems for Agricultural Products

In the past, Japan's wholesale markets for fresh produce played a very important role in the distribution structure that links producers of agricultural products to retailers and consumers. More recently, however, there have been some major changes to the structure of both agricultural production activity and food retailing, which have led to a decline in the volume of produce handled by the wholesale markets and a corresponding increase in distribution channels that bypass the wholesale markets. In June 2020 the Government enacted changes to the Wholesale Market Act. Previously, it was illegal in principle for third parties to deal directly with the wholesalers (these wholesalers were not allowed to sell merchandise to anyone other than intermediate wholesalers and traders who participate in the wholesale market). Direct procurement was forbidden (intermediate wholesalers were not allowed to deal directly with anyone other than the wholesalers from their market) and wholesale diversification was restricted (wholesalers were not allowed to handle any products other than the fresh produce sold in their own wholesale market). These market principles have now been eliminated, and it has brought about a shift that is likely to transform Japan's system of wholesale fresh produce distribution dramatically.

An effective logistics system is essential in order to ensure that a multitude of agricultural goods produced in Japan can be delivered in a steady, year-round supply to consumers nationwide. However, Japan's logistics industry faces a growing shortage of truck drivers which is likely to intensify when new regulations, limiting the number of hours of overtime that employees can work, go into effect in April 2024. Much of the distribution activity for agricultural products involves medium- or long-haul transport routes, and there is concern that the system may be unable to handle some of the shipment volume in the future. Japan's agricultural products distribution network is entering a period of rapid restructuring and change. This report will address some of the major issues that the distribution and logistics faces, and consider various perspectives on where the industry is headed in the future.

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