



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

**Inside Japan**  
**The Fish and Seafood Trade**

**April 2015**



**TRADE SUMMARY\***

Japan is the second-largest fish and seafood importer in the world and the top market in all of Asia. Japan's fish and seafood import market was valued at C\$16.2 billion in 2013, a decrease of 11.8% from 2012. Japan's supply is quite diversified, with fish and seafood products imported from 123 different countries. Japan's top suppliers in 2013 were China (with a 17.9% share), Chile (8.2%), Thailand (8.1%), Russia (7.8%), and the United States (7.8%).

In 2013, Japan's primary fish and seafood imports included frozen shrimp and prawns (C\$2.0 billion), prepared or preserved shrimp and prawns (C\$794 million), frozen skipjack/stripe-bellied bonito tuna fillets (C\$644 million), frozen fish (C\$543 million), and frozen fish fillets (C\$533 million). Imports from Canada were valued at C\$427.5 million.

Japan's exports of fish and seafood in 2013 were valued at C\$2.1 billion, an increase of 11.9% from the previous year. Japan's leading exports were frozen, dried, or salted molluscs (C\$407 million), prepared or preserved sea cucumbers (C\$240 million), prepared or preserved scallops (C\$149 million), frozen mackerel (C\$125 million), and frozen fish (C\$105 million). Top export destinations were Hong Kong with a 25.8% share, the United States with 13.4%, and China with 12.8%.

\*numbers in the trade summary section came from Global Trade Atlas (GTA), 2014

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## CANADIAN PERFORMANCE

Canada was the 12th-largest supplier of fish and seafood to Japan, with sales of C\$427.5 million in 2013 (based on Japanese import data). This represents a decrease of 13.4% from 2012 resulting from a decline in imports from Canada of frozen crab, fresh salmon fillets, frozen shrimp, frozen fish liver and roe, and clams. The leading products imported from Canada in 2013 included frozen crab (C\$92.6 million), frozen cold-water shrimp (C\$74.0 million), dried, smoked, or salted fish liver and roe (C\$38.7 million), frozen fish liver and roe (C\$23.9 million), and frozen lobster (C\$22.1 million) (Global Trade Atlas, 2014).

Japan was Canada's third-most important market for fish and seafood, and received approximately 5.4% of Canada's fish and seafood exports in 2013. Overall, fish and seafood was Canada's ninth-most significant export sector to Japan, and represented 2.2% of all Canadian merchandise exports to Japan in 2013 (Global Trade Atlas, 2014).

## CONSUMPTION TRENDS

Per capita consumption of fish and seafood in Japan declined from approximately 40 kg in 2007 to 33 kg in 2012, due in part to a rise in consumption of meat and dairy products (Euromonitor International, 2014).

Other factors responsible for the decline in per capita consumption include consumer food safety concerns following the Fukushima nuclear power plant meltdown and reduced fishing capacity caused by the earthquake and tsunami. The declining population and changing lifestyles may explain the declining consumption (Euromonitor International, 2014).

An article in *World Fishing & Aquaculture*, March 24, 2013, entitled "Japan seeks to boost seafood consumption," expounds on the efforts of both the Japanese government and the fishing industry to reverse the meat consumption trend in favour of increasing fish and seafood in the Japanese diet. To that end, the fish processing industry is trying to develop innovative products that are easier to prepare.

Japan is a major importer of a number of premium seafood products which Canada has to offer, such as shrimp, salmon, scallops and lobster (Global Trade Atlas, 2014). Consumer-ready products that are convenient and easy to prepare and eat would be welcomed in Japan, which has traditionally been known for its high per capita consumption of fish and seafood.



## BY THE NUMBERS

### Top Ten Suppliers of Fish and Seafood to Japan and Top Imported Products in 2013 (Based on Japanese Import Data)

Rank	Country	Total Import Value (C\$)	Top Import Supplied	Top Import Value (C\$)
	World	16,216,071,898	Frozen shrimp and prawns	2,005,336,606
1	China	2,902,009,905	Prepared / preserved fish, whole or pieces	398,796,241
2	Chile	1,324,591,696	Frozen Pacific salmon	413,883,557
3	Thailand	1,319,508,050	Prepared/preserved shrimp and prawns	415,546,586
4	Russia	1,267,752,394	Frozen fish liver and roe	256,130,789
5	United States	1,267,172,355	Frozen Alaska Pollock	245,594,480
6	Vietnam	957,364,825	Frozen shrimp and prawns	445,129,932
7	Indonesia	890,473,634	Frozen shrimp and prawns	423,460,954
8	South Korea	857,751,008	Frozen tuna fillets/skipjack/strip-bellied bonito	143,377,312
9	Norway	819,672,863	Fresh/chilled Atlantic and Danube salmon	188,471,059
10	Taiwan	456,580,194	Frozen big eye tuna	242,591,497

Source: Global Trade Atlas, 2014.

### Top Ten Japanese Fish and Seafood Imports from the World in 2013

Rank	Top Imports	Import Value (C\$)
1	Frozen shrimp and prawns	2,005,336,606
2	Prepared/preserved shrimp and prawns	794,448,837
3	Frozen skipjack/strip-bellied bonito tuna fillets	643,706,293
4	Frozen fish	542,766,041
5	Frozen fish fillets	533,438,713
6	Frozen fish meat	520,480,280
7	Prepared/preserved fish, whole or pieces	506,579,193
8	Frozen fish liver and roe	500,107,506
9	Live eels	497,751,335
10	Frozen big eye tuna	487,038,239

Source: Global Trade Atlas, 2014.



## TOP TEN FISH AND SEAFOOD SUPPLIERS TO JAPAN IN 2013

The figures listed below are in Canadian dollars.

<b><u>1. Imports from China</u></b>		<b><u>2. Imports from Chile</u></b>	
Prepared/preserved fish, whole or pieces	\$398.8M	Frozen Pacific salmon	\$413.9M
Non-minced prepared/preserved eels	\$248.9M	Frozen trout fillets	\$383.3M
Prepared/preserved molluscs	\$200.6M	Frozen trout	\$126.8M
Prepared/preserved crab	\$166.2M	Frozen Pacific, Atlantic and Danube salmon fillets	\$93.3M
Live eels	\$151.8M	Sea urchins	\$59.9M
<b><u>3. Imports from Thailand</u></b>		<b><u>4. Imports from Russia</u></b>	
Prepared/preserved shrimp and prawns	\$415.5M	Frozen fish liver and roe	\$256.1M
Frozen shrimp and prawns	\$222.5M	Frozen crab	\$238.3M
Non-minced prepared/preserved skipjack/bonito tuna	\$210.1M	Frozen sockeye salmon	\$196.8M
Frozen fish meat, except steaks and fillets	\$121.1M	Frozen fish	\$102.4M
Frozen/dried/salted cuttlefish and squid	\$77.6M	Frozen cold-water shrimp and prawns	\$96.4M
<b><u>5. Imports from the United States</u></b>		<b><u>6. Imports from Vietnam</u></b>	
Frozen Alaska pollock, except fillets	\$245.6M	Frozen shrimp and prawns	\$445.1M
Frozen fish liver and roe	\$203.9M	Prepared/preserved shrimp and prawns	\$214.0M
Frozen fish	\$183.1M	Frozen/dried/salted cuttlefish and squid	\$40.4M
Frozen crab	\$87.3M	Frozen fish meat, except steaks and fillets	\$33.7M
Dried/smoked/salted fish liver and roe	\$68.0M	Prepared/preserved fish, whole or pieces	\$28.1M
<b><u>7. Imports from Indonesia</u></b>		<b><u>8. Imports from South Korea</u></b>	
Frozen shrimp and prawns	\$423.5M	Frozen skipjack/stripe-bellied bonito tuna fillets	\$143.4M
Non-minced prepared/preserved skipjack/bonito tuna	\$66.0M	Live fish	\$65.8M
Fresh/chilled big eye tuna	\$65.0M	Seaweeds for human consumption	\$64.0M
Prepared/preserved shrimp and prawns	\$63.4M	Frozen big eye tuna	\$53.9M
Fresh/chilled yellow fin tuna	\$37.4M	Live, fresh or chilled abalone	\$52.3M
<b><u>9. Imports from Norway</u></b>		<b><u>10. Imports from Taiwan</u></b>	
Fresh/chilled Atlantic and Danube salmon	\$188.5M	Frozen big eye tuna	\$242.6M
Frozen fish fillets	\$171.9M	Frozen yellow fin tuna	\$59.7M
Frozen mackerel	\$121.0M	Live eels	\$33.3M
Fresh/chilled Pacific, Atlantic and Danube salmon fillets	\$89.8M	Frozen albacore/long finned tuna	\$28.3M
Frozen fish meat, except steaks and fillets	\$86.1M	Frozen swordfish	\$12.4M

Source: Global Trade Atlas, 2014.



## MARKET SIZES

With a traditional diet favouring fish and seafood and a population of 127 million, Japan is a major market for fish and seafood products. Euromonitor International reports that Japanese per capita consumption of fish and seafood was 33 kg in 2012.

### Historic Fresh Fish and Seafood Volume Sales in Japan by Segment in '000 Tonnes

Category	2007	2008	2009	2010	2011	2012	CAGR* 2007-2012
Molluscs & cephalopods	1,127.6	1,088.6	1,071.8	1,018.4	914.7	885.7	-4.7%
Crustaceans	627.6	601.5	588.5	570.8	536.6	528.5	-3.4%
Fish	3,296.4	3,195.4	3,054.4	2,978.7	2,740.4	2,822.6	-3.1%
Total	5,051.6	4,885.4	4,714.7	4,567.9	4,191.7	4,236.8	-3.5%

**Source:** Euromonitor, 2014. **Please note:** Volume sales for the fresh fish and seafood market include both foodservice and retail sales. Any slight discrepancies in column totals are due to rounding. \*CAGR = compound annual growth rate

### Forecast Fresh Fish and Seafood Volume Sales in Japan by Segment in '000 Tonnes

Category	2012	2013 <sup>F</sup>	2014 <sup>F</sup>	2015 <sup>F</sup>	2016 <sup>F</sup>	2017 <sup>F</sup>	CAGR* 2012-2017 <sup>F</sup>
Molluscs & cephalopods	885.7	862.0	834.3	804.7	774.1	748.3	-3.3%
Fish	2,822.6	2,794.4	2,732.9	2,650.9	2,576.7	2,512.2	-2.3%
Crustaceans	528.5	518.0	506.6	496.4	485.0	472.4	-2.2%
Total	4,236.8	4,174.3	4,073.8	3,952.0	3,835.8	3,733.0	-2.5%

**Source:** Euromonitor, 2014. **Please note:** Volume sales for the fresh fish and seafood market include both foodservice and retail sales. Any slight discrepancies in column totals are due to rounding. \*CAGR = compound annual growth rate

## DISTRIBUTION CHANNELS

The foodservice channel accounts for 48% of fresh fish and seafood sales in Japan, followed by the retail channel with 35%. This shows the importance of the foodservice sector for fish and seafood consumption in Japan. Imported products such as shrimp and salmon are in heavy demand by the food service sector (Food Export Association of the Midwest USA, *Japan Country Profile*).

### Distribution of Fresh Fish and Seafood Sales in Japan – Percentage % Breakdown Based on Volume Sales

Channel	2008	2009	2010	2011	2012	2013
Foodservice	48.1	47.9	47.9	47.9	48.0	48.0
Retail	34.8	35.0	35.0	35.0	35.0	35.0
Institutional	17.1	17.1	17.1	17.1	17.0	17.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

**Source:** Euromonitor, 2014.



## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Japan**  
<http://www.tradecommissioner.gc.ca/e-f/jp/index.htm>
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

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- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

For additional information on China Fisheries and Seafood Exposition, please contact:

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## RESOURCES

Euromonitor International, 2014

Euromonitor International, 2014 – *Report on Fish and Seafood in Japan*

Food Export Association of the Midwest USA, *Japan Country Profile*, retrieved October 8, 2014 from: <https://www.foodexport.org/Resources/CountryProfileDetail.cfm?ItemNumber=1016>

Global Trade Atlas, 2014

World Fishing & Aquaculture, *Japan seeks to boost seafood consumption*, March 24, 2013, retrieved October 7, 2014 from: <http://www.worldfishing.net/news101/regional-focus/japan-seeks-to-boost-seafood-consumption>



## **Inside Japan: The Fish and Seafood Trade**

*Global Analysis Report*

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