



Agriculture and
Agri-Food Canada

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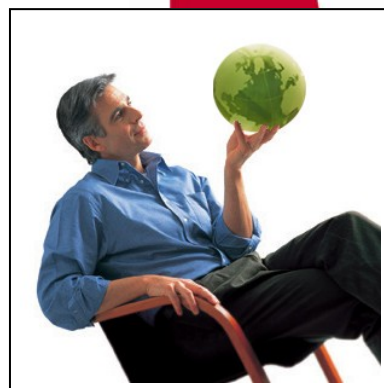
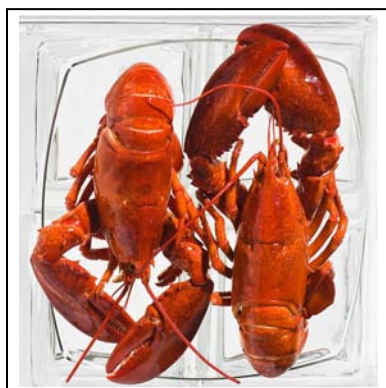
**International
Markets
Bureau**

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Inside Japan

Seafood Trade





► TRADE SUMMARY

Japan is a large market that is vital to the Canadian economy. In 2008, the population of Japan was more than 4 times the population of Canada. It was also Canada's second leading export market with over 9.2% of all of Canada's agri-food and seafood exports.

As a seafood market, Japan leads the world with imports of US \$14.1B in 2008, an increase of 10.1% from 2007. Japan's world market share stands at nearly 15%. Top suppliers to Japan were China (17.3%), the US (10.7%), Russia (9.1%), Thailand (7.9%) and Chile (6.7%). Japan's supply is very diversified as over 127 countries export fish and seafood products to Japan.

Japan's main fish and seafood imports include frozen shrimp and prawns (\$1.8B), frozen crab (\$682M), frozen fish liver roe (\$644M), frozen bigeye tuna (\$562M), live fresh octopus (\$331M), and live fresh squid (\$239M).

Japan is a net importer of fish and seafood. In 2008, Japan exported just over \$1.6B of fish and seafood products, a decline of 1.1%. Most of Japan's exports came from fresh scallops (\$138M), mackerel (\$131M), frozen tuna (\$125M), frozen Pacific salmon (\$99M), fresh Tara livers and roe (\$45M), and live sea bream (\$35M). Top destinations include Hong Kong (23.9%), the US (14.9%), South Korea

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► CANADIAN PERFORMANCE

Canada currently stands 11th as a supplier of fish and seafood to Japan with sales of \$427M in 2008 (based on Japanese import data). This represents an increase of 7.5% from 2007. Most of the increase came from higher exports of frozen crab (\$74M), frozen shrimp (\$72M), dried and salted liver and roe (\$53M), frozen halibut/turbot (\$32M), frozen Shishamo (\$30.7M), as well as Atlantic and Danube salmon (\$22M).

Japan is Canada's second most important destination for fish and seafood behind the US which receives 63% of Canada's products.

For Canada, fish and seafood is the ninth most significant export sector to Japan behind agri-food products, bituminous coal, ores, wood and wood pulp, and aluminum. The fish and seafood sector represents nearly 4% of all products exported to Japan over the past three years.

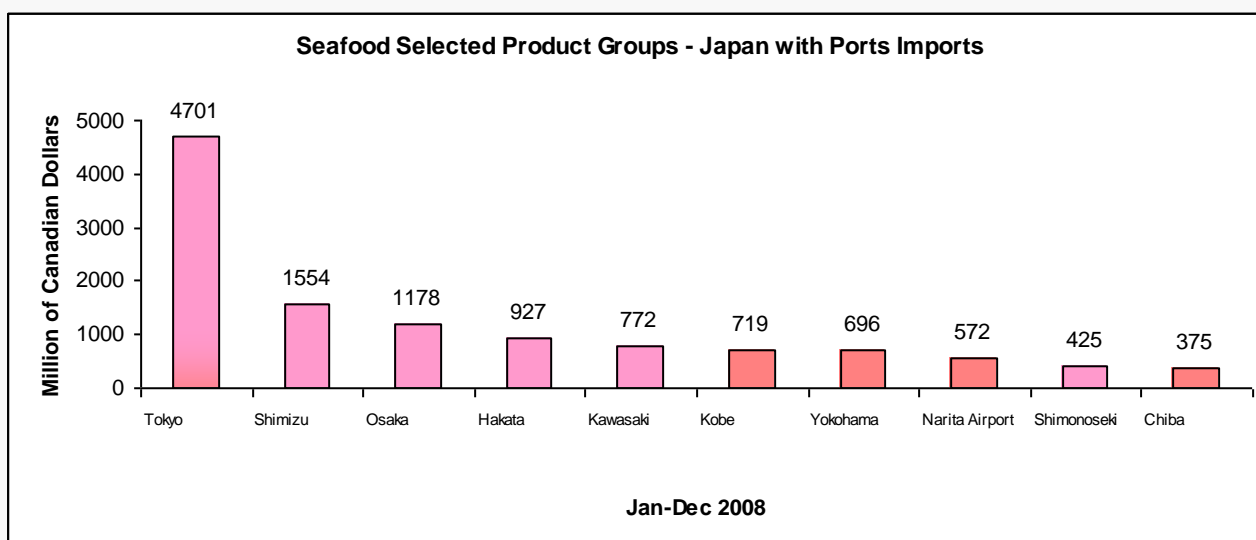
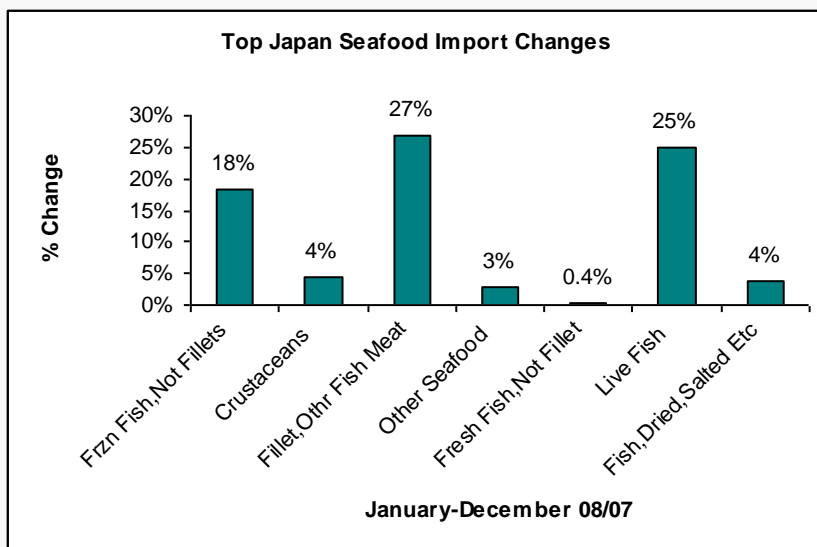
► DID YOU KNOW?

**WITH 29%, THE PORT OF KOBE
HAS SEEN THE LARGEST
INCREASE IN FISH AND SEAFOOD
IMPORTS.**



► BY THE NUMBERS

Agri-food Imports	World (US \$Billion)	Top Supplier
Total	14.1	China
Frozen shrimp and prawns	1.764	Vietnam
Frozen crab	0.682	Russia
Frozen fish livers and roe	0.644	US
Frozen bigeye tuna	0.562	Taiwan
Live fresh octopus	0.331	Mauritania
Live fresh squid	0.239	Thailand





► COMPETITIVE LANDSCAPE — TOP SEAFOOD SUPPLIERS TO JAPAN

Chinese Exports to Japan in 2008

- Live eel: US \$161M
- Frozen shrimp and prawns: US \$133M
- Frozen bigeye tuna: US \$118M
- Fresh live squid: US \$67M
- Fresh octopus: US \$51M
- Fresh live baby clams: US \$27M

American Exports to Japan in 2008

- Frozen fish liver and roe: US \$354M
- Frozen mince meat of Teragra: US \$349M
- Frozen sable fish: US \$128M
- Frozen crab: US \$118M
- Frozen sockeye salmon: US \$95M
- Dry salted fish liver and roe: US \$58M

Russian Exports to Japan in 2008

- Frozen crab: US \$335M
- Frozen fish liver and roe: US \$270M
- Fresh crab: US \$335M
- Frozen sockeye salmon: US \$121M
- Frozen shrimp and prawns: US \$103M
- Live sea urchin: US \$70M

Thai Exports to Japan in 2008

- Prepared shrimp and prawns: US \$290M
- Minced fish meat: US \$228M
- Frozen shrimp and prawns: US \$212M
- Prepared tuna: US \$157M
- Fresh live squid: US \$87M
- Frozen mongo and ika flour meal: US \$59M

► MARKET OPPORTUNITIES

- There are many untapped opportunities in Japan mostly in frozen crustaceans. Frozen crab and frozen lobster are a delicacy in Japan and Canadian crustaceans are much in demand.
- Intensely flavoured salmon such as Pacific and Sockeye are very popular in Japan.
- Fresh water frozen fish roe such as carp roe could be successful in Japan. Dry salted roe is also very successful.
- Frozen shrimp and prawns are growing fast in Japan, but Asian suppliers are difficult to displace because of cost of labour and travel.
- Canadian frozen halibut exports to Japan have the potential to grow. Canada is currently the second leading supplier to Japan.



The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

Inside Japan Seafood Trade

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